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

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Please ask for: Schools Forum Team

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Thursday 3 October 2024

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 11 October 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 "S Lawton".

Samantha Lawton

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: Welcome, Introductions and Apologies for absence	
2: Minutes of the Schools Forum Briefing held on 1st March 2024	1 - 4
Minutes to follow.	
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3: Matters arising from the meeting held on 1st March 2024	
4: Kirklees Education & Learning Partnership Board (standing item)	
Verbal update: KELPB attendees	
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5: High Needs Block (standing item)	
<ul style="list-style-type: none">• Safety Valve and £3.6m block transfer	
Verbal update: LA representative	
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6: DSG Outturn 2023/24	5 - 8
David Baxter	
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7: Contingency review 2023/24	9 - 14
David Baxter	
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8: Update on the national funding position 2025/26	15 - 18
David Baxter	
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9: Any other business

19 - 22

Any Other Business

10: Confirm minutes

11: Next meeting details

Friday, 29th November 2024 – Briefing & Public

Willow 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 March 2024** at 8:30am

held at **Cathedral House, Huddersfield.**

Present:

Name:	Category of Membership:
	Nursery School Head (0)
Diana Wilson, Jenny Shore, Katie Pearson	Primary School Head (3)
Andrew Fell	High School Head (1)
	Special School Head (1)
Todd Cheetham	Special Academy Head (0)
Darren Christian (Chair), Laura Willimott, David Wadsworth, Debbie Kelley	Academy Head (2)
Rebecca Smith	Pupil Referral Unit (1)
Hazel Danson	Non-school Member (2)
Matthew Pinder	School Governor (1)
David Baxter, Liz Kilner (Minute Clerk), John Bartlett, Emma Brayford, Paul Dagnall, Martin Wilby	Officers in Support (5)
	Observers (0)
	Others (0)

Item	Title	Actions
1	<p>Welcome, Introductions and Apologies for Absence</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"> • Tom Brailsford – Strategic Director, Children & Families • Kieran Lord – Service Director, Resources, Improvements & Partnerships • Cllr Elizabeth Reynolds – Portfolio Holder • Isabel Brittain – Service Director, Finance • Jo-Anne Sanders – Service Director, Learning and Early Support • Helen Pearson – Maintained Primary • Rik Robinson – Maintained Special • Andi Gilroy-Sinclair – LA Nursery School • Vicky Morris – NASUWT • Fiona Denham – Senior Kirklees Learning Partner 	
2	<p>Minutes of the Schools Forum Briefing meeting held on 1 March 2024</p> <p>The minutes were confirmed as an accurate record of the last meeting.</p>	
3	<p>Matters arising from meeting held on 9 March 2024</p> <p>There were no matters arising not covered on the agenda</p>	
4	<p>Kirklees Education and Learning Partnership Board (KELPB)</p> <p>An overview of items discussed at ELBP was shared by members of the Board</p>	

5	<p>High Needs Block</p> <p>(a) <u>Safety Valve Monitoring Update</u></p> <p>John Bartlett updated the meeting.</p> <ul style="list-style-type: none"> We have still not had an update from the DfE about the Safety Valve submission. We have still not had an update about the AP Free school application. <p>Q. When do we expect the next tranche of money from the DfE? A. We expect to receive £4m this financial year but this has not yet been received.</p> <p>Q. Have we exhausted all avenues for complaint and challenge about the delays in communication and the uncertainty in the Safety Valve process and the impacts on the LA? A. We can check if there are any other unexplored routes for challenge.</p> <p>Schools Forum noted that there was increasing concern about the lack of communication and uncertainty in the Safety Valve and AP Free school application process.</p> <p>It was noted that the Trade Unions are also supporting a campaign to raise issues with school funding.</p> <p>ACTION: The Chair to discuss the appropriateness of a letter to the DfE from School Forum raising concerns with communication processes.</p> <p>(b) <u>Mainstream top-up funding review</u></p> <p>John Bartlett updated the meeting.</p> <ul style="list-style-type: none"> The final Task and Finnish group meeting will take place today. Meetings are now scheduled to share information with schools and partners. <p>Q. Are we still on track for roll out of the new Clusters in September 2024. A. Yes we are.</p>	Chair
6	<p>Summary of School Budget Share allocations 24-25 and the effects for schools</p> <p>David Baxter summarised contents of the 3 papers confirming:</p> <ul style="list-style-type: none"> The Budget 2024 – 25 has been formally signed off by the ESFA. Budget allocations have now been sent out to individual schools. Colleagues in schools are now working on school budgets for 2024-25. The Safety Valve Block Transfer of £2.6m for 2024-25 has now been approved by the Secretary of State. 	
7	<p>Growth Fund monitoring update</p> <p>The Growth Funding Update – January 2024 had been circulated before the meeting.</p> <p>Martin Wilby updated the meeting and summarised key areas of the report.</p> <ul style="list-style-type: none"> Growth Funding within the Schools Block Pupil Growth Fund (KS1) 2023-2024 Interventions Future Pupil Growth 2023-2024 <p>Q. Some schools are receiving significant funding?</p>	

	A. We do monitor schools and how they access the growth fund over time to spot trends. We do have some very small primary schools and help is needed to sustain the curriculum offer.	
8	Any Other Business There was no other business	
8	Confirm Minutes The minutes of the previous meeting were confirmed above.	
9	Date and times of next public meeting: <ul style="list-style-type: none"> • Friday, 21 June 2024 – 10.00 am – 11.00 am, Chestnut Room, Cathedral House 	

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Service Area:	Schools Finance
Presented By:	David Baxter
Report:	2023/2024 Dedicated Schools Grant (DSG) Outturn
Date:	21 st June 2024
Purpose Of Report:	To update Schools Forum on the 2023/2024 DSG Outturn
Is a Decision Required?	No

Kirklees Schools Forum

21st June 2024

2023/2024 Dedicated Schools Grant (DSG) Outturn

1. Summary

- 1.1 This report is to inform Schools Forum members of the 2023/2024 outturn position of the Dedicated Schools Grant (DSG). This includes the additional funding from the participation in the High Needs Safety Valve programme, as revised in March 2024 reflecting the updated grant payment profile that extends the scheme until 2029/2030, rather than 2026/2027 as originally agreed.
- 1.2 The summary information of the delegated maintained schools surplus and deficit balances is also provided as at 31st March 2024.

2. Overall Dedicated Schools Grant (DSG) 31st March 2024

- 2.1 The overall DSG balance as at 31st March 2024 reports an overall deficit to be carried forward of £43.7 million, which is an adverse movement from 31st March 2023 of £14.8 million. The table below shows the individual funding block analysis:

Dedicated Schools Grant Reserve Account - Blocks	Net Outturn 2023/2024 £ million	Net Outturn 2022/2023 £ million	Year on Year Movement (+ adverse) £ million
High Needs	44.1	29.0	15.1
Early Years	-0.5	-0.2	-0.3
Schools and Central Schools and Services	0.1	0.1	0
Net Dedicated Schools Grant Reserve Account	43.7	28.9	14.8

- 2.2 The Council continues to participate in the Dedicated Schools Grant deficit reduction Safety Valve Programme that was updated in March 2024. This has resulted in payments totalling £19.7 million as at 31st March 2024. The total agreed ESFA contribution, to be paid by 31st March 2030, is £33.5 million (£13.8 million outstanding) to be paid annually at £2.3 million per financial year. [Kirklees SV agreement \(publishing.service.gov.uk\)](https://publishing.service.gov.uk)

3. Individual School Balances

- 3.1 The balance for all maintained schools as at 31st March 2024 totalled £11.2 million (£11.7 million 2022/2023). This includes the in-year academisation of academisation of six schools and represents an overall reduction of £0.5 million 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 £0.3 million (including 1 school in deficit), equivalent to £11.5 million or a like for like reduction in balances of £0.2 million.

Report for Schools Forum

Area	Number of Establishments	Combined Balance 31 March 2024
Primary Schools	93	£5.4 million
Special Schools	4	£0.6 million
Secondary Schools	6	£5.2 million
Maintained Total	103	£11.2 million
In Year Academisation		
Primary Schools	6	£0.3 million
Comparison	109	£11.5 million

3.2 A total of 26 schools, all primary, reported a cumulative deficit position as at 31st March 2024 of £0.78 million. All these schools are working to reduce their deficit balance as part of their budget / resource planning for 2024/2025 onwards.

3.3 Information covering the 'excess surplus balances' for those schools which have exceeded the 10% (primary & special schools) and 8% (secondary schools) tolerance of their total revised budget will be agreed with each individual school. Any potential recoupment on these schools will be considered in an additional report.

4 Centrally Managed School Budgets

4.1 Both the de-delegation and the traded aspects of central school budgets are managed centrally on behalf of all schools. These fall into the two 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.

4.2 The overall effect on the DSG account for the above for 2023/2024 is a reported deficit 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. The maternity / paternity de-delegated resource reported an overspend of £61k and the Trade union de-delegated / traded service reported on overspend of £45k. Both these elements were mitigated through the use of the de-delegated contingency and continue to be monitored and reviewed in 2024/2025.

4.3 The net deficit of £24k is included in the overall DSG deficit position as at 31st March 2024.

5. Recommendations / Actions

Schools Forum are asked to note the following:

- The overall deficit outturn of the Dedicated Schools Grant (DSG) for 2023/2024 of £43.7 million.
- The total net surplus balance on individual maintained school accounts of £11.7 million.
- The outturn position for the centrally managed schools services.

David Baxter
Schools Finance Manager

Service Area:	Schools Finance
Presented By:	David Baxter
Report:	Dedicated Schools Grant (DSG) De-Delegated Contingency 2023/2024
Date:	21 st June 2024
Purpose Of Report:	To update Schools Forum on the financial performance of the above de-delegated scheme.
Is a Decision Required?	No

Kirklees Schools Forum

21st June 2024

Schools Contingency Review 2023/2024

1. Summary

- 1.1 This report is to update Schools forum on how the de-delegated contingency resources for 2023/2024 as agreed by Schools Forum on 11th November 2022 and by Cabinet on 17th January 2023 ([summary report template \(kirklees.gov.uk\)](https://www.kirklees.gov.uk) para 2.4.2 and appendix C) were applied.
- 1.2 The de-delegated contingency fund is operated for maintained primary and secondary schools to correct funding errors, support schools facing emergencies, pick up costs it would be unfair to ask schools to meet, pay one-off financial interventions for schools in financial difficulty to help them secure necessary savings and any other exceptional circumstances as deemed appropriate.

2. Allocation of Funds 2023/2024

- 2.1 For 2023/2024 the contingency resources were allocated as per the table below. All funding allocations look to take into account whether, or not, it would be the best use of the resource, ideally with an outcome that improves the overall situation for either schools or the wider Dedicated Schools Grant (DSG) balance.

Area Supported	Amount £,000
Schools in Financial Difficulty	431
Exceptional allocation International New Arrivals	120
Exceptional support for schools	68
Maternity De-delegation Overspend	61
Empty Property Council tax contributions	58
Trade Union Deficit Support	45
Flu Vouchers	5
Total	788

The full breakdown of allocations is shown in Appendix A.

- 2.2 It should be noted that despite the allocation of the above resources, especially the £431k for schools in financial difficulty, twenty seven maintained school (all primary) reported a deficit position after intervention that totalled £860k as at 31st March 2024.
- 2.3 As with all de-delegated funds, the impact of academisation continues to reduce the amount of funds available and this will need to be considered further by Schools Forum as part of the annual budget challenge and review process in October / November 2024 for the 2025/2026 financial year.

3. Recommendations / Actions

Schools Forum are asked to note the contents of the report.

David Baxter
Schools Finance Manager

Schools in Financial Difficulty – Allocations	Amount £
Shaw Cross I&N School	60,812.00
Denby Dale First & Nursery School	56,472.00
Holme J&I School	45,520.00
Moldgreen Community Primary School	35,140.00
Grange Moor Primary	26,529.00
Linthwaite Ardron J&I School	25,906.00
Reinwood I&N School	21,449.00
Ashbrow School	21,330.00
Kirkburton First School	19,822.00
Hinchliffe Mill J&I School	18,828.00
Oak C of E Primary School	17,180.00
Pentland I&N School	12,229.00
Battleyford Primary School	10,590.00
Denby First School	9,026.00
Dalton School	8,795.75
Clough Head J&I School	8,807.00
Hade Edge J&I School	7,509.00
Crow Lane J I & N School	6,172.00
Emley First School	3,667.00
High Bank JI&N School	3,341.00
Wilberlee J&I School	3,334.00
Cumberworth First School	2,895.00
Howard Park Community	2,645.00
St Thomas Primary School	1,214.00
Headlands J I & N School	1,161.00
Earlsheaton Infant School	341.00
Total	430,714.75

Exceptional Allocations - International New Arrivals	Amount £
Birkby Junior	59,911.00
Paddock JIN	59,911.00
Total	119,822.00

Exceptional Support for Schools	Amount £
Honley JIN	30,000.00
Hinchliffe Mill	9,900.00
Wellhouse	5,208.20
Oak Primary	18,366.00
St Thomas	5,000.00
	-59.89
Total	68,414.31

Maternity De-delegation Deficit	Amount £
Maternity De-delegated scheme	61,000.00
Total	61,000.00

Empty Property Council Tax Contributions	Amount £
Denby Dale First & Nursery (Gilthwaites)	4,950.54
Eastborough J I & N	5,588.16
Flatts Nursery	4,889.64
Rawthorpe Junior	4,191.12
All Hallows CE(VA) Primary	2,794.08
Huddersfield St Patricks Catholic Primary	3,259.78
Batley Parish CE JI&N	3,259.78
Salendine Nook High	4,191.12
101 Low Westwood Golcar	3,259.78
St Patricks JIN School House, Birstall	1,788.92
Gomersal First	5,477.47
Shepley First	4,928.10
St Peter's CE(VA) JI & EY	1,397.04
Thornton Lodge Nursery	5,663.98
Pentland I & N	2,798.64
Total	58,438.15

Appendix A

Trade Union – Traded / De-delegation Deficit Support	Amount £
Trade Union Traded / De-delegated scheme deficit	45,000.00
Total	45,000.00

2023/2024 Flu Vaccine Support	Amount £
Temporary Flu Vaccine support	4,600.00
Total	4,600.00

Service Area:	Schools Finance
Presented By:	David Baxter
Report:	Schools Premises Disapplication Request 2025/2026
Date:	11 October 2024
Purpose Of Report:	To confirm the schools premises disapplication requirements for 2025/2026 financial year.
Is a Decision Required?	No, however the view of Schools Forum is important
Decision context	LAs need to discuss with Schools Forum any proposals they intend to put to the Secretary of State about the use of exceptional factors

Kirklees Schools Forum

11 October 2024

Schools Premises disapplication 2025/2026

1. Introduction

- 1.1 In advance of the publication Schools operational guide for 2025/2026 the ESFA have issued on the 3rd October 2024 a summary policy document confirming that there will be 'no substantial changes to the NFF (National Funding Formula) for 2025/2026'.
- 1.2 The guidance states that Local authorities can apply to the department to use exceptional circumstances relating to school premises. Local authorities should only submit applications where the value of the factor is more than 1% of a school's budget and applies to fewer than 5% of the schools in the local authority's area.

2. Schools Premises Disapplication

- 2.1 The following schools incur additional premises costs (rents), due to individual and unique circumstances that the individual schools operate within and are broadly in line with the disapplications in previous years:

School	Disapplication Amount	Comments
Birkenshaw Primary School	£48,306	<i>Modular Rental charges from September 2018 linked to aborted BSF proposal</i>
Denby Dale First & Nursey	£27,560	<i>Modular Rental charges</i>
Gomersal St Mary's CE Primary	£21,873	<i>Double unit hired Sept 2012 linked to aborted BSF proposal. New DfE school re-build project now underway.</i>
Hanging Heaton CE J & I	£11,500	<i>Rented schools premises (Savile Estates)</i>
Wellhouse J & I	£23,000	<i>Premises rented from the Methodist Church</i>
Total	£132,239	

- 2.2 The five schools listed above all meet the conditions for exceptional circumstances, namely that is more than 1% of schools budget and applies to fewer than 5% of schools in the local authority area.
- 2.3 In addition to meeting the ESFA criteria, the individual agreements with external providers have been requested for review and challenge. The information was subsequently confirmed with Schools asset management team with additional clarification sought where the initial information obtained was inconsistent between the school and the asset management team (e.g. linked to future building plans).
- 2.4 The total amount to be funded in 2025/2026 through the application of the 'exceptional circumstances' disapplication request is £132,239.

3. Recommendation

- 3.1 Schools Forum members are requested to review the above application of the exceptional circumstances factor (disapplication request) for the 2025/2026 financial year and indicate their support for the Local Authority's proposal.

David Baxter
Schools Finance Manager
October 2024

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Kirklees Schools Forum

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3. Recommendation

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David Baxter
Schools Finance Manager
October 2024

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