

# Public Document Pack



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

**Samantha Lawton**

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 12 June 2025

## 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 20 June 2025**.

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
<b>1: Welcome, Introductions and Apologies for absence</b>	
<b>2: Minutes of the Schools Forum Briefing held on 10 January 2025</b>	1 - 6
<b>3: Matters arising from the meeting held on 10 January 2025</b>	
<b>4: Kirklees Education &amp; Learning Partnership Board (standing item)</b>	
Kirklees Education & Learning Partnership Board (standing item)	
No meetings since the last briefing.	
KELPB attendees	
<hr/>	
<b>5: High Needs Block (standing item)</b>	
High Needs Block (standing item)	
LA Representative	
<hr/>	
<b>6: DSG Close down 2024/25</b>	7 - 10
DSG Close down 2024/25	
David Baxter	
<hr/>	
<b>7: Annual Schools Forum membership report</b>	11 - 14
Annual Schools Forum membership report	
Emma Brayford	
<hr/>	

**8: Any other business**

**9: Confirm minutes**

**10: To be confirmed**

This page is intentionally left blank

**The KIRKLEES SCHOOLS FORUM PUBLIC**  
**(Schools Funding Consultative Group)**  
**meeting held online on Friday 10 January 2025**  
**at 10.00am via Teams** (due to adverse weather conditions)

**Present:**

Name:	Category of Membership:
Andi Gilroy-Sinclair	Nursery School Head
Diana Wilson, Helen Pearson	Primary School Head
	High School Head
Rik Robinson	Special School Head
	Special Academy Head
Darren Christian (Chair), Laura Willimott, Dave Wadsworth, Paul Brook, Debbie Kelly, Ian Rimmer	Academy Head
Rebecca Smith	Alternative Provision
Vicky Morris	Non-school Member
Mathew Pinder	School Governor
Nicky West (Minute Clerk), Martin Wilby, David Baxter, Jo-Anne Sanders, John Bartlett, Emma Brayford, Tom Brailsford	Officers in Support
	Observers
	Others

Item	Title	Actions
1	<p><b>Welcome, Introductions and Apologies for Absence</b></p> <p>Darren Christian (Chair) welcomed all attendees to the meeting.</p> <p>Apologies were received as follows.</p> <ul style="list-style-type: none"> <li>• Jenny Shore – Maintained Primary Schools</li> <li>• Vicky Morris – Non-school Member</li> <li>• Emma Brayford – Officer in Support</li> <li>• Andrew Fell – Maintained Secondary</li> <li>• Hazel Danson - NEU</li> </ul>	
2	<p><b>Minutes of the Schools Forum Public meeting held on 11 October 2024</b></p> <p>The minutes were confirmed as an accurate record of the last meeting.</p>	
3	<p><b>Matters arising from meeting held on 11 October 2024</b></p> <p>(a) <u>High Needs Block (Minute 5a refers)</u></p> <p>Jo Anne Sanders updated that there had been a communication from the DfE soon after the last meeting that the Safety Valve arrangements would continue.</p>	
4	<p><b>Kirklees Education and Learning Partnership Board (KELPB)</b></p> <p>Jo-Anne Sanders reported on the last meeting which took place on 18 December 2024:</p> <ul style="list-style-type: none"> <li>• It was reported that medical needs training had been reviewed with the clinical officer.</li> <li>• There was discussion about the Fair Access Protocol review.</li> </ul>	

	<ul style="list-style-type: none"> <li>• There was a SEND update presentation.</li> <li>• A proposal was discussed about Multi-Agency Safeguarding to strengthen arrangements which will be implemented from February 2025.</li> <li>• There had also been updates from the Schools Forum meetings.</li> </ul>											
5	<p><b>High Needs Block</b></p> <p>Jo-Anne Sander provided an update:</p> <ul style="list-style-type: none"> <li>• Quarterly Safety Valve monitoring submission continue to be made.</li> <li>• Meetings have taken place in relation to the last submission and discussions took place covering the current position and mitigations in place. The current position reflects the adverse impacts of increased costs from external providers and the increase in the number of young people being placed in settings outside of the LA</li> <li>• There remains uncertainty about the approved AP Free School which is impacting on Safety Valve predictions.</li> <li>• There was positive feedback in the meeting in relation to Cluster Working in the LA.</li> <li>• The LA has been invited to be part of commissioned research on the Safety Valve process.</li> <li>• EHCP backlogs in the LA have been reduced significantly. The team have worked very hard to achieve this.</li> </ul> <p>Tom Brailsford provided a quick overview of the national position including:</p> <ul style="list-style-type: none"> <li>• The government have announced that no new Safety Valve agreements will be entered into in future.</li> <li>• Kirklees Council is the 2<sup>nd</sup> worst funded authority in the UK for high needs.</li> </ul>											
6	<p><b>2025/26 Funding Formula</b></p> <p>A Schools Funding Formula 2025/26 report had been circulated ahead of the meeting.</p> <p>David Baxter outlined the key aspects of the proposal. The final allocations are as follows:-</p> <table> <tr> <td>Schools Block</td> <td>£397,195,102</td> </tr> <tr> <td>Central Schools and Services Block</td> <td>£2,844,604</td> </tr> <tr> <td>High Needs Block</td> <td>£72,020,148</td> </tr> <tr> <td>Early Years Block</td> <td>£68,318,306</td> </tr> <tr> <td><b>Total</b></td> <td><b>£540,378,160</b></td> </tr> </table> <p>The Safety Valve – High Needs Block Transfer is £3.6 million or 0.91% of schools block budget which requires Secretary of State approval.</p> <p>The National Funding Formula Funding Rates were shared.</p> <p><b>Q. Why is there a big difference under Middle school sparsity?</b>  A. David Baxter will look into this further but there will not be a big impact for Kirklees schools.</p> <p><b>Q. There is a discrepancy between the total value of £540,378,160 and the total allocation which is approximately £10,000,000 less. What is the reason for this?</b>  Q. This deduction is made nationally, the lower value is the actual allocation.</p> <p>The Minimum Fund Guarantee (MFG) is set at -0.35% within a permissible range of -0.5% and 0.0%.</p> <p>The Growth Fund has been provisionally set at £1.2 million to allow for a balanced Authority Proforma Tool (APT) / Local School Funding Formula.</p>	Schools Block	£397,195,102	Central Schools and Services Block	£2,844,604	High Needs Block	£72,020,148	Early Years Block	£68,318,306	<b>Total</b>	<b>£540,378,160</b>	
Schools Block	£397,195,102											
Central Schools and Services Block	£2,844,604											
High Needs Block	£72,020,148											
Early Years Block	£68,318,306											
<b>Total</b>	<b>£540,378,160</b>											

	<p>It was noted that the Teachers' Pay Additional Grant, Teachers' Pension Employer Contribution Grant and Core Schools Budget Grant are now built into the National Funding Formula.</p> <p>A breakdown of the proposed budget for each school was shared including numbers on roll in October 2024 and in October 2023 as well as increase/decrease in numbers on roll.</p> <p><b>Q. What is the current Minimum Fund Guarantee set at?</b>  <b>A.</b> For 2024/25 it is set at +0.5%.</p> <p>It was explained that Schools Forum must be consulted on the proposed Local School Funding Formula and its views would be included in a report to Cabinet due to be published next week to support final decision making.</p> <p><b>RESOLVED:</b> That the Schools Forum support the Proposed Schools Block APT Allocations / Local School Funding Formula 2025/2026.</p> <p>Jo-Anne Sanders referred to the reduction in pupil numbers and the significant impact on budget and the challenges that this represents.</p>	
7	<p><b>Growth Funding</b></p> <p>A Growth Fund report had been circulated ahead of the meeting. Martin Wilby explained that a similar report had been shared previously and had been updated to include data from the October 2024 census.</p> <p>There was a discussion about the proposal to reduce the Growth Fund to £1,050,000 or whether to keep at the current amount of £1,200,000.</p> <p><b>Q. What happens if there is an underspend?</b>  <b>A.</b> It could be used to offset other budgets or carried forward.</p> <p><b>Q. If the lower value of £1,050,000 is agreed, how would the additional funding be reallocated?</b>  <b>A.</b> It would be used to adjust the Minimum Fund Guarantee.</p> <p><b>Q. Are all the schools who have been allocated Pupil Growth funding maintained schools?</b>  <b>A.</b> No, some are academy schools as all school, including academies in effect contribute to the Growth Fund and can, therefore, benefit from it.</p> <p><b>RESOLVED:</b> That the Schools Forum agreed to keep the Growth Fund at £1,200,000 for 2025/26.</p> <p>It was noted that the Growth Fund will continue to be reviewed at Schools Forum Meetings twice per year (after National Offer Day and After October census).</p>	
8	<p><b>Central Schools and Services Block (CSSB) proposed allocations 2025/26</b></p> <p>A Central Schools and Services Block (CSSB) Allocations 2025/2026 report had been circulated ahead of the meeting.</p> <p>It was explained that further detail had been added to the report following the decision to approve the proposal in principle at the last Schools Forum meeting.</p> <p><b>RESOLVED:</b> That approval is given to the proposed Central Schools and Services Block (CSSB) 2025/26 Block Allocations.</p>	

9	<p><b>Proposed Schools Block De-delegations for 2025/26</b></p> <p>It was confirmed that the report had been amended since the last meeting with further details added including rationale at point 2.3.</p> <p><b>Q. What happens if a school academises during the year? Is there a rebate?</b>  <b>A.</b> Yes there are rules in the DfE guidance about this.</p> <p><b>RESOLVED:</b> That the primary phase of maintained schools agree to the proposed schools block de-delegations for 2025/26.</p> <p>The Chair read out an extract of an e-mail from Andrew Fell, the maintained secondary school representative on Schools Forum (who was unable to attend the meeting due to extenuating circumstances):</p> <p><i>'I've ready through the papers with relevant points included below:</i></p> <ul style="list-style-type: none"> <li>• <i>I support the de-delegation as proposed. Please could it be confirmed that four out of the six maintained secondaries buy into Trade Union facilities times. I would also like a clear breakdown of the school improvement spend, specifically in relation to secondary provision.</i></li> <li>• <i>CSSB - happy to support the decision of forum'</i></li> </ul> <p><b>RESOLVED:</b> That the secondary phase of maintained schools agree to the proposed schools block de-delegations for 2025/26.</p> <p>[Officer note: a breakdown of school improvement spend was last reported to Schools Forum in July 2024. As per the action recorded above an updated report is due in the near future which will provide the information requested by AF]</p>	
10	<p><b>Early Years Funding Consultation and next steps</b></p> <p>An Early Years Funding consultation and timeline 2025/26 report had been circulated ahead of the meeting.</p> <p>Martin Wilby explained the 5 areas for consultation and confirmed that the consultation period will end on 19 January 2025. Virtual briefings will take place this week and next and an outcomes report will be produced following the consultation period.</p> <p>The outcomes will be presented to the Early Years Reference Group and then to a Schools Forum Briefing on 7 February 2025. By this time, it is expected that Cabinet will have delegated decision making on the Local Early Years Funding Formula to Tom Brailsford. Tom will take account of the views of Schools Forum members before final decision making. The plan is to bring certainty to Early Years providers as soon as possible after this date.</p>	
11	<p><b>Any Other Business</b></p> <p>There were no items of Any Other Business.</p>	
12	<p><b>Confirm minutes</b></p> <p>The minutes of the previous meeting were confirmed above.</p>	
13	<p><b>Dates and time of next meeting</b></p> <p>The next Public Meeting will be on 7<sup>th</sup> March 2025, 10.00am – 11.00am – The meeting will be held at Cathedral House, St Thomas Road, Huddersfield. HD1 3LG</p>	

	The Chair thanked everyone for attending the meeting.	
--	---	--

**Signature (Chair)** .....

**Date**.....

This page is intentionally left blank

<b>Service Area:</b>	Schools Finance
<b>Presented By:</b>	David Baxter
<b>Report:</b>	2024/2025 Dedicated Schools Grant (DSG) Outturn
<b>Date:</b>	20 <sup>th</sup> June 2025
<b>Purpose Of Report:</b>	To update Schools Forum on the 2024/2025 DSG Outturn
<b>Is a Decision Required?</b>	No

## Kirklees Schools Forum

20<sup>th</sup> June 2025

### 2024/2025 Dedicated Schools Grant (DSG) Outturn

#### 1. Summary

- 1.1 This report is to inform Schools Forum members of the 2024/2025 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 31<sup>st</sup> March 2025.

#### 2. Overall Dedicated Schools Grant (DSG) 31<sup>st</sup> March 2025

- 2.1 The overall DSG balance as at 31st March 2025 reports an overall deficit to be carried forward of £63.9 million, which is an adverse movement from 31<sup>st</sup> March 2024 of £20.2 million.
- 2.2 There were a number of significant underlying service pressures, including £20.1 m (2023/24: £15 m) on Special Educational Needs and Disability (SEND) activity, in excess of the resources available to fund this activity through the High Needs funding block allocation within the Dedicated Schools Grant (DSG).
- 2.3 The increase in costs was mainly due to rising complexity and demand in mainstream schools and inflationary increases from external providers. Following a period of enhanced monitoring during 2023/24 the DSG Safety Valve Management Plan has been extended until 2029/30 from 2026/27. The Council has now been removed from enhanced monitoring and the service continues to work collaboratively with schools and other partners to make every effort to reduce the cumulative deficit by 2029/30.
- 2.4 Costs continue to increase in relation to High Needs expenditure. The areas with cost pressures are Mainstream Top-Ups, Special School Top-Ups and Independent School Places. Additional local capacity has been introduced via Additionally Resourced Provisions and Special School Satellite provisions and a more robust approach to contract management and this has helped to mitigate any further increases. Cluster working for mainstream top up funding has also been implemented and it is anticipated that this will help to mitigate cost increases whilst also ensuring that the best possible outcomes for children are achieved.
- 2.5 Following the introduction of a Statutory Instrument in November 2020 and an extension for a further 3 years (from 2022/23 to 2025/26) along with an update of the CIPFA Code, this 'deficit' balance is held in the 'Dedicated Schools Grant Adjustment Account', an unusable reserve. The aim of the CIPFA code is to ensure that DSG deficits are ringfenced and held separately from General Fund resources so that specific measures can be put in place to address the deficits without placing pressure on resources required for other essential services.

## Report for Schools Forum

### 3. Individual School Balances

- 3.1 The balance for all maintained schools as at 31<sup>st</sup> March 2025 totalled £10.9 million (£11.2 million 2023/2024). This includes the in-year academisation of five schools and represents an overall reduction of £0.3 million in balances, summarised in the Table below.

Summary School Balances 31 <sup>st</sup> March 2025		
Sector	Number of LA Maintained Establishments	School Balance 31 <sup>st</sup> March 2025
Primary	88	£6.5m
Secondary	6	£4.4m
Special	4	£0.0m
Total	98	£10.9m

2024/2025 Academisation		
Sector	Number of Schools Academised	Total Balance Transferred
Primary	5	£0.4m

- 3.2 A total of 13 schools (26 in 2023/2024), reported a cumulative deficit position as at 31<sup>st</sup> March 2025 of £0.97 million (£0.76million 2023/2024). All these schools are working to reduce their deficit balance as part of their budget / resource planning process for 2025/2026 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 to Schools Forum.

### 4 Centrally Managed School Budgets

- 4.1 Both the de-delegation and the traded aspects of central school budgets are managed 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 2024/2025 is a surplus of £208k. 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 a surplus of £68k (£61k deficit in 2023/2024), the Trade union de-delegated / traded service reported on overspend of £36k (£45k deficit in 2023/2024) and the school reorganisations budget reported a surplus of £186k
- 4.3 The net surplus of £208k is included in the overall DSG deficit position as at 31<sup>st</sup> March 2025.

### 5. Recommendations / Actions

Schools Forum are asked to note the following:

- The overall deficit outturn of the Dedicated Schools Grant (DSG) for 2024/2025 of £63.9 million.
- The total net surplus balance on individual maintained school accounts of £10.9 million.
- The outturn position for the centrally managed schools services.

David Baxter  
Schools Finance Manager

## Report for Schools Forum

<b>Service Area:</b>	Learning and Early Support / Schools Finance
<b>Presented By:</b>	Martin Wilby
<b>Report:</b>	Annual Schools Forum membership review
<b>Date:</b>	20 June 2025
<b>Purpose Of Report:</b>	To present the methodology and outcome of the annual Schools Forum membership review and seek consensus for the recommendations
<b>Is a Decision Required?</b>	Yes
<b>Decision context</b>	It is fundamental that there is confidence that Schools Forum is representative of the local school system.

### Annual Membership Review to be reported to Schools Forum

### Current Kirklees Schools Forum Membership May 2025

School Members		Non-School Members	
Andi Gilroy-Sinclair	Local Authority Nursery School	Vacant	Early Years PVI settings (shared position)
Diana Wilson (Vice Chair)	Maintained Primary Schools	Vicky Morris	NASUWT
Helen Pearson	Maintained Primary Schools	Hazel Danson	NEU
Katie Pearson	Maintained Primary Schools	Sally Rawson	Kirklees College (Post 16)
Jenny Shore	Maintained Primary Schools	Matthew Pinder	Kirklees Governors
Rik Robinson	Maintained Special Schools	Cllr Rylah	Cabinet Member for Education*
Andrew Fell	Maintained Secondary	Local Authority Officers in Support	
Debbie Kelly	Primary Academy	Jo-Anne Sanders	Service Director - Learning and Early Support
Laura Willimott	Primary Academy	Tom Brailsford	Strategic Director Children and Families
Todd Cheetham	Special Academy	Vacant	Head of Educational Outcomes
Darren Christian	Secondary Academy	Martin Wilby	Head of Education, Places and Access
David Wadsworth	Secondary Academy	David Baxter	Finance Manager
Ian Rimmer	Secondary Academy	Elizabeth Kilner	Minute Clerk
Rebecca Smith	Alternative Provision (state funded)	Kevin Mulvaney	Service Director - Finance
Paul Brook	Secondary Academy	Emma Brayford	Senior Kirklees Learning Partner
		John Bartlett	Head of Finance

\* Non-voting member

### Quorate position:

15 school members + 5 non school (voting) members. 40% of members required to be quorate = **8 members**

## Report for Schools Forum

### School Members vs voting non-school members check

No. of school members	Total members	% of school members	Compliance
15	20	75%	<b>Compliant with the 67% minimum requirement for school members</b>

### Mainstream school membership check

#### Current mainstream school membership:

	Maintained		Academy		Total	
<b>Primary</b>	<b>4</b>	36.4%	<b>2</b>	18.2%	<b>6</b>	54.5%
<b>Secondary</b>	<b>1</b>	9.1%	<b>4</b>	36.4%	<b>5</b>	45.5%
<b>Total</b>	<b>5</b>	45.5%	<b>6</b>	54.5%	<b>11</b>	100.0%

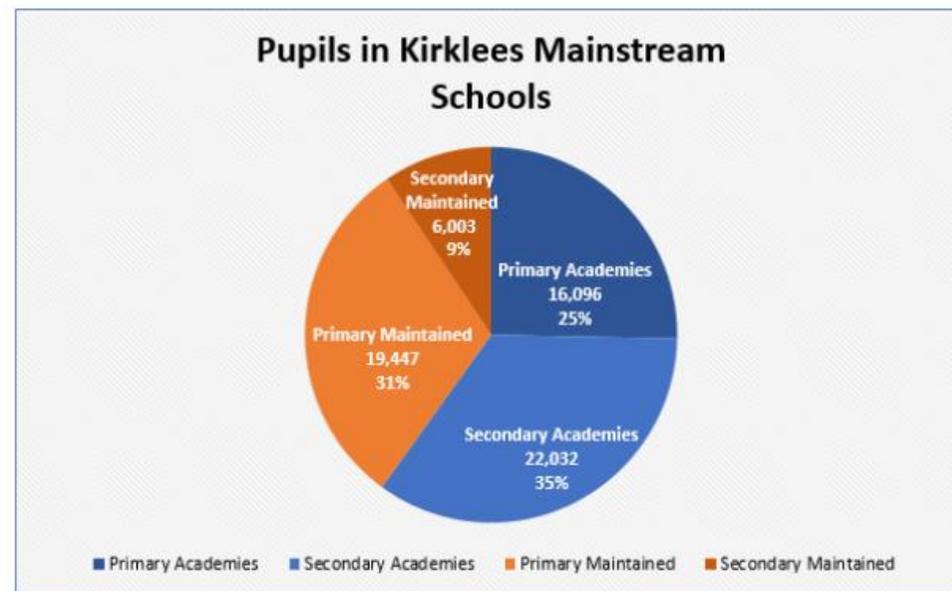
#### May 2025 mathematical 'ideal' membership model:

	Maintained		Academy		Total	
<b>Primary</b>	<b>3.4</b>	30.6%	<b>2.8</b>	25.3%	<b>6.1</b>	55.9%
<b>Secondary</b>	<b>1.0</b>	9.4%	<b>3.8</b>	34.7%	<b>4.9</b>	44.1%
<b>Total</b>	<b>4.4</b>	54.5%	<b>6.6</b>	45.5%	<b>11</b>	100.0%

The model is based upon the status of each in May 2025 and January census 2025 pupil numbers.

#### May 2025 Membership Review Recommendation:

**The next vacant position for a maintained primary representative should be replaced by an academy representative, ideally from the primary phase.**



*N.B. This information is provided by the January 2025 School Census.*

Checks are based on requirement from: [Schools Forum – Operational and good practice guide](#), DfE March 2021

### Appendix 1 - Mathematical ideal model workings and history

May 2025

Pupil numbers

	Maintained		Academy		Total	
Primary	19447	30.6%	16096	25.3%	35543	55.9%
Secondary	6003	9.4%	22032	34.7%	28035	44.1%
Total	25450	40.0%	38128	60.0%	63578	100%

May 2024

Pupil numbers

	Maintained		Academy		Total	
Primary	22885	35.6%	13215	20.6%	36100	56.2%
Secondary	5993	9.3%	22123	34.5%	28116	43.8%
Total	28878	45.0%	35338	55.0%	64216	100%

Note: Changes between the May 2024 to May 2025 models – The May 2024 model was based upon School status and census in January 2024. Whereas the May 2025 model is based upon school status in May 2025 and January census 2025 pupil numbers. Hence the changes between the models reflect 18 months of academy conversion.