

# The KIRKLEES SCHOOLS FORUM PUBLIC (Schools Funding Consultative Group) meeting held on **Friday 23 June 2023** at 10.00 am at **Cathedral House, Huddersfield**

**Present:**

<b>Name:</b>	<b>Category of Membership:</b>
Andi Gilroy-Sinclair	Nursery School Heads (1)
Helen Pearson, Diana Wilson, Laura Willimott, Katie Pearson, Jenny Shore	Primary School Heads (5)
Andrew Fell	High School Heads (1)
Paul Evans	Special School Heads (1)
	Special Academy Heads (1)
Michelle Lee, Dave Wadsworth, Darren Christian (Chair)	Academy Heads (5)
Rebecca Smith	Pupil Referral Units (1)
Vicky Morris	Non-school members (5)
Matthew Pinder	School Governors (1)
Liz Kilner (minute clerk), Jo-Anne Sanders, David Baxter, Kelsey Clark-Davies, Emma Brayford	Officers in Support
Cllr Carole Pattison	Observers

<b>Item</b>	<b>Title</b>	<b>Actions</b>
<b>1</b>	<p><b>Apologies for Absence</b></p> <p>The Chair welcomed all to the meeting. Matthew Pinder was noted as a new Forum Member representing School Governors.</p> <p>Apologies were received from:</p> <ul style="list-style-type: none"> <li>• Ian Rimmer – Secondary Academy Head</li> <li>• Kath Duffy – Early Years</li> <li>• Hazel Danson - NEU</li> <li>• Martin Wilby – Head of Education Places and Access</li> <li>• Dean Langton – Service Director Finance</li> <li>• Mel Meggs – Strategic Director for Children’s Services</li> <li>• Sally Rawson – Kirklees College</li> </ul>	
<b>2</b>	<p><b>Minutes of the Schools Forum Public meeting held on 3 March 2023</b></p> <p>The minutes of the above meeting were agreed as a correct record of the meeting.</p>	
<b>3</b>	<p><b>Matters arising from meeting held on 3 March 2023</b></p> <p>There were no matters arising for discussion.</p>	
<b>4</b>	<p><b>Kirklees Education &amp; Learning Partnership Board (KELPB)</b></p> <p>Jo-Anne Sanders updated the meeting on the meeting of the KELPB meetings held since 3<sup>rd</sup> March.</p> <p>The following areas were discussed at the meeting on the 15<sup>th</sup> March.</p> <ul style="list-style-type: none"> <li>• Budget discussions and Kirklees Cabinet financial approvals.</li> <li>• A presentation from Professor Paul Miller about inclusion and equity as well as his research into exclusions. There is an opportunity for collective training in the LA in</li> </ul>	

	<p>relation to equality and inclusion which we hope to have in place for the new academic year.</p> <ul style="list-style-type: none"> <li>• Feedback to KELPB on the Government White paper and discussions together with head teachers from maintained schools.</li> <li>• Data was shared about LA Traded Services and what was being bought back by schools and settings. There is more work to do in this area to develop Management Information.</li> <li>• Committee feedback was provided by Education Improvement Committee, Service Committee and Places, Access and Inclusion Committee.</li> </ul> <p>The following areas were discussed at the meeting on the 26<sup>th</sup> April.</p> <ul style="list-style-type: none"> <li>• The main focus of the meeting was learning place sufficiency. A detailed presentation was made to the Board covering all phases of education.</li> <li>• The presentation slides will be circulated.</li> <li>• There are planned changes in Early Years provision following government announcements.</li> <li>• We have falling numbers in the primary age youngsters. We need to look at options to move forward and these will be presented back to the KELPB meeting.</li> <li>• We currently have a bulge in secondary school pupil numbers which will feed through to Post 16.</li> <li>• There was a lot of discussion at the Board to secure a shared baseline of understanding in order to plan strategically moving forwards.</li> <li>• The presentation slides do give a top level overview.</li> <li>• We do need to have proposals given the current challenges on school budgets and the struggles to achieve balanced budgets. We need to do this collectively.</li> </ul> <p>The following areas were discussed at the meeting on the 7<sup>th</sup> June.</p> <ul style="list-style-type: none"> <li>• There was a follow up discussion of Sufficiency with feedback from Places, Access and Inclusion who had picked up some development work after the previous ELPB meeting.</li> <li>• There was an update on the new School Improvement Model. This included an update from The Educational Improvement Committee. Engagement has taken place on proposals. The outcome of engagement is 'Agree / Strongly Agree' with the new School Improvement Model proposals which will now be worked up with a view to the new approach being implemented for September 2023.</li> <li>• Vicky Metheringham (Service Director) updated the meeting on the preparations in place for the anticipated upcoming inspection of Childrens Services in the LA (ILACS) and what to expect.</li> <li>• There was an update on the scheduled Our Kirklees Futures Summit and Head Teacher Conference. The KELPB were assured that everything is in place for the event which is planned to take place on the 27<sup>th</sup> June 2023.</li> </ul>	<p><b>Slides to be circulated to Forum Members</b></p>
<p><b>5</b></p>	<p><b>Dedicated Schools Grant (DSG) outturn including school balances</b></p> <p>David Baxter presented a paper on the DSG outturn position for 2022/2023 as well as Excess and Deficit Balances review 2022/2023 which was circulated before the meeting.</p> <p>David Baxter updated the meeting and summarised key areas of the report.</p> <ul style="list-style-type: none"> <li>• Combined Balances at 31 March 2023 £11.5m.</li> <li>• Excess Balances at 31 March 2023 £1.74m.</li> <li>• Schools with deficit balances at 31 March 2023 £0.398m.</li> <li>• Next Steps</li> </ul> <p>Q. Are excess balances defined as reporting a balance of over 10% of the total budget for Primary and Special schools and over 8% of the total budget for Secondary Schools? A. Yes.</p>	

<p>Q. Have we double checked the information provided by schools on proposed expenditure. A. Not double checked but we can request additional information.</p> <p>Q. have we had claw backs of excess balances in the past? A. Yes.</p> <p>Q. have we received information on proposed expenditure from all schools? A. No not from every school yet.</p> <p>Q. We should consider that schools on PPP contracts do have difficulty spending money due to delays in quotes and getting work done. We should look at the context for all schools with excess balances in detail. A. Noted. It is also the case that some schools need to 'save up' for significant projects and in this period will have an excess balance.</p> <p>It was noted by Jo- Anne Sanders that deficit balances in schools are actually more of a concern than excess balances.</p> <p>Q. Is the total for schools with deficit balances at 31 March 2023 £398k. How is this being funded? A. Schools are all working on action plans to resolve deficit balances.</p> <p>Q. What happens to the deficit balance? A. Schools will have to put in place action plans to achieve a balanced budget. Deficit budgets are not acceptable.</p> <p>Q. In the case of Paddock school, the deficit is a result of a significant number of International New Arrivals. Funding will be received based on the census data. On this basis there is no significant concern. A. Noted.</p> <p>It was noted that, technically, excess balances can be clawed back but this should not be progressed unless we know the detailed context for the excess balances for all schools.</p> <p>It is important that Schools Forum discuss excess balances. This is one of our checks for school funding. In the past, there have been valid cases to claw back excess balances.</p> <p>David Baxter noted that there are ongoing discussions with schools with deficit budgets about action plans and staffing structures. Schools are working very hard to reduce deficits. All Schools have been challenged very hard to set balanced budgets as DSG resources are very limited for the financial year 2023/24.</p> <p>Jo-Anne Sanders noted that a collective approach in the LA to sufficiency is very important. As has been fed back earlier, the KELPB are looking at sufficiency. The DfE will review at the overall excess balance position across the LA in the context of the deficit on the High Needs Block</p> <p>Q. Can we ensure that we get more information from all schools with an excess balance to understand the context? A. Yes.</p> <p>Q. Have plans and forecasts been done to understand future year deficits? A. All schools have to submit a 3-year plan to the LA. The October census data will be a key assumption.</p> <p><b>ACTION:</b> A sub committee group to be set up including Andrew Fell and Katie Pearson to do a detailed review of excess balances and make proposals back to Schools Forum.</p>	<p><b>Andrew Fell will coordinate</b></p>
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	<p>ACTION: Additional information to validate proposed expenditure to be requested from schools with excess balances.</p>	<p><b>the sub committee.</b></p> <p><b>School Finance team</b></p>
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## High Needs Update

### Updated Safety Valve Management Plan

Jo-Anne Sanders updated the meeting.

- The LA is currently in Enhanced Monitoring within the Safety Valve Programme. The LA are off track for the original savings plan.
- A resubmission of the revised plan and trajectories is due on 30 June 2023.
- Meetings have been held with DfE advisors.
- After resubmission, if successful, quarterly monitoring of the revised plan will be put in place by the DfE.
- It is very important that the LA stay within the Safety Valve Programme. There is over £16m of funding at risk for the LA.
- There will be significant financial problems for the LA if they drop out of the Safety Valve Programme.
- We have had meetings with the DfE during the re planning process and feedback has been taken. It is very important that the revised plan is based on realistic assumptions and delivery of the revised plan will be key.
- We do still have challenges in the LA with provision.
- The assumptions for the revised plan were summarised including;
  - A cap on out of area spend.
  - Additional provision to come on line in September 2023.
  - Early Years block transfer of £0.5m per annum.
  - SEND inclusion fund transfer and cap on spending.
  - Consultant (Peter Gray) work on different ways of funding activities.
  - More workforce development in schools.
- We plan to have an in year balanced budget for 2026/27 but some historic deficit will remain.
- We have got example data dashboards to include in the submission.
- Engagement with schools and settings will be summarised.
- Risks to the revised plan include;
  - Inflation
  - Cost of living impacts
  - Rising costs of capital investments
  - Demand and complexity of need
- Opportunities include;
  - System changes and more satellite provision
  - Less reliance on out of area provision
  - Potential to have an AP Free School
- We have had feedback confirming that we have made significant progress.
- The revised plan will be submitted on the 30 June 2023 together with narrative.
- If the revised plan is accepted, quarterly monitoring will start in September 2023.
- There will be a further update at the next Schools Forum meeting.

**Q. Is the overall deficit £1.4m or is this just for a single year?**

A. This is the deficit for the overall budget by 2026/27.

**Q. At what point would the LA be excluded from the Safety Valve programme? Is a deficit of £1.4m by 2026 / 27 acceptable?**

A. We need to continue to engage with the DfE, but we need to give confidence that we can achieve an in year balanced budget to give confidence that the overall plan is achievable. Confidence in our collective capacity and ability to deliver plans is key.

**Q. Is the contribution from the Main Schools Block unchanged?**

A. Yes.

**Q. When do you expect that the decision on the AP Free school will be made?**

7	<p>A. This is expected in Autumn 2023, with an opening date not before 2025 if approved. This will make a step change to provision in the LA. There are two applications but we will not get both.</p> <p><b>Q. Can you confirm that the revised plan will not change the agreed transfers from the Main Schools Block?</b></p> <p>A. The assumptions have not changed and the Block Transfer remains part of the proposal.</p> <p><b>Q. Do we need to be sure that pupils going to Special Schools are still the right pupils?</b></p> <p>A. This is a question and there will be new pathways. This needs to be considered at the Special Schools Heads meeting. There needs to be clarity on the graduated approach.</p> <p><b>Q. Places in Special schools can depend on parents' ability to navigate the system?</b></p> <p>A. Yes but this can work both ways.</p> <p>(a) <u>Specialist Placement Sufficiency Update.</u></p> <p>Specialist Placement Sufficiency Update May 2023 slides had been circulated before the meeting.</p> <p>Kelsey Clark-Davies updated the meeting.</p> <ul style="list-style-type: none"> <li>• Out of area placements currently cost circa £11m per annum which is a significant cost. There will always be a need for a small number of out of area placements. Up to 75% of these children have SEMH as a primary need.</li> <li>• We are working very hard on Local Sufficiency of places. We have also expanded our Specialist Outreach teams and have had positive feedback about their support.</li> <li>• The SEND Sufficiency overview slide was summarised including; <ul style="list-style-type: none"> <li>- Future Joseph Norton site at Deighton Road – places to increase from 83 to 132</li> <li>- Future Woodley School and College site at Fernside Avenue – places to increase from 122 to 180.</li> <li>- Beaumont Park Academy ARP – 12 places</li> <li>- Carlinghow Academy ARP – 12 places</li> <li>- Netherhall St James ARP – 12 places</li> <li>- Netherhall Learning Campus Junior School – 12 places</li> <li>- Netherhall Learning Campus High School – 20 places</li> <li>- Old Bank Academy ARP – 16 places</li> <li>- Ravenshall and Headfield satellite – 10 places</li> <li>- Woodley Post 16 satellite proposal TBC</li> <li>- Commissioned Alternative Provision</li> <li>- Alternative Provision Free School</li> </ul> </li> <li>• Using local providers will impact positively on transport costs, both local and out of area. Transformation plans are currently being worked upon for Transport</li> </ul> <p>The Chair noted thanks and support for all the work being done by Jo-Anne Sanders.</p> <p>Jo Anne Sanders noted that support and feedback from Schools Forum is appreciated. The Forum members were thanked for the open, honest and professional conversations.</p>	
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	<p><b>Any Other Business</b></p> <p>None raised</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 13<sup>th</sup> October 2023                      Public</li> </ul> <p>The Chair thanked everyone for attending the meeting and for their contributions across the Academic Year.</p>	

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

**Date.....**