

LEEDS SCHOOL FORUM

**Meeting to be held on
Tuesday, 18th July, 2023 at 4.30 pm**

MEMBERSHIP

Bradley Taylor, A. Primary Governors - Kirkstall Valley Primary
Kate Burton, E. Academy Reps – Alder Tree Primary
Rebecca White, B. Primary Heads, Sharp Lane Primary
Victoria McWalker, A. Primary Governors, St Margaret's Horsforth C of E
Stratis Koutsoukos, B. Primary Governors, St Nicholas Catholic Primary
Nick Tones, J. Non Schools, Schools JCC
Christopher Thornton, J. Non Schools 16-19 Providers
Simon Prinsep, E. Academy Reps, Abbey Grange CofE
Peter McQuillen Strong, J. Leeds Catholic Diocese
Gavin Hosford, E. Academy Reps - Green Meadows
Rachel Colbourn, E. Academy Reps - Bramhope Primary
Jatinder Ubhi, A. Primary Governor - Swarcliffe Primary
Dave Kagai, A. Primary Governors - St Nicholas Primary
Sarah Talbot, E. Academy Reps - East Ardsley Primary
John Garvani (LSF), A. Primary Governors - Broadgate Primary School
John Hutchinson, B. Primary Heads - St Theresa's Catholic Primary
Peter Harris, B. Primary Heads - Farsley Farfield Primary
Julie Harkness, B. Primary Heads - Carr Manor Community school - Primary Phase
Emma Wraight, B. Primary Heads - Fieldhead Carr Primary
David Webster, C. Secondary Governors - Pudsey Grammar
Delia Martin, D. Secondary Heads - Benton Park
David Gurney, E. Academy Reps - Cockburn School
Rob Dixon, E. Academy Rep, Pudsey Waterloo Primary
Neil Miley, E. Academy Reps - Dixons Academy
John Thorne, E. Academy Reps - St Mary's Academy Menston
Joe Barton, E. Academy Reps - Woodkirk Academy
Russell Trigg, F. Governor East SILC
Mary Ruggles, H. Academy Specialist Provision - Springwell Academy
Diane Reynard, I. Special School Principal - East / NW SILC - SILC Principals
Angela Hynes, J. Non School PVI - Nursery Provider
Dan Cohen (Leeds School Forum), J. Jewish Faith Schools

A G E N D A

| Item No | Title | Lead | Time | Purpose |
|----------------|--|-------------|-------------|-----------------|
| 1. | APOLOGIES | Chair | 16:30 | For information |
| 2. | SCHOOL FORUM MEMBERSHIP | Chair | 16:35 | For information |
| 3. | MINUTES OF PREVIOUS MEETING <i>3 - 8</i> | Chair | 16:50 | For information |
| 4. | MATTERS ARISING | Chair | 16:55 | For decision |
| 5. | DEDICATED SCHOOLS GRANT 2022/23 - RESERVES <i>9 - 22</i> | Tim Pouncey | 17:00 | For information |
| 6. | ANY OTHER BUSINESS | Chair | 18:15 | For information |
| 7. | MEETING DATES FOR 23/24 AND FORWARD PLAN <i>23 - 24</i> | Chair | 18:25 | For decision |
| 8. | CLOSE MEETING | Chair | 18:30 | For information |

| Item | Title | Actions |
|-------|--|---------|
| 1.0 | Welcome and Apologies | |
| 1.1 | The Chair welcomed everyone to the meeting. Apologies were noted and introductions made. | |
| 2.0 | Schools Forum Membership | |
| 2.1 | Vacancies remain for: 1 x PVI Nursery Provider vacancy. 1 x Alternative Academy vacancy. 1 x Primary Headteacher vacancy. 1 x Academy Headteacher vacancy Action: to re-advertise the Primary Headteacher vacancy. | |
| 3.0 | Minutes of Previous Meeting | |
| 3.1 | The minutes were agreed. | |
| 3.2 | <ul style="list-style-type: none"> • 5.6.2. to be discussed again at this meeting • 5.4.6. 6 JT wanted clarification on whether caps would be removed. DfE said it would. LM advised cap continues to 23/24. Forum members would like an eye keeping on that. • 6.10. PH asked for guidance, and had the scheme changed in high needs block. TP advised that additional blocks should be allocated to minority of schools, as per the High Needs Block Operational Guide. 64% of schools currently get this funding. The School and Early Years Finance (England) Regulations state that the value for additional blocks must be £6k. | |
| 4.0 | Matters Arising | |
| 4.1 | There were no matters arising. | |
| 5.0 | DSG Budget Monitoring 2022-23 | |
| 5.1 | LM went through the Dedicated Schools Grant (DSG) Outturn Report 2022/2023. This report has been circulated as part of the Agenda pack. | |
| 5.2 | <u>Schools Block</u> | |
| 5.2.1 | The Schools Block had a year-end surplus of £287k which was mainly due savings against the growth fund. | |
| 5.2.2 | The de-delegated budget had an in year under spend of £336k and £466k from surplus balance clawback. The total de delegated surplus carried forward is £1.95m of which £500k was already earmarked to offset the de delegated contingency budget in 23/24. | |
| 5.2.3 | It was proposed that £1.25m of the remaining surplus be refunded back to mainstream maintained schools, pro rata to their original contributions in 21/22 and 22/23. | |
| 5.2.4 | Member wanted to know if the schools knew that they were getting the money back. - TP advised that the schools will be made aware of the refund before they break up for the summer term. TP advised on the process the Council must take. A report must be done, and decision published this will take 30 days and the process is currently underway. | |

| | | |
|-------|--|----|
| 5.2.5 | The largest amount a school would be refunded is around £27k, primary schools are approximately £3-6k (Post meeting note; see information in appendix to report elsewhere on this agenda; actual figures are higher). | |
| 5.2.6 | The refund will be 2023/24 as it is not possible to adjust the 2022/23 budget. | |
| 5.3 | <u>Early Years Block</u> | |
| 5.3.1 | The Early Years Block underspent by £862k. | |
| 5.3.2 | Funding for Early years was based on the January 2022 and the January 2023 Census. | |
| 5.3.3 | The current estimate from the latest census indicates that there has been a reduction of 3 & 4 year olds of 1.1% and a reduction of 2 years old of 12%. | |
| 5.3.4 | These figures relate to children receiving Early Years Funding Entitlement, not the total number of children at this age. | |
| 5.3.5 | Panel member asked if there was a figure for the total number of 2-Year-olds in the City. ACTION To obtain total figure for 2-year-olds. RM can obtain these figures | RM |
| 5.3.6 | The underspend is £532k less than the underspend in 2021/22. | |
| 5.3.7 | A Government announcement on further childcare support for working parents is expected. Further details will be provided shortly. | |
| 5.4 | <u>High Needs Block</u> | |
| 5.4.1 | The High Needs Block had a year-end underspend of £6.84m. Of this underspend, a saving of £2.97m was against the Out of Area (OOA) and Residential placements. There has been some difficulty in accessing accurate data for projections during the year and data available in January suggested a similar expenditure pattern to previous years and as a result a higher expenditure amount was projected than actually occurred. In addition, there was more scrutiny in decision making around the places that were purchased. | |
| 5.4.2 | There was an overspend of £845k in SEND top ups, the largest element of this due to increased top ups paid to mainstream schools. £5.3m more was paid to these setting than in 21/22. | |
| 5.4.3 | The Invest to Save recruitment drive was unsuccessful. This has been revised with of better outcomes. | |
| 5.4.5 | £947k of the 2022/23 of the High Needs Supplementary funding was not utilised as previously reported to Schools Forum. | |

| | | |
|--------|---|----|
| 5.4.6 | As there is a significant underspend, Children & Families will look at a range of proposals and bring these back to a supplementary Schools Forum in July. | |
| 5.4.7 | Question was raised around how many children are going out of area – KJ can find out this out ACTION to find figures/numbers of children going to OOA placements | KJ |
| 5.4.8 | KJ explained difficulty in accessing OOA places. KJ said discussion around SEND early help and a piece work is currently going on to look at this. The feedback from schools is that the numbers of CYP and the complexity of needs has increased especially after the pandemic. OOA; a strategic drive is needed to look at costs and provision and there are some OOA settings that are full; this contributes to underspend. Further quality assurance for OOA placements is required and there is more reporting and accountability needed. There was a discussion as to what happens if there are insufficient quality places. | |
| 5.4.9 | The Chair requested that proposals re the use of the underspend are brought back to the supplementary meeting in July. | |
| 5.4.10 | TP outlined that the underspend is anticipated to be a one off, so we must be careful what to do with the surplus. We don't want a boom and bust and then have to reverse some funding decisions – need consistent approach for the future. | |
| 5.5 | <u>Central Schools Block</u> | |
| 5.5.1 | The Central Schools Block had a minor underspend of £44k mainly due to savings in Admissions. | |
| 5.6 | <u>Reserves</u> | |
| 5.6.1 | The final year end position demonstrates a General DSG surplus to be carried forward of £7.06m and a de delegated surplus of £1.95m. | |
| 5.6.2 | Deficit action plan for DfE – a plan doesn't need to be submitted for this year due to the surplus balance. | |
| 5.7 | <u>Initial High Needs Budget Projections 2023/24</u> | |
| 5.7.1 | It is still early in the year, but the initial projection demonstrates a small saving of £223k against the High Needs budget 23/24. | |
| 5.7.2 | The projection assumes a £2.7m underspend on OOA although full impact of new academic year is not yet known. | |
| | Further savings are anticipated on the Invest to Save in 23/24 as although plans are being developed, due to recruitment timescales it is not expected. | |

| | | |
|------------|--|----|
| 5.7.3 | that all appointments will be made by the year end and so savings of £500k are projected. | |
| 5.7.4 | Funding to mainstream setting is projected to be £4.98m overspent due to increased numbers of high needs pupils remaining within mainstream schools. | |
| 5.7.5 | With regards to the options to utilise the 22/23 surplus TP confirmed that any decision to give de-delegated money back to schools would be a council decision not a schools forum decision | |
| 5.7.6 | Frustration was expressed with regards to the surplus on the High Needs block, so a resolution to give this back to schools was raised. ACTION to consider refunding back to schools the previous High Needs Block transfer. | TP |
| 5.7.8 | Date of the proposed supplementary Schools Forum proposal was considered. ACTION date of the meeting be agreed, and invites sent. | KB |
| 5.7.8 | Noted that people are frustrated by the underspend and the money is there for the children of today not the future. | |
| 5.6.7 | SM provided reassurance that when underspend was recognised a lot of work went on behind the scenes to review and used this as an opportunity to do checks and balances and learn lessons for next year. | |
| 5.7.9 | SM noted that whilst the service acknowledge that the first recruitment drive was unsuccessful, they are confident that the latest recruitment process will be more effective. | |
| 5.7.10 | | |
| 6.0 | School Balances and Extended Balances Outturn 2022/23 | |
| 6.1 | LJ went through the School Balances and Extended Balances Outturn 2022/23 report which refers to maintained schools only. | |
| 6.1.1 | The report demonstrated that overall school balances have decreased by £10.05m during 2022/23 to £33.2m. Primary school balances have decreased by £10.02m, secondary schools have increased by £152k, SILC balances reduced by £932k. | |
| 6.1.2 | A question was asked about school balances expressed as a percentage of schools' budgets. 3-4% was mentioned as an approximation. ACTION Schools Forum asked for information on school balances expressed as a percentage. | LJ |
| 6.1.3 | Table 2 of the report summarised the year end surplus and deficit balances for each maintained school. | |

| | | |
|------------|--|----|
| 6.1.4 | Overall, the number of schools ending the year with a deficit balance has increased by 15 to 36 schools. The total value of these deficit budgets is £4.11m | |
| 6.1.5 | There are 138 schools with a surplus balance of which 79 schools have an excess surplus balance above the new 8% threshold. There are 24 schools which have retained a surplus balance above the threshold for 3 consecutive years and are liable for clawback. These schools have been asked to complete an application to retain their excess balances for consideration by members of Schools Forum and Childrens and Families. | |
| 6.2 | Details were given on how the LA is working with deficit schools to support them. The DfE can help with support from SMRAs and a number are to go ahead this year. | |
| 6.2.1 | Extended Service Accounts Schools hold £7m of balances in extended service accounts, in three broad areas 1. Breakfast/afterschool £3.75m 2. Clusters £2.1m 3. AIP £1.16m | |
| 6.2.2 | The AIP balances are currently being reviewed for 2022/23 and may be subject to clawback. ACTION Schools Forum is asked to note the 2022/23 school and extended school balances and the work ongoing to consider both clawback of excess surplus balances and to review deficit action plans. ACTION to bring back to next School Forum. | EJ |
| 7.0 | Any Other Business | |
| | LM reported that the EFSA had asked that we make Schools Forum aware of a potential change to the APT budget. The adjustment relates to just 5 PFI schools which will be notified of the changes to their funding 23/24. All 5 schools will receive additional funding. | |
| 8.0 | Meeting Dates for 2023-24 and Forward Plan | |
| 8.1 | The next meeting will take place via MS Teams on 18.07. 2023 at 1630-1830. | |



Report of the Director of Children and Families Services

Report to the Leeds Schools Forum

Date 18th July 2023

Subject: Dedicated Schools Grant 2022/23 – Reserves

Report author: Tim Pouncey

Contact number: 0113 3783628

1 Summary of main issues

1.1 At the meeting of the Schools Forum on 22nd June 2023 a report was presented on the 2022/23 outturn position. The focus of discussion was the level of DSG balances. The main issue in this report is the proposals for addressing the balances and Schools Forum are invited to comment on the options available.

1.2 For ease of reference, the summary position as reported to Schools Forum on 22nd June 2023 is repeated below. It is also of significance that the initial projections for 2023/24 reported to Schools Forum at the same June meeting indicated that, broadly speaking, the High Needs Block would be back in balance in 2023/24 and that the underspends in 2022/23 would not be repeated. This adds another level of complexity to the challenge of developing proposals to deal with the accumulated surplus. In short, we do not anticipate that the underspend will repeat in 2023/24 and there is a high degree of uncertainty about future years DSG settlements. Therefore, proposals to reduce the surplus cannot be recurrent expenditure because the source of funding cannot be guaranteed.

1.3 Overall, the variation on general DSG is analysed as follows:

| | Funding £000 | Expenditure £000 | Variance £000 |
|--------------------------------------|------------------|---------------------|------------------|
| Schools Block | (323,687) | 323,400 | (287) |
| Early Years Block | (59,373) | 58,511 | (862) |
| High Needs Block | (104,032) | 97,186 | (6,846) |
| Central Schools Services Block | (5,138) | 5,094 | (44) |
| Total In Year Underspend | (492,230) | 484,191 | (8,039) |
| Deficit brought forward from 2021/22 | | | 979 |
| Surplus at 31/3/23 | | | (7,060) |

1.4 The variation on de-delegated budgets is analysed as follows:

| | Budget £000 | Actual £000 | Variance £000 |
|--|----------------|----------------|------------------|
| De-delegated budgets | 5,152 | 4,766 | (386) |
| Recovery of surplus balances | | (466) | (466) |
| Total In Year Underspend | 5,152 | 4,300 | (852) |
| Surplus brought forward from 2021/22 | | | (1,098) |
| Surplus at 31/3/23 | | | (1,950) |
| Earmarked to offset de-delegated services in 2023/24 | | | 500 |
| Proposed refund of surplus | | | 1,250 |
| Remaining unallocated de-delegated reserve | | | (200) |

2 De-delegated Surplus

- 2.1 Following consultation with all maintained schools, Schools Forum on 18th January 2022 approved the de-delegation of budgets for schools contingency, maternity and other cover, suspended staff cover, Trades Unions facilities, school library service, free school meals eligibility, behaviour support, support for underperforming ethnic minority groups and bilingual learners and school improvement.
- 2.2 As set out in 1.4 above, the surplus was £1.95m because of the in-year underspend, the clawback of surplus balances and the surplus brought forward from 2021/22. As previously referenced at Schools Forum, £0.5m has been earmarked to part fund delegated services in 23/24 (and therefore reduce in year contributions from schools).
- 2.3 It is also proposed the £1.25m is refunded to schools in 2023/24. The refund will be pro rata to their contribution to the de-delegated funds. For the avoidance of doubt, this refund will only apply to maintained mainstream schools as it is only maintained mainstream schools that contributed to the de-delegated budgets. A small number of maintained mainstream schools have academised since the de-delegation was affected; these settings will similarly receive a refund.
- 2.4 In accordance with Council's constitutional decision-making arrangements, a notification of an intention to make such a decision was published on 15th June 2023. It is a requirement that the notification be published 28 prior to the decision being made and that a report upon which the decision maker relies is also published 5 days before the decision is made. On the assumption that the decision is made, a further period of 5 days must lapse before the decision is implemented so that the decision may be 'called in' for reconsideration if enough

Members are minded to call in the decision. Accordingly, the decision cannot be made before 14th July 2023.

- 2.5 Appendix 1 (column H) attached shows the amounts that individual schools will receive during 2023/24 if the decision is made to refund de-delegated balances.

3 Schools Block to High Needs Block Transfer

- 3.1 At the meeting of Schools Forum on 18th November 2021, Schools Forum approved the transfer of £3.127m from the Schools Block to the High Needs Block for the financial year 2022/23. This was done following a consultation with all schools that saw 97% of those schools that responded, supporting the transfer. Block transfers of this nature are a decision reserved for School Forum.
- 3.2 It is now apparent that the High Needs Block did not require the transfer of funding.
- 3.3 Council officers have raised with issue of reversing the block transfer with the ESFA due to the technical nature of inter block transfers and the implications for the Authority Proforma Toolkit return to the DfE. The ESFA do not have any issue with the principle but think that to do this in 23/24 would require a disapplication request and/or resubmission of APT and the reissue of all funding statements. This could be a complicated and lengthy process. The DfE have stated that, with the summer recess, it is unlikely that any disapplication request will be considered until Autumn. They have also said that there appears to be 'no exceptional circumstances' which could 'weaken any disapplication request'.
- 3.4 As an alternative, we could inject the £3.127m into the 24/25 formula i.e., next financial year. Although this could potentially delay the implementation of the refund it does provide certainty that the refund can be implemented compared to the position in respect of a disapplication request as outlined by the ESFA.
- 3.5 Schools Forum should be aware that because of the Minimum Funding Guarantee and the cap on gains that was applied to the schools funding formula, not all schools saw a reduction in their budget due to the block transfer. We would wish to ensure that the refund of the transfer was made on the same basis i.e., only those schools that saw a reduction would benefit from the refund. As a result of the cap on gains and MFG, approximately 40% of settings did not contribute to the transfer.
- 3.6 The transfer to the High Needs Block affected schools funded from the Schools Block. To be clear, special schools are not funded from the Schools Block and therefore did not see a funding reduction to affect the transfer.
- 3.7 As detailed in the medium-term financial plan brought to Schools Forum in October 2022, the indications are that High Needs Block funding will increase by 3% in future years. However, the increase in pupils requiring high needs support is projected to increase by a greater amount. The MTFs will be updated through the summer and reported to the Council's Executive Board. This will take into account the DfE announcement of indicative funding levels for 24/25 that are due to be published by the end of July. Until funding settlements are known it is proposed to retain £3.5m in the DSG reserve. Retaining this figure in the

reserves reduces but does not eliminate the potential for future requests for inter-block transfers give the uncertainty about funding levels and demand pressures on the DSG more widely and the HNB specifically.

4 Funding for Inclusion

- 4.1 We are aware that there are concerns about the application process. Settings will be aware that following the FFI Round Table meetings, the FFI process has been quite significantly streamlined. Feedback on these changes at the recent FFI briefings has been very positive. The FFI Round Table Working Group is meeting in July to explore other recommendations from the Round Table and briefings feedback, such as further simplification of the EHCP funding processes and identifying capacity to move to an annual FFI cycle from next academic year.
- 4.2 Schools are also keen to be able to apply for FFI funding for any age group, the requirement for an annual application for funding for children with an EHCP to be dropped and a trial of an EY ongoing application system from next year.
- 4.3 Given the ongoing role of the Round Table meetings, it is anticipated that further announcement can follow in July and/or early in the new academic year.
- 4.4 Given the nature of the proposed changes to the FFI application process that will significantly simplify the process regarding the 'application window,' it is anticipated that there will be a bulge of applications i.e., for those young people for whom the window would not ordinarily be open. It would therefore be prudent to retain a proportion of the surplus to smooth the inevitable budget spike between the old system and the new system. Details will be available in September.

5 Services Provided by the Council

- 5.1 Notwithstanding previous discussions with Schools Forum about the underspend in 2022/23 on those services provided by the Council and the projected underspend on 'Invest to Save' in 2023/24, feedback from settings is that services such as STARS and SENIT, are welcomed. Now that projected spend (linked to the Council's ability to attract and retain professionals) have increased, it would be sensible to evaluate their contribution and, if appropriate and supported by settings, to seek to do more of the same. The Council will therefore explore these options and report back to Schools Forum to support the increasing number of children with complex needs.
- 5.2 It is anticipated, given the comments in 1.2 above about the non-recurrent nature of the surplus that proposals will consider options for a digital platform around the SEND offer, aligned to the Leeds Local Offer.

6 Early Years Block

- 6.1 The Early Years Block underspent by £862k. In recent years, the Early Year Block has consistently underspent although the level of underspend has been reducing.
- 6.2 The hourly rate received in 2022/23 increased by 8p per hour for 2 year olds and 6p per hour for 3 and 4 year olds. The full increase for 2 year olds was passed onto providers. For 3 and 4 year olds, the base rate has been increased to £4.78 per hour from £4.46 per hour in 2021/22, exceeding the 6p uplift funded by the DfE. This means that £5.20 per hour is being utilised even though the funding received by the council is only £5.12 per hour, proactively managing the historic surplus on the Early Years block.
- 6.3 The unfunded hourly rate was increased as a result of the consistent underspend on the early years block in previous years. It was estimated that this approach would reduce the underspend on this block by approximately £800k. The 2022/23 underspend was £532k less than the 2021/22 underspend.
- 6.4 For 2024/25, the underspend will be reassessed to evaluate whether a further unfunded increase in the 3 & 4 year-old hourly rate is affordable. In addition, regulations state that a local authority may consider in its funding formula the number of places it wishes to fund in the school, class or provider (instead of the predicted total number of hours of attendance), where the authority has reserved those places for children with SEND or children in need. We will explore options to provide some place funding and present options to Schools Forum as either consultation or for decision; depending on the specific block of DSG used to fund the places.
- 6.5 We will also explore further options for inclusion to be funded from the High Needs Block as this would allow greater headroom to increase the base rate for providers. Providers consistently report that the base rate is the most important aspect of the funding model as this influences their business models, budgeting, planning, and charging policies through providing them with greater certainty.
- 6.6 On 7th July 2023 the DfE announced an Early Years Supplementary Grant (EYSG) for September 2023 to March 2024. The supplement will see an increase in funding for 2 year-olds of £1.91 per child per hour and 12p per child per hour for 3 and 4 year-olds. In addition, EYPP will increase by 4p per child per hour and the Disability Access Funding will see an annual increase of £53.
- 6.7 The local authority will be passing on the supplements in full and will be engaging with providers in the coming weeks to ensure they are aware of the increased rates they will benefit from beginning in September 2023.
- 6.8 The DfE has informed us that they expect to publish local authorities' EYSG allocations and the conditions of grant in September 2023.

7 Conclusions

- 7.1 Options exist to deal with the surplus by way of refunds of de-delegated contributions and reversing the block transfer in 23/24 or injecting the inter-block transfer into the formula for 2024/25. This will reduce the surplus by £4.377m.
- 7.2 The above proposals would have the following in year impact on DSG reserves. Some proposals cannot be implemented in year but are shown in the table with a zero in year impact as the financial impact will be in the following year.

| | General £000 | De-delegated £000 | Total £000 |
|---|-----------------|----------------------|---------------|
| Reserves brought forward from 2022/23 | (7,060) | (1,950) | (9,010) |
| Projected underspend in 2023/24 | (235) | | (235) |
| | <hr/> | <hr/> | <hr/> |
| | (7,295) | (1,950) | (9,245) |
| Proposed use of reserves | | | |
| Refund de-delegated reserves to schools | | 1,250 | 1,250 |
| Earmarked to offset 23/24 de-delegation | | 500 | 500 |
| Earmarked for block transfer injection | 3,127 | | 3,127 |
| FFI application and processes | | | |
| EY Block places/SEND | | | |
| STARS and SENIT | | | |
| | <hr/> | <hr/> | <hr/> |
| Balance of available/general reserves | (4,168) | (200) | (4,368) |

- 7.3 This will result in restated and unearmarked reserves of £4,368k. This represents 0.5% of the 2022/23 DSG. This restated surplus would effectively allow some leeway to smooth the transition to revised FFI application procedures, some reserves to mitigate funding pressures and therefore reduce the likelihood of future years inter-block transfers.

8 Recommendations

- 8.1 Schools Forum are requested to note and provide comments on the proposals for using the 2022/23 underspend.

2022/23 de-delegation contributions from schools

| LAESTAB | School Name |
|---------|--------------------------------------|
| 3832000 | Lane End Primary School |
| 3832002 | Rufford Park Primary School |
| 3832270 | Guiseley Primary School |
| 3832271 | Rawdon Littlemoor Primary School |
| 3832275 | Scholes (Elmet) Primary School |
| 3832283 | Horsforth Featherbank Primary School |
| 3832286 | Churwell Primary School |
| 3832293 | Seven Hills Primary School |
| 3832302 | Westroyd Primary School and Nursery |
| 3832303 | Greenside Primary School |
| 3832308 | Carlton Primary School |
| 3832309 | Robin Hood Primary School |
| 3832312 | Thorpe Primary School |
| 3832314 | Woodlesford Primary School |
| 3832324 | Yeadon Westfield Junior School |
| 3832327 | Oulton Primary School |
| 3832329 | Bramham Primary School |
| 3832331 | Pudsey Bolton Royd Primary School |
| 3832334 | West End Primary School |
| 3832335 | Southroyd Primary and Nursery School |
| 3832336 | Gildersome Primary School |
| 3832338 | Farsley Springbank Primary School |
| 3832342 | Victoria Junior School |
| 3832347 | Crossley Street Primary School |
| 3832348 | Tranmere Park Primary School |
| 3832356 | Queensway Primary School |
| 3832358 | Yeadon Westfield Infant School |
| 3832363 | Horsforth Newlathes Primary School |
| 3832364 | Westbrook Lane Primary School |
| 3832365 | Lowtown Primary School |
| 3832369 | Birchfield Primary School |
| 3832382 | Morley Victoria Primary School |
| 3832385 | Bardsey Primary School |
| 3832389 | Primrose Lane Primary School |
| 3832390 | Wigton Moor Primary School |
| 3832397 | Ninelands Primary School |
| 3832398 | Broadgate Primary School |
| 3832400 | Deighton Gates Primary School |
| 3832401 | Ashfield Primary School |
| 3832403 | Westgate Primary School |
| 3832405 | Otley the Whartons Primary School |
| 3832407 | Beecroft Primary School |
| 3832408 | Blenheim Primary School |

| | |
|---------|--|
| 3832409 | Brudenell Primary School |
| 3832410 | Iveson Primary School |
| 3832411 | Kirkstall Valley Primary School |
| 3832412 | Little London Community Primary School |
| 3832413 | Quarry Mount Primary School |
| 3832414 | Spring Bank Primary School |
| 3832415 | Rosebank Primary School |
| 3832416 | Adel Primary School |
| 3832417 | Hawksworth Wood Primary School |
| 3832418 | Cookridge Primary School |
| 3832420 | Ireland Wood Primary School |
| 3832421 | Weetwood Primary School |
| 3832425 | Bankside Primary School |
| 3832427 | Chapel Allerton Primary School |
| 3832428 | Gledhow Primary School |
| 3832432 | Talbot Primary School |
| 3832433 | Bracken Edge Primary School |
| 3832434 | Kerr Mackie Primary School |
| 3832436 | Alwoodley Primary School |
| 3832437 | Manor Wood Primary School Formally Carr Manor Primary School |
| 3832438 | Highfield Primary School |
| 3832439 | Moor Allerton Hall Primary School |
| 3832440 | Moortown Primary School |
| 3832441 | Shadwell Primary School |
| 3832444 | Beechwood Primary School |
| 3832447 | Grange Farm Primary School |
| 3832448 | Grimes Dyke Primary School |
| 3832449 | Harehills Primary School |
| 3832450 | Hovingham Primary School |
| 3832452 | Seacroft Grange Primary School |
| 3832456 | White Laith Primary School |
| 3832457 | Wykebeck Primary School |
| 3832458 | Cross Gates Primary School |
| 3832462 | Shakespeare Primary School |
| 3832464 | Manston Primary School |
| 3832467 | Parklands Primary School |
| 3832468 | Swarcliffe Primary School |
| 3832469 | Fieldhead Carr Primary School |
| 3832470 | Beeston Primary School |
| 3832471 | Windmill Primary School |
| 3832473 | Greenmount Primary School |
| 3832474 | Hunslet Carr Primary School |
| 3832475 | Hunslet Moor Primary School |
| 3832476 | Ingram Road Primary School |
| 3832478 | Westwood Primary School |
| 3832481 | Low Road Primary School |
| 3832482 | Clapgate Primary School |
| 3832483 | Hugh Gaitskell Primary School |
| 3832486 | Castleton Primary School |
| 3832487 | Cobden Primary School |

| | |
|---------|---|
| 3832488 | Park Spring Primary School |
| 3832490 | Stanningley Primary School |
| 3832491 | Summerfield Primary School |
| 3832492 | Five Lanes Primary School |
| 3832493 | Whingate Primary School |
| 3832494 | Whitecote Primary School |
| 3832496 | Lower Wortley Primary School |
| 3832497 | Lawns Park Primary School |
| 3832499 | Greenhill Primary School |
| 3832503 | Swinnow Primary School |
| 3832505 | Farsley Farfield Primary School |
| 3832506 | Rothwell Primary School |
| 3832510 | Sharp Lane Primary School |
| 3832512 | Asquith Primary School |
| 3832513 | Otley All Saints CofE Primary School |
| 3833030 | Aberford Church of England Voluntary Controlled Primary School |
| 3833031 | Rawdon St Peter's Church of England Voluntary Controlled Primary School |
| 3833033 | Barwick-in-Elmet Church of England Voluntary Controlled Primary School |
| 3833037 | Harewood Church of England Voluntary Controlled Primary School |
| 3833038 | St Margaret's Church of England Voluntary Controlled Primary School |
| 3833040 | Micklefield Church of England Voluntary Controlled Primary School |
| 3833045 | St James' Church of England Voluntary Controlled Primary School |
| 3833046 | Calverley Church of England Voluntary Aided Primary School |
| 3833047 | St Mary's Church of England Controlled Primary School Boston Spa |
| 3833051 | Pool-in-Wharfedale Church of England Voluntary Controlled Primary School |
| 3833052 | Burley St Matthias Church of England Voluntary Controlled Primary School |
| 3833053 | Middleton St Mary's Church of England Voluntary Controlled Primary School |
| 3833054 | Bramley St Peter's Church of England Primary School |
| 3833056 | St Bartholomew's CofE Voluntary Controlled Primary School |
| 3833329 | Roundhay St John's Church of England Primary School |
| 3833350 | St. Oswald's CofE Primary School |
| 3833351 | Hawskworth Church of England Primary School |
| 3833356 | Lady Elizabeth Hastings' CofE VA Primary School, Thorp Arch |
| 3833357 | Collingham Lady Elizabeth Hastings' Church of England Primary School |
| 3833358 | St Edward's Catholic Primary School, Boston Spa |
| 3833362 | St Francis Catholic Primary School, Morley |
| 3833364 | Rothwell St Mary's RC Primary School |
| 3833366 | St Joseph's Catholic Primary School, Wetherby |
| 3833367 | St Anthony's Catholic Primary School, Beeston |
| 3833370 | Corpus Christi Catholic Primary School |
| 3833371 | St Francis of Assisi Catholic Primary School |
| 3833372 | Holy Family Catholic Primary School |
| 3833374 | St Joseph's Catholic Primary School, Hunslet |
| 3833375 | St Nicholas Catholic Primary School |
| 3833376 | Our Lady of Good Counsel Catholic Primary School |
| 3833379 | St Philip's Catholic Primary School |
| 3833382 | St Patrick Catholic Primary School |
| 3833385 | St Theresa's Catholic Primary School |
| 3833902 | Adel St John the Baptist Church of England Primary School |
| 3833903 | Cookridge Holy Trinity Church of England Primary School |

| | |
|---------|--|
| 3833904 | Kirkstall St Stephen's Church of England (VA) Primary School |
| 3833907 | Meanwood Church of England Primary School |
| 3833908 | St Matthew's Church of England Aided Primary School |
| 3833909 | All Saint's Richmond Hill Church of England Primary School |
| 3833911 | St Peter's Church of England Primary School, Leeds |
| 3833912 | Whinmoor St Paul's Church of England Primary School |
| 3833913 | Beeston Hill St Luke's Church of England Primary School |
| 3833915 | Brodetsky Primary School |
| 3833917 | Strawberry Fields Primary School |
| 3833921 | Drighlington Primary School |
| 3833922 | Hollybush Primary |
| 3833925 | Great Preston VC CofE Primary School |
| 3833926 | Fountain Primary School |
| 3833927 | The New Beverley Community Primary School |
| 3833928 | Valley View Community Primary School |
| 3833929 | Shire Oak VC Primary School |
| 3833931 | Allerton CofE Primary School |
| 3835200 | Lady Elizabeth Hastings CofE Primary School |
| 3834006 | Lawnswood School |
| 3834032 | Allerton High School |
| 3834040 | Allerton Grange School |
| 3834062 | Ralph Thoresby School |
| 3834102 | Pudsey Grammar School |
| 3834106 | Benton Park School |
| 3834108 | Guiseley School |
| 3834111 | Wetherby High School |
| 3834751 | Cardinal Heenan Catholic High School |
| 3834753 | Mount St Mary's Catholic High School |
| 3834041 | Carr Manor Community School, Specialist Sports College |
| 3834063 | Roundhay School |

| Refund Pro rata 2021/22 Contribution | Refund Pro rata 2022/23 Contribution | Total Refund |
|--|--|----------------------|
| £283,999.00 | £965,998.00 | £1,249,997.00 |
| £2,096.00 | £7,212.00 | £9,308.00 |
| £1,261.00 | £4,302.00 | £5,563.00 |
| £1,617.00 | £5,569.00 | £7,186.00 |
| £1,261.00 | £4,263.00 | £5,524.00 |
| £1,230.00 | £4,374.00 | £5,604.00 |
| £875.00 | £3,023.00 | £3,898.00 |
| £1,726.00 | £5,835.00 | £7,561.00 |
| £1,791.00 | £6,107.00 | £7,898.00 |
| £826.00 | £2,740.00 | £3,566.00 |
| £1,234.00 | £4,443.00 | £5,677.00 |
| £1,226.00 | £4,186.00 | £5,412.00 |
| £1,712.00 | £5,750.00 | £7,462.00 |
| £853.00 | £3,447.00 | £4,300.00 |
| £1,615.00 | £5,632.00 | £7,247.00 |
| £909.00 | £3,251.00 | £4,160.00 |
| £1,387.00 | £5,061.00 | £6,448.00 |
| £774.00 | £2,537.00 | £3,311.00 |
| £1,816.00 | £6,262.00 | £8,078.00 |
| £904.00 | £3,300.00 | £4,204.00 |
| £1,606.00 | £5,769.00 | £7,375.00 |
| £1,515.00 | £5,316.00 | £6,831.00 |
| £1,604.00 | £5,700.00 | £7,304.00 |
| £782.00 | £2,663.00 | £3,445.00 |
| £840.00 | £2,868.00 | £3,708.00 |
| £1,236.00 | £4,222.00 | £5,458.00 |
| £795.00 | £2,750.00 | £3,545.00 |
| £602.00 | £2,089.00 | £2,691.00 |
| £1,664.00 | £5,705.00 | £7,369.00 |
| £844.00 | £2,878.00 | £3,722.00 |
| £854.00 | £2,937.00 | £3,791.00 |
| £863.00 | £2,953.00 | £3,816.00 |
| £1,775.00 | £6,011.00 | £7,786.00 |
| £769.00 | £2,637.00 | £3,406.00 |
| £803.00 | £2,815.00 | £3,618.00 |
| £1,943.00 | £6,778.00 | £8,721.00 |
| £1,633.00 | £5,523.00 | £7,156.00 |
| £1,868.00 | £5,836.00 | £7,704.00 |
| £839.00 | £2,861.00 | £3,700.00 |
| £860.00 | £2,947.00 | £3,807.00 |
| £837.00 | £2,874.00 | £3,711.00 |
| £755.00 | £2,606.00 | £3,361.00 |
| £1,327.00 | £4,588.00 | £5,915.00 |
| £2,075.00 | £7,164.00 | £9,239.00 |

| | | |
|-----------|------------|------------|
| £1,101.00 | £3,938.00 | £5,039.00 |
| £1,620.00 | £5,882.00 | £7,502.00 |
| £961.00 | £3,234.00 | £4,195.00 |
| £2,425.00 | £9,327.00 | £11,752.00 |
| £1,027.00 | £3,231.00 | £4,258.00 |
| £905.00 | £3,096.00 | £4,001.00 |
| £1,507.00 | £5,124.00 | £6,631.00 |
| £880.00 | £2,981.00 | £3,861.00 |
| £1,510.00 | £5,517.00 | £7,027.00 |
| £1,391.00 | £4,828.00 | £6,219.00 |
| £1,910.00 | £6,360.00 | £8,270.00 |
| £847.00 | £2,974.00 | £3,821.00 |
| £3,055.00 | £10,974.00 | £14,029.00 |
| £1,869.00 | £6,588.00 | £8,457.00 |
| £2,636.00 | £8,755.00 | £11,391.00 |
| £1,848.00 | £6,228.00 | £8,076.00 |
| £1,805.00 | £7,460.00 | £9,265.00 |
| £1,742.00 | £6,067.00 | £7,809.00 |
| £1,863.00 | £6,322.00 | £8,185.00 |
| £1,892.00 | £6,961.00 | £8,853.00 |
| £1,892.00 | £6,450.00 | £8,342.00 |
| £2,436.00 | £8,007.00 | £10,443.00 |
| £870.00 | £3,083.00 | £3,953.00 |
| £851.00 | £2,940.00 | £3,791.00 |
| £1,999.00 | £6,705.00 | £8,704.00 |
| £2,046.00 | £6,939.00 | £8,985.00 |
| £1,077.00 | £3,996.00 | £5,073.00 |
| £3,323.00 | £11,176.00 | £14,499.00 |
| £3,379.00 | £11,162.00 | £14,541.00 |
| £1,042.00 | £3,562.00 | £4,604.00 |
| £891.00 | £3,141.00 | £4,032.00 |
| £1,867.00 | £6,862.00 | £8,729.00 |
| £942.00 | £3,185.00 | £4,127.00 |
| £3,377.00 | £12,238.00 | £15,615.00 |
| £930.00 | £3,160.00 | £4,090.00 |
| £1,834.00 | £6,126.00 | £7,960.00 |
| £1,433.00 | £4,995.00 | £6,428.00 |
| £1,202.00 | £3,711.00 | £4,913.00 |
| £2,883.00 | £10,036.00 | £12,919.00 |
| £2,047.00 | £7,203.00 | £9,250.00 |
| £2,185.00 | £7,796.00 | £9,981.00 |
| £1,810.00 | £6,206.00 | £8,016.00 |
| £2,168.00 | £7,142.00 | £9,310.00 |
| £1,561.00 | £5,670.00 | £7,231.00 |
| £1,360.00 | £4,672.00 | £6,032.00 |
| £823.00 | £2,926.00 | £3,749.00 |
| £1,884.00 | £6,514.00 | £8,398.00 |
| £2,757.00 | £9,578.00 | £12,335.00 |
| £1,782.00 | £5,782.00 | £7,564.00 |
| £974.00 | £3,372.00 | £4,346.00 |

| | | |
|-----------|-----------|------------|
| £1,879.00 | £6,093.00 | £7,972.00 |
| £922.00 | £3,112.00 | £4,034.00 |
| £913.00 | £3,158.00 | £4,071.00 |
| £1,809.00 | £6,134.00 | £7,943.00 |
| £1,949.00 | £6,750.00 | £8,699.00 |
| £1,825.00 | £6,031.00 | £7,856.00 |
| £1,344.00 | £4,522.00 | £5,866.00 |
| £936.00 | £3,131.00 | £4,067.00 |
| £1,777.00 | £6,346.00 | £8,123.00 |
| £890.00 | £3,043.00 | £3,933.00 |
| £1,748.00 | £5,909.00 | £7,657.00 |
| £1,322.00 | £4,551.00 | £5,873.00 |
| £2,633.00 | £9,156.00 | £11,789.00 |
| £1,651.00 | £5,692.00 | £7,343.00 |
| £850.00 | £2,879.00 | £3,729.00 |
| £413.00 | £1,387.00 | £1,800.00 |
| £1,272.00 | £4,329.00 | £5,601.00 |
| £825.00 | £2,812.00 | £3,637.00 |
| £411.00 | £1,425.00 | £1,836.00 |
| £1,701.00 | £5,853.00 | £7,554.00 |
| £115.00 | £1,313.00 | £1,428.00 |
| £486.00 | £1,270.00 | £1,756.00 |
| £1,656.00 | £5,721.00 | £7,377.00 |
| £533.00 | £1,860.00 | £2,393.00 |
| £814.00 | £2,723.00 | £3,537.00 |
| £1,004.00 | £3,367.00 | £4,371.00 |
| £1,737.00 | £6,135.00 | £7,872.00 |
| £1,590.00 | £5,778.00 | £7,368.00 |
| £2,697.00 | £9,898.00 | £12,595.00 |
| £874.00 | £3,063.00 | £3,937.00 |
| £1,538.00 | £5,190.00 | £6,728.00 |
| £417.00 | £1,470.00 | £1,887.00 |
| £453.00 | £1,719.00 | £2,172.00 |
| £812.00 | £2,764.00 | £3,576.00 |
| £642.00 | £2,277.00 | £2,919.00 |
| £900.00 | £3,042.00 | £3,942.00 |
| £870.00 | £2,983.00 | £3,853.00 |
| £826.00 | £2,820.00 | £3,646.00 |
| £893.00 | £3,118.00 | £4,011.00 |
| £1,371.00 | £4,562.00 | £5,933.00 |
| £0.00 | £3,606.00 | £3,606.00 |
| £1,002.00 | £3,397.00 | £4,399.00 |
| £970.00 | £3,367.00 | £4,337.00 |
| £1,411.00 | £4,810.00 | £6,221.00 |
| £888.00 | £3,097.00 | £3,985.00 |
| £1,060.00 | £3,648.00 | £4,708.00 |
| £987.00 | £3,272.00 | £4,259.00 |
| £1,796.00 | £6,015.00 | £7,811.00 |
| £822.00 | £2,841.00 | £3,663.00 |
| £1,641.00 | £5,713.00 | £7,354.00 |

| | | |
|-----------|------------|------------|
| £926.00 | £3,088.00 | £4,014.00 |
| £840.00 | £2,912.00 | £3,752.00 |
| £1,764.00 | £5,847.00 | £7,611.00 |
| £1,092.00 | £3,653.00 | £4,745.00 |
| £1,177.00 | £3,905.00 | £5,082.00 |
| £953.00 | £2,996.00 | £3,949.00 |
| £1,865.00 | £6,060.00 | £7,925.00 |
| £913.00 | £3,165.00 | £4,078.00 |
| £1,309.00 | £4,469.00 | £5,778.00 |
| £1,497.00 | £5,360.00 | £6,857.00 |
| £1,895.00 | £6,651.00 | £8,546.00 |
| £850.00 | £2,927.00 | £3,777.00 |
| £1,595.00 | £5,930.00 | £7,525.00 |
| £2,124.00 | £7,308.00 | £9,432.00 |
| £1,726.00 | £5,982.00 | £7,708.00 |
| £873.00 | £3,047.00 | £3,920.00 |
| £2,869.00 | £9,420.00 | £12,289.00 |
| £519.00 | £1,652.00 | £2,171.00 |
| £6,451.00 | £20,361.00 | £26,812.00 |
| £4,849.00 | £14,994.00 | £19,843.00 |
| £6,242.00 | £19,827.00 | £26,069.00 |
| £3,809.00 | £12,176.00 | £15,985.00 |
| £4,563.00 | £14,196.00 | £18,759.00 |
| £5,009.00 | £15,195.00 | £20,204.00 |
| £4,484.00 | £14,059.00 | £18,543.00 |
| £2,618.00 | £7,915.00 | £10,533.00 |
| £3,788.00 | £11,703.00 | £15,491.00 |
| £4,691.00 | £15,312.00 | £20,003.00 |
| £6,771.00 | £21,417.00 | £28,188.00 |
| £7,841.00 | £25,353.00 | £33,194.00 |

Schools Forum forward plan 2023/24

| Schools Forum date | Driver for date | Agenda items | Purpose | Responsible officer | Comments |
|---------------------|---|--|---------------------------|---------------------------------|----------|
| Thursday 22/06/2023 | No external requirements | School balances 2022/23 outturn | Information | Lucie McAulay/Liz Jackson | |
| | | DSG 2022/23 outturn | Information | Lucie McAulay/Shirley Maidens | |
| Thursday 05/10/2023 | Get views from SF before consultation | DSG budget monitoring 2023/24 | Information | Lucie McAulay/Shirley Maidens | |
| | | School funding update 2024/25, including consultation plans | Information | Lucie McAulay | |
| | | DSG Medium Term Financial Strategy 2024/25 - 2028/29 | Information | Lucie McAulay | |
| Thursday 16/11/2023 | Assume consultation the week before and after half term then need time to clear reports before SF. Disapplication deadline usually 20th November, SF | School funding formula arrangements 2024/25, including any transfers of funding between the DSG blocks | Decision and consultation | Liz Jackson | |
| Tuesday 16/01/2024 | APT deadline usually 21st Jan, SF needs to be before this. Final funding figures received from ESFA at end of Dec. Need as much time as possible at start of Jan to do modelling before SF meeting. | Final school funding arrangements 2024/25 | Information | Lucie McAulay | |
| | | De-delegation 2024/25 decision | Decision | Liz Jackson | |
| Thursday 22/02/2024 | Approval of EY funding by SF before end of Feb. Can't hold SF meeting during half term. | Free Early Education Entitlement rates and centrally retained funding 2024/25 | Decision and consultation | Chris Sutton | |
| | | High Needs Budget 2024/25 | Information | Lucie McAulay / Shirely Maidens | |
| | | DSG budget monitoring 2023/24 | Information | Lucie McAulay/Shirley Maidens | |
| | | | | | |

This page is intentionally left blank