

Cheshire West & Chester Council

## **Cheshire West and Chester Schools Forum**

Tuesday 14 January 2025  
4.30pm – 6.30 pm

Virtual Meeting

Schools Forum Clerk  
Children and Families  
Cheshire West and Chester Council  
Telephone 07584 206913



## **Notes for members of the public**

### **Cheshire West and Chester Schools Forum**

The Council welcomes and encourages you to be at its meetings and Committees.

You are requested to remain quiet whilst the meeting is taking place.

The agenda is sometimes divided into two parts. You are allowed to stay for the first part. When the Forum is ready to deal with the second part you will need to leave the meeting because the business will be of a confidential nature, for example, dealing with individual people, contracts and financial affairs of other parties.

Members of the public wishing to attend Schools Forum meetings should contact the Schools Forum Clerk:

Email: [school.relationshipteam@cheshirewestandchester.gov.uk](mailto:school.relationshipteam@cheshirewestandchester.gov.uk)

Telephone: 07584 206913

## Agenda for Cheshire West and Chester Schools Forum 14 January 2025

1.	4.30	Introductions and apologies		
2.	4.35	Minutes and matters arising of last meeting 2.1 To agree the minutes held 3 December 2024 2.2 Matters arising		Page 4-10
3.	4.45	Dedicated Schools Grant (DSG) 2024-25 Forecast Outturn at Third Review	Lynsey Taylor	Page 11-12
4.	4.55	Central School Services Block (CSSB) 2025-26	Lynsey Taylor	Page 13-16
5.	5.10	De-delegation proposals for 2025-26	Lynsey Taylor	Page 17-22
6.	5.30	Growth Funding 2025-26	Lynsey Taylor	Page 23-25
7.	5.45	Schools Funding Update	Lynsey Taylor	Page 26-29
8.	6.00	SEND High Needs programme	Debbie Edwards	Verbal update
9.	6.15	Council Financial Position	Lynsey Taylor	Verbal update
10.	6.25	Any Other Business		
11.	6.30	Next meeting: Monday 12 February 2024		
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**Cheshire West and Chester  
Schools Forum  
14 January 2025**

**Agenda item 2**

**Minutes of Cheshire West and Chester Schools' Forum on 3 December 2024**

<b>Members</b>	<b>Representing</b>	<b>Attendance</b>
<b>Schools and Academies</b>		
Jan Diamond	Primary headteachers	Attended
Nicky Dowling	Primary headteachers	Attended
Kate Docherty	Primary headteachers	Attended
Beth Hacking	Primary headteachers	Absent
Michelle Ashfield	Primary headteachers	Apologies
Kerry Forrester	Primary headteachers	Substitute
Claire Hughes	Primary governors	Attended
Lisa Rigby	Primary governors	Absent
Hannah Mater	Primary governors	Apologies
James Bancroft	Primary governors	Attended
David Curry	Secondary headteachers	Attended
David Rowlands (Vice Chair)	Secondary governors	Attended
Vacancy	Secondary governors	Vacancy
Neil Oxley	Special headteachers	Attended
Philip Hopwood	Special governors	Attended
Andy Stewart	PRU	Attended
Deborah Beaumont	Academies - mainstream	Apologies
Simon Faircloth	Academies - mainstream	Attended
Duncan Haworth (Chair)	Academies - mainstream	Attended
Cathryn McKeagney	Academies - mainstream	Attended
Kevin Simpson	Academies - mainstream	Attended
Jonathan Deakin	Academies - mainstream	Absent
Louise Smith	Academies - mainstream	Attended
Vacancy	Academies - mainstream	Vacancy
Michelle Duval	Academies - special	Attended
<b>Non Schools</b>		
Paula Adolph	PVI early years providers	Attended
Vacancy	PVI early years providers	Vacancy
Kathryn Magiera	Diocese	Absent
Caroline Vile	Diocese	Apologies
Greg Foster	Unions	Attended
Geoff Wright	Unions	Absent
Ian Devereux Roberts	CWAPH	Attended
Vacancy	16-19 providers	Vacancy
<b>Official Observers</b>		
Councillor Adam Langan	Cabinet Member Children & Young People	Absent
	Education Skills & Funding Agency	Absent
<b>Invited Observers</b>		

Councillor Adrian Waddelove	Shadow Cabinet Member Children & Young People	Attended
<b>Officers in attendance</b>		
Nicholas Ajaegbu	Senior Finance Manager - Children & Families	
Debbie Edwards	Head of Education and Inclusion	
Charlotte Fenn	Clerk	
Sharon McKeown	Children Services Liaison Manager	
Lynsey Taylor	Finance Manager - Children & Families	
Simone White	Interim Director of Children & Families	

## 1. Introductions and apologies

Apologies were noted.

Duncan Haworth reported the following updates to membership:

### Resignation:

Beth Hacking Head Cherry Grove Primary – resigning 31 December 2024.

Duncan thanked Beth for her contribution to Schools Forum work.

### New members:

#### Primary Governor representatives

Claire Evans - Governor Neston Primary School

James Bancroft – Governor Whitegate CofE Primary School

Hannah Mather - Governor Woodlands Primary School

#### Academies representatives

Louise Smith - Warrington Primary Academy Trust.

New members were welcomed to Schools Forum.

Simone White, Interim Director of Children and Families, introduced herself to the group.

## 2. Minutes and matters arising of last meeting

### 2.1 To agree the minutes from the meeting held 8 October 2024

The minutes of the meeting held on 8 October 2024 were agreed as a correct record.

### 2.2 Matters arising

It was noted that the 12 of November meeting had been cancelled as DfE notification regarding the School Funding Arrangements 2025-2026 had not been received by that date.

### **2.2.1 Arrangements for funding from the High Needs Block 2024-2025**

Duncan confirmed that Forum had written to the DfE again with additional comments regarding funding, copy was circulated with Forum papers. The DfE had not yet responded.

### **2.2.2 Early Years Funding Formula Consultation and proposal for 2024-2025**

Duncan reported that there was no further update at this time, the national funding information for Early Years expected in December had not yet been published.

## **3. Education – Capital Programme 2024-2028**

Sharon McKeown introduced herself and took Forum members through the report which provided an update on the Education Basic Need Capital Programme, highlighting the key points.

Sharon drew Forum's attention to the table in paragraph 5 which showed the levels of grant funding received over the last seven years, which in totality amounted to around £34 million. It was noted that in 2021-22 the grant funding was significantly higher than previous years, £24 million. This was due to the team doing a review on how forecasts were done and refining planning areas resulting in the data provided to the DfE highlighting the need on an individual planning area level. It was noted that there was a lag between submitting forecasts and receiving the funding from the DfE, which was reviewed on a yearly basis to ensure they were not over funded for places. Sharon referred Forum to the link to the score card, under paragraph 9, which showed how the authority was performing in terms of the funding and quality, forecasts and parental preference. It was noted that the authority was doing well under all these categories.

Forum members' attention was drawn to Appendix 1 which identified School Planning areas with an estimated number of places required and the active schemes where schools had already been spoken to and solutions were in place and progressing. Other planning areas had been flagged as part of the latest forecasting and officers would be meeting with schools to potentially look at solutions to put in place utilising the grant funding.

Philip Hopwood sought clarification as to whether this process included special schools and had the increased demand on special school places come into the forecast thinking. Sharon explained that there was a separate programme for SEND, growth around this area was not captured as part of the Basic Need programme and suggested a separate paper be brought to Schools Forum regarding this issue in the new year.

Neil Oxley sought clarification regarding the drop-in birth rates and longer-term view on surplus places.

Sharon responded that there was not a consistent picture across the borough, this varied between planning areas. There were pockets across the authority where there were surplus places but there were also pockets where they were seeing growth, mainly due to extensive new housing developments. Potentially there was a new local plan

being developed for the Council which would support growth due to new housing and demand for places.

David Rowlands commented that another factor was that this borough was one of the boroughs with the greatest requirement to build new housing and future intake of pupils would depend on the quantity and type of housing built. Sharon responded that they worked closely with planning colleagues to ensure they had a process through 106 where they captured those requirements going forward.

Claire Hughes commented that had read a figure from the national audit office that nationally 24 thousand schools were beyond their life and asked what the criteria was for the authority to determine when a school was no longer fit for purpose or viable for repair and required rebuilding.

Sharon responded that there was a separate grant allocation called Condition that was used to look at the condition of the school estate. Sharon acknowledged that the authority was under funded, the Council had a large backlog of maintenance requirements across the estate, the annual funding received of around £4million, did not cover the maintenance backlog. The authority had the opportunity to tap into national initiatives such as the rebuild programme, but that programme only considered the schools in the worst condition. The Council did its best to maintain schools with the funds available; there was a process to prioritise the worst condition works within the back log of maintenance.

Claire acknowledged that schools had a long wait to be rebuilt and nationally was not good enough leaving older schools in a terrible situation but was appreciative of what the Council did within funding constraints.

**Resolved that Schools Forum note the paper.**

#### **4. School Funding Arrangements 2025-2026**

Lynsey Taylor tabled/shared on screen the report which provided Schools Forum with details on the school funding arrangements for 2025-2026 following the publication by the DfE on 28 November 2024, the impact on Cheshire West and Chester and proposals for consulting with schools and Schools Forum on the arrangements for 2025-2026.

Lynsey reported that there was still some information to be published by the DfE which would need further analysis.

Lynsey took Forum through the main headlines in the report.

Council to continue to mirror the national funding formula (NFF) because we had already committed to that and the DfE expected all Councils to have moved to the direct NFF by the 2027-2028 funding year.

The changes in CW&C allocation announced to date were as follows:

- £7,494m (2.6%) increase in schools block funding.
- £4,025m (7%) increase in high needs block funding.

- No announcement on the early years block funding.
- £3k decrease in central schools' services block funding

Overall, for CW&C, the indicative allocation for 2024-2025 was £378m and £390m in 2025-2026 for maintained schools and academies.

Most of the technical aspects to the School Block had not changed due to the lateness of the announcement; the DfE wanted to review everything and make changes from 2026-2027.

There was a change to PFI, previously the Council could choose what inflation factor used according to their rules and regulations, for 2025-2026 the DfE was using a blanket inflation rate for all the PFI schools, as the rate was yet to be announced, the impact on schools was unknown.

Another change reported was that the mainstream schools' elements of TPAG, TPECG and CSBG would be rolled into the schools NFF for 2025 -2026 and would not be separate grants. The government had added these grants into the primary basic per pupil unit value, the KS3 basic per pupil unit value and the KS4 basic per pupil unit value. Lynsey confirmed that she would do an analysis on the funding impact on each school for January's Schools Forum.

It was also noted that there was to be a separate grant for National Insurance contributions which would not be added to the NFF; Government hadn't announced the allocations yet as were still working on how they were going to allocate it.

There had been changes to the Minimum Funding guarantee (MFG). In previous years the highest MFG had been 0.5% per pupil compared to baseline, government had now reduced this to 0%, so the authority had to set an MFG between minus 0.5% and +0.0% per pupil compared to baseline. Lynsey proposed that an MFG of 0.0% was set, which meant that no school would get less than they did in 2024-2025.

It was noted for High Needs block funding the government had also set the MFG as 0%, which meant Special schools would not get less than their 2024-2025 allocation.

Special schools would continue to get separate grant for TPAG, TPECG and core school budget.

It was noted that for the Central School Services Block (CSSB) the government was continuing to reduce historic commitments funding by 20%. In term of the licences block bought by government, the budget had increased.

It was noted that there were two exceptional circumstances disapplication's that were done every year, Upton-by-Chester High School sports facilities and Wincham Primary School rental of a hall. The submission date for authorities was 18 November 2024 and Officers were therefore seeking retrospective approval.

Lynsey also requested agreement from Schools Forum to recommend to Cabinet in January 2025 to continue with the NFF.



Lynsey made reference to Appendix A which showed the current DSG 2024-2025 and Indicative 2025-2026 allocations.

David Rowlands declared an interest as a governor at Upton-by-Chester High School.

Neil Oxley raised an issue regarding grant funding and special schools; currently funding was based on the commissioned number of places (PAN) but where schools had numbers over PAN, schools were not getting adequate grant funding e.g to cover the teachers pay increase.

Lynsey responded that Finance had looked at the figures and tried different scenarios and in each scenario six special schools lost out and six had an advantage, none of the scenarios worked for all schools, which is why they had gone with what the government recommended. It was noted that the schools that lost out weren't necessarily those above PAN, and some that lost out were those struggling financially and some of those gaining were already in a better financial position. Lynsey suggested they could consult on the scenarios.

Andy Stewart agreed with Neil's comments. His school was in the position where they were 20% over PAN and for each pupil over PAN. they were already 10k down on place funding, and then not getting the grant funding compounded it. Andy acknowledged that it was not within the gift of the Forum to resolve, the ideal situation would be for the funding coming into the authority not being based on PAN and would welcome a consultation.

Lynsey asked Andy to send her an email explaining the issues and she would look into his individual case as well.

Andy also asked if there was any indication that the place funding would be increased, had it kept up with inflation it would be around £13k.

Lynsey confirmed the government were still saying the place funding would be £10k for 2025-2026 but they were reevaluating everything and looking at changes for 2026-2027.

Philip Hopwood supported the comments from other colleagues and spoke out on behalf of all special schools. Philip supported a consultation being done to also get a better understanding of the scenarios looked at. Special schools were significantly suffering, not just in this year but in future years in terms of the funding likely to get and deficits, making significant chooses in hiring staff and the degree of risk starting to take and the level of complex needs. The issue was why were they not receiving the £10k for all places above PAN. Philip sighted his school as an example where their PAN was 111 and were currently looking at taking over 120 and had been at that level for the last six years which was unsustainable.

David Rowlands commented that the case made by Special schools was one worth pestering government about. The effect of their fund shortage on the quality of care and education they can provide for their pupils must be severe and can't be acceptable.

Philip Hopwood supported David's comments to put pressure on government and acknowledged the financial pressure also being put on mainstream colleagues as were diverting resources.

## **Resolved that Schools Forum**

- i. note the report, in particular the proposal not to further consult with schools on the schools block funding formula as no changes were proposed;
- ii. recommend to Cabinet that the Schools Block funding formula continues to mirror the Schools National Funding Formula (SNFF) values for 2025-2026;
- iii. approve the submission of disapplication requests for Upton by Chester High School and Wincham Primary School; and
- iv. agree the Minimum Funding guarantee level of 0%.

## **5. Reinstating the High Needs finance subgroup**

Debbie Edwards introduced the item to consider reinstating the High Needs finance subgroup and review the terms of reference. It was noted that the group last met some years ago.

Debbie asked that the subgroup be formed and functioning from the start of the new financial year; Lynsey Taylor had agreed to chair the subgroup.

David Rowlands commented that the previous discussions reflected the need for the subgroup to be reinstated.

Resolved that Schools Forum agreed

- i. to reinstate High Needs finance subgroup;
- ii. expressions of interest to be a member of the subgroup to be sent to Schools Forum Clerk; and
- iii. subgroup to be formed and functioning from the beginning of the new financial year.

## **6. Any Other Business**

Duncan informed Forum that they would receive a copy of the funding paper presented by Lynsey Taylor (item 4) and there was a need to conduct the annual de-delegation consultation which they would receive shortly, the results of which would be presented to Forum at the January meeting for discussion.

## **7. Next meeting**

14 January 2025.

### Agenda Item 3

## Dedicated Schools Grant (DSG) 2024-25 Forecast Outturn at Third Review

### Purpose of the Report

1. The purpose of the report is to provide an update on the financial forecast outturn position for 2024-2025 for centrally held DSG as reported at the Third Review of Financial Performance. This is based on the forecast position on 30 November 2024.

### Recommendations

2. The Forum is asked to note the Third Review position on the DSG and next steps.

### Forecast Outturn

3. The service is currently forecasting an overspend of £10.751m on DSG budgets which is a worsened position compared to the forecast overspend of £9.619m reported to Forum in October based on the First Review position (as at the end of July).
4. Within this overall position of £10.751m the key variances can be summarised as follows: forecast overspends on Independent & Non maintained school fees of £4.882m, Top up funding mainstream £2.816m, Alternative Provision/Resource Provision £1.367m, Targeted Education Access £1.086m, Personal Budgets £0.580m, Additional SEN costs £0.457m, staffing costs £0.053m offset by forecast underspends on Independent School Fees non SEN -£0.120m and other costs -£0.370m.
5. The forecast position currently assumes a balanced position for early years budgets. The revised funding allocation for 2024-25 will be determined from the take up reported in the January 2025 census and may result in a change to the overall reported DSG position when this is received.

### DSG Reserve

6. The table below summarises the forecast position on the DSG reserve as at Third Review.

	<b>£000</b>
DSG reserve brought forward (deficit)	7,482
Forecast in year deficit 2024-25	10,751
<b>Forecast deficit reserve for 2024/25</b>	<b>18,233</b>

## **Next Steps**

7. The service will continue to monitor the position and seek mitigations where possible however the forecast position is a further increase to the brought forward deficit on the DSG reserve with a cumulative £18.233m forecast by the end of 2024-25.

## **Agenda Item 4**

### **Central School Services Block (CSSB) 2025-26**

#### **Purpose of the report**

1. This report provides Schools' Forum with a line by line breakdown of the Central School Services Block (CSSB) for 2025-26, and seeks approval for the amounts on each line.
2. This report reminds Schools' Forum of the responsibilities that local authorities hold for all Schools.

#### **Recommendations that Schools' Forum**

- i. approves the amounts on each line within the CSSB for 2025-26; and
- ii. notes the responsibilities of the local authority for all schools in the Cheshire West and Chester area.

#### **Background**

3. The CSSB was introduced in 2018-19 to fund local authorities for the statutory duties they hold for both maintained schools and academies. The CSSB brings together:
  - Funding previously allocated through the retained duties element of the Education Services Grant (ESG).
  - Funding for ongoing central functions, such as admissions, previously top-sliced from the schools block.
  - Residual funding for historic commitments, previously top-sliced from the schools block.
  - Funding for the Teachers' Pension Employer Contribution Grant (TPECG) for centrally employed teachers

#### **CSSB 2025-26**

4. In 2025-26, ongoing responsibilities have been funded in broadly the same way as previously with updated baselines in line with the 2024-25 Dedicated Schools Grant (DSG) allocations. Funding for 2025-26 is £1,856,155.50 (Pupil head count of 45,831 x £40.50 unit of funding).
5. Funding for historic commitments in 2025-26 is £331,679 compared to £414,598 in 2024-25. This funding was again reduced by 20% from the 2024-25 amount. The Department for Education's (DfE) expectation remains that expenditure from DSG will also reduce over time, as contracts and other commitments reach their end points, and

they will continue to monitor this expenditure year-on-year. The DfE will seek explanations of expenditure recorded on section 251 returns where this is not reducing as expected.

6. The overall CSSB allocation is £2,187,835.
7. Where local authorities hold duties in relation to all schools (as set out in schedule 2 part 1 to 5 of The School and Early Years Finance (England) (No. 2) Regulations 2023 all schools must be treated on an equivalent basis.
8. Schools' Forum approval is required to confirm the amounts on each line. Table 1 below provides a line by line breakdown of the local authority CSSB allocations for 2025-26 and for comparative purposes the approved 2024-25 values.

**Table 1 - Central School Services Block Allocations 2025-26**

Description	2024-25	2025-26	Note
	£	£	
<b>Historic Commitments (Prior to April 2013)</b>			
Prudential borrowing costs	414,598	331,679	(Schedule 2, paragraph 2(a)). <b>Schools' Forum approval is required.</b>
<b>Sub Total</b>	<b>414,598</b>	<b>331,679</b>	
<b>Ongoing Responsibilities</b>			
Admissions	707,060	707,060	Expenditure on the operation of the system of admissions of pupils to schools (including expenditure incurred in carrying out consultations under section 88C (2) of the 1998 Act(b)) and in relation to appeals. <b>Schools' Forum approval is required.</b>
Servicing of schools' forum	41,476	41,476	Expenditure incurred in connection with the LA's functions of running the forum as defined under section 47A of the 1998 Act (addition under Section 43 of Education Act 2002). <b>Schools' Forum approval is required.</b>
Contribution to responsibilities that local authorities hold for all schools	662,948	742,720	In 2017-18 the Education Services Grant (ESG) retained rate was included in the schools block of the Dedicated Schools Grant allocation. Appendix A provides details of the services included under this line. <b>Schools' Forum approval is required.</b>

Central licences negotiated by the Secretary of State	364,899	364,899	The DfE has agreed with the following agencies to purchase a single national licence managed by the Department for all state funded schools in England: <ul style="list-style-type: none"> <li>• Christian Copyright Licensing International (CCLI)</li> <li>• Copyright Licensing Agency (CLA)</li> <li>• Education Recording Agency (ERA)</li> <li>• Filmbank Distributors Ltd. (for the PVSL)</li> <li>• Mechanical Copyright Protection Society (MCPS)</li> <li>• Motion Picture Licensing Company (MPLC)</li> <li>• Newspaper Licensing Authority (NLA)</li> <li>• Performing Rights Society (PRS)</li> <li>• Phonographic Performance Limited (PPL)</li> <li>• Schools Printed Music Licence (SPML) <b>Schools' Forum approval is not required (although they should be consulted).</b></li> </ul>
<b>Sub Total</b>	<b>1,776,383</b>	<b>1,856,155</b>	
<b>Total Central School Services Block</b>	<b>2,190,981</b>	<b>2,187,835</b>	

**Please Note: we are awaiting from DfE the central licences charge for 2025-26. Any adjustments will be made to the 'contribution line for responsibilities held for all schools'.**

## Appendix A- Responsibilities that Local Authorities Hold for All Schools

### Responsibilities held for all schools

#### Statutory and regulatory duties

- Director of children's services and personal staff for director (Schedule 2, paragraph 15a)
- planning for the education service as a whole (Schedule 2, paragraph 15b)
- authorisation and monitoring of expenditure not met from schools' budget shares (Schedule 2, paragraph 15c)
- formulation and review of local authority schools funding formula (Schedule 2, paragraph 15d)
- internal audit and other tasks related to the local authority's chief finance officer's responsibilities under Section 151 of the Local Government Act 1972 except duties specifically related to maintained schools (Schedule 2, paragraph 15e)
- consultation costs relating to non-staffing issues (Schedule 2, paragraph 19)
- plans involving collaboration with other local authority services or public or voluntary bodies (Schedule 2, paragraph 15f)
- standing Advisory Committees for Religious Education (SACREs) (Schedule 2, paragraph 17)
- provision of information to or at the request of the Crown other than relating specifically to maintained schools (Schedule 2, paragraph 21)
- revenue budget preparation, preparation of information on income and expenditure relating to education, and external audit relating to education (Schedule 2, paragraph 22)

#### Education welfare

- functions in relation to school attendance (Schedule 2, paragraph 16)
- responsibilities regarding restrictions on the employment of children (Schedule 2, paragraph 18)
- functions in relation to the exclusion of pupils from schools, excluding any provision of education to excluded pupils (Schedule 2, 20)

#### Asset management

- management of the local authority's capital programme including preparation and review of an asset management plan, and negotiation and management of private finance transactions (Schedule 2, paragraph 14a)
- landlord responsibilities, including those in relation to land leased to academies for schools (Schedule 2, paragraph 14b)



**Agenda Item 5**

**De-delegation proposals for 2025-26**

**Purpose of the Report**

1. The purpose of this report is to agree the services to be de-delegated by maintained schools for 2025-26.

**Recommendations**

2. Schools Forum (maintained school representatives) is requested to agree the services to be de-delegated to the Local Authority for 2025-26 as detailed for:
  - a) Contingencies to cover the cost of staff on suspension (primary and secondary representatives separately)
  - b) Free school meals eligibility assessments (primary and secondary representatives separately)
  - c) Covering the cost of staff on maternity/paternity/adoption leave (primary representatives only)
  - d) Pooling of funding to cover the costs of trade union facilities time (primary and secondary representatives separately)
  - e) School improvement team (primary, secondary and special/alternative provision representatives separately)

**Background**

3. Since 2013, Schools Forum has agreed annually the de-delegation of funds for maintained schools. The principles of de-delegation previously agreed are included in **Appendix A**. This arrangement of pooling funds to cover specific purposes is proposed again for 2025-26 to cover maintained schools collectively from costs arising from the following:

	Primary	Secondary	Special/ Alternative Provision
Contingencies to cover the cost of staff on suspension	✓	✓	
Free school meals eligibility assessments	✓	✓	
Covering the cost of staff on for maternity/paternity/adoption leave	✓		
Pooling of funding to cover the costs of trade union facilities time	✓	✓	
School Improvement core and additional improvement activities	✓	✓	✓

**Consultation with schools**

4. A consultation on the options to de-delegate funds for the next financial year was issued to schools on 10 December 2024 and closed on 7 January 2025. Schools were asked to consider

whether the amount delegated to them on a per pupil basis allows them to meet the costs or buy in the services they need individually. The rationale for de-delegation is to achieve economies of scale and to pool risk across schools for these costs.

5. A summary of the number of responses and percentage to each response to the consultation are shown below by sector. Based on the responses received, there is support for the continuation of most items of de-delegation for Schools Forum to consider in agreeing the de-delegation arrangements for 2025-26.

**(i) Primary maintained schools**

<b>If you are a representative of a local authority maintained primary school, do you agree to continue with the de-delegation of the following in 2025-26?</b>						
<b>Answer Choices</b>	<b>Strongly agree</b>	<b>Agree</b>	<b>Neither agree or disagree</b>	<b>Disagree</b>	<b>Strongly disagree</b>	<b>Response Total</b>
Contingencies to cover suspensions	26.09% 6	47.83% 11	17.39% 4	8.70% 2	0.00% 0	23
Free school meals eligibility assessment	22.73% 5	63.64% 14	13.64% 3	0.00% 0	0.00% 0	22
Staff costs- supply cover for maternity/paternity/adoption leave	36.36% 8	50.00% 11	13.64% 3	0.00% 0	0.00% 0	22
Staff costs - trade union facilities	27.27% 6	40.91% 9	22.73% 5	9.09% 2	0.00% 0	22

**(ii) Secondary maintained schools**

<b>If you are a representative of a local authority maintained secondary school, do you agree to continue with the de-delegation of the following in 2025-26?</b>						
<b>Answer Choices</b>	<b>Strongly agree</b>	<b>Agree</b>	<b>Neither agree or disagree</b>	<b>Disagree</b>	<b>Strongly disagree</b>	<b>Response Total</b>
Contingencies to cover suspensions	60.00% 3	20.00% 1	0.00% 0	0.00% 0	20.00% 1	5
Free school meals eligibility assessment	50.00% 2	50.00% 2	0.00% 0	0.00% 0	0.00% 0	4
Staff costs - trade union facilities	75.00% 3	0.00% 0	0.00% 0	0.00% 0	25.00% 1	4






**De-delegation of funding for all maintained schools for school improvement activities**

6. In January 2022, the DfE confirmed that they would remove the School Improvement Monitoring and Brokering (SIMB) Grant that was payable to local authorities to support school improvement activities. School and Early Years Finance Regulations were amended to allow local authorities to agree de-delegated funds from maintained schools to replace the grant. The SIMB grant was removed entirely for 2023-24. De-delegation would put more decisions about improvement provision to schools into the hands of school leaders (via schools forums). As the beneficiaries of improvement support from councils, the government believe it is right that schools contribute




to the cost of such support but, in turn, they should have greater influence over the activity undertaken.

7. The current de delegated funding for the Cheshire West and Chester School Improvement budget for 2024-25 is £237k and is used flexibly to support both core and additional improvement activities. There is a team structure of officers and school improvement advisors, both permanent staff and bought in services to respond flexibly to deliver school support and intervention.
8. In the consultation, schools were asked whether they wished to continue with current School Improvement arrangements in 2025-26. Please see responses below.

#### Local Authority Maintained Primary Schools

If you are a representative of a local authority maintained primary school, do you agree to continue with the de-delegation in line with the option chosen in 2024-25?				
Answer Choices			Response Percent	Response Total
1	Strongly agree		8.70%	2
2	Agree		52.17%	12
3	Neither agree or disagree		13.04%	3
4	Disagree		21.74%	5
5	Strongly disagree		4.35%	1
				23

#### Local Authority Maintained Secondary Schools

If you are a representative of a local authority maintained secondary school, do you agree to continue with the de-delegation in line with the option chosen in 2024-25?				
Answer Choices			Response Percent	Response Total
1	Strongly agree		0.00%	0
2	Agree		20.00%	1
3	Neither agree or disagree		0.00%	0
4	Disagree		20.00%	1
5	Strongly disagree		60.00%	3
				5

## Local Authority Maintained Special Schools

**If you are a representative of a local authority maintained special school, do you agree to continue with the de-delegation in line with the option chosen in 2024-25?**

Answer Choices		Response Percent	Response Total
1	Strongly agree	0.00%	0
2	Agree	80.00%	4
3	Neither agree or disagree	0.00%	0
4	Disagree	20.00%	1
5	Strongly disagree	0.00%	0
			5

9. In reviewing the consultation responses Schools Forum should consider how the funding will enable the Local Authority to undertake the intervention activities and statutory responsibilities for the Borough's maintained schools collectively. As with other de-delegation arrangements, where pooled funds are created schools will be able to access the service offer when needed and not all schools will necessarily require access to that service each year.

### Proposed amounts for de-delegation 2025-26

10. The proposed level of de-delegation for 2025-2026 is based on establishing pooled budgets at 2024-25 expenditure levels, adjusted for pupil numbers and inflation/pay awards. The proposed rates for de-delegation are shown in the table below against 2024-25 rates.

	2024-25 rates			2025-26 rates		
	Lump sum	Per pupil	Per FSM pupil	Lump sum	Per pupil	Per FSM pupil
<b>Primary Total</b>	<b>£2368.43</b>	<b>£30.55</b>	<b>£6.79</b>	<b>£2498.69</b>	<b>£40.16</b>	<b>£7.16</b>
Contingencies to cover the cost of staff on suspension		£2.32			£2.45	
Free school meals eligibility assessments			£6.79			£7.16
Covering the cost of staff on for maternity leave	£2,368.43	£16.07		£2,498.69	£24.88	
Pooling of funding to cover the costs of trade union facilities time		£2.42			£2.55	
School Improvement		£9.74			£10.28	
<b>Secondary Total</b>		<b>£12.71</b>	<b>£6.79</b>		<b>£13.42</b>	<b>£7.16</b>
Contingencies to cover the cost of staff on suspension		£1.73			£1.83	
Free school meals eligibility assessments			£6.79			£7.16
Pooling of funding to cover the costs of trade union facilities time		£4.49			£4.74	
School Improvement		£6.49			£6.85	

<b>Special/Alternative Provision Total</b>		<b>£6.49</b>			<b>£6.85</b>	
School Improvement		£6.49			£6.85	

### **Proposal for Schools to purchase the School Leasing Scheme.**

11. The Council have been asked by 'Link' whether schools would like to buy into a 'School Leasing Scheme'. The current cost for the schools leasing scheme would be £2,500 + VAT per annum overall for all maintained schools combined.

12. The key features of the service are:

- Link review any lease proposals provided to schools
- Link confirm that the leases schools enter into are Operating Leases that comply with relevant accounting rules
- Link will review the lease documentation to make sure that there are no onerous clauses, such as automatic lease extensions, documentation fees and facility fees in the terms and conditions of the lease contract
- Link provides assurance that the lease provides best value of money to the school and that the asset is worth leasing
- Link can provide generic leasing advice
- Link can provide an annual training session on leasing to Head Teachers and School Business Managers
- Link will provide a summary report for the client of all leasing activity under the scheme which can be sent as regularly as the client wants
- Allow access to a number of other Link managed Find a Tender -tendered frameworks, such as a Vehicle Contract Hire Scheme, which schools can use to procure minibuses (including maintenance)
- Allows access to the School Leasing Framework, a Find a Tender and the Department of Education approved framework where schools can lease technological equipment through a simple process and on pre-tendered rates.

13. Link will still be able to assist schools with arranging new leases (which will be compliant with the final DfE guidance when issued), check supplier proposals for compliance, value for money, review Terms and Conditions to obtain the removal of onerous terms / conditions and ancillary fees etc.

14. Would schools be interested in an option to buy into this scheme?

### **Next Steps**

15. The agreed rates for de-delegation to be included in the School Funding Formula submission to the ESFA for the 22 January deadline. De-delegated funds will be deducted from schools opening budgets and details included in the budget letter issued to individual schools before the statutory deadline of 28 February 2025.

## **Appendix A**

### **Principles of de-delegation**

Guidance on the operation of de-delegated services issued by the ESFA remains unchanged from previous years and includes the following requirements:

- the requirement to make a clear statement of how the funding is to be taken out of the formula
- reporting unspent de-delegated funding at the year end to Schools Forum
- local authorities retaining de-delegated funding up to 1 September for Academy conversions occurring up to this date. Full year de-delegation to be retained for conversions after 1 September. This is to allow services to plan operations for the financial year.
- local authorities are able to carry over unspent de-delegated central expenditure to be used for the same purpose. This ensures that funds can be carried forward without having to be allocated through the formula again and ensures funding that maintained schools de-delegate continues to be available for the use of maintained schools.

### **Principles for managing de-delegated fund**

The principles for managing de-delegated funds as agreed with Schools Forum in 2014- 2015 will continue so that:

- (i) Any underspend/overspend arising on individual funds is carried forward as allowed by the School Finance Regulations to offset/be offset against further de-delegation in the following financial year.
- (ii) Primary and Secondary de-delegation to be managed separately to ensure the de-delegation rates reflect expenditure within each sector.
- (iii) Total de-delegation to reduce as schools transfer to Academy in line with reduced pupil numbers and number of schools as the level of expenditure will reduce accordingly with fewer schools.

## **Agenda Item 6**

### **Growth Funding 2025-26**

#### **Purpose of the Report**

1. To provide Forum members with an update on how growth funding was allocated in 2024-25.
2. To obtain approval to set a growth fund of approximately £256,566 for 2025-26, and to continue with the current growth funding criteria and methodology.

#### **Recommendations that the Schools' Forum**

- i. notes the content of the report; and
- ii. approves the amount and proposals relating to the operation of the growth fund for 2025-26 onwards.

#### **Background**

3. Growth funding is within local authorities' schools block allocation. For 2025-26 growth funding has again been allocated to local authorities using a formulaic method based on lagged growth data, instead of a historic basis.
4. For 2025-26 growth funding allocation for Cheshire West and Chester within the schools' block totals £674,949.
5. As it is within the schools block, a movement of funding from the schools formula into the growth fund would not be treated as a transfer between blocks.
6. The growth fund can only be used to:
  - Support growth in pre-16 pupil numbers to meet basic need.
  - Support additional classes to meet the infant class size regulation.
  - Meet the costs of new schools
7. The growth fund may not be used to support:
  - Schools in financial difficulty (any such support for maintained schools should be provided from a de-delegated contingency).
  - General growth due to popularity (which is managed through lagged funding).
8. In accordance with Department for Education (DfE) guidance local authorities are required to produce criteria on which growth funding is to be allocated. It should provide a transparent and consistent basis for the allocation of funding. The criteria should both

set out the circumstances in which payment could be made and provide a basis for calculating the sum to be paid.

9. The local authority is also required to consult the Schools' Forum and gain agreement on the total size of the growth fund and the criteria used to allocate funding.
10. Any funds remaining at the end of the financial year must be added to the following year's Dedicated Schools Grant (DSG) but may be earmarked for the same purpose.

### **Growth Fund 2024-25**

11. The 2024-25 growth fund was set at £349,533.

12. The agreed criteria used to allocate funding consisted of the following:

- Allocation based on basic need only.
- Applicable to schools where the local authority have officially agreed a change in Published Admission Number (PAN).
- Funding is for pupils in Reception (Year 3 for Junior schools)/Year 7, above the original PAN up to and including the new PAN, based on the change in pupil numbers between October Censuses.
- Anything above the new PAN is classified as general growth.
- Funding will continue year on year until the PAN change has filtered through all year groups.
- Funding for a bulge class will be a one-off payment based on the agreed number of pupils in the bulge class.
- Primary schools AWPU £3551.40 per pupil, Secondary schools KS3 AWPU £5011.40 per pupil multiplied by 7/12 representing the period September to March which is not funded within the school's budget share.

13. In accordance with DfE guidance where growth funding is payable to academies, the local authority is required to fund the increase for the period from the additional September intake through until the following August. The local authority should enter the cost of growth funding for the April – August period on the recoupment tab of the Authority Proforma Tool (APT) so that the recoupment calculation can be adjusted accordingly.

### **Growth Funding 2025-26**

14. The Growth Funding for 2025-26 allocation has decreased from £777,653 to £674,949. Of the £674,949 growth allocated to Cheshire West & Chester £256,566 is required to meet temporary increases in primary and secondary admissions in September 2025 and growth in resource provision. The remainder of the growth fund allocation £423,383 is being allocated through the schools block funding formula and will be distributed to schools through the formula allocations.



## **Next Steps**

15. The local authority will also continue to use the criteria used in 2024-25 to allocate growth funding because, in accordance with DfE guidance, it contains clear objective trigger points for qualification and a clear formula for calculating allocations. The only change will be that the primary and secondary funding values will increase in line with the values included within the schools funding formula for 2025-26.

## **Agenda Item 7**

### **Schools Funding Update**

#### **1 Purpose of the Report**

- 1.1 This report details the draft School Allocation and Funding Formula for 2025-26 taking into account the decisions taken previously on the principles of the local funding formula and the October 2024 census data provided by the Education and Skills Funding Agency (ESFA).

#### **2 Recommendations**

2.1 The Schools Forum is requested to:

- (i) For the proposed allocations and proposals to form the opening budget for 2025-2026 for approval by Council on 20 February 2025.
- (ii) Approve the continuation of the existing 0.5% transfer from schools block to high needs block for 2025-26
- (iii) The Schools Forum (School, Academy and PVI representatives) is requested to endorse the draft funding formula submission to the ESFA. Proposed unit values are included in Appendix A

#### **3 Background**

- 3.1 The indicative DSG allocation for 2025-26 was made available by the Education and Skills Funding Agency (ESFA) in December 2024 and forms the basis of the budget proposals for 2025-2026. The submission to the ESFA of the Schools Block Funding Formula for primary and secondary schools and academies is required by 22 January 2025. Following the meeting in December 2024, Schools Forum recommended to continue to mirror the National Funding Formula factors and values for 2024-2025. This decision will be endorsed by Cabinet at the meeting on 15 January 2025. The final budget approval and formula values will be taken by Council on 20 February 2025.

#### **4 Dedicated Schools Grant 2025-26**

- 4.1 Following confirmation of the allocations through National Funding Formulae, the Dedicated Schools Grant (DSG) allocation will continue to consist of four blocks of funding in 2025-26. The gross allocation for the Local Authority (prior to academy recoupment) is to increase by £41.953m from £363.221m in 2024-25 to £405.174m in 2025-26.

- 4.2 The changes are summarised in table 1 below.






**Table 1 Final DSG 2024-2025 and indicative 2025-2026 allocation**

<b>DSG Allocation Block</b>	<b>Final 2024-2025 £000</b>	<b>Indicative 2025-2026 (Dec 2024) £000</b>	<b>Change £000</b>
Schools Block	265,285	285,308	20,023
High Needs Block	58,352	62,656	4,304
Early Years Block	37,392	55,022	17,630
Central School Services Block	2,191	2,187	-4
<b>Total DSG Allocation</b>	<b>363,221</b>	<b>405,174</b>	<b>41,953</b>

4.3 The DSG allocation funds both schools and academies and also central services and retained budgets for education and schools. The school funding formula to be used to allocate the School Block funding is as agreed by Cabinet on 15<sup>th</sup> January 2025 and reflects the decision to mirror the National Funding Formula factors and values in the local formula.

4.4 In accordance with the DfE requirement to ringfence the schools block allocation, 99.5% of the schools block will be allocated through the funding formula approved by Cabinet on 15<sup>th</sup> January 2025. This assumes the continuation of the existing 0.5% transfer to other funding blocks will be approved by Schools Forum as requested in the consultation with schools conducted in December 2024 / January 2025. The table below shows the 44 responses received to the consultation question which are largely in support of maintaining the transfer. The value of the transfer for 2025-26 is £1.426m which is 0.5% of the total School Block allocation. Please see Appendix B for draft School Block allocations for 2025/26. Please note these allocations are subject to School Forum and DfE amendments/approval.

**Considering the continuing pressure on funding from the high needs block, do you agree with the proposal to continue to transfer up to the existing 0.5% of funding from the schools block for a further year in 2025-26?**

<b>Answer Choices</b>			<b>Response Percent</b>	<b>Response Total</b>
1	Strongly agree		29.55%	13
2	Agree		43.18%	19
3	Neither agree or disagree		9.09%	4
4	Disagree		11.36%	5
5	Strongly disagree		6.82%	3
				44

5. The 2025-2026 formula is based on pupil numbers and demographics taken from the October 2023 census (although funding allocations are based on October 2021 pupil characteristics). This data was made available by the ESFA on 18 December

2024 and forms the basis of the formula values proposed in this report for the final formula submission.

## 6. DSG Deficit

6.1 Due to ongoing and unavoidable increasing demand for high needs provision above the available funding the DSG deficit is set to increase. Local authorities are permitted to hold a deficit reserve based on a temporary override of accounting treatment approved by the Department for Levelling Up, Housing & Communities (DLUHC) until March 2026. The DSG reserve position is summarised in the table 2 below.

<b>Table 2</b>	<b>£m</b>
2023-24 Brought forward deficit position	7.482
2025-26 Forecast in year pressure (as at Third Review)	10.751
<b>Total DSG reserve deficit</b>	<b>18.233</b>

6.2 In line with Department for Education guidance on recovering DSG deficits, the Local Authority are commencing the implementation of recommendations arising from the SEND Strategic Review which form the basis of a recovery plan to bring the in year DSG position into balance by 2026-27. To address the cumulative deficit, the service is undertaking a wider review of DSG funded budgets and will pursue a number of further savings proposals in 2025-26.

## 7. Institution led factors

7.1 There are four premises factors within the formula for which funding allocations have been applied as set out below.

Approved Exceptional Circumstance	Lease agreement for Wincham Primary School to ensure that they have sufficient school hall premises. The sum is more than 1% of the school's budget and only impacts upon this school. This exceptional circumstance was in place pre 2013 and a reapplication has been approved by the ESFA for 2024-2025 within an inflation uplift in line with RPI applied to the agreement.
Approved Exceptional Circumstance	Management Agreement for Upton High School for hire of sports facilities in place since 2016-2017. The sum is more than 1% of the school's budget and only impacts upon this school. This exceptional circumstance was in place for 2022-2023 and a reapplication has been approved by the ESFA for 2024-2025 within an inflation uplift in line with RPI applied to the agreement.
PFI Funding	Delegated amounts are an apportionment of affordability gap across the 6 PFI schools. The affordability gap for each school has been calculated using a combination of direct and apportioned costs to give a % for each school which is set out in the revised governing body agreements. Amounts have been inflated from 2024-25 values to meet the RPI increase in the unitary charge.

## 8. Notional SEN

8.1 The current Council notional SEN calculation is based on percentages determined from the funding reforms and mapping of the local funding formula in 2013. The calculation allocates the following percentages to each school's schools block allocation.

Formula Factor	Primary	Secondary KS3	Secondary KS4
Basic Entitlement	4.41%	4.41%	4.32%
Deprivation (Free School Meals Ever 6 plus IDACI Bands)	32.88%	32.6%	32.6%
Low scorer funding	100%	100%	100%
Lump Sum	2.8%	3.63%	3.63%

8.2 The Notional SEN guidance calculation remains the same as 2024-25.

## 9 Confirmation of centrally retained budgets

9.1 The draft formula assumes that the Schools Block allocation will be distributed in full except for the Growth Fund and the continuation of the 0.5% transfer to the high needs block. Other budget setting items will not affect the total amount to be distributed to primary and secondary schools which is now ringfenced.

## 10 Next Steps

10.1 Further to any amendments described within this report, the School Funding Formula will be submitted to the ESFA for 22 January deadline for final approval. A draft funding statement will be sent to schools following this so that schools are notified as early as possible of the proposed allocations. As per the requirements of the School Finance Regulations, final funding statements will be issued to individual maintained schools by 28 February 2024.

10.2 Further detail on early years funding rates and high need funding arrangements to be tabled for discussion with Schools Forum at the meeting in February 2025.

10.3 To include the central spend budgets in the 2025-2026 Section 251 Budget statement submission to the DfE for April 2025.

**Appendix A** 2024-2025 formula values used in Cheshire West and Chester (CW&C) against the 2025-2026 proposed CW&C formula values

**To follow**

**Appendix B** Draft School Block Allocations

**To follow**

**Cheshire West and Chester  
Schools Forum  
14 January 2025**

**Agenda item 11**

**Schedule of meetings 2024-2025**

**Schools Forum** – all meetings 4.30pm – 6.30pm

<b>Date</b>	<b>Venue</b>	<b>Proposed agenda</b>
Monday 10 February 2025	MS Teams	<ul style="list-style-type: none"> <li>• Early Years Funding for 2025-2026</li> <li>• Arrangements for funding from the High Needs Block 2025-2026</li> </ul>
Tuesday 1 July 2025	MS Teams	<ul style="list-style-type: none"> <li>• DSG 2024-2025 outturn</li> <li>• School balances at the end of 2024-2025 (with appendices for schools and academies)</li> <li>• Directed revisions to schemes for financing schools</li> <li>• Annual review of Schools Forum membership, constitution, and terms of reference</li> </ul>

**Schools Forum Finance Subgroup**

<b>Date</b>	<b>Time</b>	<b>Venue</b>
Tuesday 21 January 2025	2.00 – 4.00 pm	MS Teams
Tuesday 10 June 2025	2.00 – 4.00 pm	MS Teams

**Schools Forum High Needs Finance Subgroup** – To be reinstated from the beginning of the new financial year - dates to be confirmed.