

## **AGENDA FOR BURY SCHOOLS' FORUM**



*Contact::* Andrea Tomlinson  
*Direct Line:* 0161 253 5133  
*E-mail:* a.j.tomlinson@bury.gov.uk  
*Web Site:* www.bury.gov.uk

**To: All Members of Bury Schools' Forum**

Dear Schools' Forum Member/Colleague

### **Bury Schools' Forum**

You are invited to attend a meeting of the Bury Schools' Forum which will be held as follows:-

|                             |   |
|-----------------------------|---|
| <b>Date:</b>                | Tuesday, 21 October 2025  |
| <b>Place:</b>               | Microsoft Teams   |
| <b>Time:</b>                | 4.00 pm   |
| <b>Briefing Facilities:</b> | If Opposition Members and Co-opted Members require briefing on any particular item on the Agenda, the appropriate Director/Senior Officer originating the related report should be contacted. |
| <b>Notes:</b>               |   |

## **AGENDA**

### **1 APOLOGIES FOR ABSENCE**

### **2 MINUTES OF THE LAST MEETING** *(Pages 3 - 8)*

The Minutes of the Last Meeting held on 10 July 2025 are attached

### **3 MATTERS ARISING**

Facilities Time

This item to be deferred to a future meeting once 2026/2027 funding information has been issued by DfE.

### **4 SEND GRADUATED APPROACH**

Damian Kay, School Assurance Officer will give a presentation at the Meeting

### **5 HIGH NEEDS BUDGET AND PROJECT SAFETY VALVE** *(Pages 9 - 14)*

Report attached

### **6 SCHOOLS' FORUM MEMBERSHIP** *(Pages 15 - 16)*

The Schools's Forum Membership 2025/2026 is attached.

### **7 ANY OTHER BUSINESS**

**Bury Schools Forum  
Thursday 10 July 2025  
Microsoft Teams**

**Attendance****Early Years**

None in Attendance

**Maintained Primary**

Alyson Malach,  
Simon Waddington,  
Rachel O'Neil

Governor (Plus Governors Forum) (S)  
Headteacher – Hollins Grundy Primary  
Headteacher - Hoyle Nursery School

**Maintained Secondary**

None in Attendance

**Maintained Special**

None in attendance

**Academy Primary**

Martin Van Hecke  
Kelly Macadam  
James Gabrielides

The Sycamore CE Trust – St Thomas's C E Primary  
(MAT CEO)  
Head Teacher – Unsworth Primary

**Academy Secondary**

None in Attendance

**Special**

None in Attendance

**Pupil Referral Unit**

None in Attendance

**Non-Schools Sector**

Helena Thom  
Catherine Ainsley

NEU  
NASUWT

**16 – 19 Education Representative**

None in attendance

**Children's Services Department**

Stephen Holden  
Philip Herd  
Alison Vidler

Director of Education and Skills  
Finance  
Senior Schools Finance Officer (Schools & Systems  
Finance)

**Observer(s)**

None in attendance

## 1. APOLOGIES FOR ABSENCE

Joanne Hurst  
Carinna Vitti

Headteacher – Millwood School  
Principal – Holy Cross College

## 2 MINUTES OF THE LAST MEETING

### It was agreed:

That the Minutes of the meeting held on 14 January 2025 be approved as a correct record of the meeting.

## 3 DEDICATED SCHOOLS' GRANT (DSG) POSITION 2024 - 2025

Alison Vidler presented a report setting out the DSG position 2024 - 2025.

It was explained that the Council had a deficit position of £18.459m at the beginning of the 2024-25 financial year. During the financial year, the service has worked on making savings where possible, whilst facing increased demand.

Due to the ongoing significant demand for high needs funding, the Council has agreed a revised DSG deficit recovery plan with the Department for Education (DfE), which extends the period for deficit recovery until 2028-29.

The Council's financial accounts have now been prepared with the DSG deficit position at the end of the 2024-25 financial year (pre audit) standing at £19.041m, an increased deficit position of £0.582m.

The work on the PSV workstreams, and reducing expenditure in future years, is paramount in ensuring a balanced position in the High Needs Block and a continued reduction in the carried forward DSG deficit position.

Alison Vidler presented an update on Schools Balances for information.

It was explained that Schools Balances brought forward from 2023-24 totalled £2.555m. At the end of the 2024-25 financial year, Schools Balances totalled £2.484m, a total reduction of £0.071m. These numbers do not include academies that the Local Authority does not report on. The outturn position is split as follows:

### 2024-25 Closing School Balances

Nursery 81,825  
Primary 25,160  
Secondary 1,370,489  
Special 1,006,945  
**Total 2,484,419**

The update included at Appendix 1 is the School Balances detail per Bury School and explained that it should be noted that the number of schools which are in a deficit position has reduced from 17 at the end of 2023-24, to 12 at the end of the 2024-25 financial year.

Of the 17 schools that ended 2023-24 with a deficit: 5 recovered the deficit in 2024-25; 2 converted to academy status; 4 have an approved deficit recovery plan; 3 have yet to agree a

deficit recovery plan; 3 planned to balance in 2024-25, but still ended the year with a deficit. Of the 12 schools ending 2024-25 with a deficit, there are 10 schools that cannot currently set a balanced budget for 2025-26: 4 already have an approved deficit recovery plan; 4 plans are currently being reviewed by Finance staff before submission for approval; 2 have not yet submitted a deficit recovery plan for approval. Discussions are ongoing with the schools that have not yet submitted a deficit recovery plan.

**It was agreed:**

That the contents of the report be noted

**4 BURY SCHOOLS' FORUM REPRESENTATION JANUARY 2025 CENSUS**

Alison Vidler presented a report explaining the schools forum member representation in relation to the proportion of maintained schools and academies in the borough.

It was explained that the January 2025 census showed that Bury has 68% of its Primary and Secondary pupils in Academies and 32% in Maintained Schools.

Forum representation also reflects the proportion of Secondary and Primary age children within each category, which confirms Academies with 45% Secondary and 55% Primary, and Maintained Schools with 37% Secondary and 63% Primary.

The report set out the membership from both Maintained and Academy schools in both primary and high schools, PRU, Early Years, 16 – 19 and teachers professional associations.

Due to recent and forthcoming academy conversions, the current representation of Forum needs to be adjusted so that it continues to be representative. The current representation is summarised below. Academies have 11 representatives; 5 Secondary (of which 3 are currently vacant), 5 Primary (of which 1 is currently vacant) and 1 Special. Maintained Schools have 5 representatives; 1 Secondary (which is currently vacant), 3 Primary (of which 1 is currently vacant) and 1 Special.

Stephen Holden explained that representation would be requested through various different groups, meetings and newsletters to request nominations to the vacant seats on the Forum.

**It was agreed:**

That the contents of the report be noted.

**5 PROPOSED REVISIONS TO THE SCHEME FOR FINANCING SCHOOLS**

Alison Vidler presented a report setting out the proposed revisions to the scheme for financing schools.

Additions and amendments were summarised within the report. The Draft Scheme for Financing Schools was appended to the report.

**It was agreed:**

That the revisions set out within the report be approved.

**6 FACILITIES TIME FOR UNION DUTIES**

Stephen Holden presented a briefing note setting out the different funding models for the funding of facilities time for union representation in schools.

Facilities time is a statutory entitlement that allows trade union representatives to take reasonable time off from their normal duties to carry out union-related activities. In the context of English schools, this provision plays a vital role in supporting effective industrial relations, promoting staff wellbeing, and ensuring that employee voices are heard in decision-making processes.

Under the Trade Union and Labour Relations (Consolidation) Act 1992, and further reinforced by the Trade Union (Facility Time Publication Requirements) Regulations 2017, schools and academy trusts are required to provide and report on facilities time for union representatives.

This includes time for duties such as representing members in disciplinary or grievance procedures, attending training, and engaging in consultations with school leadership.

The Department for Education (DfE) encourages schools to manage facilities time in a way that balances operational needs with the legal rights of union representatives. While the DfE guidance outlines expectations for transparency and accountability, the implementation of facilities time varies significantly across local authorities and multi-academy trusts.

Bury's approach to the management of this has been through a pooled budget funded from de-delegation from maintained schools and buy-back from academies. The pooled budget funds backfill, up to a maximum of UPS3, for schools and academies that release staff for agreed union duties.

The Schools' Forum is invited to consider the following options for funding union facilities time across Bury schools:

## **1. Continue De-Delegation for Maintained Schools & Buy-back for Academies**

Maintain the current arrangement where maintained schools de-delegate a portion of their budget to the local authority to fund a central pool for facilities time and academies pay via buy-back.

**1.A** Support backfill costs up to UPS3 (Current Arrangement)

**1.B** Support backfill costs at the full salary of the union representative

## **2. End De-Delegation and Academy Buy-back and Delegate Responsibility to Individual Schools**

Cease central funding and allow each maintained school or academy to manage and fund facilities time independently from their delegated budgets.

## **3. Develop a Pooled Funding Arrangement for maintained schools and academies**

End de-delegation and establish a voluntary pooled fund that includes contributions from both maintained schools and academies to support a shared facilities time service.

**3.A** Support backfill costs up to UPS3

**3.B** Support backfill costs at the full salary of the union representative

### **It was agreed:**

1. To continue de-delegation for maintained schools & buy back by Maintaining the current arrangement where maintained schools de-delegate a portion of their budget to the local authority to fund a central pool for facilities time and academies pay via buy-back.

2. To defer any further decisions to the next meeting of the Schools' Forum when more representatives are in attendance.

## **7 THANKS TO STEPHEN HOLDEN**

It was reported that this would be the last meeting of Schools' Forum that Stephen would attend in his interim role as Director of Education and Skills.

### **It was agreed:**

That Stephen be thanked for his support to Schools' Forum.

Note: The meeting started at 4pm and ended at 5.10pm

This page is intentionally left blank



Bury Council  
**Department for Children and Young People**

---



**Agenda Item**

**Report to School Forum**  
**21<sup>st</sup> October 2025**

**For Information**

**Author Phil Herd**

**Contact**

**Phil Herd**

**[email.P.Herd@Bury.gov.uk](mailto:email.P.Herd@Bury.gov.uk)**

## **High Needs Block (HNB) Outturn 24-25 and 25-26 Projections**

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

1.1 to inform Schools Forum of the HNB 24-25 Outturn Position and the 25-26 HNB Projections.

### **2. Background**

2.1. A HNB report went to Forum in January outlining the proposed 25-26. This report outlines what the current projections are for this financial year.

2.2 The report also outlines the 2024-26 actual spend on HNB.

### **3. 2024-25 Outturn Position (Appendix 1)**

3.1. The in-year deficit in 2024-25 was £1,594,769 and after underspend from other DSG Blocks was £581,807.  
(Appendix 1)

3.2. The brought forward deficit was £18,459,281 meaning the deficit at 31<sup>st</sup> March 2025 was £19,041,088.

3.3. A deficit of £19m is significant but many LA's who are not in Project Safety valve have far greater deficits.

3.4 An in-year deficit of £581,807 is minor compared to other LA's and previous years in Bury.

3.5 The deficits across all LA's are huge and growing at an unsustainable level. There is a white paper due to be published which will outline the Governments SEN reform

plans. The implications of these plans will be the subject of a future report to Forum.

#### **4. 2025-26 Projections (Appendix 1)**

4.1 There are pressures in this year's projections: -

- Independent special schools £934k. This is due to a lack of internal SEN provision.
- The number of pupils requiring Alternative Provision is increasing. There is an AP strategy being produced and efforts are continually being made to re-integrate pupils back into mainstream settings. £753k

4.2 There are some underspends that help mitigate the above

- The take up of RP places is continually lower than what is planned. (£400k)
- The number of EHCP's projected in Bury schools is lower than what was projected in January. (£533k)

#### **5 Overall Position Forecast March 2026**

5.1 The forecast position for March 2026 is a deficit of £22.256m compared to a of £22.268m in January.

## **6. Project Safety Valve (PSV)**

6.1 Bury is part of the PSV programme and is required to submit financial monitoring reports to the DFE on a quarterly basis. These figures project many years into the future.

6.2 The projections indicate a deficit of £34.6m by March 3032 and thereafter a reduction. These forecasts will be overridden by the implications of the pending SEN reform white paper.

## **7. Recommendations**

7.1 Forum members are asked to note the contents of this report.

| 2024-25<br>Outturn<br><br>£ | High Needs Block 2025-26 Projection    |        |                   |            |            |                   |            |                        |
|-----------------------------|--|--------|-------------------|------------|------------|-------------------|------------|------------------------|
|                             |  | Budget |                   |            | Projection |                   |            | Total<br>Variance<br>£ |
|                             |  | Places | Unit<br>Cost<br>£ | Total<br>£ | Places     | Unit<br>Cost<br>£ | Total<br>£ |                        |
|                             | <b><u>Expenditure</u></b>              |        |                   |            |            |                   |            |                        |
| 4,824,167                   | Millwood                               | 190    | 28,814            | 5,462,720  | 184        | 28,819            | 5,302,735  | -159,985               |
| 8,777,081                   | Elms Bank                              | 356    | 25,830            | 9,195,620  | 356        | 26,866            | 9,564,335  | 368,715                |
| 1,147,215                   | Brookhaven                             | 80     | 19,754            | 1,580,328  | 80         | 19,493            | 1,559,432  | -20,896                |
| 1,586,628                   | Cloughside                             | 62     | 25,889            | 1,605,140  | 62         | 25,889            | 1,605,140  | 0                      |
| 2,774,968                   | Ash Grove PRU                          | 136    | 22,677            | 3,084,040  | 136        | 23,149            | 3,148,253  | 64,213                 |
| 19,110,060                  | Total Bury Special<br>Schools          | 824    | 25,411            | 20,927,848 | 818        | 25,892            | 21,179,895 | 252,047                |
| 1,870,265                   | Resourced Provision                    | 156    | 18,307            | 2,855,833  | 135        | 18,188            | 2,455,343  | -400,490               |
| 13,171,881                  | Independent Special<br>Schools         | 207    | 59,955            | 12,411,000 | 223        | 59,781            | 13,344,798 | 933,798                |
|                             | EHCP Mainstream top<br>Ups             |        |                   |            |            |                   |            |                        |
| 9,358,672                   | Bury Schools                           | 1,333  | 8,717             | 11,622,000 | 1,193      | 9,276             | 11,068,490 | -553,510               |
| 1,577,545                   | OOB Schools                            | 143    | 11,773            | 1,680,000  | 162        | 11,286            | 1,828,028  | 148,028                |
| 1,787,292                   | Post 16 Places                         |        |                   | 1,957,000  |            |                   | 1,868,000  | -89,000                |
| 0                           | Early Years Top Ups                    |        |                   | 300,000    |            |                   | 275,000    | -25,000                |
| 893,968                     | Alternative Provision                  |        |                   | 978,500    |            |                   | 1,731,802  | 753,302                |
| 747,735                     | Personal Budgets<br>Therapy<br>and FSM |        |                   | 670,000    |            |                   | 918,853    | 248,853                |
| 48,517,418                  | Total Direct Support                   |        |                   | 53,402,181 |            |                   | 54,670,209 | 1,268,028              |
| 144,761                     | (Primary and<br>Secondary)             |        |                   | 209,900    |            |                   | 206,000    | -3,900                 |
| 359,993                     | Outreach Team                          |        |                   | 694,500    |            |                   | 503,100    | -191,400               |
| 194,280                     | Home and Hospital<br>Tuition           |        |                   | 121,600    |            |                   | 219,500    | 97,900                 |
| 968,032                     | Visual and Hearing<br>Impairment       |        |                   | 1,123,000  |            |                   | 992,400    | -130,600               |
| 1,667,065                   | Total SEN Support<br>Services          |        |                   | 2,149,000  |            |                   | 1,921,000  | -228,000               |
| 50,184,483                  | <b>Total Expenditure</b>               |        |                   | 55,551,181 |            |                   | 56,591,209 | 1,040,028              |

| High Needs Block 2025-26 Projection |  |        |                   |             |            |                   |             |                   |
|-------------------------------------|--|--------|-------------------|-------------|------------|-------------------|-------------|-------------------|
| 2024-25<br>Outturn                  |  | Budget |                   |             | Projection |                   |             | Total<br>Variance |
|                                     |  | Places | Unit<br>Cost<br>£ | Total<br>£  | Places     | Unit<br>Cost<br>£ | Total<br>£  |                   |
|                                     | <b>Income</b>                            |        |                   |             |            |                   |             |                   |
| -47,578,209                         | High Needs Block DSG                     |        |                   | -50,107,000 |            |                   | -50,589,838 | -482,838          |
| 1,194,000                           | Import/Export Adj                        |        |                   | 1,272,000   |            |                   | 1,246,000   | -26,000           |
| -721,811                            | Bury Block Transfer                      |        |                   | -200,000    |            |                   | -312,570    | -112,570          |
| -899,279                            | Health Service Contribution              |        |                   | -1,600,000  |            |                   | -1,000,000  | 600,000           |
| 0                                   | General Fund Contribution                |        |                   | -2,000,000  |            |                   | -2,000,000  | 0                 |
| -48,005,298                         | <b>Total Income</b>                      |        |                   | -52,635,000 |            |                   | -52,656,408 | -21,408           |
|                                     | <b><u>PSV Income and Expenditure</u></b> |        |                   |             |            |                   |             |                   |
| 415,584                             | Expenditure                              |        |                   | 298,000     |            |                   | 280,000     | -18,000           |
| -1,000,000                          | Income                                   |        |                   | -1,000,000  |            |                   | -1,000,000  | 0                 |
| -584,416                            | <b>Net PSV Contribution</b>              |        |                   | -702,000    |            |                   | -720,000    | -18,000           |
|                                     |  |        |                   |             |            |                   |             |                   |
| 1,594,769                           | <b>NET Expenditure</b>                   |        |                   | 2,214,181   |            |                   | 3,214,801   | 1,000,620         |

**Maintained Schools**

## Primary (3)

Simon Waddington (headteacher)  
Rachel O'Neil (headteacher)  
Richard Ainsworth (gov)

## Secondary (2)

Vacancy

## Special (1)

Joanne Hurst (headteacher)

**Academy Schools**

## Primary (5)

Martin Van Hecke (headteacher)  
Ruth Onyekaba (Headteacher)  
James Gabrielides (headteacher)  
Emma Graves (headteacher)  
Kelly Macadam (MAT CEO)

## Secondary (4)

Paul Johnson (Headteacher)  
James Franklin Smith (MAT CEO)

Vacancy

Vacancy

Vacancy

## Special (1)

Orienne Langley-Sadler (headteacher)

**Pupil Referral Unit (1)**

Vacancy (headteacher)

**Non-School Members****16 – 19 Education Representative (1)**

Carina Vitti (Holy Cross Principal)

**Teachers' Professional Associations (3)**

Ben Connor (NAHT)  
Secretary.bury@Nasuwt.org.uk  
Helena Thom (NEU)

**PVI Early Years Providers (1)**

Vacancy

Quoracy – 40% voting members (when no vacancies – 9. Currently 17 filled – 6)

This page is intentionally left blank