

AGENDA



SCHOOLS FORUM

Date: Thursday 22 September 2022
Time: 4.30pm
Place: Microsoft Teams

Distribution

Members of the Committee

Julia Anwar	Dave Baker (Vice Chair)
Jo Dent	Ross Newman
Stuart Evans	Pippa Osborne
Kim Garland	Diane Owen
Clare Haughton	Lisa Parker
Aaron Jefferies	Will Roberts
David Jenkins	Fr. Malcolm Strange
Nicola Jones	Andy Watson
Louise Leader	Susie Weaver
Kirby Littlewood	Bernice Webber
Steve Moir	David Williams
	Louisa Wilson

Appropriate Officers attending:

Mustafa Salih
Hilary Smith
Caroline Warren
Alison Davies

Councillors attending:

Erica Williams
Trevor Jones

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AGENDA

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- 3 DECLARATIONS OF INTEREST (Dave Baker)
- 4 SCHOOLS FORUM MEMBERSHIP (ELECTION OF CHAIR) (Ali Davies)
- 5 ANY OTHER ITEMS THE CHAIR DECIDES ARE URGENT (Dave Baker)
- 6 MINUTES FROM LAST MEETING (Dave Baker)
- 7 SCHOOL PLACE PLANNING (Hilary Smith)
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- 9 SCHOOLS FORUM CONSTITUTION (Ali Davies)
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**South Gloucestershire Schools Forum
Minutes of Meeting held on
Thursday 7 July 2022
Microsoft Teams**

PRESENT:

Sarah Lovell (Chair)	Chief Operating Officer, Cabot Learning Federation
Dave Baker (Vice Chair)	CEO, Olympus Academy Trust
Julia Anwar	Head of Business Operations, Olympus Academy Trust
Jo Dent	Maintained Primary Governor Representative
Kim Garland	Headteacher, Brimsham Green School
Clare Houghton	Page Park Preschool
David Jenkins	Governor, Crossways Schools
Nicola Jones	Representative Special Academies
Louise Leader	Headteacher, Pathways Learning Centre
Pippa Osborne	Headteacher Christ Church Junior School
Terry Redfern (rep Kim Garland)	Brimsham Green School
Will Roberts	CEO, Castle School Education Trust (CSET)
Susie Weaver	Executive Headteacher, Cabot Learning Federation
Bernice Webber	Headteacher, Old Sodbury CE Primary School
David Williams	Diocese of Gloucester

Executive Members:

Erica Williams, Cabinet Member - Schools, Skills & Employment

Officers:

Mustafa Salih, Head of Financial Management and Business Support
Hilary Smith, Head of Education, Learning and Skills
Caroline Warren, Finance Business Partner
Deb Luter, Schools Finance Officer

Others:

Justine Poulton, Audit Manager, Internal Audit

1. WELCOME AND INTRODUCTIONS

Attendees were welcomed by the Chair.

2. APOLOGIES FOR ABSENCE

Trevor Jones, Erica Williams, Chris Sivers, Mustafa Salih, Kirby Littlewood, Stuart Evans, Diane Owen, Lisa Parker, Katherine Marks, Claire Hill, Fr. Malcolm Strange, Steve Moir, Louisa Wilson, Caroline Warren, Ross Newman

3. DECLARATIONS OF INTEREST – Dave Baker and Julia Anwar declared an interest re Item 9

4. SCHOOLS FORUM MEMBERSHIP (Ali Davies)

4A – Election of a New Chair

Sarah Lovell is resigning as Chair of the Schools Forum from the end of this academic year. There were no nominations received in advance or at the meeting.

Dave Baker, Vice Chair, is prepared to stand in until we can find a permanent Chair and happy to cover in the interim. Sarah will continue to chair this meeting and Dave will be the interim Chair from the next meeting.

Terms of office for the Chair is 4 years.

4B – Membership Update

The 2 governor vacancies have now been filled and they will start from the September meeting. Substitute governor to be recruited.

5. ANY OTHER ITEMS THE CHAIR DECIDES ARE URGENT (Sarah Lovell)

None

6. MINUTES FROM LAST MEETING – 12th May 2022

Special schools letter

The Special Schools letter has been sent to schools by Mustafa Salih. Special schools were happy with the response.

Outstanding item was in relation to the Minimum Funding Guarantee.

Action: Hilary to ask Mustafa if a letter has been sent to schools.

Remainder of the Minutes recorded as accurate.

7. Financial Regulations for Schools (Justine Poulton)

This report is for information.

By way of introduction, Justine is the Audit Manager in the Internal Audit team within the Council. This paper is aimed specifically at maintained schools as academies have their own financial regulations.

The Financial regulations for schools were last updated in 2019. This document is the refresh as there have been quite a significant number of additions. The schools financial value standard (SFVS) is a mandatory self-assessment return produced by Government each year. It must be completed by all LA maintained schools and there is a requirement for the Chief Financial Officer to sign a declaration to confirm that every school has completed the exercise.

We are liaising with a small group of business managers, and we have compiled a consultation document for them and are happy to share that.

Internal audit services will collate any feedback over the summer, and it will be circulated to all maintained schools for September 2022.

If schools have any concerns, we can talk and support with that. Justine's contact email is Justine.poulton@southglos.gov.uk if there are any questions.

Action:

Members of the Schools Forum are invited to consider the contents of the Financial Regulations for Schools and provide any feedback on their content and layout to internalauditmail@southglos.gov.uk. (Please clearly mark your response so that it is clear it is financial regulations for schools feedback. Please forward all responses by 30th July 2022.)

8. Dedicated Schools Grant 2020-21 Outturn (Hilary Smith)

This paper provides Schools Forum with the 2020/21 DSG Outturn. We are in a better position than we were forecasting at the last Schools Forum. There is still an overspend but it is an improving picture at the start of the in-year by £1,267k and some of this success has been achieved by the work we have been doing on the debt recovery and we must make sure we stay on track especially when we submit our safety valve.

The report goes through all the elements of the DSG, including Pathways and we will be looking at each of those in detail to see if there is any more we can do to stay on track in relation to the Deficit Recovery Plan.

There is an underspend of £361,000 and that relates to recruitment of staffing and, consequently, a high level of vacancies. For example, in EHC teams and this is an issue because it impacts on our ability to improve and presents a risk to delivery of the safety valve deficit recovery plan. So we are investing in creating a 7th EHC team of a Senior EHC coordinator and two EHC coordinators. As a new approach to creating more

efficient additional capacity, we are creating a new Assistant EHC Coordinator post to be first point of contact for families and schools, cover the duty contact line, support preparedness for needs assessments and for tribunals. There will be one assistant per team, and we believe this will make a significant difference.

Good news on the Early Years block where there is an underspend of £123,000 and, based on the outturn position for 2022/23, the deficit has been fully recovered.

JA – Any progress in the overspend due to the reliance on out of area LA placements?

HS – There is satisfactory progress in reducing our out of area placements.

9. Growth Funding – Additional requirement to support bulge classes (Hilary Smith)

To make Schools Forum members aware of a developing position of the report we brought to the last Schools Forum on growth funding and some areas getting quite tough, in respect of specific pressures with high yields to housing and young people from overseas. We have no places in Yrs 7 and 8 in Patchway and Filton; we have approached Olympus, who have agreed they will support bulge classes of Yrs 8 and 9 at Patchway and we will be providing growth funding to Patchway to support those bulge classes.

Thornbury housing development and Ukraine families being supported and sponsored by people has resulted in no places available in Yrs 1 and 2 so we are in discussion about bulge classes in Yrs 2 and 3. No implications on the funding as it can be accommodated within the growth funding.

We had on the agenda, now deferred to the October meeting, a report on the commissioning of school places. Shane Billingham is covering the work and is doing quite a detailed analysis of where we are on housing yield, compared to where we thought we would be with those housing developments. Also impact of children coming in from overseas from Hong Kong, refugees, and Ukraine. Because of what is happening in relation to fuel prices, contractors are pulling transport services. Historically some families in South Glos expressed a preference to send their children to secondary schools in BANES but, with some of those routes withdrawn, those parents are choosing to stay in South Glos and this is also having a small impact.

SL – Are we confident the schools selected for growth are appropriate considering there are other schools under capacity?

HS – Yes, the location of the families is in an area of saturation. Transportation to other schools is not an option.

SL – Question from a forum member in advance of the meeting – One third of the Ukraine pupil funding is being retained by the council. What is this being spent on?

HS – There is funding for Ukraine children with 2/3rds passed over to the schools and 1/3 retained centrally to cover the cost of services where it makes most sense to coordinate/commission centrally.

Anything we do not use, we will distribute across schools and have a contingency. We are still awaiting information from the Department for Education.

We have commissioned English for Speakers of Other Languages (ESOL) classes and are holding them in certain venues, and we are looking to take some of the provision out on an outreach basis to our communities to ensure access.

10. High Needs Working Group (HNWG) Update

DB – There has been a massive amount of progress in all the areas. There is engagement with parent groups and there was an update on the Early Years (EY) work streams, all of them see us in a better position than at the start of the year. There remains work to do.

HS – We are improving our in-year overspend but we are still overspending.

In terms of Early Years, which has got off to a good start, panels are up and running from 12th April – transitional funding from EY to reception is proving cost effective. Quite a few children in EY with complex needs.

The work to support families, childminders and training for childminders is really moving at a pace.

Risk areas – SGC Lead in Early Years is remains absent due to illness so we have had to put an interim arrangement in place to manage those risks. EHC team is a significant risk with a number of unfilled vacancies. We are responding and dealing, as appropriate.

The safety valve – positive impact on themes 5 and 6. Theme 5 reliance on independent placements and we have a plan and are taking it forward.

We are listening to schools about the banding changes. High levels of commitment and good dialogue.

DB – There is more demand for special school placements and the communication from the special schools is pertinent.

LL – Risk Register – how we can pull those elements to reassure Schools Forum to communicate those things?

HS – Feedback from schools on communications – the letter for parents was not accessible, so we have now distributed an easy read version. Also, schools raised concerns that we were not consulting parents on the changes to our financial arrangements. This is because the financial arrangements are for the LA and schools, but we need to ensure that we demonstrate that the changes will allow us to sustain services and improvement. Therefore, the approach with parents has been to also focus on the bigger picture and that the new arrangements are needs-led and that is the right approach for children and young people.

With increasing demand, we also need to make sure that we use our specialist provision for the most complex children and therefore continue to develop our capacity to support

more children in mainstream and continue to shift the balance to earlier intervention and support through the SEN clusters. We have been experiencing challenges with sustaining leadership of the clusters; Headteachers are busy people and there is a time commitment to lead a cluster board, with complicated financial and commissioning arrangements so we need to consider how we make sure it is not too burdensome and that succession planning is easier.

Key risk across the system of staff in EY and EHC team and responding to the implementation changes – key staffing and support, school leader level and LA level too.

LL – Can the Schools Forum help and support the central team to drive this forward?

SL – Capacity to deliver it but if there is anything we can support with the cluster leads, please let us know.

11. Schools Forum Forward Plan

Constitution for the Autumn meeting.

Forward Plan to be circulated before the next meeting.

Proposed dates for the next academic year were agreed as:

Thursday 22 September

Thursday 3 November

Thursday 1 December

Thursday 19 January

Thursday 2 March

Thursday 11 May

Thursday 6 July

12. Any Other Business

DB – I want to say on behalf of the Schools Forum what a brilliant Chair you have been. Your knowledge, attention to detail, willingness to hold to account and to challenge have been phenomenal and we are all really grateful for that. You will be a significant loss to the Forum. I was hoping the meeting would be in person so that I could present flowers but will make sure you get them tomorrow!

HS – Thank you Sarah on behalf of the LA officer team, with no disrespect to previous post holders, for raising the bar in terms of professionalism, support, and challenge and therefore for doing such a wonderful job.

SL – I have been part of the Forum since 2016 and Chair for 3 years. It has certainly been a great experience with some interesting times. The role of the Forum is important. What we do, and how we work together, LA and schools, to make sure funding is beneficial to all pupils. It has been an absolute pleasure and I wish everybody lots of luck. Thank you.

Meeting closed

South Gloucestershire Council

SCHOOLS FORUM

22 SEPTEMBER 2022

CURRENT POSITION ON SCHOOL PLACES ACROSS THE SCHOOLS SYSTEM IN SOUTH GLOUCESTERSHIRE (ALL WARDS)

Purpose of Report

1. To provide a summary of the position on availability of school places currently and in future years to highlight action planned and/or required to ensure the local authority is meeting its statutory duty to ensure sufficient places are available to meet current and projected demand.

Recommendation

2. It is recommended that Schools Forum note that sufficient places are available in both the primary and secondary phase currently due to action taken and planned, although this will need to be monitored closely in the secondary phase in particular.

Policy

3. The local authority has a statutory duty to ensure that the provision of school places in the local area is sufficient to meet the demands of the local community.
4. Demand for places is influenced by a range of factors which are taken into consideration in determining whether the total supply of places across the local area is sufficient or needs to change to meet demand. The factors considered include:
 - Total school age population resident in South Gloucestershire
 - The percentage of population likely to take up places in the independent school sector based on trends in previous years
 - The percentage of population likely to take up places in schools in neighbouring (or other) local authorities based on trends in previous years
 - The numbers of children from outside the local authority area likely to be seeking places in South Gloucestershire schools
 - Changes in birth rate in the local area which will be impacting on school age population in future years
 - The number of new homes planned for the local area which will impact on school age population in future years.
5. Each year local authorities have the opportunity to submit a School Capacity and Place Planning (SCAPP) return to the Department for Education (DfE) setting out the current position on capacity available within state maintained schools within the local area, current and projected demand for places including details of new housing developments and details of funding likely to be secured from housing developers to

contribute (Section 106 contributions) to the cost of new education infrastructure required to meet the additional school age population demand from the developments.

6. The DfE use the information provided via the SCAPP returns from all local authorities to determine the level of funding that will be allocated to each local authority as Basic Need grant in the following financial year, which can then be used to contribute to the cost of creating the additional supply of places required.
7. The DfE do not commit to meeting the cost of the supply of places and it is the case that the total cost of new infrastructure may often require more funding than is available overall from Section 106 contributions and Basic Need grant. For this reason, cost effective options for creating additional capacity and opportunity for alternative delivery arrangements may be beneficial and should be explored.
8. Options for creating additional capacity include expansion of existing sites and new schools and the option chosen will depend on the accessibility of existing sites for the community served, constraints of existing sites and availability of suitable land for a new school.
9. Analysis of potential new development sites is currently underway to determine the likely yield of school age population from the development site and the options available to create the new places required to meet the additional demand. In the meantime, a review of the position on sufficiency of places to 2028 has been completed and submitted to DfE for the SCAPP return this year.

Summary of the Current Position on Sufficiency of School Places

10. The current position on school places is set out in the position statements included as Appendix A (Primary Phase) and Appendix B (Secondary Phase) to this report.

Primary Phase

10.1 The key findings/conclusions for the primary phase are as follows:

- Following a period of declining birth rate, this now appears to have stabilised with total intake into all reception classes to be approximately 3,300 this year for which there are 3,700 places currently available.
- South Gloucestershire has received a high number of families moving into the local area from Hong Kong. However, overall, there are sufficient places for available for these children in the primary phase although some schools are impacted much more than others.
- Globally there are between 272 and 392 surplus places in any given existing year group although there are year groups in planning areas where there are still localised pressures.
- Currently, there are pressures in
 - Thornbury/ Alveston – Reception and Years 2 and 3 for September for the current academic year.
 - Yate - Year 6 cohort.
 - Bradley Stoke Year 6 cohort.

- A breach class has already been provided for Stoke Lodge Year 5 pupils for September 2022.
 - There is a shortage of in year places in Downend/ Lyde Green this year: Barley Close will help manage this by taking what would be Lyde Green pupils.
- The provision of additional places will need to be aligned closely with the numbers of surplus places, available capital and what the existing estate can offer. Against a backdrop of insufficient basic need funding, limited developer contributions and rising construction costs, the provision of new schools arising across South Gloucestershire for the foreseeable future may be hard to justify and it is recommended that expansion of existing schools should be considered in the first instance.

Secondary Phase

10.2 The key findings/conclusions for the secondary phase are as follows:

- In 2016 there was an upturn in the demand for secondary school places which has continued over the last 6 years.
- The increased demand for secondary places could have been higher. In 2015 the “staying on rate” (total young people transitioning from a South Glos primary to a South Glos secondary) was 91% but this has declined to 85% by 2019.
- The staying on rate in 2022 has increased for the first time in more than 7 years to 86.4% and with improved performance of secondary schools may mark the start of an upturn in staying on rate.
- There has been additional demand for secondary places because of families moving in from overseas and this has created additional pressure in the Bradley Stoke area
- Projected demand overall for Year 7 places changes from a minimum of 2946 in 2022 to 2850 in 2028. However, if the staying on rate were to return to the 2015 level, then the demand would increase to 3040 in 2028.
- Based on existing permanent forms of entry the base Year 7 capacity is currently 2920 but for September 2022, the total number of year 7 places available will be 3130. The increased capacity for this academic year is a result of several breach classes that have been put in place to meet planning area specific need arising from the delays in the delivery of Lyde Green Secondary school.
- The permanent expansion of 2 forms of entry (60 place) at Abbeywood and the opening of the new 6 forms of entry (180 place) school at Lyde Green will result in an increase in capacity and supply of places to 3160.
- The demand for places at schools across all planning areas is closely matched by the places available except for schools in the Thornbury area which have a high level of surplus places.
- Therefore, whilst the total supply of places available overall is sufficient to meet need, the global position is skewed by the number of surplus places in Thornbury and the situation in each planning area will need to be monitored closely.

Departmental Contact

Hilary Smith

Position Statement on Sufficiency of School Places – Primary Phase

1. Primary Projections to 2028

1.1 Global Overview and Methodology

Following the significant birth rate increases in the early 2000's and the subsequent increase in the number of primary school places provided through the capital programme the birth rate has slowed over the last 10 years. That said, primary intake numbers in the local authority have been fairly stable since 2019 and it is anticipated that although there will be fluctuations in the period to 2028 the gross number of pupils entering reception in 2028 will be similar to those entering in 2023.

Unlike when predicting secondary intakes, the key factor in projecting a reception cohort is the birth rate some 5 years previous and whilst there are also a number of other factors involved, the birth to reception cohort figure is key to projecting demand. It should be noted that birth rate data during and since Covid is not as solid a data source as it was, and this has resulted in changes to the primary projections in the last two years. However, this volatility is manageable against a wider picture where the overall pressure on places is less concerning than the secondary picture: we have a borough wide capacity of 3713 reception places with only 3324 starting in Reception this September. Whilst we would expect this number to increase as the cohort moves through the school due to a net increase of in year pupil numbers there will still be a considerable number of primary surplus places at a global level across the local authority.

With the arrival of a number of families from Hong Kong over last year we have seen an increase across the academic year of 118 pupils in our Primary schools (between the Autumn and Summer censuses) but even assuming similar numbers coming through year on year there will still be plenty of surplus places at a global level. If we take the highest projected reception intake over the next 5 years and allow a 3% uplift giving a figure of 3498 there is still more than 6% surplus against the local authority wide capacity of 3713.

1.2 High Level Reception Projection to 2028

The global projection to 2028 anticipates that whilst there is some upward and downward fluctuation in the period, the overall reception intake by summer 2028 will likely be similar to the figure we anticipate will be in our schools come summer 2023.

Global Reception Projection to 2028		
Year	Reception Projection	Capacity
2022/23	3355	3713
2023/24	3396	
2024/25	3178	
2025/26	3262	
2026/27	3337	
2027/28	3366	

2. Capacity and Surplus Places

2.1 Changes in primary population 2017-2022

This table details the changes in Primary numbers between 2017 and 2022. As the increased primary numbers arising from the birth rate increase have moved through the primary phase there are increases of more than 10% in years 5 and 6 across this period. However, as the birth rate increase has levelled off the numbers in Reception and Year 1 have declined. Overall, there has been an increase in primary numbers of 595 across this period although as the larger cohorts move through to secondary it is expected that this overall figure will reduce slightly in the coming years.

Global Primary Census Data 2017 to 2022								
Census	R	1	2	3	4	5	6	Total
Summer 2017	3525	3441	3424	3346	3359	3173	3090	23358
Summer 2018	3426	3500	3438	3419	3351	3347	3135	23616
Summer 2019	3371	3420	3494	3428	3370	3325	3320	23358
Spring 2020	3408	3382	3419	3467	3422	3358	3319	23775
Summer 2021	3343	3412	3344	3415	3478	3397	3358	23747
Summer 2022	3372	3375	3468	3359	3457	3523	3399	23953
Diff 2017-22	-153	-66	44	13	98	350	309	595

2.2 Current position on availability of places

The table below illustrates current primary school numbers by planning area, capacity by planning area and the current offers for the September 2022 intake. Globally there are between 272 and 392 surplus places in any given existing year group although as highlighted in red, there are year groups in planning areas where there are still localised pressures. Within each of these planning areas there are several sub- areas (up to seven in some planning areas) which are smaller clusters of primary schools and again within these areas there may be localised pressured in certain year groups even within planning areas that on the face of it have surplus capacity.

NOR Primary from the Summer 22 Census by Planning Area and Offers for Sept 22

Offers 2223	PAN	PA	R	1	2	3	4	5	6
340	410	PA 1	354	373	367	344	355	337	376
519	548	PA 2	505	479	516	518	499	564	508
240	245	PA 3	241	243	255	270	279	268	284
809	855	PA 4	787	805	784	766	828	812	777
569	555	PA 5	536	544	553	507	534	514	525
534	705	PA 6	542	542	582	567	557	598	564
313	395	PA 7	356	350	357	346	350	343	333
3324	3713		3321	3337	3414	3321	3402	3441	3367

NB PAN Figure does not take account of existing bulges in infant and junior range.

3. Conclusions

The global position regarding sufficiency of primary places to 2028 shows significant levels of surplus places will remain unless there are any permanent reductions in primary numbers in this period. However, there are and will continue to be localised pressures at planning area and sub planning area level.

At planning area level there is a current and future anticipated shortfall of places in Planning Area 5 whilst there will be limited capacity in Planning Area 3. This demand for places in planning area five will be eased once Lyde Green Primary is built out but until then there will be continued need for breach classes in this area. Barley Close is taking a breach class for the 2022/23 academic year to manage demand in advance of Lyde Green being built out.

There are also several pockets of increased demand in certain year groups in certain areas currently and these situations should be managed by either breach classes or asking schools in the junior phase to go over number (where demand is a few pupils rather than thirty where a breach would be required).

Currently, there are pressures in

- Thornbury/ Alveston – Reception and Years 2 and 3 for September for the current academic year.
- Yate - Year 6 cohort.
- Bradley Stoke Year 6 cohort.
- A breach class has already been provided for Stoke Lodge Year 5 pupils for September 2022.
- There is a shortage of in year places in Downend/ Lyde Green this year: Barley Close will help manage this by taking what would be Lyde Green pupils.

To manage these pressure points it is essential to work closely with the admissions team and schools to ensure demand can be met and whilst these pressure points do not generally require additional permanent expansions to be put in place, significant housing developments coming on stream traditionally require the need for either expansions or new schools.

Further work is required to review the major housing development sites due to come forward in this period which will be undertaken over the coming months as part of updating and finalising the commissioning of places strategy. Whilst ideally, Section 106/CIL contributions will be sufficient to underwrite the requisite capital expenditure needed to meet education infrastructure requirements arising from the development, often the sums received are insufficient. Moving forward the provision of additional places will need to be aligned closely with the numbers of surplus places, available capital and what the existing estate can offer. Against a backdrop of insufficient basic need funding, limited developer contributions and rising construction costs, the provision of new schools arising in the local authority may be hard to justify and it is recommended that expansion of existing schools should be considered in the first instance.

Position Statement on Sufficiency of Places – Secondary Phase

1. Secondary Projections to Sept 2028

1.1 Overview and Methodology

An increase in the birth rate since 2002 began to feed through from 2016 onwards marking the start of an upturn in demand for secondary school places. The Year 7 cohort has increased by 335 pupils (11 Forms of Entry) over the past 6 six years with 2946 accepted offers for the September 2022 intake against a figure of 2611 on roll in summer 2016.

This number could have been significantly higher but for a sharp decline in our Year 6 to 7 stay on rate between 2015 and 2021. In 2015 more than 91% of pupils in South Gloucestershire Primary schools moved through to our Secondary schools but by 2019 this figure had dropped to just over 85%. Following a period of 3 years where the stay on rate has been static at circa 85.5% this has increased for the first time in more than seven years with this September's intake to 86.4%. *(Please note that this figure won't be finalised until the end of the 22/23 academic year)*

The importance of fluctuations in the stay on rate is key to our pupil place planning because a 6% upward swing back up to where the rate was 7 years ago would mean a difference of 190-200 more pupils entering our schools in year 7. With the vast improvement in performance of our Secondary schools over the past 3 years it is reasonable to expect that the stay on rate will increase moving forward as more parents choose our schools once again.

When producing the projected Secondary figures in this report taking us through to 2028, we have used the average stay on rate for the last 3 completed academic years (85.5%) and subsequently these figures present a best case (low pupil number) scenario. We have also applied a 3% uplift on this figure in the various tables to allow for in year pupil movement, the recent influx of Hong Kong families/pupils, and Ukrainian families/ pupils and also because it is best practice to allow some head room in a pupil place strategy to manage some of the many variables i.e. changes to stay on rate; changes to inward/outward migration, changes to housing development proposals, parental preference etc. The reason that these projections run to 2028 is because they have been based on existing numbers in our Primary School censuses and therefore the Sept 2028 cohort are pupils who were in the 2021/22 Reception age group.

1.2 High Level Secondary Projection to 2028

Local authority wide Year 7 projections to 2028.

Intake Year	Yr. 7 Intake	Y7+3%	Yr. 7 @ 91.2% SOR
Sep-22	2946	3034	3112
Sep-23	2979	3069	3177
Sep-24	2947	3035	3143
Sep-25	2860	2946	3050
Sep-26	2938	3026	3133
Sep-27	2868	2954	3059
Sep-28	2850	2936	3040

NB Sep 22 Year 7 Intake figure is based on actual admissions data. The final column shows the number that would be coming through if we return to the 2015 stay on rate (SOR) of 91.2%.

2. Capacity and Availability of Places

2.1 Existing capacity and Planned Changes

Based on existing permanent forms of entry our base Year 7 capacity is currently 2920. For September 2022, the total number of year 7 places available will be 3130. The increased capacity for this academic year is a result of several breach classes that have been put in place to meet planning area specific need arising from the delays in the delivery of Lyde Green Secondary school.

A permanent 2FE (60 place) expansion at Abbeywood and the provision of a new 6FE (180 place) school at Lyde Green will be delivered in this planning period meaning that the total capacity will increase to 3160.

2.2 Position on Places in Secondary Schools by Planning Area

There are 5 Secondary School planning areas across the local authority and demand for places varies across the planning areas:

Planning Area 1: Thornbury and Alveston

This planning area consists of two schools: The Castle and Marlwood and is the only area with significant levels of surplus places. The Year 7 capacity across this area was 480 but this figure has been reduced to 420 from September 2022 as Marlwood's planned admission number has been taken down from 210 to 150. The number of accepted offers for this planning area for Sept 2022 is 332 meaning that there are 88 surplus Year 7 places for the 22/23 Academic year. Across the period to 2028 numbers in this planning area are expected to rise slightly but it is still expected that there will be high levels of surplus places in the area.

Planning Area 2: Yate and Chipping Sodbury

This planning area consists of three schools, Brimsham Green, Chipping Sodbury and Yate with an overall Year 7 capacity of 510. Brimsham Green has increased its PAN to 210 for Sept 22 and has filled. The year 7 intake in this area has risen by 15% overall since the Sept 20 intake and there are only 17 places available for the 22/23 Academic year, 16 of which are at Chipping Sodbury. Whilst there are no current plans for permanent expansions in this area in this planning period, we will be carefully monitoring the residential build out rates to ensure that there are sufficient places in the short and medium term with a view to potentially putting another form of entry into the area if required.

Planning Area 3: Filton, Patchway, Bradley Stoke and Stoke Gifford

This planning area consists of three schools- Bradley Stoke, Abbeywood and Patchway with an overall capacity of 540. It is proposed that a 2FE (60 place) permanent expansion will be built out in this planning period bringing the number of places up to 600. Abbeywood is taking a further 60 pupils for September 2022 as it begins to take the additional numbers via breach classes in advance of the permanent facilities being delivered. Both Bradley Stoke and Abbeywood have filled to their full planned admission numbers for the last 4 years and subsequently the only surplus places in the area are at Patchway. There are currently 52 of the 180 places available in the expected Year 7 cohort for this September.

Work is currently being undertaken to assess the timescales for the significant levels of residential development in this planning area and in the longer term – outside of this planning period – there will be a need for additional secondary school provision in this area.

Planning Area 4: Winterbourne, Downend, Mangotsfield and Emersons Green.

This planning area currently consists of 4 schools: Downend, King’s Oak, Mangotsfield and Winterbourne with a further new school – Lyde Green – in design development currently. The overall capacity of this planning area is currently 900 and will rise to 1080 once Lyde Green is completed. Originally planned for completion in September 2022 it is not expected to be delivered at the earliest by September 2025. Subsequently there has been a need to put in place several breach classes to manage demand in existing schools with numbers starting in September 22 at 1003- a figure we anticipate will increase across the academic year. There has been an increase of 14% in the year 7 cohort across the last 12-month period.

Planning Area 5: South Kingswood, Hanham, Longwell Green, Oldland Common and Warmley

This planning area consists of 3 schools – Hanham Woods, John Cabot and Sir Bernard Lovell and whilst numbers have been consistent over the last 4 years (varying between 559 and 572) there are only 14 surplus places in this planning area for the 22/23 academic year. Demand for places in area 5 should be viewed in conjunction with Planning Area 4 as there is crossover in the pattern of admissions. Whilst there are currently no further plans in place to put in additional permanent forms of entry in planning area, similar to the situation in planning area 2, this should be kept under review over this planning period and may well be impacted by the delays to the delivery of the school at Lyde Green.

Census/ Admissions data 19/20 to 22/23 by Planning Area (PA)

PA 1	22/23	21/22	20/21	19/20
The Castle (PAN270)	214	244	239	269
Marlwood (PAN 150 from Sept 22)	118	117	111	95
Total	332	361	350	364
PA 2				
Brimsham Green Secondary School (PAN 210)	209	153	160	164
Chipping Sodbury Secondary School (PAN 150)	134	141	119	114
Yate Academy (PAN 150)	150	149	149	153
Total	493	443	428	431
PA 3				
Abbeywood (PAN 240 from Sept 22)	241	209	185	183
Bradley Stoke (PAN 180)	183	181	180	180
Patchway (PAN 180)	128	159	163	143
Total	552	549	528	506
PA 4				
Downend School (PAN 210)	270	238	236	241
King's Oak Academy (PAN 150)	143	148	146	147
Lyde Green new Secondary School	0	0	0	0

Mangotsfield School (PAN 240)	230	199	225	217
Winterbourne Academy (PAN 300)	360	298	300	300
Total	1003	883	907	905
PA 5				
Hanham Woods Academy (PAN 180)	180	181	159	174
John Cabot Academy (PAN 160)	172	157	179	171
Sir Bernard Lovell School (PAN 210)	214	234	223	214
Total	566	572	561	559

Year 7 Capacity based on known permanent expansions Planning			
Area	School	Existing	Proposed
1	Castle	270	
1	Marlwood	210	150
	Total Capacity in		
	PA 1	480	420
2	Brimsham	210	
2	Chipping Sodbury	150	
2	Yate	150	
	Total Capacity in		
	PA2	510	
3	Bradley Stoke	180	180
3	Abbeywood	180	240
3	Patchway	180	180
	Total Capacity in		
	PA3	540	600
4	Kings Oak	150	150
4	Mangotsfield	240	240
4	Downend	210	210
4	Winterbourne	300	300
4	Lyde Green		180
	Total Capacity in		
	PA4	900	1080
	Sir Bernard Lovell	210	
	Hanham Woods	180	
	John Cabot	160	
	Total Capacity in		
	PA 5	550	
	Existing Total	2980	
	Proposed Total		3160

3. Conclusions

Whilst the low point global projection figure for the next few years varies between 2850 and 2979, we would expect these numbers to increase during the period principally due to the improvement in performance in our secondary schools in recent years.

The 6 to 7 stay on rate for the September 2022 intake has experienced an upturn for the first time since 2015 and the admissions data should be monitored closely once the applications including lates for September 23 have been processed, to ensure that any upturn can be managed by breach classes as required.

Allowing a 3% place contingency the figure of 3069 is still some 91 places below the total capacity that would be in place once Lyde Green and Abbeywood are built out. That said, as can be seen in the admissions data table the global figure is somewhat skewed by the fact that most surplus places are in Planning Area 1 and for this September in Planning Area 3.

Significant delays in the delivery of Lyde Green Secondary have resulted in the need for breach classes in planning area 4 for this September as well as schools in planning area 5 going over number. With delivery now not expected until September 25 at the earliest there will be the need to ensure appropriate plans are in place to meet demand in the short-term. Abbeywood has uplifted its Planning Admission Number by 2FE to 240 for the first time this September as part of the proposed permanent expansion and the school has filled to over 240. This has coincided with a reduction in the number of pupils at Patchway school although it is expected that the number of surplus places will reduce due to the in-year movement and in the longer term, residential development in this area will certainly require additional Secondary infrastructure.

BUDGET UPDATE (VERBAL)

SOUTH GLOUCESTERSHIRE COUNCIL

SCHOOLS FORUM

22 September 2022

Schools Forum Membership, Constitution & Self-Assessment

Purpose of Report

1. The purpose of the report is:
 - To review the membership of the Schools Forum (SF) against 2021 Schools Census Data, The Schools Forums (England) Regulations 2012, and Education & Skills Funding Agency guidance and take action to update if necessary.
 - To highlight any member posts that are vacant or coming to the end of their term.
 - To note the process for appointing new members or renewing terms of office.
 - To provide an opportunity for future review of the Schools Forum Constitution.
 - To note the Schools Forum self-assessment toolkit, which will be discussed at the November Schools Forum meeting.
 - This report aims to ensure that the Schools Forum is representative and quorate and operating within good practice guidance.

Background

2. The latest membership list is published on our Schools Forum page and is dated September 2022. It is attached to this paper at Annex 1.
3. It is suggested in the Schools Forum Constitution 2018 that the Schools Forum constitution and membership are reviewed annually at the last meeting of the academic year. We reviewed this in July 2021 and are reviewing again now to take into account:
 - (1) the composition of the Forum against the latest Summer 2022 Schools Census data
 - (2) to consider any current or upcoming vacancies, and
 - (3) to note the Schools Forum self-assessment toolkit (Annex 2).
4. For information, the SF Constitution, which is referred to in this paper, is published on our [Schools Forum page](#).

Review of Membership (Composition)

5. We have taken into account [The Schools Forums \(England\) Regulations 2012](#) and [Education & Skills Funding Agency guidance](#) when considering the membership of the Schools Forum.

6. In line with the regulations and guidance, Schools Forums must have:
- Maintained Primary, Secondary and Special Schools members (at least one must be a rep of headteachers, and one must be a rep of governors)
 - Mainstream and Special Academies members (If there are any alternative provision Academies in the authority's area, at least one Academies member must be a representative of an alternative provision Academy)
 - Where the authority maintain one or more pupil referral units (PRU), at least one schools member must be a representative of a PRU
 - Where the authority maintain one or more nursery schools, at least one schools member must be a representative of a nursery school¹.
 - Non-schools members
7. The advice also sets out that schools and academies members together must number at least two-thirds of the total membership of the schools forum (17 of the 25 places) and the balance between maintained primary, maintained secondary and academies members must be broadly proportionate to the pupil numbers in each category.
8. Current membership has been set with regard to 2022 Schools Census Data for Maintained and Academy primary and secondary schools – see footnotes 4 and 5 for current numbers. All other sectors must have at least one representative.
9. Membership of SF has been reviewed against the 2022 Schools Census Data as set out below. This is relevant for the Maintained and Academy Primary and Secondary schools only as all other places on SF are set out in the regulations (at least 1 per Sector). All sectors are included in the table for completeness:

Table 1: 2022 SF Membership

		Number of pupils (2022 Schools Census)	2022 Weighted average spaces²	2022 Weighted average % membership³ (against total pupils in primary and secondary maintained schools and academies only)
Maintained Schools				
1	Primary	19689	9	49.5%
2	Secondary	1515	1	3.8%
3	Special	295	1	
4	PRU	59	1	
Academies				
1	Primary	3463	1	8.7%
2	Secondary	15070	6	37.9%
3	Special	270	1	
Non Schools				
1	16-19		1	
2	Early		2	

¹ We do not have any maintained nursery schools and so do not have representation from this sector.

²Based on % total pupils in primary and secondary pupils in maintained schools and academies only (39737). Number of spaces left on SF after having filled those that are set out in regulations - 17 remaining after Maintained Special/PRU, Academy Special, and Non School 16-19/Early Years/Diocese.

³ See Table 2 also.

	Years			
3	Diocese		2	
Total			25	

10. It is recommended that membership of the Forum takes into account:
- 9 spaces on Forum allocated to members set out in SF Regulations (greyed in the above table).
 - Weighted average used to allocate the remaining 17 spaces (two thirds) in relation to the percentage of total pupils in those sectors (shown in detail in Table 2).
11. There are no proposed changes to the Forum membership based on 2022 Schools Census data.
12. Table 2 shows how the 17 places have been allocated across maintained and academy primary and secondary schools.

Table 2: 2022 SF Membership (allocation of 17 places)

	Total	Weighted %	2022 spaces on SF (from remaining 17)	Notes
Primary Maintained	19689	49.5	8.5	Assume round up to 9
Secondary Maintained	1515	3.8	0.64	Assume round up to 1
Primary Academies	3463	8.7	1.4	Assume round down to 1
Secondary Academies	15070	33	5.6	Assume round up to 6
Total primary/secondary Maintained and Academies	39737	100		17 Spaces (remaining of 25 total after allocated all those in regulations)

Updates to Membership

13. The latest membership list is available at Annex 1
14. No members are coming to the end of their terms of office (4 years)
15. We are holding 2 vacancies on Schools Forum:
- One Primary Headteacher resigned at the end of July. Therefore, we have a vacancy for a Primary Maintained Headteacher/Headteacher Rep
 - The Chair of the Schools Forum resigned at the end of the last academic year and, therefore, we have a vacancy for a Secondary Academy Headteacher / Headteacher Representative or Governor.
 - The election of a new Chair for the Forum was covered under item 4 of this Schools Forum.
16. Following this Forum, we will go out for self-nomination and election for the maintained primary vacancy, and this will be done in conjunction with The Heads' Executive who meet regularly.

17. The position for Head/Head rep/s from a Secondary Academy will be taken forward through the Academies Group.
18. In line with Education & Skills Funding Agency guidance, review of membership is a standing agenda item at each meeting.
19. The membership list at Annex 1 is subject to review by members of this group. If there are changes to be made, please highlight these to the report author. Highlighted rows will be updated to show vacancy/new term/new member.

Substitution Vacancies

20. We still hold vacancies for substitute members for:
- Maintained Primary Governor
 - Special Academy
 - Secondary Academy
21. These posts do not affect the core membership of the Forum. Recruitment for these will be taken forward over the coming months. These should be taken forward through the respective groups for Academies and in liaison with the Governor Development Officer for the Primary Governor.

Meetings Update

22. The ESFA regulations were updated in 2021 to allow for virtual meetings and feedback has been overwhelmingly positive.
23. The guidelines allow for Schools Forum to be held virtually indefinitely. Therefore, as a Forum we will need to consider which meetings could be virtual and those meetings where it would be valuable to meet in person. For all meetings, we will need to ensure that appropriate documentation is published in accordance with good practice and the forum remains open to allow members of the public to join.

Review of Constitution

24. The Schools Forum Constitution complies with the [‘The Schools Forum \(England\) Regulations 2012’](#), which came into force in October 2012. It also and takes account of advice published by the DfE, [Schools Forum Operational and Good Practice Guide](#), Schools Forum Structure and Schools Forum Powers and Responsibilities.
25. The latest Constitution is dated September 2018. We are not proposing any changes to the Constitution and ask members of the Schools Forum to review it on the relevant [Schools Forum page](#).

Schools Forum Self-Assessment Toolkit

26. As set out in the [Schools forum operational and good practice guide](#) document, the self-assessment toolkit allows identification of strengths and potential weaknesses.

27. Schools Forum is asked to note the draft Self -Assessment at Annex 2 – this will be an agenda item for the November Schools Forum.

RECOMMENDATIONS

1. Schools Forum approve allocation of Schools Forum membership at paragraph 10.
2. Any changes to the membership list included at Annex 1 be highlighted to the report author who can update accordingly.
3. Vacancies will be filled as set out under **Updates to Membership**, to ensure that the Schools Forum is representative and quorate.
4. Schools Forum to note the Self-Assessment Checklist at Annex 2, which will be discussed at November Schools Forum

Ali Davies, Business Support Manager, Department for People

Annex 1: South Gloucestershire Schools Forum Membership (September 2022)

Type & number of Members	No	Sub-Group Represented	Forum Representative	Establishment	Term of Office/Position
Maintained school members (5 Primary Headteachers/4 Primary Governors/1 Secondary/1 Special/1 PRU representative) = 12					
Primary	1 of 5	Headteacher/Headteacher Representative	Bernice Webber	Headteacher, Old Sodbury CE Primary	23/01/2020
Primary	2 of 5	Headteacher/Headteacher Representative	VACANT		
Primary	3 of 5	Headteacher/Headteacher Representative	Kirby Littlewood	Stanbridge Primary School	21/01/2021
Primary	4 of 5	Headteacher/Headteacher Representative	Pippa Osborne	Christ Church CofE School	01/01/2019
Primary	5 of 5	Headteacher/Headteacher Representative	Louisa Wilson	St. Stephens C of E Junior School	21/01/2021
Primary	1 of 4	Governor	Andy Watson	Governor – Hanham Primary Federation	07/07/2022
Primary	2 of 4	Governor	David Jenkins	Governor – Crossways Schools	18/07/2019
Primary	3 of 4	Governor	Jo Dent	Governor – Alexander Hosea Primary	02/12/2021
Primary	4 of 4	Governor	Aaron Jeffries	Governor – Coniston Primary School	07/07/2022
Secondary	1 of 1	Headteacher/Headteacher Representative or Governor	Kim Garland	Headteacher – Brimsham Green	18/07/2019 (2 nd term)
Special Schools	1 of 1	Headteacher/Headteacher Representative or Governor	Lisa Parker	Headteacher Warmley Park	21/01/21 (2 nd term)

PRU (only has to be 1)	1 of 1	Headteacher/Headteacher Representative or Governor	Louise Leader	Headteacher Pathways Learning Centre	18/07/2019 (2 nd term)
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Type & number of Members	No	Sub-Group Represented	Forum Representative	Establishment	Term of Office/Position
Academies members (1 Primary/1 Special/6 Secondary member representatives) = 8					
Primary Academy	1 of 1	Headteacher/Headteacher Representative or Governor	Susie Weaver	Executive Principal CLF	19/09/2019 (2 nd term)
Special Academy	1 of 1	Headteacher/Headteacher Representative or Governor	Nicki Jones	Chair of Enable Trust.	21/01/2021
Secondary Academy	1 of 6	Headteacher/Headteacher Representative or Governor	Julia Anwar	Olympus Academy Trust	23/09/2021
Secondary Academy	2 of 6	Headteacher/Headteacher Representative or Governor	Dave Baker (Vice Chair)	CEO OAT	19/09/2019 (2 nd term)
Secondary Academy	3 of 6	Headteacher/Headteacher Representative or Governor	Diane Owen	Chair to Academy Council at King's Oak Academy	14/09/2017
Secondary Academy	4 of 6	Headteacher/Headteacher Representative or Governor	VACANT		
Secondary Academy	5 of 6	Headteacher/Headteacher Representative or Governor	Will Roberts	CEO CSET	01/03/2019
Secondary Academy	6 of 6	Headteacher/Headteacher Representative or Governor	Steve Moir	Headteacher – Bradley Stoke	18/07/2019

Type & number of Members	No	Sub-Group Represented	Forum Representative	Establishment	Term of Office/Position
Non-school members = 5					
16-19	1 of 1	Representative	Stuart Evans	SGS Filton	21/11//2019
Early Years	1 of 2	Representative	Ross Newman	Early Years SF Rep	14/06/2021
Early Years	2 of 2	Representative	Clare Haughton	Page Park Pre-school	23/09/2021 (2nd term)
Diocese	1 of 2	Representative	Malcolm Strange	Diocese of Bristol	18/10/2019
Diocese	2 of 2	Representative	David Williams	Diocese of Gloucester	21/01/21

Type & number of Members	No	Sub-Group Represented	Forum Representative	Establishment
Substitutions				
Maintained Primary	1of1	Headteacher	Katherine Marks	Headteacher, Frenchay Primary
Maintained Primary	1 of 1	Governor	VACANT	
Maintained Secondary	1 of 1	Member Representative	Terry Redfern/Stuart Thomas	Business Manager/AHT Brimsham Green
Maintained Special School	1 of 1	Member Representative	Tania Craig	Head teacher New Horizons
Pupil Referral Unit	1 of 1	Member Representative	Dan Walton	Deputy Head PLC
Primary Academy	1 of 1	Member Representative	Sue Kelham	Principal Wallscourt Farm
Special Academy	1 of 1	Member Representative	VACANT	
Secondary Academy	1 of 1	Member Representative	VACANT	

Annex 2 – Schools forum self-assessment toolkit



Education
Funding
Agency

This toolkit provides local authority officers and elected members with a framework for assessing the strengths and weaknesses of their schools forum. The toolkit is designed as a set of questions which can be considered by individuals or the forum as a whole.

Question	Yes / No	Notes
1. Are meeting dates set in well advance and details (including time and venue) published in an accessible manner to enable interested parties to plan their attendance?	Yes	Meetings are set for the full academic year in the preceding July meeting. This is managed through the Schools Forum forward plan.
2. Are meetings timed to coincide with key dates? (e.g., reporting of funding formula)	Yes	Yes – the Chair and Vice Chair along with the Service Director for Education Learning & Skills and Service Director for Financial Management & Business Support set dates to fit in with key consultation and funding dates. These are then raised to the SF meeting for discussion and agreement.
3. Are meetings held in an accessible venue to enable observers to attend easily?	Yes	Currently all meetings are virtual and held via Teams and therefore are accessible to many. Discussion is ongoing re which meetings will be held in person.
4. Is there a dedicated website link for schools forum, is it current and regularly updated?	Yes	There is The Schools Forum South Gloucestershire Council (southglos.gov.uk) It is regularly updated with the agendas, papers and minutes of

Question	Yes / No	Notes
		meetings. A review will be held once vacant posts are filled on any additional information required to be updated on the site.
5. Are the agenda and papers publicly available on the authority's website at least 6 working days in advance of the meeting?	Yes	Meetings are held on a Thursday and papers are uploaded to the website on the preceding Friday.
6. Are the papers published as a single document, so that users can download easily?	Yes	
7. If papers are tabled at the meeting, are they published on the website promptly after the meeting?	Yes	
8. Are draft minutes published a reasonable time (e.g., within 2-3 weeks) after the meeting, rather than waiting until the following meeting?	Yes	
9. Are the minutes clear and unambiguous, with sufficient detail to illustrate the discussions, without reporting verbatim every point made?	Yes	
10. Is the constitution clear and appropriate? Including e.g. <ul style="list-style-type: none"> - a clear process for ensuring proportional representation - the process for electing members and their tenure - the timescale for review is clearly set out - the process for dealing with repetitive non attenders 	Yes	

Question	Yes / No	Notes
11. Is there an induction pack or training programme available for new members?	-	This will be taken forward – there is a slide pack that will be updated
12. Is the election process clear and transparent? i.e. representatives are elected only by the group they are representing, whether phase-specific for maintained schools, or by the proprietors of academies for academy members.	Yes	
13. Do the papers contain clear recommendations and indicate in a consistent manner whether the item is for information, consultation or decision?	Yes	
14. Is it clear to observers who attendees at the forum are representing? (e.g., by use of name plates, indicating sector)	Yes	
15. Does the chair manage the meeting well, ensuring that all are able to contribute to the agenda items, that no bias towards any sector is evident and that no single person or organisation is able to dominate the discussion?	Yes	
16. Is there inclusive participation in discussions for all phases and types of members?	Yes	
17. Do members actively canvass views and objectively represent their whole peer group at the forum and provide feedback after meetings?	Yes	
18. Where votes are required, is it clear who is eligible to vote for	Yes	

Question	Yes / No	Notes
different items?		
19. Where votes are required, are the arrangements for recording the votes clear and unambiguous?	Yes	Documented in the minutes
20. Is there a system in place for a decision if votes are tied?	Yes	
21. Is the operational & good practice guide used to regularly review the forum's adherence to good practice?	Yes	The constitution has been assessed against the operational and good practice guide and this toolkit covers some areas

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SCHOOLS FORUM FORWARD PLAN

Nov	3rd			
		7	Implementation of new banding and top up arrangement for special schools and alternative provision.	Mustafa Salih
		8	Schools Forum Self-Assessment Checklist	Mustafa Salih

ANY OTHER BUSINESS