

Schools Forum

Date: Thursday 25 September 2025

Time: 4.30pm

Location: Teams

Chair: Pippa Osborne

Members of the Committee

Pippa Osborne (Chair)	Ross Newman
Julia Anwar	Elly Owen
Dave Farr	Will Roberts
Tania Craig	Fr. Malcolm Strange
Nicky Edwards	Andy Watson
Paul Evry	Susie Weaver
Dave Farr	David Williams
Kim Garland	Sue Wright
Florence Hiatt	
Aaron Jefferies	
David Jenkins	
Nicola Jones	
Jonathan Keohane	
Ruth Laing	
Louise Leader	

Appropriate Officers attending:

Mustafa Salih
Hilary Smith
Deb Luter
Michelle Palmer
Justine Poulton

Councillors attending:

Ian Boulton

Chris Sivers, Executive Director for the Department for People, Badminton Road Offices,
Yate, South Gloucestershire, BS37 5AF

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South Gloucestershire Council – Schools Forum

25th September 2025

AGENDA

1. WELCOME AND INTRODUCTIONS
2. A MINUTES SILENCE - DAVE
3. APOLOGIES FOR ABSENCE (Pippa Osborne)
4. DECLARATIONS OF INTEREST (Pippa Osborne)
5. ANY OTHER ITEMS THE CHAIR DECIDES ARE URGENT (Pippa Osborne)
6. MINUTES FROM 03rd JULY 2025 MEETING (Pippa Osborne)
7. OUTTURN 2024-2025 REPORT + SAFETY VALVE UPDATE (VERBAL) (Mustafa Salih)
8. PLACE PLANNING (PRESENTATION) (Mike Wheeler)
9. OFSTED SEND INSPECTION (VERBAL) (Hilary Smith)
10. YEAR 3 OF NEW BANDING AND TOP-UP ARRANGEMENTS REVIEW AND UPDATE (Mustafa Salih)
11. HNWG (VERBAL) (Susie Weaver)
12. SCHOOLS FORUM FORWARD PLAN
13. ANY OTHER BUSINESS

South Gloucestershire Schools Forum

Minutes of Meeting held on 3 July 2025

Location: Teams

Chair: Pippa Osborne

Forum Members

Pippa Osborne (Chair)	Headteacher Christ Church Junior School
Dave Baker (Deputy Chair)	CEO, Olympus Academy Trust
Julia Anwar	Head of Business Operations, Olympus Academy Trust
Tania Craig	Executive Head Teacher, New Horizons Learning Centre
Nicky Edwards	Early Years representative
Dave Farr	Finance Manager, Leaf Trust
Jonathan Keohane	Headteacher Callicroft Primary School/Olympus School
Louise Leader	Headteacher, Pathways Learning Centre
Ross Newman	CEO of the Leaf Trust representing Academies
Andy Watson	Chair of Governors, Hanham Primary Federation
Bernice Webber	Headteacher, Old Sodbury Primary School
David Williams	Diocese of Gloucester
Susie Weaver	Executive Director, Cabot Learning Federation
Sue Wright	Finance Director CSET

Executive Councillors:

Ian Boulton, Cabinet Member - Schools, Skills, Employment and Business

Officers:

Mustafa Salih, Service Director Resources and Business
 Deb Luter, Senior Accountant - People (Children)
 Justine Poulton, Head of Internal Audit

Others: Tamsin Moreton, Director of Finance & Operations, Enable Trust

APOLOGIES FOR ABSENCE

Chris Sivers, Will Roberts, Hilary Smith, Caroline Warren, Michelle Trigg, Nicola Jones, Aaron Jefferies, Flo Hiatt, Kim Garland, Diane Owen, David Jenkins, Fr. Malcolm Strange

WELCOME AND INTRODUCTIONS

The Chair and Deputy Chair welcomed attendees.

1. **DECLARATIONS OF INTEREST – None**
2. **ANY OTHER ITEMS THE CHAIR DECIDES ARE URGENT**

None

3. **MINUTES FROM LAST MEETING – 08th May 2025**

2 typos:

Primary Schools

Second paragraph should read **preference** and not reference.

New Bridges should read **Two** Bridges.

Remainder of the Minutes recorded as a true record.

4. **Schools Forum Membership and Constitution (for recommendation) (Mustafa Salih representing Michelle Trigg)**

The Forum previously agreed not to change the balance of the membership every time there was an amendment to the Membership and that the Forum would take a view once a year with an updated Membership report.

We reviewed the membership to update the Forum where there was a vacancy for a maintained Secondary Headteacher and Dave Baker has been asked to find a representative to fill that vacancy.

We have also had notification of 2 colleagues that are stepping down. Bernice Webber, Headteacher Maintained Primary and Diane Owen, Chair of Academy Council All-through MAT CLF.

The position for Head/Head rep/s from Maintained Primary School will be taken forward at the primary heads executive meeting.

The position of Head/Head rep/s from an All-through MAT CLF will be taken forward by the Deputy Chair through the Academies Group. Again, we will liaise with Dave Baker to co-ordinate a replacement for Diane to be a representative for the Academy Sector.

Our thanks to both Bernice and Diane who have contributed to the Forum but particularly to Diane for her length of service.

It was suggested if the LA could send a card or flowers to Diane for her length of service.

Action: Pippa, Dave, Susie, Nicky and Mustafa to address that.

Some substitution vacancies but they don't affect the core membership but will try to fill those sub vacancies.

A review was undertaken to see how long colleagues had been on the Forum and there were a number who had over the 4 year limit period and we undertook to check those names and they all still wanted to continue. The Chair has approved their continuation and checked within the terms of the Constitution.

The paper also mentions that the Chair and the Clerk, Michelle, met and went through the self-assessment toolkit just to make sure we are meeting the guidance, so for example all the documents end up on the website and the public website.

Action: The Constitution has now been adjusted and will be circulated and added to the agenda of the next Forum meeting.

DB – As this is Tamsin's last meeting we would like to thank you Tamsin for your service both as a service of the Council and working with The Enable Trust and supporting Schools Forum and thank you and good luck with what comes next.

Tania Craig has spoken to Beth Jones of Warmley Park and she is happy for Tania Craig to continue to be the Schools Forum rep for special schools moving forward. The Chair and Deputy Chair are happy to accept Tania's continued support to the Forum.

5. Schools in Financial Difficulty Update (Maintained Schools and Academies Update) (Mustafa Salih/Deb Luter)

MS went through the slides produced by Deb.

JA – Noticed a pattern - are there any types of schools in financial difficulty across the board?

DL - No pattern because as we are the lowest funded LA the funding is starting to affect all our schools and those who have lower pupil numbers are still balancing their budgets.

DF – Quantify the value of the deficits – how big is it?

Action: MS – We can send that around and make sure that's logged. We will also send a powerful message that the data is showing a worst situation for half of the schools.

NE – A worrying review about efficiency improvements in schools when we have already got deficits - is this after the spending review announcements.

MS – These positions were done before the spending announcements and had hoped that the spending announcement would inject some extra funding. Trying to gather a picture with other LAs. The spending announcement doesn't seem to offer a lot of extra funding for schools; it won't make it worse but not better. The spending review of 1% real terms increase for schools.

JA – Are there any schools being closed and are there any opportunities for schools in SG to work together to improve their position.

MS – Yes to the second question – what else can we do how we work together.

Closing schools – that hasn't appeared has a solution or a requirement, so no we are not looking any closing schools.

DB – We talked at the Cabinet meeting about how a Trust can pool its finances and use the money in a different way. We can move the money around because it is one budget and manage the monies in a different way which is sharing the general annual grant to that of the smaller schools to balance the budget and we are able to generate as a surplus in larger schools.

SW – The benchmarking and per pupil amount being useful here and the message we are trying to convey.

DL – The Trust are reporting on their finances but they may have schools that are not South Glos schools and they don't report it at individual school level. Even though they don't report at individual school level their financial position is worsening.

LL – Does it reference the Trust to operate in a way that maintained schools don't – clarity before the information is made public.

DL – We don't know what was included.

NE - This is at the same time Early Years had 3-4% increase in actual funding whilst there is no provision for covering NI and none of those grants for Early Years.

DL - In the past we have pulled together schools' leaders that have been able to go into another school to help them to balance their budget and we really need to think about putting that in place again from a pool of school experts and help some of those schools as the input of an headteacher can be a lot more powerful. It may be beneficial to pull together a Task and Finish group of colleagues from Schools Forum to help us plan out how to help schools in financial difficulty going forward.

DB – In terms of the Cabinet report, we took the opportunity to share some of the key messages. I talked about the Academy Trust perspective messages about the money being the same with Pippa talking about the pressures of schools in financial difficulty. In terms of public attention not many people were watching although some were accessing it remotely so we were able to take the opportunity to share key messages.

PO – Downend Voice - there is a real appetite around this and so much more about this on the national level and less that it is happening across the board in so many ways.

Great to have another update about the recent work of the F40 group. I had not realised they have now got 3 months to read it before the discussions happen. Realistic recommendations about lobbying central government and some of the things South Glos helps us with for example H&S, HR etc.

IB – Welcome to Cabinet and we welcome the Task and Finish report. We do have three months to consider the findings and the work has already started. Pippa and Dave to meet again and take this further and meet the recommendations in preparation for the October Cabinet meeting. I hope we will have a couple of months to really ensure that our message is landing in Whitehall. We will be referring before October.

PO - Thank you Ian for your continued support which is much appreciated.

DB – Thank you Ian – interesting opportunity to following this up with Claire Hazelgrove who came to visit Patchway Community School and I took the opportunity to meet with her. She wants to do all she can do to support in the Schools Forum meeting and I had a discussion with the Schools Standards Minister about the F40 and the relative challenge in the NFF and hope in terms of key messages they are shared and taken away.

NE - Met with Claire Young, MP, with early Years providers and she re-emphasised whether there is a route to the MPs not to invite but may be invite to a virtual session as they do value about spending the time keeping up the momentum.

6. Funding Update (Including Supplementary Grant) (Verbal) (Mustafa Salih)

Good news that the outturn position at the end of 2024/2025 has improved from what we forecast at Q3 of £1m. DSG has not worsened from Q3 to Q4; however, we have a significant in-year deficit of £11.4m. There is an overspend again on our annual allocation from the DfE for the High Needs budget. The cumulative deficit over the year was just under £39m and we are having to take measures to look at the banding rate system and top up rates such as the cluster funds and investing in more local expanding schools and we need to do that through the High Needs Working Group (HNWG) which is important and not diminishing. We keep in touch with other LAs with similar problems meeting their Safety Valve targets and the challenge continues.

A full report on the actual Outturn will be presented at the next Schools Forum.

7. Financial Regulations for Schools (Justine Poulton)

Justine produced a presentation.



Financial Regulations
for Schools.pptx

This is for the maintained sector only as Academies write their own financial regulations.

We will be offering some Microsoft teams short sessions to School Business Managers in September/October, to enable them to ask any questions they have about the new regs or any other queries or concerns they might have.

PO – Headteachers should also be encouraged and invited to all this information. Maybe discuss this at the Headteacher Executive briefing as I think many of us just do not know what this looks like.

JP – Would be happy for HTs to attend with SBMs and will reach out separately.

PO – The messaging from the LA about all things finance is still the responsibility of the HT even though the running of the finance is the SBM or SBL.

DB – Justine’s team provides internal audit for Olympus Academy Trust and I know our Trusts are grateful that we buy into that service and refine our practices.

8. Scheme for the Financing of Schools – DfE Directed Changes 2025 (Deb Luter)

This is a statutory document that LAs must have in relationship with the maintained schools. This is directed by the DfE and reviewed every year and make directed revisions. If they do have to update our schemes with those revisions we have to report them to the Schools Forum. The only change they have just updated is an extra item where a school’s budget share may be charged: the cost of an undisputed invoice for energy where a school has entered into an agreement with the Secretary of State for the supply of energy and failed to pay such an invoice (Regulation 23 of the regulations).

9. High Needs Working Group Update (Verbal) (Susie Weaver)

We met on the 7th May and it was in person at King’s Oak Academy. We recognise it is worth noting the engagement in the HNWG is strong and the LA’s offered share has really developed over the last 2 years.

Looking at the actions where we are an outlying EHCP, the team took us through the growth of SEMH and focused particularly in detail to understand that action in terms of training and QA and looked at the next steps and planned action and thinking about working through the South Glos Way.

We had a moderation exercise and looked at the annual activity of the banding and banding levels and looking at the outcomes of that. Of 53 pupils, 29 premium, 7 went down and 17 went up. Also looking at the following:

- theme 7 strand which is around post 16 and reducing and decreasing NEET.
- could we support the internship and guarantee a project.
- communication systems and bring back to Schools Forum.
- being able to have a separate governance and broaden it from HNWG to the newsletter and how to bring the newsletter to the governance team.

Action: Hilary Smith and David Jenkins going forward.

10. Any Other Business

NE – Are schools finding the free breakfast clubs a negative or positive on the financial position and are they beneficial or not?

Action: PO – We will bring this question into the planning of the next Schools Forum on how best to answer the question.

Pippa - SEND Inspection with the LA and schools taking place within the next 3 weeks. We are making a difference, we are a proactive Schools Forum and we are working together - thank you so much.

Meeting closed

South Gloucestershire Council

SCHOOLS FORUM

25th September 2025

Outturn 2024-2025 (Report) + Safety Valve Update (Verbal)

Purpose of Report

1. To update Schools Forum on the Dedicated Schools Grant and Safety Valve Outturn position for 2024/25.

Dedicated Schools Grant (DSG) Funded budgets

2. The Dedicated Schools Grant is reporting an outturn cumulative overspend of £38,915k, which is an improvement of £971k since Quarter 3. This arises from an in year overspend of £13,788k, Safety Valve payments relating to the DSG recovery plan (£2,000k), a council contribution from the Financial Risks reserve relating the Safety Valve agreement (£333k) and a brought forward deficit balance of £27,460k.

DSG Funding

3. The net DSG budget at outturn excluding academies and High Needs recoupment, is £154,773k. Table 1 below shows the original funding announced as of December 2023 and the various in year adjustments against the DSG for recoupment, Early Years census changes and High Needs Block changes.

Table 1 – DSG Funding Announcement

DSG Budget	Net £'000
Original Budget allocation (December 2023)	298,716
Adjustments and Recoupment	
• High Needs Block Direct Funding By EFA	-7,571
• Academy Recoupment	-125,961
• School Business Rates Adjustment	-2,726
• Early Years Block – updated Indicative Under 2s funding	741
• Academy Conversions (1 st April to 30 th June 2024)	-11,398
• High Needs Block – Import/Export Adjustment	-125
• Early Years Block – updated January 2024 Census	-583
• Academy Conversions (1 st July to 31 st October 2024)	-229
• Central Schools Service Block (Copyright Licences Increase)	18
• High Needs Block – Import/Export Adjustment	225
• Early Years Block – Summer Term Claims 2 year old working parents and Pupil Premium	916
• Early Years Block – Autumn Term Claims 2 year old working parents and Pupil Premium	2,750
Total revised DSG (March 2025)	154,773

4. The DSG funding covers four funding blocks, the Schools Block, the Central Schools Services Block, the High Needs Block and the Early Years Block.
5. The outturn under/overspend position for each funding block is provided in table 2 below (see column headed Outturn Unusable Reserve) and the key changes and risks in the subsequent paragraphs.

Table 2 – Funding position by Blocks

Funding by Blocks	Gross Budget	EFA / Other Income Budget	Budget Reserve (Usuable / Unusable Approved Q3)	Net Budget (DSG)	Gross Exp	EFA / Other Income	Outturn Unusable reserve	Net Exp	Over / (Under)
	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s
Schools Block:									
Total Schools Block - Primary & Secondary Schools (excluding Academies)	78,387	-9,920	470	68,937	82,866	-14,467	538	68,937	0
Central Schools Services Block:									
Total Central Schools Services Block	3,499	-155	18	3,362	3,598	-266	30	3,362	0
High Needs Block:									
Schools & Independent Providers (including Academies)	54,586	5,055	-15,419	44,222	60,177	-1,282	-14,673	44,222	0
Central Items	2,256	-303	40	1,993	2,250	-361	104	1,993	0
Total High Needs Block	56,842	4,752	-15,379	46,215	62,427	-1,643	-14,569	46,215	0
Early Years Block:									
Private, Voluntary & Independent Providers	34,836	-20	20	34,836	35,188	-316	-36	34,836	0
Central Items	1,628	-317	112	1,423	1,370	-196	249	1,423	0
Total Early Years Block	36,464	-337	132	36,259	36,558	-512	213	36,259	0
Total In-Year DSG & EFA Funding	175,192	-5,660	-14,759	154,773	185,449	-16,888	-13,788	154,773	0

Total DSG In Year Overspend	-13,788
DSG Deficit Reserve B/F	-27,460
DSG Safety Valve Agreement 2024-2025 (DfE Contribution £2,000k)	2,000
DSG Safety Valve Council Contribution from Financial Risks Reserve	333
Total DSG Deficit Reserve	-38,915

DSG Reserve:	£'000s
DSG Deficit Reserve B/F from previous years (Appendix 7 - Unusable Reserve)	-27,460
Approved Budget 2024/25	-10,041
DSG Safety Valve Agreement 2024/25 - Forecast	2,000
DSG Safety Valve Council Contribution from Financial Risks Reserve	333
Request increase draw on DSG Reserve at Quarter 1 (£660k)	-660
Request increase draw on DSG Reserve at Quarter 2 (£3,056k)	-3,056
Request Increase draw on DSG Reserve at Quarter 3 (£1,002k)	-1,002
Reduce draw on DSG unusable reserve at Outturn	971
Total DSG Deficit Reserve (Appendix 7 - Unusable Reserve)	-38,915

Schools Block

6. The Schools Block is reporting an outturn underspend of £538k, an improvement of £68k since Quarter 3. This is mostly due to a contingency provision held for late falling rolls or growth funding claims not being required.

7. The Central Schools Services Block is reporting an outturn underspend of £30k, an improvement of £12k since Quarter 3.
8. The Early Years Block is reporting an outturn underspend of £213k, an improvement of £81k since Quarter 3. This is mostly due to staffing costs where the start dates for employees filling vacancies were later than forecast, delays in CAPITA developments and a contingency provision being held to support increased reporting requirements was not required. It should be noted that the total cost of funding the termly claims from providers exceeded the pass-through funding amount received by the DfE, resulting in an overspend. This has been offset against the underspend within the centrally retained allocation.
9. High Needs Block is reporting an outturn overspend of £14,569k, an improvement of £810k since Quarter 3. The overspend position is before applying the £2,000k DSG safety valve payments received during 2024/25 and £333k council contribution.
10. The main areas where the outturn position increased or decreased by £100k or more compared to Quarter 3 relate to demand and/or price increases within the areas summarised below and supported by the changes in demand and price illustrated in the Table 3 below.
11. South Gloucestershire Special Schools and Placements made to Pathways Learning Centre (PLC) is reporting an outturn overspend of £954k, an increase of £351k since Quarter 3. This is due to an increase in demand of 36 placements which has been partially offset by the average weekly price being £63 per week less compared to Quarter 3. The increase in demand relates to 16 placements in Special Schools and the previously planned reduction of 20 placements at PLC from 1st September 2025 was reconsidered in November 2025, resulting in the reinstatement of the place numbers.
12. Post 16 (Further Education College, Independent placements and Alternative Provision) is reporting an outturn overspend of £499k, an improvement of £678k since Quarter 3. This is mostly due to 40 placements ending (£453k) and various other changes linked to annual reviews and pupil movers out of authority resulting in a net cost reduction of £225k.
13. Independent and Non-Maintained Special Schools is reporting an outturn overspend of £695k, an improvement of £738k since Quarter 3. This is mostly due to a reduction in the average weekly price of £71 per week and a reduction in demand of 5 placements compared to Quarter 3.
14. Statemented Support is reporting an outturn overspend of £1,471k, an increased overspend position of £380k since Quarter 3. This is mostly due to an increase in the average weekly price compared to Quarter 3. This has been partially offset against the reduction in demand. There were 214 new assessments which resulted in a net cost of £279k after offsetting against the contingency held for new placements, there has been an increase of £154k relating to 79 annual reviews where bandings increased, 10 plans ceased (£44k) and various other changes linked to payment protection, transfers in and out of Primary and Secondary Education resulted in a net cost reduction of £9k.
15. Other High Needs areas are reporting an outturn overspend of £55k, an improvement of £191k since Quarter 3. This is due to a few Demand Led areas where

Quarter 3 figures included contingencies for potential new provisions which did not materialise such as Hospital Education Service (£44k) and High Risk Group (£121k). The improvement has been partially offset by increased expenditure on other high needs areas including Sensory Support Service £42k, equipment £18k and other small changes £6k.

Table 3 - High Needs Demand and Price Table

High Needs Pressure areas	Outturn 2021/22	Outturn 2022/23	Outturn 2023/24	Quarter 1 2024/25	Quarter 2 2024/25	Quarter 3 2024/25	Outturn 2024/25
Independent and Non-Maintained Special Schools - Placements No.s	107	122	130	131	137	149	144
Average Weekly Price (38 wks)	£1,710	£1,614	£1,809	£1,789	£1,844	£1,818	£1,747
Statemented Support Provision including SG Pupils in OLA Schools No.	888	963	1,201	1,296	1,412	1,464	1,431
Average Weekly Price (38 wks)	£273	£269	£236	£232	£220	£216	£228
Post 16 - FE Independent Specialist Placements	27	28	37	38	43	44	43
Average Weekly Price (38 wks)	£1,184	£1,302	£1,037	£1,127	£1,300	£1,308	£1,257
Post 16 - FE Colleges	360	295	298	318	303	311	315
Average Weekly Price (38 wks)	£167	£184	£198	£131	£200	£187	£163
Post 16 Alternative Provision	53	57	143	155	155	170	164
Average Weekly Price (38 wks)	£378	£558	£433	£594	£623	£639	£615
Post 16 - Total Placements	440	380	478	511	501	525	522
Average Weekly Price (38 wks)	£255	£322	£358	£334	£425	£427	£328
Education other than at School SENHN No.s	7	13	19	26	31	31	24
Average Weekly Price (38 wks)	£681	£515	£521	£464	£390	£425	£580
Other Alternative Provision SENAP No.s	35	50	33	35	76	67	26
Average Weekly Price (38 wks)	£247	£366	£630	£802	£503	£507	£1,207
OLA Special Schools No.s	88	104	109	114	110	130	138
Average Weekly Price (38 wks)	£563	£606	£611	£668	£739	£676	£637
Early Years High Needs Support No.s (EHCPs only)	35	23	30	28	27	38	43
Average Weekly Price (38 wks)	£175	£201	£170	£354	£241	£187	£174
Special Schools No.s	492	517	557	592	602	608	624
Average Weekly Price (38 wks)	£561	£577	£616	£622	£623	£621	£618
Resource Bases No.s	139	145	154	158	156	147	142
Average Weekly Price (38 wks)	£570	£583	£471	£446	£454	£466	£497
PLC No.s	169	170	170	150	150	150	170
Average Weekly Price (38 wks)	£600	£622	£603	£657	£657	£657	£597

* during 2021/22 Alternative provision costs for Children in School monitored separately. In additional in 2023/24 all Post 16 learners not in school were moved to Post 16 Alternative provision.

Note the averages are calculated based on forecast outturn or actual number of placements as at outturn. The Quarter 1, 2 and 3 figures include contingency provision held for new placements, the outturn does not include any contingency provision and therefore the average price can swing significantly.

DSG Recovery Performance

16. The outturn position shows an overspend of £13,788k before applying the £2,000k DSG safety valve payment and £333k council contribution, which represents a net increase of £3,747k above the safety valve target for 2024/25.

17. The main pressure areas at outturn compared to our Safety Valve budget plan submitted to the DfE for 2024/25 relate to Independent Placements (£695k), Post 16 Education (£499k), High Needs Support in Primary and Secondary schools (£1,472k), Special Schools (£1,032k), Resource Bases (£198k) and OLA Special School and Resource Base placements (£984k). These pressures have been partly mitigated due to improvements from other DSG block funded areas (£681k), other Educational Support areas (£251k) and increase in block funding (£201k) when compared to the safety valve submission.

18. As previously reported to Schools Forum the Department continues to see an increase in the number of requests for Education, Health and Care Plans (EHCPs) and the cost of providing support to children and young people with an EHCP.

19. Insufficient local special specialist provision results in reliance on more expensive Independent and Non-Maintained Schools, Education other than at Schools and Alternative Provision Packages. Whilst this pressure has been partially mitigated by increasing provision at New Horizons and the opening of Two Bridges Special Free School in September 2024, the number of young people in Post 16 with Social, Emotional and Mental Health issues has increased resulting in the reliance of more costly Alternative Provision support due to insufficient specialist courses within Further Education.

20. Our latest safety valve submitted on 2nd April 2025 was based on a forecast outturn position for 2024/25. The Department for Education (DfE) has acknowledged receipt of our return and confirmed we will receive our first 2025-26 Safety Valve Payment. In addition, they will be assessing our future monitoring report to ensure our plans for management of the DSG and local SEND system represent the best available value for money under the current statutory arrangements. We have been allocated a SEND adviser to support us in ensuring our plans are as robust as possible. An initial meeting took place with Mustafa Salih and a follow up meeting is due to take place shortly with other finance and SEND colleagues included.

21. To mitigate the ongoing pressures, the People Department continues to work closely with School representatives in the High Needs Working Group and Schools Forum looking at future options such as offering more targeted prevention support which should reduce the number of EHCP requests and looking at cost productive ways of increasing local provision Specialist Provision.

Author

Caroline Warren, Finance Business Partner
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SOUTH GLOUCESTERSHIRE COUNCIL

SCHOOLS FORUM

25th September 2025

Place Planning (Presentation)

SOUTH GLOUCESTERSHIRE COUNCIL

SCHOOLS FORUM

25th September 2025

Ofsted SEND Inspection (Verbal)

South Gloucestershire Council

REPORT TO: Schools Forum for Consultation

25th September 2025

Year 3 of New Banding and Top-Up Funding Arrangements Review and Update

Purpose of Report

1. To update the Forum on moving to the removal of protected transitional funding on the SEND Top-Up and Banding Arrangements. In February 2022 The Council, through Cabinet and Full Council, approved the implementation of new banding and Top-Up Funding arrangements with specific transitional protection to apply over academic years 2022/23 to 2024/25.

Recommendations

This paper updates the Forum on the process undertaken and its outcome to support removal of protected transitional funding and invites views from the Forum.

Policy

2. The School and Early Years Finance (England) Regulations set out requirements local authorities must follow in establishing funding arrangements for schools. These regulations are supplemented by the DfE's High Needs Operational Guide that provides specific guidance regarding the funding arrangements for supporting pupils with special educational needs and disabilities (SEND).
3. The source of funding to support schools and SEND pupils is a ring-fenced grant received by local authorities known as the Dedicated Schools Grant (DSG). Local Authorities must distribute an element of the Schools Budget to their maintained schools using a formula which accords with the regulations made by the Secretary of State for Education and enables the calculation of a budget share for each maintained school. The financial controls within which delegation works are set out in the Council's Scheme for the Financing of Schools.
4. The DSG is allocated to local authorities in 4 blocks as follows:
 - Schools Block: relates mainly to funding for mainstream school budget shares
 - High Needs Block: relates to funding to support children and young people with Special Educational Needs and Disabilities (SEND),

- Early Years Block: relates to funding for supporting nursery education providers and other general early years education responsibilities,
 - Central Services Block: relates to funding to support LA statutory responsibilities relating to schools.
5. Requirements relating to each of the blocks and the DSG in totality are covered in the regulations previously mentioned.

Background

6. South Gloucestershire Council carried out a review of how Top-Up Funding (TuF) and banding is undertaken and found that the previous system was very complex, decisions were not always consistent and proportionate to the assessed needs of the children and young people. This often led to confusion for parents, schools and officers and a lack of transparency.
7. In January 2021, a working group, led and facilitated by 2 independent SEN consultants, was commissioned to carry out this review.
8. The review highlighted the previous complex and confusing arrangements including a plethora of funding allocation methodologies (see report from Dec 24 for more details) and the need to move to a universal banding and TuF system to instil clarity and transparency for all stakeholders. As a result, new banding and top-up arrangements were adopted from September 2022.
9. The previous approaches also created a lopsided system within South Gloucestershire. The review found that South Gloucestershire was characterised with more children being identified as requiring an EHCP than other comparable LAs. The funding allocated as TuF was, on average, much higher than in most other local authorities across the country. Our local SEND system could not be sustained whilst we continued to be such an extreme outlier on this important measure.
10. The gap between the funding we receive and our expenditure is significant and continues to be a challenge with increased demand and rising costs.

Safety Valve agreement

11. The Council has a Safety Valve agreement with the DfE with the objective of achieving an in-year balanced DSG budget and repaying the cumulative deficit. As part of our original and revised safety valve agreement, developing a new funding mechanism and getting the Local Authority spend to be more in line with other Local Authorities both nationally and locally, forms part of our agreement. Under that agreement, as long as we maintain progress towards the agreed targets, we receive an additional £25m (in tranches from 2021-22 to 2026-27) to help reduce the historical, cumulative deficit. To date, all scheduled payments have been received.
12. It is important to note that without the DfE's injection of £25m, the Council and schools would have needed to save that amount themselves requiring a much greater and longer impact on schools.

New Banding, TuF System and transitional protection

13. The new banding and top-ups were introduced from September 2022 and were introduced with significant transitional protection.
14. Previous data reported to Schools Forum showed that the reductions in our top-up levels needed to reach the England averages would need to be: Primary - 40%, Secondary - 43%, Special - 20%, PRUs - 54%, Independent/Private - 21%
15. To ensure we took manageable steps to a balanced budget position the aim was to move **towards** the England Averages for the proportion of pupils supported with EHCPs and top up levels rather than **to** them.
16. Top up level changes approved were as follows:
 - Prim/Sec: 25% reduction rather than 40%/43%
 - Spec: 14% reduction rather than 20%
 - PRU: 17% reduction rather than 54%
 - Ind/Priv: 10% reduction rather than 21%
17. It was important to apply these changes in a manageable manner and this was achieved by applying phased, transitional protection over a 3-year period for primary and secondary schools.
18.
 - AY 2022/23 - 7%
 - AY 2023/24 - 10%
 - AY 2024/25 - 8%

19. We are now at the point where the protection funding is scheduled to cease (from Sept 25) and another major piece of work was carried out to assess the impact.

Due Diligence process

20. As in previous years, a sample of EHCPs were reviewed in detail to assess whether the new TuF rates would provide sufficient funding to enable schools to meet the needs as identified in Section F of the EHCP.
21. 40 EHCPs were reviewed from a representative sample of clusters, schools and bandings. The review team included school representatives (Special school HT), Educational Psychologists, EHCP Team representatives and finance representatives. This work took place over May, June and July of this year and each EHCP was reviewed thoroughly along with other supporting documents such as annual review meeting summaries and annual review school reports.
22. We would like to extend our sincere thanks to Tania Craig, Headteacher at New Horizons Learning Centre for dedicating precious time to be part of the review meetings and contributing a very important school perspective.

Results of Case Study review

23. For transparency, 1 EHCP was removed from the final summary as a result of the Section F within the current EHCP being updated for Specialist provision and confirmation from the EHCP team that this pupil was transferring to a Special School in September 2025. It was considered therefore that they were not a fair representation of placements in mainstream settings.
24. Overall, a review of the 39 EHCP's showed an overall surplus of £16.6k. The costings considered an estimated pay award and included the £6k notional SEN contribution from the school to each EHCP. Where there wasn't definable support to cost, an agreed view was taken using all information available to conclude what the support could be.
25. Below shows a summary of the review, separating between old ready reckoner EHCP's and ones under the new banding system. It indicates the old EHCP's under the Ready Reckoner system are phasing out and the new model is more representative of pupils needs.

Average deficit for 19 EHCP's entitled to protection (old RR's)	£311
Average surplus for 20 EHCP's under new banding with no protection	-£1,124
Average net surplus based on cases reviewed (39)	-£425

26. This is a welcome contrast to the previous years' findings where it was anticipated that removing all protection funding could mean a net shortfall.
27. It is important to highlight that there were some individual EHCPs where the assessed cost was greater than the TuF rate but in many cases within the schools affected there were other EHCPs where the TuF funding received was greater than the assessed cost. Where EHCPs assessed costs were greater than the TuF rate there appeared to be a pattern of them being historic EHCPs using the Ready Reckoner approach which gave little flexibility for schools in terms of how they met needs. Through the annual review process and over time these will phase out and the pattern of the case study reviews over the past 3 years appears to support this.
28. As highlighted in previous reports, it is important to remember that schools can seek to have the banding level of an individual EHCP reviewed through the annual review or an emergency review. That is and will continue to be available for any school where the TuF funding can demonstrably be shown to be insufficient to meet the needs identified in the EHCP.
29. The number of pupils still eligible for transitional payment protection has reduced significantly with 22% remaining eligible as at March 25 compared to 73% at our starting point. This rose to 78% as at March 23 due to EHCP's given between September 22 and February 23 also being awarded transitional funding.

Ready Reckoner Numbers						
	Snapshot Number	Number qualifying for PP	Number of Pupils who didn't qualify for PP	Year 1 (number of Pupils who didn't qualify)	Year 2 (number of Pupils who didn't qualify)	Year 3 (number of Pupils who didn't qualify)
Aug-22	793	583	184	26		
Mar-23	909	709	173	27		
Mar-24	1,107	458	489	25	*135	
Mar-25	1,309	287	854	16	112	**40
Head Count Information						
	Headcount	Leavers	New	Total		
Aug-22	861	-143	75	793		
Mar-23	793	-61	177	909	***	
Mar-24	909	-213	411	1,107		
Mar-25	1,107	-239	441	1,309		
* 95 stopped qualifying for PP in Year 2 through the percentage reduction and 39 due to banding changed / annual reviews						
** 14 stopped qualifying in Year 3 through percentage reduction and 26 due to banding changes / annual reviews						
***Note of the 177 new assessments awarded 140 qualified for PP						

30. In last year's report, it was highlighted that a key area of improvement was clarity within Section F is needed in respect of what support forms part of the core education offer and what genuinely requires additional funding. This would improve parents, schools and the LA understanding of what the top up funding is for. Local Authority Officers were conducting a piece of work to investigate how the section F of an EHCP can be improved but this is currently on hold until we know what the SEND announcement due in October contains.

31. The conclusion of the sampling exercise does give confidence that the removal of protected transitional funding is manageable for schools and we can proceed to the planned removal of Transitional Protection. Original plans were to implement from September 25, however we do not intend to back date and therefore will remove the transitional protection from October 25.

Author:

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SOUTH GLOUCESTERSHIRE COUNCIL

SCHOOLS FORUM

25th September 2025

HNWG (Verbal)

South Gloucestershire Council

SCHOOLS FORUM

3 July 2025

Schools Forum Forward Plan 2025

Sept 2025 25	Microsoft Teams	
	A minutes Silence -Dave	Chair/All
	Outturn 2024-2025 report + Safety Valve Update (Verbal)	Caroline Warren/ Mustafa Salih
	Place Planning (Presentation)	Mike Wheeler
	Ofsted SEND Inspection (Verbal)	Hilary Smith
	Year 3 of New Banding and Top-Up Arrangements Review and Update (EHCP Breakdown)	Mustafa Salih
	HNWG Update (Verbal)	Susie Weaver

Nov 2025	06	Proposed in person meeting – venue to be confirmed	
		Current Position on school places across schools' system in South Gloucestershire Update	Hilary Smith
		High Needs Working Group Update	Susie Weaver
		Election of Vice Chair	Chair/Mustafa
		School Budgets 2025-2026 (verbal update)	Mustafa Salih
		Schools in Financial Difficulty Update	Deb Luter
		Q1 Financial Performance Report 2023-2024	Caroline Warren

Dec 2025	04	Microsoft Teams	
		Schools Budget Announcement	Mustafa Salih
		Implementation of new banding and top up arrangement for special schools and alternative provision	Mustafa Salih
		Free Breakfast Clubs financial position (Are schools finding the free breakfast clubs a negative or positive on the financial position and are they beneficial or not?)	Jo Briscoombe
		Children and Education Transformation Programme (Report/Presentation)	Mustafa Salih / Hilary Smith

ANY OTHER BUSINESS