

Schools Forum

Date: Thursday 24th September 2026

Time: 16.30 hrs

Location: TEAMS

Chair: Ross Newman

Members of the Committee

Ross Newman (Chair)

Julia Anwar

Nicky Edwards

Paul Evry

Dave Farr

Kim Garland

Florence Hiatt

David Jenkins

Nicola Jones

Jonathan Keohane

Ruth Laing

Louise Leader

Tania Craig (Deputy Chair)

Elly Owen

Will Roberts

Fr. Malcolm Strange

Susie Weaver

David Williams

Sue Wright

Appropriate Officers attending:

Mustafa Salih

Hilary Smith

Caroline Warren

Michelle Palmer

Deb Luter

Councillors attending:

Ian Boulton

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

Telephone: (01454) 863253

Enquiries to: Mustafa Salih, Service Director, Resources and Business; Telephone (01454)
862548 or E-mail mustafa.salih@southglos.gov.uk

Public Rights to Information and Attendance at Meetings

YOU HAVE A RIGHT TO:

- Attend all Council, Committee and Sub-Committee meetings unless the business to be dealt with would disclose 'confidential' or 'exempt' information.
 - Inspect agendas and public reports five days before the date of the meeting.
 - Inspect agendas, reports and minutes of the Council and all Committees and Sub-Committees for up to six years following a meeting.
- Inspect background papers used to prepare public reports for a period of up to four years from the date of the meeting. (A list of background papers to a report is given at the end of each report). A background paper is a document on which the officer has relied in writing the report.
- Have access to the public register of names, addresses and wards of all Councillors with details of the membership of all Committees and Sub-Committees.
- Have a reasonable number of copies of agendas and reports (relating to items to be considered in public) made available to the public attending meetings of the Council, Committees and Sub-Committees.
- Have access to a list setting out the decision-making powers the Council has delegated to their officers and the title of those officers.
- Copy any of the documents mentioned above to which you have a right of access. There is a charge of 15p for each side of A4, subject to a minimum charge of £4.
- For further information about this agenda or how the Council works please contact Mustafa Salih (01454) 862548 or e-mail mustafa.salih@southglos.gov.uk
- Also see our website www.southglos.gov.uk

EMERGENCY EVACUATION PROCEDURE

In the event of a fire alarm, fire drill or other emergency, signalled by a continuously ringing bell, please leave from the room via the signs marked "Exit".

OTHER LANGUAGES AND FORMATS

This information can be made available in other languages, in large print, Braille or on audio tape. Please phone (01454) 868686 if you need any of these or any other help to access Council services.

AGENDA

1. WELCOME AND INTRODUCTIONS
2. APOLOGIES FOR ABSENCE (Ross Newman)
3. DECLARATIONS OF INTEREST (Ross Newman)
4. ANY OTHER ITEMS THE CHAIR DECIDES ARE URGENT (Ross Newman)
5. MINUTES FROM 02nd JULY MEETING (Ross Newman)
6. CURRENT POSITION ON PLACES ACROSS SOUTH GLOUCESTERSHIRE
(Presentation) (Mike Wheeler)
7. SCHOOLS FORUM MEMBERSHIP UPDATE AND ATTENDANCE (Report) (Michelle Trigg)
8. OUTTURN 2025-2026 (Report) (Caroline Warren)
9. SEND REFORM UPDATE (Standing Item) (Verbal) (Mustafa Salih)
10. SCHOOLS FORUM FORWARD PLAN
11. ANY OTHER BUSINESS:

South Gloucestershire Schools Forum

Minutes of Meeting held on 02nd July 2026

Location: Teams

Chair: Pippa Osborne

Forum Members

Pippa Osborne (Chair)	Headteacher Christ Church Junior School
Tania Craig (Deputy Chair)	Executive Head Teacher, New Horizons Learning Centre
Julia Anwar	Chief Operating Officer, Olympus Academy Trust
Nicky Edwards	Early Years representative
Paul Evry	Chief Finance Officer, Mosaic Partnership
Dave Farr	Finance Manager, Leaf Trust
Kim Garland	Headteacher, Brimsham Green Secondary School
Florence Hiatt	Head of Additional Learning Support, SGSC
David Jenkins	Governor, Crossways Schools
Jonathan Keohane	Headteacher Callicroft Primary School/Olympus School
Ruth Laing	Head of Early Years and Community
Louise Leader	Special Academy Representative
Ross Newman	CEO of the Leaf Trust representing Academies
Elly Owen	District and Branch Secretary – South Gloucestershire NEU
Will Roberts	Chief Executive, CSET
Fr. Malcolm Strange	Mosaic Chaplaincy Lead
Daniel Walton	Pathways AP Headteacher Representative
Susie Weaver	Executive Director, Cabot Learning Federation
David Williams	Diocese of Gloucester
Sue Wright	Finance Director CSET
Madeleine Roberts (Reserve)	Director of Finance, Enable Trust

Executive Councillors:

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

Officers:

Mustafa Salih, Service Director Resources and Business
 Caroline Warren, Finance Business Partner
 Deb Luter, Senior Accountant - People (Children)
 Claire Paines, Schools Finance Officer

Guests: Meryl Campbell – Teacher at John Cabot Academy, and Joint Secretary of NEU South Glos District.

APOLOGIES FOR ABSENCE

Chris Sivers, Tania Craig, David Williams, Paul Evry, David Jenkins, Fr. Malcolm Strange, Flo Hiatt, Elly Owen, Andrew Cummings

1. **Declarations of Interest** – None
2. **Any Other Items the Chair decides are urgent** – None
3. **Minutes of last meeting** – 07th May 2026

MC (JCA) – raised a matter regarding point 5, Trade Union Facilities Fund. The issues under discussion are still live and require further discussion, negotiation and agreement with trade unions before implementation.

MS – Ongoing discussions are taking place with a trade union body. A meeting is being arranged to continue those discussions and review the proposed scheme. Any impacts or changes arising from the discussions will be reported to the next Schools Forum meeting. An item for the agenda is proposed for the next meeting (Term 1 next year) to provide an update. Following that update and consideration of any changes, the matter can be closed.

Remainder of the Minutes of the meeting were approved as an accurate record.

4. **Schools in Financial Difficulty Update (Deb Luter)**

The document provides an update on the financial position of maintained schools in South Gloucestershire and the support being provided to schools experiencing financial difficulties.

Overall Financial Position

- Maintained schools ended the last financial year in a £0.5 million surplus, a significant improvement from the £0.4 million deficit forecast at the revised budget stage.
- Despite this improvement, cumulative school balances have declined over recent years, falling from £6.8 million in 2021/22, reflecting wider financial pressures across the education sector.

Performance of Schools Previously Identified as in Financial Difficulty (SIFD)

- Last year:
 - 22 schools were not considered in financial difficulty.
 - 6 schools were in Category A (balanced budgets for the current year but deficits forecast in future years).
 - 25 schools were in Category B (unable to submit a balanced budget).

- All Category A schools remained in surplus, with five performing better than expected.
- Of the 25 Category B schools:
 - 5 achieved a surplus.
 - 16 improved their deficit position.
 - 4 reported slightly worse deficits due to specific local circumstances.

Impact of Financial Support

- 16 Category B schools received support from a School Resource Management Adviser (SRMA) programme funded by the Department for Education.
- Of these:
 - 12 improved their deficit position.
 - 1 moved into surplus.
- The improvements are attributed to the work of schools, the Schools Finance Team and wider local authority support.

Current Position (2026/27 Budget Submissions)

- Out of 53 maintained schools:
 - 27 are not considered SIFD.
 - 6 are Category A.
 - 20 are Category B.
- This shows progress compared with the previous year:
 - Non-SIFD schools increased from 22 to 27.
 - Category B schools reduced from 25 to 20.

However, Category B schools collectively still face significant financial pressure, and the overall projected position for maintained schools is a £1.7 million deficit.

Key Challenges

- Falling pupil numbers are a major factor behind worsening financial positions for some schools and are the reason three schools entered Category B for the first time this year.
- Although some schools remain in deficit, the projected 2026/27 position has improved by more than £1.8 million compared with forecasts made earlier in the year.

Ongoing Support

- Schools in financial difficulty will continue to receive:
 - SRMA support.
 - Recovery meetings.
 - Financial management support from Schools Finance, Admissions and Education Improvement teams.

- Changes to criteria around surplus places and falling rolls funding have increased the number of schools eligible for financial assistance.

Overall Message

While South Gloucestershire schools continue to face significant financial challenges, particularly due to falling pupil numbers, there has been a marked improvement in financial performance over the last year. Fewer schools are now classed as being in significant financial difficulty, and ongoing support measures are helping schools improve their financial sustainability.

5. Summary of the SEND Reform Plan (Hilary Smith)

The SEND Reform Plan was submitted on 19 June and sets out South Gloucestershire's commitment to improving SEND provision across the local area partnership. It responds directly to findings from the SEND inspection, which identified that experiences and outcomes for some children are inconsistent, particularly for those with social, emotional and mental health (SEMH) needs.

Strengths Identified

The plan builds on existing strengths, including:

- Strong collaboration between the local authority, schools and health partners.
- An increasingly inclusive school system.
- Established cluster arrangements that support partnership working.
- A commitment to shared leadership and accountability.

Main Objectives

The reform programme aims to:

- Improve outcomes for all children and young people with SEND.
- Increase inclusion within mainstream schools.
- Build workforce capability.
- Improve early identification of needs.
- Strengthen co-production with families and stakeholders.
- Work towards greater financial sustainability.

Five Key Areas of Focus

1. Workforce Development and Early Identification

- Upskill staff across education settings.
- Improve early identification of SEND.
- Reduce referrals for assessments, suspensions, exclusions and specialist placements.
- Introduce an "Experts at Hand" model, giving schools access to specialist advice and expertise.

2. Inclusion and Mainstream Provision

- Support more children within mainstream schools.
- Reduce reliance on specialist placements.
- Develop a local inclusion framework with shared accountability across schools, MATs, local authority and health partners.

3. Capacity and Infrastructure

- Increase specialist SEND provision within mainstream schools.
- Create local specialist places closer to home.
- Reduce expenditure on independent and out-of-area placements through capital investment.

4. Post-16 and Transition

- Improve post-16 opportunities and transitions.
- Increase local education, employment and training pathways.
- Reduce the number of young people becoming NEET or requiring expensive out-of-area provision.
- Support young people to develop skills needed to access opportunities.

5. Engagement and Co-production

- Build parental confidence and trust.
- Embed a system-wide approach to engagement and co-production.
- Implement a co-production charter developed with the Parent and Carer Forum.

Funding and Potential Benefits

If approved, the authority expects to receive:

- £2.063 million revenue funding (primarily for the Experts at Hand programme).
- £4.611 million capital funding for new inclusion bases.
- Approximately £50 million towards the existing SEND deficit.

Next Steps

Work has already begun ahead of funding approval, including:

- Recruiting a programme manager and specialist staff.
- Developing a SEND data dashboard.
- Reviewing governance arrangements.
- Engaging stakeholders in ongoing co-production.
- Preparing for delivery from Quarter 2 (from 1 July).

Key Discussion Points

During the meeting, members acknowledged:

- The submission timescales were extremely tight.
- Stakeholder engagement was undertaken as far as possible but will need to expand significantly during implementation.
- True co-production will be a major focus of the next phase.
- South Gloucestershire is considered to be in a stronger position than many authorities because of its established cluster model and existing investment in inclusion.

Overall: The plan represents a significant programme of SEND reform focused on inclusion, early intervention, local provision, workforce development and stronger partnership working, with the potential to attract over £56 million in support if approved.

Summary of the SEND Reforms Governance and Plan (Mustafa Salih)

The PowerPoint presentation explains how South Gloucestershire is organising and delivering its SEND (Special Educational Needs and Disabilities) Reform Programme, with a focus on improving inclusion, outcomes, and financial sustainability.

Governance Structure

- Council Cabinet sits at the top of the governance structure and will approve key decisions.
- The Children's Outcomes Board will act as the DfE-required SEND Inclusion and Alternative Provision (AP) Board.
- A SEND and AP Reform Steering Group of senior officers will oversee implementation and drive the reforms forward.
- The High Needs Working Group will work closely with the Steering Group to ensure collaboration on decisions, priorities and progress.

Four Main Reform Building Blocks

The work is organised into four DfE-defined areas:

Strengthening Inclusion Across Education Settings

- Early years support.
- Strengthening the universal SEND offer.

Access to Specialist Support and Local Placements

- Development of the "Experts at Hand" model.
- EHCP reforms.
- Increasing local specialist provision.

System Leadership, Partnership and Co-production

- Governance development.
- Parent, carer, child and young person participation.
- Embedding co-production across all workstreams.

Encouraging an Inclusive Culture

- Workforce development and training.
- Reviewing financial arrangements to support inclusion across schools.

Supporting Workstreams

Additional enabling functions will support all areas:

- Financial sustainability and SEND deficit management.
- Communications and culture change.
- Data, performance monitoring and intelligence.

Main Reform Priorities

The plan aims to:

- Improve early identification of SEND needs.
- Build workforce capability.
- Support more children within mainstream schools.
- Reduce reliance on specialist and out-of-area placements.
- Expand local specialist provision.
- Improve post-16 pathways, employment and training opportunities.
- Strengthen engagement with parents and carers through co-production.

Funding Requested

South Gloucestershire expects:

- £2.063 million revenue funding for programmes such as Experts at Hand.
- £4.611 million capital funding for inclusion bases and provision.
- Around £50 million towards the existing SEND deficit.

Key Messages

- The council believes it is starting from a strong position due to existing partnership working and its cluster model.
- More detailed co-production with schools, parents and partners will happen during implementation, following a very tight national submission timescale.

- The overall goal is a more inclusive, sustainable SEND system that improves outcomes for children and young people while reducing financial pressures.

6. Scheme for Financing Schools – DfE Directed Changes (Caroline Warren)

This report is an annual update to Schools Forum regarding the Scheme for Financing Schools.

Key points:

- The scheme applies only to maintained schools.
- Academies are not covered by this scheme because they operate under arrangements set by the ESFA (Education and Skills Funding Agency) / DfE (Department for Education).
- There have been no directed changes requiring amendment to the scheme.
- There have been no requests to update the wording of the scheme.
- As a result, the current scheme will remain unchanged.
- The purpose of the report is simply to inform Schools Forum members that no review or amendments are required this year.

Therefore, the annual review found no required changes to the Scheme for Financing Schools, so the existing arrangements for maintained schools will continue unchanged.

7. High Needs Working Group Update (HNWG) (Susie Weaver)

The HNWG met on the 1st July and the meeting focused on ensuring the High Needs Working Group remains aligned with its original Terms of Reference as it moves into a new phase of SEND reforms and transformation.

The group reviewed its seven Terms of Reference and agreed they remain fit for purpose. Key priorities include:

- Ensure improving outcomes for Children and Young People (CYP) with Special Educational Needs is central to the work of the group.
- Ensure the voice of the CYP and their families is evident and influencing the work of the group.
- Maintain oversight of the programmes for training and development of education professionals in early years settings and schools contributing to the delivery of the HNWG's strategic plan aimed at bringing the High Needs Block into an in-year balanced position, and which is sustainable over the long term.
- Receive regular quantifiable updates from lead professionals in line with the themes identified by the HNWG.

- The group will monitor the cumulative High Needs Block deficit and assess the impact of the implemented strategies.
- Contribute to the evaluation of the effectiveness and implementation of South Gloucestershire's SEND Strategy for the Local Area to ensure that high quality provisions for every child with SEND is delivered within an inclusive environment, at affordable costs and making efficient use of financial resources.
- Take account of local policy and national policy and legislation for SEND.

HNWG July 2026 Update

- Spring term scheduling – we took a planned pause whilst we supported the Local Area Partnership focus on developing and submitting the SEND reforms plan.
- July meeting - new proposal for governance arrangements, shared explored and considered by HNWG as part of structural developments that underpin readiness for reforms.
- Detailed overview of the building blocks which outline the workstreams shared by Local Authority team.
- Discussion time given to the interplay and connections of the different boards and consideration given to the focus areas and connections across and through the various groups and workstreams.
- HNWG aiming to consider in the September meeting the core focus and strands of the building blocks and identify 3-5 main areas to shape the work of HNWG during 2026-27.
- Looking to continue to invest in local area partnership and to consider how to communicate headline messages early with further clarity and confirmation to come through following updates from the DfE.
- Forward planner, Action Log and comms plan confirmed ahead of September meeting. Dates for November onwards to be scheduled and shared with the group in due course.

8. Schools Forum Forward Plan

Sept 2026	24th	Microsoft Teams	
		Current Position on Places across South Gloucestershire (presentation)	Mike Wheeler
		Schools Forum Membership update & Attendance	Michelle Trigg
		Outturn 2025-2026 Report	Caroline Warren

		SEND Reform update (standing item) Verbal update	Mustafa Salih
--	--	---	---------------

9. AOB

- Meeting format for next year: A new hybrid model was proposed and agreed. Meetings will alternate between:
 - One meeting held online via Teams
 - One meeting held in person
- Meeting location: The in-person meetings will be held at Badminton Road, as it is the main office and considered a central location. The previous practice of changing venues will cease.
- Feedback on hybrid meetings: Participants felt the hybrid approach worked well, allowing:
 - Broader attendance from those unable to travel
 - Contributions from online attendees
 - More robust discussions during in-person sessions
- **Approval:** Forum members present and online indicated their agreement with the proposed alternating hybrid model.
- Appreciation was expressed to Marwood School for hosting the meeting. Sadly, Will was unable to attend due to an Ofsted inspection at one of his schools.
- New Chair for Schools Forum: Discussions have been ongoing about appointing a new Chair from September. As no volunteers came forward during the meeting, Ross Newman (Leaf Academy) was proposed based on his skills, experience, and involvement with the forum. We have had that seconded as well. Ross agreed to take on the role.

PO – So Ross congratulations, It is an amazing committee and it is such a testament to that close working relationships.

Key decisions:

1. Adopt an alternating online/in-person hybrid meeting model next year.
2. Use Badminton Road as the permanent venue for in-person meetings.
3. Ross Newman to become the new Schools Forum Chair from September.

Andy Watson – “This is my last meeting with the forum. So as a governor on the board, thank you very much for the opportunity to be with you over the last four years. It's been an absolute honour and privilege to really see how much hard work the board puts into ensuring children's education in the authority is the best it possibly can be.”

And finally, a message from the outgoing Chair, Pippa

“It really, really has been an honour and a pleasure to be part of this group and then take on chair of the group. And thank you to all of you and to colleagues past and present as well, who have contributed to make it so effective. So, maybe I'll turn up now and again and be an observer and see how it's all going. I hope everyone has a good end of term and a lovely summer break for those who are having one. Thank you so much.”

Meeting closed

South Gloucestershire Council

SCHOOLS FORUM

24th September 2026

Current position on Places across South Gloucestershire (Presentation)

South Gloucestershire Council

SCHOOLS FORUM

24th September 2026

Schools Forum Membership and Constitution (for recommendation)

Purpose of Report

The purpose of this report is to provide Schools Forum with an update on Membership as of September 2026 and to seek approval for the outlined recommendations.

Background

1. In accordance with the Schools Forum Constitution, the Forum is required to review its membership annually. This report aims to:
 - (1) Review any current or anticipated vacancies, and
 - (2) Assess the Forum's composition in light of school academisation as of August 2026.
2. For reference, the Schools Forum Constitution mentioned in this report is available on the [Schools Forum page](#).
3. Membership has been reviewed using data from the Summer 2026 Schools Pupil Census. This data is relevant for determining representation from Maintained and Academy Primary and Secondary schools. Other sectors are required to have at least one representative, regardless of pupil numbers.

Updates to Membership

4. The most recent membership list, dated September 2026, is available on the Schools Forum webpage and attached as Annex 1.
5. From January 2026, Crossways School has joined The Leaf Trust, this has not impacted the membership seats.
6. Table one shows the makeup of School's Forum Membership from September 2026, which is the current position.

Table 1: 2026 SF Membership (from September 2026)

	Pupil Numbers (after Mosaic academisation)	% of Pupil Numbers	Pro-rata of 17 SF Members to pupil Nos	Notes
Primary Maintained	10934	27%	4.5	Assume round down to 4

Secondary Maintained	1622	4%	0.7	Assume round up to 1
Academies	28,496	69%	11.8	Assume round up to 12
	41,052	100%	17	
1 Maintained Special School			1	
1 Academy Special School			1	
1 PRU			1	
Total Schools reps			20	

Vacancies

7. There are currently **seven** vacancies on the Schools Forum:

- Maintained Primary Headteacher / Headteacher Representative (x2)
- Maintained Primary Governor Representative
- All Through MAT Academies (x2)
- Primary MAT
- Secondary Headteacher / Headteacher Representative

8. The position of Headteacher /Headteacher rep(s) from Maintained Primary will be taken forward by the Chair.

9. The position for Headteacher /Headteacher rep(s) from Secondary Academy and All Through MAT will be taken forward by the Deputy Chair through the Academies Group.

10. In accordance with Education & Skills Funding Agency guidance, membership review remains a standing item on each meeting agenda.

11. The membership list in Annex 1 is open for review by Forum members. Any updates (e.g., vacancies, new terms, new members) should be reported to the author.

Resignations / Appointments / Nominations

12. We have 1 new member to the forum

- Daniel Walton (PLC) (replacing Louise Leader)

13. We have 2 representative who has changed roles.

- Louise Leader (changed to special Academy rep)
- David Jenkins (changed to Governor for Hambrook Primary School)

14. We have 2 representatives who have stood down / resigned as a member of the forum.

- Pippa Osborne (Chair – Primary Maintained)
- Andy Watson (Primary MAT LEAF Trust)

15. The position for Chair has been nominated and elected at the 02nd July Forum.

16. The position of Head/Head rep/s from Primary MAT will be taken forward by the Chair through the Academies Group.

Substitution Vacancies

17. The following substitute vacancies remain:

- Maintained Primary Headteacher / Governor (x2)
- Secondary Academy

18. 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.

Terms of Office

19. Under the Schools Forum Constitution, members are appointed for a four-year term of office and may be re-elected at the end of their term, provided they continue to meet the eligibility criteria for membership. A review of the current membership confirms that no terms of office are due to expire during 2026. Members will be contacted in advance of their term expiry date to advise them of the renewal process and any requirements for re-election or re-appointment.

Attendance

20. In accordance with the Schools Forum Constitution, members are expected to attend Forum meetings regularly and remain committed to fulfilling their role as a Forum member.

21. Attendance levels will be reviewed and reported to the Forum on a six-monthly basis as part of its ongoing governance arrangements. An attendance register (refer to Annex 2) will be included with the report for members' reference and transparency.

22. Whilst there are currently no members who have missed three consecutive meetings, the Forum recognises that this situation could arise in the future. Where attendance becomes a concern, the Chair and/or Clerk will contact the member concerned to discuss the importance of regular attendance and their ongoing commitment to participating in the Forum.

23. Members experiencing difficulty attending meetings are encouraged to notify the Clerk in advance so that any appropriate arrangements can be considered where applicable.

Recommendations

20. Schools Forum is asked to:

- a) Highlight any changes to the membership list in **Annex 1** to the report author for updating.
- b) Request that the Chair and Deputy Chair ensure all vacancies listed under **Updates to Membership** are filled, maintaining a representative and quorate Forum.

Contact information

Michelle Trigg

People's Business Support Manager

 Michelle.trigg@southglos.gov.uk

Annex 1: South Gloucestershire Schools Forum Membership (September 2026)

Type & number of Members	No	Sub-Group Represented	Forum Representative	Establishment	Term of Office/Position
Maintained school members (2 Primary Headteachers/2 Primary Governors/1 Secondary/1 Special/1 PRU representatives) = 7					
Primary	1 of 4	Headteacher/Headteacher Representative	VACANT		
Primary	2 of 4	Headteacher/Headteacher Representative	VACANT		
Primary	3 of 4	Governor Representative	David Jenkins	Governor – Hambrook Primary School	18/07/2023 (3 rd term)
Primary	4 of 4	Governor Representative	VACANT		
Secondary	1 of 1	Headteacher/Headteacher Representative or Governor	Kim Garland	Headteacher – Brimsham Green School	18/07/2023 (4 th term)
Special School	1 of 1	Headteacher/Headteacher Representative or Governor	Tania Craig (Vice Chair)	Executive Head Teacher, New Horizons	01-07-2025 (1 st term)
Special School Pupil Referral Unit (PRU) (only has to be 1)	1 of 1	Headteacher/Headteacher Representative or Governor	Daniel Walton	Headteacher - Pathways Learning Centre (PLC)	06/05/2026 (1 st term)

Type & number of Members	No	Sub-Group Represented	Forum Representative	Establishment	Term of Office/Position
Academies members (7 all-through / 3 Primary / 1 Secondary / 1 Mosaic representatives / 1 Special Academy) = 13					
Special Academy	1 of 1	Headteacher/Headteacher Representative or Governor	Louise Leader		06/05/2026 (1 st term)
All-through MAT OAT	1 of 12	Headteacher/Headteacher Representative or Governor	VACANT		
All-through MAT OAT	2 of 12	Headteacher/Headteacher Representative or Governor	Julia Anwar	Head of Business Operations (Olympus Academy Trust)	23/09/2025 (3 rd term)
All-through MAT OAT	3 of 12	Headteacher/Headteacher Representative or Governor	Jonathan Keohane	Headteacher – Callicroft Primary School (Olympus)	01-09-2024 (1 st term)
All-through MAT CSET	4 of 12	Headteacher/Headteacher Representative or Governor	Sue Wright	Finance Director (Castle School Education Trust) CSET	01/09/2023 (1 st term)
All-through MAT CSET	5 of 12	Headteacher/Headteacher Representative or Governor	Will Roberts	CEO (Castle school Education Trust) CSET	01/03/2023 (3 rd term)
All-through MAT CLF	6 of 12	Headteacher/Headteacher Representative or Governor	Susie Weaver	Education Director (Cabot Learning Federation)	19/09/2023 (4 th term)
All-through MAT CLF	7 of 12	Headteacher/Headteacher Representative or Governor	VACANT		

Primary MAT LEAF	8 of 12	Headteacher/Headteacher Representative or Governor	Ross Newman (Chair)	CEO (LEAF Trust)	14/06/2025 (3 rd term)
Primary MAT LEAF	9 of 12	Headteacher/Headteacher Representative or Governor	Dave Farr (replaced Debbie Beazer)	Finance Manager (LEAF Trust)	01-09-2024 (1 st term)
Primary MAT LEAF	10 of 12	Headteacher/Headteacher Representative or Governor	VACANT		
Secondary Academy	11 of 12	Headteacher/Headteacher Representative or Governor	VACANT		
Primary MAT Mosaic	12 of 12	Headteacher/Headteacher Representative	Paul Evry	CFO (Mosaic Trust)	(1 st term)
Non-school members = 6					
16-19 (COLL, MAT)	1 of 1	Representative	Florence Hiatt	Lead for Learning Support SGS College	10-05-24 (1 st term)
Early Years	1 of 2	Representative	Nicki Edwards	Early Years (Natural Choices Nurseries Ltd)	02/11/2023 (1 st term)
Early Years	2 of 2	Representative	Ruth Laing	Head of Early Years and Community Leaf Trust (King's Forest Primary)	09-05-24 (1 st term)
Diocese	1 of 2	Representative	Malcolm Strange	Diocese of Bristol	23/05/2025 (3 rd term)
Diocese	2 of 2	Representative	David Williams	Diocese of Gloucester	21/01/2025 (2 nd term)
Trade Union	1 of 1	Representative	Elly Owen	Trade Union Representative (NASUWT)	05-12-2024 (1 st term)

--	--	--	--	--	--

Type & number of Members	No	Sub-Group Represented	Forum Representative	Establishment
Substitutions				
Primary	1 of 3	Headteacher/Headteacher Representative	VACANT	
Primary	2 of 3	Headteacher/Headteacher Representative or Governor	VACANT	
Primary	3 of 3	Headteacher/Headteacher Representative	Louisa Wilson	St. Stephens C of E Junior School (confirmed by Pippa, stood down, now reserve)
Secondary	1 of 1	Member Representative	Terry Redfern/Stuart Thomas	Business Manager/AHT Brimsham Green
Special School	1 of 1	Member Representative	Tania Craig	Head teacher - New Horizons
Special School Pupil Referral Unit	1 of 1	Member Representative	Dan Walton	Deputy Head – Pathways Learning Centre (PLC)
All-through MAT CLF	1 of 1	Member Representative	Sue Kelham	Principal - Wallscourt Farm
Academy Special	1 of 1	Member Representative	Madeleine Roberts	(Email from Louise Leader - Madeleine Roberts will remain on the Forum as the reserve 07-05-26)
Academy Secondary	1 of 1	Member Representative	VACANT	

Annex 2 Attendance Report

Membership	2025			2026			
Service	25th Sept	06th Nov	04th Dec	15th Jan	12th March	07th May	02nd July
Governor					SD	N/A	N/A
LEAF Trust	Y		A	A			Y
Executive Director SGC	A	A	A	A	A	A	A
Head Teacher	N/A	N/A	N/A	N/A	N/A	Y	Y
Finance Manager	Y	Y		A	A	Y	
Governor	Y	A	A		Y	Y	
Diocese	Y	A			Y	A	
Trade Union	Y	Y			Y	Y	
South Gloucestershire and Stroud College	Y	A		A	Y		
Service Director SGC	Y	A			Y	Y	Y
Cabinet Member	Y	Y	A		Y	Y	Y
Head of Business Operations,	Y	Y			Y	Y	Y
Headteacher	Y	Y			Y	Y	Y

Headteacher	A	Y				Y	Y
Special Academy	Y	A			Y	Y	Y
Diocese	A	Y			A		
Service Director SGC	Y	Y			Y	Y	Y
Early Years	Y	Y			Y	Y	Y
CFO	Y	Y	A		Y		
Chair - Headteacher	Y	Y			Y	Y	Y
LEAF Trust		Y	A		A		Y
Early Years	Y	Y			Y	Y	Y
Finance Director	Y	Y		A		Y	Y
Executive Principal	Y	Y		A		Y	Y
Vice Chair	Y	Y			Y	A	Y
CEO		A			Y	Y	

South Gloucestershire Council

SCHOOLS FORUM

24th September 2026

Dedicated Schools Grant 2025/26 Outturn

Purpose of Report

1. To update Schools Forum on the Dedicated Schools Grant (DSG) and Safety Valve outturn position for 2025/26.

Dedicated Schools Grant (DSG) Outturn budget position

2. The Dedicated Schools Grant is reporting an outturn cumulative deficit of £57,364k, an increase of £281k since Quarter 3. This arises from an in year overspend of £20,449k, partially offset by £2,000k of Safety Valve payments received in 2025/26 and a brought forward deficit balance of £38,915k.

DSG Funding 2025/26

3. The net DSG budget at outturn excluding academies and High Needs recoupment, is £180,780k. Table 1 below shows the original funding allocation announced as of December 2024 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 2024)	337,368
Adjustments and Recoupment	
• High needs Block Direct Funding By EFA	-8,568
• Academy Recoupment	-151,230
• Deduction for ESFA Payments relating to Business Rates	-3,078
• Central Block protection Prudential Borrowing and Pensions	371
• High Needs Block – Import / Export Adjustments (July 2025)	-270
• High Needs Block – Special Free Schools	460
• High Needs Block – Academy Conversion PLC	-1,142
• Early Years Block – updated January 2025 Census	551
• High Needs Block – Import / Export Adjustments (November 2025)	390
• Early Years Block – Summer Term claims for 9mth to 2 year olds, 2 year old Working Parents and Pupil Premium	4,381
• In Year Academy Conversions	-924

• Early Years Block – Autumn Term claims for 9mth to 2 year olds, 2 year old Working Parents and Pupil Premium	2,471
Total Revised DSG (March 2026)	180,780

4. The Dedicated Schools Grant (DSG) is divided into four funding blocks: Schools Block, Central Schools Services Block, High Needs Block, and Early Years Block.
5. The outturn under and overspend positions for each funding block is provided in table 2 below (see column highlighted green) 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 Approved Q2)	Net Budget (DSG)	Gross Exp	EFA / Other Income	Outturn Unusable Reserve (In Year DSG)	Net Exp	Over / (Under)
	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s
Schools Block:									
Total Schools Block - Primary & Secondary Schools (excluding Academies)	78,430	-8,170	150	70,410	81,937	-11,518	-9	70,410	0
Central Schools Services Block:									
Total Central Schools Services Block	3,677	-187	32	3,522	3,703	-230	49	3,522	0
High Needs Block:									
Schools & Independent Providers (including Academies)	67,568	-175	-20,305	47,088	70,113	-2,431	-20,594	47,088	0
Central Items	2,125	-280	-26	1,819	2,254	-457	22	1,819	0
Total High Needs Block	69,693	-455	-20,331	48,907	72,367	-2,888	-20,572	48,907	0
Early Years Block:									
Private, Voluntary & Independent Providers	56,570	0	0	56,570	56,871	-250	-51	56,570	0
Central Items	1,595	-224	0	1,371	2,002	-765	134	1,371	0
Total Early Years Block	58,165	-224	0	57,941	58,873	-1,015	83	57,941	0
Total In-Year DSG & EFA Funding	209,965	-9,036	-20,149	180,780	216,880	-15,651	-20,449	180,780	0

Total DSG In Year Overspend	-20,449
DSG Deficit Reserve B/F	-38,915
DSG Safety Valve Agreement 2025-2026 (DfE Contribution £2,000k)	2,000
Total DSG Deficit Reserve	-57,364

DSG Reserve:	£'000s
DSG Deficit Reserve B/F from previous years (Unusable Reserve)	-38,915
Approved Budget 2025/26	-8,438
DSG Safety Valve Agreement 2025-2026 (DfE Contribution £2,000k)	2,000
Request increase draw on DSG Reserve at Quarter 1 (£12,108k)	-12,108
Request reduce drawdown on DSG Reserve at Quarter 2 (£329k)	329
Request reduce drawdown on DSG Reserve at Quarter 3 (£49k)	49
Reduce draw on DSG unusable reserve at Outturn	-281
Total DSG Deficit Reserve (Unusable Reserve)	-57,364

Schools Block

6. The Schools Block is reporting an outturn overspend of £9k, an increase in expenditure of £159k since Quarter 3. This is due to applications from schools relating to either falling rolls and surplus places that were received and approved after Quarter 3.

Central Schools Services Block

7. The Central Schools Services Block is reporting an outturn underspend of £49k, an improvement of £18k since Quarter 3.

Early Years Block

8. The Early Years Block is reporting an outturn underspend of £83k, an improvement of £101k since Quarter 3. This is mostly due to staffing and non-staffing related expenditure within the centrally retained element being lower than previously expected.

High Needs Block vs Safety Valve

9. The High Needs Block is reporting an outturn overspend of £20,572k, an increase of £241k since Quarter 3. This represents an increase of £14,134k above the safety valve target of £6,438k.

10. After applying the £2,000k DSG safety valve payment and the net underspend of £123k across the Schools, Central Schools Services and Early Years Blocks, the overall DSG Deficit exceeds the 2025/26 safety valve target by £12,011k. This is an increase of £281k since Quarter 3 across the DSG blocks.

11. The key high needs areas where the outturn has increased or decreased compared to Quarter 3, as a result of changes in demand and/or price are summarised below and supported by the demand and price data shown in Table 3 below.

12. High Needs Support in Primary and Secondary schools is reporting an outturn overspend of £2,359k, an increase of £368k since Quarter 3. This is due to an increase in the average weekly price of £19 per week, which has been partially mitigated by a reduction in demand of 95 Education, Health and Care Plans compared to Quarter 3.

13. South Gloucestershire Special Schools is reporting an outturn overspend of £1,262k, an increase of £189k since Quarter 3. This is due to an increase of 6 placements and an increase in the average weekly price of £2 per week since Quarter 3.

14. South Gloucestershire Resource Bases is reporting an outturn underspend of £65k, an increase spend of £19k since Quarter 3.

15. Commissioning of placements at Pathways Learning Centre is reporting an outturn underspend of £335k, an improvement of £161k since Quarter 3. This is due to a reduction in breach funding and increased income generation for permanently excluded pupils.

16. OLA Special Schools and Resource Bases are reporting an outturn overspend of £1,700k, an increase of £259k since Quarter 3. This is due to an increase in the average weekly price of £15 per week and an increase of 6 placements since Quarter 3.

17. Independent and Non-Maintained Special Schools is reporting an outturn overspend of £4,459k, an improvement of £80k since Quarter 3. This is due to a reduction of 1 placement since Quarter 3.

18. Post 16 Education is reporting an outturn overspend of £2,939k, an increase of £450k since Quarter 3. This is due to a reduction in the number of placements by 22 which has been offset by an increase in the average weekly price of £37 per week since Quarter 3.

19. Other High Needs areas are reporting an outturn underspend of £185k, an improvement of £803k since Quarter 3. This is due to a number of demand led areas where Quarter 3 forecast figures included contingencies for potential new provisions and anticipated expenditure on existing packages of support which did not materialise. These include Hospital Education Service (£60k), High Risk Group (£94k), Alternative Provision Support for Pre-16 (£135k) and the Online Tutoring pilot (£267k). Other improvements within the High Needs Block relate to final charges for Commissioned services such as Sensory Support Service and being less than previously expected and delays in other SEND related projects (£247k).

20. Other DSG areas are reporting underspends of £123k compared to the safety valve, a reduced underspend position of £40k since Quarter 3.

Table 3 – High Needs Demand and Price

High Needs Pressure areas	Outturn 2022/23	Outturn 2023/24	Outturn 2024/25	Quarter 1 2025/26	Quarter 2 2025/26	Quarter 3 2025/26	Outturn 2025/26
Independent and Non-Maintained Special Schools - Placements No.s	122	130	144	167	176	176	175
Average Weekly Price (38 wks)	£1,614	£1,809	£1,747	£2,022	£2,000	£2,032	£2,032
Statemented Support Provision including SG Pupils in OLA Schools No.	963	1,201	1,431	1,587	1,658	1,648	1,553
Average Weekly Price (38 wks)	£269	£236	£228	£213	£208	£210	£229
Post 16 - FE Independent Specialist Placements	28	37	43	50	48	49	48
Average Weekly Price (38 wks)	£1,302	£1,037	£1,257	£1,431	£1,509	£1,481	£1,545
Post 16 - FE Colleges	295	298	315	311	332	364	344
Average Weekly Price (38 wks)	£184	£198	£163	£220	£182	£177	£224
Post 16 Alternative Provision	57	143	164	215	199	199	198
Average Weekly Price (38 wks)	£558	£433	£615	£706	£700	£690	£654
Post 16 - Total Placements	380	478	522	576	579	612	590
Average Weekly Price (38 wks)	£322	£358	£395	£505	£470	£448	£485
Education other than at School SENHN No.s	13	19	24	20	27	29	35
Average Weekly Price (38 wks)	£515	£521	£580	£866	£692	£622	£511
Other Alternative Provision SENAP No.s	50	33	26	30	28	30	33
Average Weekly Price (38 wks)	£366	£630	£1,207	£1,291	£1,393	£1,351	£1,120
OLA Special Schools No.s	104	109	138	150	138	139	145
Average Weekly Price (38 wks)	£606	£611	£637	£762	£818	£781	£796
Early Years High Needs Support No.s (EHCPs only)	23	30	43	30	30	32	31
Average Weekly Price (38 wks)	£201	£170	£174	£274	£213	£204	£211
Special Schools No.s	517	557	624	684	683	676	682
Average Weekly Price (38 wks)	£577	£616	£618	£615	£621	£624	£626
Resource Bases No.s	145	154	142	138	135	135	134
Average Weekly Price (38 wks)	£583	£471	£497	£408	£426	£424	£430
PLC No.s	170	170	170	138	130	130	130
Average Weekly Price (38 wks)	£622	£603	£597	£601	£429	£429	£397

Safety Valve and SEND Reform – Outturn 2025-26 Cabinet Report

21. In February 2026, the Department for Education's Safety Valve programme was formally closed, following the Government's announcement of the High Needs Stability Grant. This new grant will be paid in Autumn 2026, subject to the council submitting, and securing the Department for Education's (DfE) approval of, a local SEND reform plan. For local authorities previously participating in the Safety Valve programme, the Stability Grant is expected to provide at least equivalent financial support to that which would have been received over the remaining life of the Safety Valve agreement. Under the original safety valve agreement, South Gloucestershire Council was due to receive £25,000k by the end of 2026/27. The Council has received £22,000k up to 2025/26, with £3,000k due in 2026/27.

22. The High Needs Stability grant is expected to cover 90% of local authorities historic and in-year DSG deficits. For South Gloucestershire Council, this could amount to £51,000k, subject to confirmation by the DfE.

23. The council holds a cumulative brought forward deficit balance on its Dedicated Schools Grant of £38,915k, this was budgeted to increase during 2025/26 by £6,438k to £45,353k based on the revised December 2023 Safety Valve submission.

24. The 2025/26 outturn position shows an in-year deficit of £18,449k, after applying a £2,000k safety valve contribution. This represents an increase of £12,011k above the Safety Valve target for 2025/26, an increase of £281k since Quarter 3. The cumulative deficit at outturn is £57,364k. Subject to DfE approval of the High Needs Stability Grant, the deficit could reduce by approximately £51,000k, leaving a cumulative deficit of £6,364k.

Author

Caroline Warren, Finance Business Partner

Tel: 01454 863153

South Gloucestershire Council

SCHOOLS FORUM

24th September 2026

SEND REFORM UPDATE (STANDING ITEM) VERBAL

SCHOOLS FORUM FORWARD PLAN

Nov 2026	05 th	(In person meeting) Rooms 0012/0013 Badminton Road Offices, Yate	
		Current Position on school places across schools system in South Gloucestershire Update	Hilary Smith
		High Needs Working Group Update	Susie Weaver
		School Budgets 2026-2027 (verbal update)	Mustafa Salih
		Schools in Financial Difficulty Update	Deb Luter
		Q1 Financial Performance Report 2026 - 2027	Caroline Warren

ANY OTHER BUSINESS