South Gloucestershire Council

Agenda

Schools Forum

Date: Thursday 5 November 2026

Time: 4.30pm

Location: Rooms 0012 and 0013, Badminton Road Offices, Yate, BS37 5AF

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
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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 24TH SEPTEMBER MEETING (Ross Newman)

6. SCHOOLS FORUM MEMBERSHIP UPDATE, ATTENDANCE, CONSTITUTION & SELF ASSESSMENT TOOLKIT (Report) (Mustafa Salih)

7. Q1 DSG FINANCIAL MONITORING REPORT 2026-2027 (Mustafa Salih)

8. HIGH NEEDS WORKING GROUP UPDATE (Susie Weaver)

9. COMMISSIONING OF SCHOOL PLACES STRATEGY (ANNUAL REVIEW) (Mike Wheeler)

10. SCHOOL BUDGETS 2027-2028 (Presentation) (Mustafa Salih)
    - Timetable
    - Upfront funding proposal (slides and spreadsheet – attached as separate documents)
11. FUNDING DISAPPLICATON REQUEST (Report) (Deb Luter)

12. SCHOOLS FORUM FORWARD PLAN

13. ANY OTHER BUSINESS:

South Gloucestershire Schools Forum

Minutes of Meeting held on 24th September 2026

Location: Teams

Chair: Ross Newman

Forum Members

Ross Newman (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
Mike Wheeler, Strategic Lead for Statutory Education

Observers:

Guy Phillips, Deputy CEO at Severn Federation Academy Trust.
Nicola Dawson, Head Teacher of Frenchay Primary School.
Daniel Webster, Head Teacher of Barrs Court.

APOLOGIES FOR ABSENCE

Chris Sivers, Tania Craig, Paul Evry, David Jenkins, Nicky Edwards

1. **Declarations of Interest –** None

2. **Any Other Items the Chair decides are urgent –** None

3. **Minutes of last meeting – 02 July 2026**

   Minutes of the meeting were approved as a true and accurate record of the meeting.

   An update on the trade union facilities item that came to the previous Schools Forum (Mustafa Salih)

   A planned meeting with the Schools Forum trade union representative, Elly Owen, has not yet been successfully arranged, but efforts are ongoing to make contact and discuss the trade union facilities issue.

   At that meeting we will go through the document that came to the Forum, pick up any issues etc and report back to a future Schools Forum. **This will be an open action.**

4. **Current position on places across South Gloucestershire (Presentation) (Mike Wheeler)**

   South Gloucestershire is experiencing declining pupil numbers, particularly in primary schools, resulting in significant surplus places. However, most families still receive one of their preferred schools, and the authority currently believes secondary capacity is broadly sufficient while it works with schools to manage falling rolls and financial pressure

   Primary Schools

   - Reception applications have fallen compared with the previous year, reflecting declining birth rates.
   - 93% of children received their first-choice primary school.
   - Additional ("breach") classes were created at several schools to meet local demand.
   - There are currently around **530 surplus primary places** across the authority, considered too many and requiring action.

Secondary Schools

- 90% of children received their first-choice secondary school.
- No breach classes were needed in 2026.
- Opening of Lyde Green Secondary School helped provide additional capacity.
- Around **243 surplus secondary places** remain across the authority.

Future Actions

- The council will proactively identify schools eligible for falling rolls or surplus places funding.
- Discussions will take place with schools and MATs about reducing Published Admission Numbers (PANs).
- Consultation on admission arrangements and PAN reductions will take place during 2026-27 for implementation from September 2028.

5. Schools Forum Membership Update and Attendance Michelle Trigg)

This item will be carried forward to the next Schools Forum due to technical issues that prevented a full report from being presented.

This is a quick summary on the position of vacancies:

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

Tanya Craig is working through the Secondary Heads Forum to fill the secondary-based vacancies. We currently have four primary vacancies. It is hoped that Nicola Dawson will take one of these positions, with Guy Phillips and Daniel Webster taking the others. This would leave just one maintained primary vacancy. Hopefully, all vacancies can be filled, resulting in a full complement of representatives on the Schools Forum.

6. Outturn 2025-2026 (Caroline Warren)

To provide an overview of the 2025-26 DSG outturn position, key financial pressures, and the implications of the transition from the Safety Valve Programme to the High Needs Stability Grant.

- The DSG closed 2025-26 with an **in-year deficit of £20,449k**. Following receipt of a **£2,000k Safety Valve payment**, the net in-year deficit reduced to **£18.449m**.
- When combined with the brought-forward deficit of **£38,915k**, the authority's cumulative DSG deficit increased to **£57,364k** at year-end.
- Financial pressures continue to be driven overwhelmingly by demand and cost growth within the High Needs Block.

Funding Overview

The DSG allocation for 2025-26 was initially set at **£337,368**. During the year, several adjustments were applied, including recoupment changes, early years census updates, central schools block protection, and high needs funding adjustments. These amendments altered the final funding retained by the authority.

Outturn by DSG Funding Block

Funding Block	Outturn Position
Schools Block	Overspend of **£9k**
Central School Services Block	Underspend of **£49k**
Early Years Block	Underspend of **£83k**
High Needs Block	Overspend of **£20,572k**

- The **Schools Block** overspend was mainly attributable to additional approved applications relating to falling rolls and surplus places.
- The **Early Years Block** benefited from staffing vacancies and lower centrally retained expenditure.
- The **High Needs Block** remains the principal area of concern, accounting for virtually all of the overall deficit position.

The High Needs Block overspend increased due to rising demand and higher placement costs across several areas:

- Statemented support increased by **£368k**, primarily due to higher average costs.
- South Gloucestershire Special Schools costs increased by **£189k** due to growth in demand and pricing.
- Post-16 provision increased by **£450k**, reflecting both increased demand and higher placement costs.

- Out-of-authority special school placements increased by **£259k** as pupil numbers and average costs rose.

Several areas partially offset these pressures:

- Independent and non-maintained provision costs reduced by **£80k**.
- Pathways Learning Centre improved by **£161k** due to lower breach payments and additional income from permanently excluded pupils.
- Underspends were achieved across several delayed projects and initiatives, including online tutoring, alternative provision, hospital education, and other SEND support programmes.

The Government's **Safety Valve Programme** ended in February 2026 and has been replaced by the **High Needs Stability Grant**.

- Subject to approval of the local SEND Reform Plan, the authority expects to receive approximately **£51,000k** through the new grant arrangement.
- This funding would substantially offset the current cumulative DSG deficit of **£57,364k**.
- The authority had previously expected to receive **£25,000k** through the Safety Valve Programme, of which **£22,000k** had already been received by the end of 2025-26. The final **£3,000k** Safety Valve payment will instead form part of the new High Needs Stability Grant arrangements.

While overall DSG performance remains challenging, the principal issue continues to be sustained growth in High Needs expenditure. The anticipated High Needs Stability Grant provides a significant opportunity to reduce the accumulated deficit and support longer-term financial sustainability.

7. SEND Reform Update (Standing Item) (Hilary Smith)

- The local authority is still awaiting a decision on the national SEND Reform Plan, with feedback expected within the next few weeks. A meeting with the DfE is scheduled for 14 October to receive feedback, agree next steps, and discuss support requirements. This invitation was issued to all local authorities and is not specific to South Gloucestershire.
- South Gloucestershire's SEND Reform Plan builds on the post-inspection SEND Strategic Plan and addresses challenges identified during the SEND inspection. The current proposals form Phase 1 of a three-phase programme.

Five key areas of focus

1. Improved co-production and engagement with families and stakeholders.
2. Better quality Education, Health and Care Plans (EHCPs), particularly health and social care contributions.

3. Maintaining a compliant Dynamic Support Register for children with the most complex needs and those at risk of hospital admission.
4. Transformational arrangements for neurodiverse children, including earlier identification and support.
5. Improved assessment times and support while children await assessment.

Strategic aims

- The reform plan is a three-year programme designed to enable more children and young people with SEND to be successfully included in local mainstream schools.
- The authority must also demonstrate readiness for future legislative changes arising from national SEND reforms.

Inclusion and system-wide improvement

- A major emphasis is on creating a more inclusive culture, leadership approach, and practice across all partners in the local area.
- While South Gloucestershire is considered to be ahead of many authorities in collaborative working, data shows ongoing inconsistency in SEND inclusion and outcomes across settings.
- To address this, the authority plans to co-design an Inclusion Framework with schools, trusts, health and social care partners, children, young people, and parent/carer representatives. A launch event is planned for 14 October.

Capacity building and specialist support

- An enhanced Experts at Hand (EAH) programme will strengthen early intervention and build capacity across schools through local clusters. Participation from secondary schools and all schools will be encouraged.
- Ali Ford has been appointed as the EAH Programme Lead, providing continuity in delivering the SEND Reform Plan.
- The plan includes expanding specialist provision within mainstream schools, including extending inclusion bases to support ages 11 to 18, supported by a three-phase capital investment programme.

Overall: The document outlines South Gloucestershire's SEND Reform Plan, focused on improving inclusion, strengthening early intervention and specialist support, addressing inspection findings, and preparing for forthcoming national SEND reforms.

8. SEND Reform Update (Standing Item) (Mustafa Salih)

This section discusses a Department for Education (DfE) initiative aimed at changing how SEND funding is distributed between schools and High Needs budgets.

Key Proposal

- Currently, schools fund the first **£6,000** per pupil of SEND support costs from their own budgets, with additional costs met through High Needs top-up funding.
- The DfE is considering increasing this threshold (for example, to £7,000 or £8,000), with funding transferred from the High Needs Block directly into school budgets.
- Schools would receive this additional SEND funding up front through a new local SEND inclusion factor.

Purpose

- Support earlier intervention and more flexible decision-making by schools.
- Reduce bureaucracy and reliance on Education, Health and Care Plans (EHCPs) where pupils' needs can be met without one.
- Align with wider government SEND reform objectives.

What Would Change

- Schools would receive more SEND funding directly.
- Schools would be responsible for funding support costs up to the new higher threshold.
- Funding would be allocated using agreed formula factors (proxies for need).

What Would Not Change

- Local authorities would still provide EHCPs and top-up funding above the agreed threshold.
- Schools' statutory SEND duties ("best endeavours") would remain.

Potential Benefits

- Earlier support for pupils.
- Greater flexibility for schools.
- Less administrative burden linked to EHCP applications.
- Stronger incentives for inclusive practice.

Potential Challenges

- Difficulty designing fair funding formulas and proxies.
- Risk of winners and losers between schools depending on their SEND profile.
- Ensuring sufficient funding genuinely transfers to schools.
- Variations in approaches between local authorities.
- Uncertainty over whether the changes would actually reduce demand for EHCPs.

Proposed Measures for Allocating Funding

The DfE suggests using indicators such as:

- Low prior attainment
- Deprivation
- English as an Additional Language (EAL)
- Pupil mobility

These would act as proxies for SEND need rather than using EHCP numbers directly.

Local Considerations and Next Steps

- The local authority already transfers some High Needs funding directly to schools through a high-incidence funding formula.
- Further work is needed on thresholds, funding transfers, allocation methods, protections for schools, and measuring impact.
- A consultation with Schools Forum is required, with any pilot application due by the end of October 2026, for possible implementation from 2027-28.

We would want to establish a school-led working group to explore a potential SEND funding model and would like some volunteers with initial proposals due by October and possible implementation from April 2027.

Names of those members who volunteered to be part of the working group were captured by Deb Luter and will be contacted soon.

Action: Slides to be shared with the Forum members. (MS)

9. Schools Forum Forward Plan

Nov 2026	**05th**	**(In person meeting) Rooms 0012/0013 Badminton Road Offices, Yate**	
		Schools Forum Membership Update & Attendance	Michelle Trigg
		Commissioning of School Places Strategy (Annual review)	Mike Wheeler
		High Needs Working Group Update	Susie Weaver
		School Budgets 2026-2027 (verbal update)	Mustafa Salih
		2027/28 School Formula Funding Disapplication Request – Small Schools Rent	Michelle Plamer

		Q1 DSG Financial Performance Report 2026 - 2027	Caroline Warren/ Mustafa Salih

Dec 2026	**03rd**	**Microsoft Teams**	
		Schools Budget Announcement	Mustafa Salih
		Schools in Financial Difficulty Update	Deb Luter

Meeting closed

SOUTH GLOUCESTERSHIRE COUNCIL

SCHOOLS FORUM

05th November 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.
   (3) Discuss the Constitution and Self-Assessment Toolkit revisions

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 **four** vacancies on the Schools Forum:

- Maintained Primary Headteacher / Headteacher Representative
- Maintained Primary Governor Representative
- All Through MAT Academies Headteacher / Headteacher Representative
- 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 4 new member to the forum

- Daniel Walton (PLC)
- Nicola Dawson (Frenchay Primary School)
- Guy Phillips (Severn Federation Academy)
- Daniel Webster (Barrs Court)

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.

Constitution & Self-Assessment Toolkit

19. The Chair and Clerk to the forum have completed the annual review of both the Constitution and Self-Assessment Toolkit.

20. As part of this review, a number of point were raised by the Chair regarding the content of the Self-Assessment Toolkit. Following consideration, several amendments and clarifications have been made:

    - Question 3: I thought we were trying to have half of the meetings in person this year?
      Response: wording amended to read 'Meetings are conducted through a combination of in-person and Microsoft Team Meetings'
    - Question 5: The commentary says 'meetings are held on a Thursday and papers are uploaded to the website on the preceding Friday '. This does not meet the 'at least 6 working days' criteria.
      Response: At present, we are unable to meet the six working day requirement due to limited administrative capacity, as responsibility for preparing and publishing the papers sits with a part-time officer. To comply with this timescale, we would need to review the current process and consider whether alternative resources or arrangements could be put in place to support the timely publication of meeting papers.
    - Question 12: I am not sure that the appointment process is clear - it is more a volunteer talked into the situation than an election.

Response: There isn't a requirement to have formal elections, our approach has always been to get representatives through our recognised school consultation groups i.e. MAT CEOs, Primary Heads Group, as long as those bodies are transparent in how they seek reps to come forward, we think this condition is being met.

- Question 19: I think we should move to using a poll to record a vote in Teams meetings moving forward for stronger clarity.
  Response: Alternative options are being explored, such as Microsoft Teams Polling.

21. A revised version of the Constitution and Self-Assessment Toolkit is available on the Schools Forum website Schools Forum page

Terms of Office

22. 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

23. 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.

24. 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.

25. 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.

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

Recommendations

27. 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	Nicola Dawson	Frenchay Primary School	01/10/2026 (1st term)
Primary	2 of 4	Headteacher/Headteacher Representative	VACANT		
Primary	3 of 4	Governor Representative	David Jenkins	Governor – Hambrook Primary School	18/07/2023 (3rd 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 (4th term)
Special School	1 of 1	Headteacher/Headteacher Representative or Governor	Tania Craig (Vice Chair)	Executive Head Teacher, New Horizons	01-07-2025 (1st term)
Special School Pupil Referral Unit	1 of 1	Headteacher/Headteacher Representative or Governor	Daniel Walton	Headteacher - Pathways Learning Centre (PLC)	06/05/2026 (1st term)

(PRU) (only has to be 1)					

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

Primary MAT	7 of 12	Headteacher/Headteacher Representative or Governor	Guy Phillips	Deputy CEO Severn Federation Academy	01/10/2026 (1st term)
Primary MAT LEAF	8 of 12	Headteacher/Headteacher Representative or Governor	**Ross Newman (Chair)**	CEO (LEAF Trust)	14/06/2025 (3rd term)
Primary MAT LEAF	9 of 12	Headteacher/Headteacher Representative or Governor	Dave Farr (replaced Debbie Beazer)	Finance Manager (LEAF Trust)	01-09-2024 (1st term)
Primary MAT Mosaic	10 of 12	Headteacher/Headteacher Representative or Governor	Daniel Webster	Barrs Court	01/10/2026 (1st term)
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)	(1st term)
Non-school members = 6					
16-19 (COLL, MAT)	1 of 1	Representative	Florence Hiatt	Lead for Learning Support SGS College	10-05-24 (1st term)
Early Years	1 of 2	Representative	Nicki Edwards	Early Years (Natural Choices Nurseries Ltd)	02/11/2023 (1st term)
Early Years	2 of 2	Representative	Ruth Laing	Head of Early Years and Community Leaf Trust (King's Forest Primary)	09-05-24 (1st term)
Diocese	1 of 2	Representative	Malcolm Strange	Diocese of Bristol	23/05/2025 (3rd term)
Diocese	2 of 2	Representative	David Williams	Diocese of Gloucester	21/01/2025 (2nd term)

Trade Union	1 of 1	Representative	Elly Owen	Trade Union Representative (NASUWT)	05-12-2024 (1st 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	VACANT	
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 Schools Forum Constitution

October 2026

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1 Introduction

The 2002 Education Act amended Fair Funding legislation in the School Standards and Framework Act 1998, requiring local authorities to establish a Schools Forum.

The function of a Schools Forum has been changed by Regulations over time. The current constitution is consistent with ***The Schools Forum (England) Regulations 2012*** (hereafter referred to as 'the Regulations'), which came into force in October 2012. The Regulations set regulatory requirements for procedural matters, voting and the conduct of meetings.

The following Constitution complies with the Regulations 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***.

2 Revisions and Review

2.1 Subject to the requirements of the Regulations, this Constitution can be reviewed and amended at any time with agreement of both the Local Authority and the Schools Forum.

2.2 The Schools Forum constitution and membership will be reviewed annually at the last meeting of the academic year.

3 Name

3.1 The South Gloucestershire Schools Forum

4 Membership

4.1 The South Gloucestershire Schools Forum (hereafter referred to as 'the Forum') will consist of 25 members. The membership is consistent with the Regulations.

4.2 The membership provides for all school types to be represented and reflects the education provision across South Gloucestershire. Places shall be divided between maintained primary and secondary members and academy representatives in proportion to the pupil numbers in each category (latest September pupil census).

- Schools members (primary, secondary) in addition to
- At least one member for both maintained special schools and PRU[1]
- Academies members[2] [3]
- Non-school members

[1] Where the LA maintains one or more special schools the Forum must have at least one school member from that sector, same applies for PRUs and nursery schools.
[2] At least 1 academies member must represent mainstream academies (which include free school, UTC's and Studio Schools) and, if there are any in the local authority area, one member for each special academies and alternative provision academies.
[3] There is no requirement for academies members to represent specific primary and secondary phases, but it may be encouraged to ensure representation remains broadly proportionate to pupil numbers.

4.3 The composition of the Forum is set out in the attached ***Appendix 1***.

5 Term of Office

5.1 Forum members shall be elected/appointed for a term of 4 years. They may be re-elected at the end of their term of office provided they continue to meet the criteria for election.

A Forum member remains in office until:

- The members term of office expires;
- The member ceases to hold office by virtue of which the member became eligible for election/appointment to the Forum;
- The member resigns from the Forum by giving notice in writing to the Forum clerk.

6 Disqualification

6.1 Any member who fails to attend three consecutive meetings of the Forum (even if they have nominated a substitute member to attend) may be asked to resign unless the Forum considers that there are particular or exceptional circumstances that have prevented their attendance.

7 Election and Nomination – School Members

7.1 The representative group in consultation with the Local Authority has set out the following election/nomination procedure. At the request of the relevant group, the clerk shall act as returning officer for any election, with costs to be met from the Forum budget.

7.2 **Maintained** primary school members are divided into the following sub-groups:

- Headteachers or headteachers representatives;
- Governors.

7.3 Maintained secondary school members, special school members and pupil referral members (PRU) will not be subdivided and will be made up of members from the following:

- Headteachers or headteachers representatives and governors.

7.4 Before proceeding to an election or appointment, all prospective nominees will be helped to understand the commitment and expectations of the role. Example nomination letter available in ***Appendix 2.***

7.5 All eligible candidates can self-nominate using the form attached ***Appendix 3***.

7.6 The procedure for operating school member elections is as follows. Sample letters can be found at ***Appendix 4:***

- An election will take place where, after a nomination period there are more candidates than vacancies available;
- All elections or nominations where appropriate will take place within 3 calendar months of any vacancy arising. In the event of a tie, or failure to elect a representative (within the 3 calendar months of the vacancy arising) the Authority may appoint a representative;

7.7 In the case of elections, eligible voters[4] as set out below will be entitled to one vote only[5]:

- Maintained primary school headteacher members – the headteacher of each maintained primary school.

7.8 In the case of elections, eligible voters[6] as set out below will be entitled to one vote only:

- Maintained primary school governor members – the governing board of each maintained primary school.

7.9 For **maintained primary, secondary schools, special schools and PRU's** representative members will be elected by the governing board or management committee, of that type of school in consultation with the headteacher.

- Maintained primary school members – all head teachers and governors are invited to share expressions of interest which are voted for at the primary heads executive meeting.
- Maintained secondary school member – as only 1 exist this position is automatically filled by the head. This would cease if they converted to a multi-academy trust.
- Maintained special school member – the governing board of each maintained special school in consultation with the headteacher.
- Maintained PRU school member - as only 1 PRU exists in South Gloucestershire the head automatically becomes a member of the forum.

8 Election and Nomination – Academies Members

8.1 The representative group in consultation with the Local Authority has set out the following election/nomination procedure. At the request of the relevant group, the clerk shall act as returning officer for any election, with costs to be met from the Forum budget.

[4] The person acting as substantive headteacher of each maintained primary school at the time of election (not special or PRU).
[5] If there are substantive maintained primary co-headteachers then both may vote (not special or PRU).
[6] It is the Governing Board that registers the vote (exercised by the Chair on behalf of the Governing Board as a whole) not individual governors.

8.2 Academies members must be elected by the proprietor bodies[7] of the academies in the Local Authority. There are three sub-groups, mainstream, special and alternative provision academies.

8.2 Academies members are representatives of the proprietor bodies of academies and are, therefore, not restricted to principles, senior staff or governors[8]. Although there is no requirement for academies members to be split into primary, secondary, special groups, South Gloucestershire encourages academies to invite nominations in accordance with the pupil proportions across all academies when electing their representatives. The current membership has been calculated on the basis pupil numbers. See ***Appendix 1*** for proportional representation.

8.3 All eligible candidates can self-nominate using the form attached ***Appendix 3.***

8.4 Before proceeding to an election or appointment, all prospective nominees will be helped to understand the commitment and expectations of the role.

8.5 The procedure for operating academy member elections is as follows:

- An election will take place where, after a nomination period there are more candidates than vacancies available.
- All elections or nominations where appropriate will take place within 3 calendar months of any vacancy arising. In the event of a tie, or failure to elect a representative (within the 3 calendar months of the vacancy arising) the Authority may appoint a representative.

8.6 In the case of elections, eligible voters, as set out below will be entitled to one vote only:

- Each academy trust board responsible for primary academies within the Local Authority in consultation with the chief executive officer.
- Each academy trust board responsible for secondary academies within the Local Authority in consultation with the chief executive officer.
- Each academy trust board responsible for special academies within the Local Authority in consultation with the chief executive officer.
- Each academy trust board responsible for all-through academies within the Local Authority in consultation with the chief executive officer

9 Non-School Members

9.1 Must not exceed a third of the Forums total membership.

9.2 Non-school members must not be:

[7] The proprietor body is the academy trust board.
[8] Governors include trustees and directors.

- An elected member of the local authority who is appointed to the executive of that LA;
- A director of Children's Services or any officer who works under the management of the Director of Children's Services;
- Other officers with a specific role in management of and/or who advise on funding for schools

9.3 South Gloucestershire Non-school members include:

- A 16-19 education provider (FE and sixth form colleges).
- Early year providers from the private, voluntary and independent sector.
- Dioceses (Church of England and Catholic).
- A Union Representative

10. Observers

10.1 The Regulations require that the Education and Skills Funding Agency (ESFA) has observer and participation[9] status at Forum meetings.

10.2 The Forum may ask other observers to attend meetings.

10.3 Observers may not take part in decision making or voting.

11 Participation of Local Authority Officer's & Executive Members

11.1 Only the following officers can speak at meetings of the Forum:

- Executive members with responsibility for education/children's services
- Director of Children Adults and Health or their representative
- Chief financial officer or their representative
- Any person invited by the Forum to provide financial or technical advice
- Any person presenting a paper to the Forum, however their ability to speak is limited to the paper they are presenting.

12 Substitution

12.1 Named substitute member(s) will be formally nominated by each of the following groups:

- 1 maintained primary headteacher member.
- 1 maintained primary governor member.
- 1 maintained secondary member representative.
- 1 maintained special school member representative.

[9] The right to attend and speak at Forum meetings.

- 1 pupil referral unit member representative.
- 1 primary academy member representative.
- 1 special academy member representative.
- 1 secondary academy member representative.

12.2 It is the responsibility of members of the Forum unable to attend the meeting to inform the clerk in advance of the meeting. The clerk will invite the named substitute to attend in their place and to receive any necessary papers. Any substitute provided by a member that is not on the list of named substitutions held by the Forum will have no right to vote but may participate in the meeting, if invited to do so by Forum members.

13. Procedures

13.1 Although many procedural matters are not prescribed in regulations the following have been agreed by the Forum to prevent any ambiguity in practice and to aid in the effective, efficient functioning of the Forum.

14. Meetings

14.1 The Forum must meet at least four times a year, in a public place.

14.2 All meetings of the Forum will be convened by the clerk in accordance with directions given by the Forum.

14.3 Written notice of a meeting, along with a copy of the agenda and papers for the meeting will be provided to all Forum members and appropriate officers and published on the Forum website at least six days before the date of the meeting.

14.4 Where it is not possible to make available reports to members seven days in advance of meetings, members will be notified before the meeting when the information will be available or whether it will be tabled at the meeting. Where information is not available seven days in advance or it is proposed that the information will be tabled at the meeting, the Forum has the discretion to accept or reject the matter and where necessary reschedule to a later agenda.

14.5 It may be necessary to arrange additional meetings at times when the Forum has urgent unforeseen or significant matters to discuss. Where the dates of scheduled meetings are changed, or additional meetings arranged, all members will be notified directly of the changes and the public website will be updated.

14.6 Additional meetings may be called allowing at least 7 days' notice, unless the chair determines, on the grounds that there are matters demanding urgent consideration. In which case the chair may determine a shorter period of notice.

14.7 Any person is entitled to attend Forum meetings however they do not have the right to participate in Forum meetings, unless they are asked to do so by the chair with the agreement of the Forum members.

15 Agenda Setting

15.1 The Forum will agree an annual work plan which outlines the key items of business to be discussed. Additional agenda items for each meeting will be determined in consultation with the chair and clerk. A planning pre-meeting will be held with the chair, vice chair and delegated officers to determine the agenda.

16. Meeting Minutes

16.1 The note taker will minute all meetings of the Forum. Minutes of each meeting will record the Forum votes where there are contrary views, recommendations and decisions.

16.2 Draft minutes will be put in the Forum website within 7 days of each meeting.

17 Quorum

17.1 A meeting is quorate if 40% of the total membership is present[10]. Substitutes taking the place of members, who are absent at the meeting, are counted in the quorum calculation.

17.2 In the event of a meeting not being quorate, members present may by majority vote decide to continue the meeting and thus be able to offer advice and respond to any consultations, however the Forum cannot legally take decisions.

18 Voting Procedures

18.1 The following restrictions must be taken into account when voting on:

- The funding formula is limited to schools members, academies members and PVI representatives.
- De-delegation is limited to the specific primary and secondary phase of maintained schools members.
- Retaining funding for statutory duties relating to maintained schools only is limited to maintained primary, secondary, special and PRU members.

18.2 All decisions will be made on a simple majority of those present and eligible to vote. In the case of an equal number of votes, the chair of the meeting shall have a second or casting vote. The outcome of any vote or resolution will be recorded in the minutes.

[10] This excludes observers, and is 40% of current membership excluding vacant positions.

18.3 It is not permitted for the chair to take a decision on behalf of the Forum no matter how urgent the matter in question.

19 Declaration of Interest

19.1 Members of the Forum should make a declaration of interest when relevant. Members should not use their position on the Forum to advance their own sectional or specific interests.

19.2 Any member with such an interest should not take part in the decision on the matter and the Forum will consider whether the member should withdraw from the meeting whilst the matter is being discussed.

20 Election of Chair

20.1 The Forum must elect a chair and vice chair from amongst its own members[11], the clerk to the Forum must act as chair during the part of the meeting at which the chair is elected. The following process applies:

- Before electing a chair the Forum must decide the length of term of office;
- The clerk must ensure that all eligible Forum members are invited to nominate themselves for the post in advance of and at the meeting;
- If a vote is required it should be held by secret ballot. It is not necessary to vote if there is only one nomination, however the nominee should leave the room to enable Forum members to discuss whether to accept the nomination and approve the appointment.

[11] Any elected member or officer of the LA who is a member of the Forum may not hold the office of chair.

Appendix 1 - Forum membership

Type & number of members	No	Sub-Group represented	Forum Representatives	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			
Primary	2 of 4	Headteacher/Headteacher Representative			
Primary	3 of 4	Governor			
Primary	4 of 4	Governor			
Secondary	1 of 1	Headteacher/Headteacher Representative or Governor			
Special School	1 of 1	Headteacher/Headteacher Representative or Governor			
Special School Pupil Referral Unit (PRU) (only has to be 1)	1 of 1	Headteacher/Headteacher Representative or Governor			
Type & number of members	**No**	**Sub-Group represented**	**Forum Representatives**	**Establishment**	**Term of Office/Position**
Academies members (7 all-through / 3 Primary / 1 Secondary / 1 Mosaic representatives) = 12					
Special Academy	1 of 1	Headteacher/Headteacher Representative or Governor			

All-through MAT OAT	1 of 12	Headteacher/Headteacher Representative or Governor			
All-through MAT OAT	2 of 12	Headteacher/Headteacher Representative or Governor			
All-through MAT OAT	3 of 12	Headteacher/Headteacher Representative or Governor			
All-through MAT CSET	4 of 12	Headteacher/Headteacher Representative or Governor			
All-through MAT CSET	5 of 12	Headteacher/Headteacher Representative or Governor			
All-through MAT CLF	6 of 12	Headteacher/Headteacher Representative or Governor			
All-through MAT CLF	7 of 12	Headteacher/Headteacher Representative or Governor			
Primary MAT LEAF	8 of 12	Headteacher/Headteacher Representative or Governor			
Primary MAT LEAF	9 of 12	Headteacher/Headteacher Representative or Governor			
Primary MAT LEAF	10 of 12	Headteacher/Headteacher Representative or Governor			
Secondary Academy	11 of 12	Headteacher/Headteacher Representative or Governor			
Primary MAT Mosaic	12 of 12	Headteacher/Headteacher Representative			
Type & number of members	**No**	**Sub-Group represented**	**Forum Representatives**	**Establishment**	**Term of Office/Position**
Non-school members = 6					
16-19 (COLL, MAT)	1 of 1	Representative			
Early Years	1 of 2	Representative			

Early Years	2 of 2	Representative			
Diocese	1 of 2	Representative			
Diocese	2 of 2	Representative			
Trade Union	1 of 1	Representative			
Type & number of members	**No**	**Sub-Group represented**	**Forum Representatives**	**Establishment**	**Term of Office/Position**
Substitutions					
Primary	1 of 3	Headteacher/Headteacher Representative			
Primary	2 of 3	Headteacher/Headteacher Representative or Governor			
Primary	3 of 3	Headteacher/Headteacher Representative			
Secondary	1 of 1	Member Representative			
Special School	1 of 1	Member Representative			
Special School Pupil Referral Unit	1 of 1	Member Representative			
All-through MAT CLF	1 of 1	Member Representative			
Academy Special	1 of 1	Member Representative			
Academy Secondary	1 of 1	Member Representative			

Appendix 2 – Example invitation for representatives

South Glos letter Header

Dear Primary School Governor

SELF-NOMINATION FOR ELECTION TO THE SCHOOLS' FORUM: PRIMARY MAINTAINED PHASE GOVERNOR REPRESENTATIVE

You are invited to nominate yourself for a vacancy that has arisen on the Schools' Forum for a Maintained Primary School Governor Representative to reflect the views of schools within the Primary Sector.

The Schools' Forum

The Schools' Forum is a statutory body of 25 members consisting mainly of Headteachers and School Governors. Schools' Forums have an important role; recent legislative changes mean that Forums not only have a consultative role in relation to the local distribution of school funding. They can also decide on certain proposals from their local authority that previously required the Secretary of State's approval.

Nominee Requirements

There are no formal requirements for this role, except an interest in school funding, a commitment to attending meetings and enthusiasm to represent the views of schools. To help you to take an informed view of the role you will be required to play, you may find it useful to read the South **Gloucestershire Schools Forum Constitution** and the ***Education and Skills Funding Agency*** guidance. Copies of the Schools' Forum agendas and minutes, are available using the following ***Link***. The Schools' Forum usually meet XXX times a year at XXXX usually in XXXXXX. The successful candidate's term of office will start in the XXXX Term. The first meeting the successful nominee will attend is XXXXXXX.

The Nomination Process

The purpose of this letter is to invite you to submit a single self-nomination for election to the Forum.

Following the nomination process I will be arranging elections (if necessary) in XXXX to determine the successful candidate before the Schools Forum meeting in February.

Should you be interested in joining the Schools' Forum please arrange for the completion of the enclosed self-nomination form and return it by XXXXXXX together with a personal statement (please try to make it no greater than 100 words).

Please contact me should you have any further queries.

Yours sincerely

Appendix 3 – Example self-nomination form

SELF-NOMINATION FORM

Pro-forma for nomination to the South Gloucestershire Schools' Forum

Academy Secondary Sector Governor Representative

PRIMARY MAINTAINED PHASE GOVERNOR REPRESENTATIVE

Name	
School	
Contact Address (this could be home or school)	
Email address	
Contact number	

It is essential that the following declaration is completed:

I agree to my self-nomination for membership of the South Gloucestershire Schools' Forum.

Sign ……..

Print Name ……..

Date ……..

All nominees are invited to append a statement of **up to 100 words** which will be used to provide information as part of the election process if required.

These details should be fully completed and returned by XXXXXX to:

Tel:

Email:

Appendix 4 – Example election letter

South Glos letter Header

Dear Primary School Chair of Governors

SCHOOLS FORUM ELECTIONS

I am writing to ask your Governing Board to vote in the election process to elect X Maintained Primary School Governor Representative/s to the Schools Forum.

I have attached a ballot paper together with supporting statements from candidates. All maintained Infant, Junior and Primary School Governing Boards are entitled to one vote per number of vacancies. In this case the Board should select X different nominees. Although the Chair lodges the vote/s on behalf of the Board, the vote must represent the view of the whole Governing Board.

Please can I encourage you to take this opportunity to influence this process and vote for your preferred nominee/s. The candidate/s elected to the Schools Forum will be representing the Maintained Primary Sector on a range of funding related issues for the next X years.

Please return the ballot paper either by email or post to me by XXXXXXXXXX.

Thank you for your assistance in this matter.

Yours sincerely

Name

Email

Postal Address

Appendix 5 – Example ballot paper

The example below provides a template for the election of 4 representatives, please amend depending upon the number required.

South Gloucestershire Schools Forum Ballot Paper for 4 Maintained Primary School Governor Representative/s.

Personal statements from nominees overleaf.

Each Maintained Infant, Junior and Primary School Governing Board has 4 votes. Please only vote once against any one nominee,

Nominees Names (alphabetical order)	School	Vote 1	Vote 2	Vote 3	Vote 4

Name of voting school	
Name of person signing returning ballot paper	
Signature	
Date	

Please return by XXXXXXXXXXX

To XXXXXXXXXXXXXX

Appendix 6 - Nominee statements

Nominee 1

Name:
School:
Statement:

Nominee 2

Name:
School:
Statement:

Nominee 3

Nominee 4

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. A planning pre-meeting will be held with the chair, vice chair and delegated officers to determine the agenda.
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 Resources & Business set dates to fit in with key consultation and funding dates. These are then raised to the SF meeting for discussion and agreement. Dates are being set in conjunction with the High Needs Working Group.
3. Are meetings held in an accessible venue to enable observers to attend easily?	Yes	Meetings are conducted through a combination of in-person and Microsoft Teams meetings.

Question	Yes / No	Notes
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 meetings. A review will be held once vacant posts are filled on any additional information required to be updated on the site. The clerk's email is shared and instructions for applying are clear.
5. Are the agenda and papers publicly available on the authority's website at least 6 working days in advance of the meeting?	No	Meetings are generally held on a Thursday, with agenda papers published on the Council's website on the preceding Friday. At present, we are unable to meet the six working day requirement due to limited administrative capacity, as responsibility for preparing and publishing the papers sits with a part-time officer. To comply with this timescale, we would need to review the current process and consider whether alternative resources or arrangements could be put in place to support the timely publication of meeting papers.
6. Are the papers published as a single document, so that users can download easily?	Yes	There is always a single document that is sent, on occasion a follow up report will be sent separately.

Question	Yes / No	Notes
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. - 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	Revisit the constitution annually in July and not every time a school conversion occurs
11. Is there an induction pack or training programme available for new members?	Yes	Induction meetings are held with the Chair and Service Director Resources & Business
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	Yes	There isn't a requirement to have formal elections, our approach has always been to get representatives through our recognised school consultation groups i.e. MAT CEOs, Primary Heads Group, as long as

Question	Yes / No	Notes
by the proprietors of academies for academy members.		those bodies are transparent in how they seek reps to come forward, we think this condition is being met.
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	Attendees of the forum and the body they represent will be added to the Chat at all virtual meetings. We regularly do a round of introductions at the start of a meeting.
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	We canvas other people's views to bring them to the forum. Communications are actively sought from heads exec, secondary heads, head teacher briefings and through LA communication.

Question	Yes / No	Notes
18. Where votes are required, is it clear who is eligible to vote for different items?	Yes	Decisions are taken at pre-meeting if it doesn't include the whole board.
19. Where votes are required, are the arrangements for recording the votes clear and unambiguous?	Yes	We have an agreed procedure for voting on teams and in person. Alternative options are being explored, such as Microsoft Teams Polling.
20. Is there a system in place for a decision if votes are tied?	Yes	In the case of an equal number of votes, the chair of the meeting shall have a second or casting vote. The outcome of any vote or resolution will be recorded in the minutes.
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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South Gloucestershire Council

SCHOOLS FORUM

5th November 2026

Dedicated Schools Grant 2026/27 Quarter 1

Purpose of Report

1. To update Schools Forum on the Dedicated Schools Grant funding and forecast outturn as at Quarter 1 2026/27.

Dedicated Schools Grant (DSG) Funded budgets

2. The net DSG budget excluding academies and High Needs recoupment is £189,783k. Details of the original DSG funding announcement (December 2025) including adjustments for recoupment and Business Rates are provided in table 1 below.

Table 1 – DSG Funding Announcement

DSG Budget	Net £'000
Original Budget Allocation (December 2025)	**363,907**
Adjustments and Recoupment	
• High needs Block Direct Funding By EFA	-10,582
• Academy Recoupment	-161,413
• Deduction for ESFA Payments relating to Business Rates	-2,500
• Central Block protection Prudential Borrowing and Pensions	371
Total Revised DSG (March 2026)	**189,783**

Quarter 1 DSG position

3. The Dedicated Schools Grant (DSG) is divided into four funding blocks: Schools Block, Central Schools Services Block, High Needs Block, and Early Years Block. The forecast under / overspend position for each funding block is provided in Table 2 below (see column highlighted green) and the key changes and risks in the subsequent paragraphs

4. The council currently holds a cumulative brought forward deficit on the Dedicated Schools Grant of £57,364k. This was budgeted to increase during 2026/27 by £29,206k. The Quarter 1 forecast deficit is £30,845k, an increase of £1,639k.

5. The overall DSG pressure of £1.639m comprises a High Needs Block pressure of £1,118k together with a Schools Block overspend of £543k, partially offset by a Central School Services Block underspend of £22k.

Table 2 – DSG Block Funding vs Quarter 1

Funding by Blocks	Gross Budget	DfE/ Other Income Budget	Budget Reserve (Usuable Approved Budget)	Net Budget (DSG)	Gross Exp	DfE / Other Income	Q1 Unusable Reserve (In Year DSG)	Net Exp	Over / (Under)
	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s
Schools Block - Primary & Secondary Schools (excluding Academies Recoupment)	76,675	-5,600	0	71,075	78,680	-7,062	-543	71,075	0
Central Schools Services Block	3,828	-228	0	3,600	3,858	-280	22	3,600	0
High Needs Block (excluding Recoupment)	80,656	-383	-29,206	51,067	81,991	-600	-30,324	51,067	0
Early Years Block	64,111	-70	0	64,041	64,235	-194	0	64,041	0
Total In-Year DSG & Other Schools Funding	225,270	-6,281	-29,206	189,783	228,764	-8,136	-30,845	189,783	0

Total DSG In Year Overspend	**30,845**
DSG Deficit Reserve B/F	**57,364**
Total DSG Deficit Reserve	**88,209**

Schools Block

6. Schools Block is forecasting an overspend position of £543k for Quarter 1. This is due to revisions of the Schools Growth, Falling Rolls and Surplus Places policies together with an increase in the number of applications received from schools. As agreed previously with Schools Forum the 2026/27 overspend will be recovered from the 2027/28 Schools Block allocation.

Central Schools Services Block

7. Central Schools Services Block is forecasting an underspend of £22k for Quarter 1. This is due to the actual charges for copyright licences 2026/27 being less than previously estimated.

Early Years Block

8. The Early Years Block is forecasting a breakeven position for Quarter 1.

High Needs Block

9. The High Needs Block is forecasting an overspend of £30,324k for Quarter 1. This represents an increase of £1,118k above the budgeted deficit of £29,206k.

10. This is due to increasing demand and price within Independent and Non-Maintained Placements (£268k), Post 16 (£203k), Primary and Secondary Schools (£190k) and South Gloucestershire Special Schools (£534k). This has been partially mitigated by improvements in other High Needs areas (£77k).

11. Independent and Non-Maintained Placements is showing an additional pressure of £268k, due to an increase in demand of 14 placements, which has been partially mitigated by a reduction in the average price of £139 per week compared to the budget.

12. Post 16 Education (Including post 16 alternative provision) is showing an additional pressure of £203k, due to an increase in demand of 13 placements, partially mitigated by a reduction in the average price of £2 per week.

13. High Needs Support in Primary and Secondary schools is showing an additional pressure of £190k due to an increase in price of £16 per week. This has been partially mitigated by a reduction in demand of 109 Education, Health and Care Plans.

14. South Gloucestershire Special Schools is showing an additional cost pressure of £534k due to an increase in demand of 15 places and an increase in the average price of £4 per week.

15. It should be noted that the Quarter 1 figures include a contingency provision for new placements based on named and unknown placements as well as a provision for possible leavers. When the September transfers and leavers are confirmed, an update on the financial forecast based on the actual changes will be reported to Schools Forum.

Table 3 – High Needs Demand and Price

High Needs Pressure areas	Outturn 2024/25	Outturn 2025/26	Budget 2026/27	Quarter 1 2026/27	
Independent and Non-Maintained Special Schools - Placements No.s	144	175	170	184	
Average Weekly Price (38 wks)	£1,747	£2,032	£2,330	£2,191	
Statemented Support Provision including SG Pupils in OLA Schools No.	1,431	1,553	1,884	1,775	
Average Weekly Price (38 wks)	£228	£229	£212	£228	
Post 16 - FE Independent Specialist Placements	43	48	66	62	
Average Weekly Price (38 wks)	£1,257	£1,545	£1,527	£1,566	
Post 16 - FE Colleges	315	344	386	381	
Average Weekly Price (38 wks)	£163	£224	£204	£207	
Post 16 Alternative Provision	164	198	274	296	
Average Weekly Price (38 wks)	£615	£654	£729	£705	
Post 16 - Total Placements	522	590	726	739	
Average Weekly Price (38 wks)	£395	£485	£522	£520	
Education other than at School SENHN No.s	24	35	30	34	
Average Weekly Price (38 wks)	£580	£511	£691	£610	
Other Alternative Provision SENAP No.s	26	33	30	29	
Average Weekly Price (38 wks)	£1,207	£1,120	£1,433	£1,504	
OLA Special Schools No.s	138	145	141	138	
Average Weekly Price (38 wks)	£637	£796	£750	£766	
Special Schools No.s	624	682	710	725	
Average Weekly Price (38 wks)	£618	£626	£718	£722	**
Resource Bases No.s	142	134	138	139	
Average Weekly Price (38 wks)	£497	£430	£409	£386	**
PLC No.s	170	130	130	130	
Average Weekly Price (38 wks)	£597	£397	£423	£408	

** note the average price is net of high needs block recoupment

Dedicated Schools Grant and SEND Reform

16. The Government's SEND Reform Programme aims to improve outcomes for children and young people with Special Educational Needs and Disabilities (SEND) by ensuring support is delivered earlier, more consistently and in a financially sustainable way. As part of this programme, local authorities are expected to receive a High Needs Stability Grant, which is intended to help address accumulated High Needs deficits.

17. The High Needs Stability grant is expected to cover 90% of local authorities historic and in-year DSG deficits.

18. The council currently holds a cumulative brought forward DSG deficit of £57,364k. When combined with the Quarter 1 forecast deficit of £30,845k, this results in a cumulative deficit of £88,209k at the end of 2026/27.

19. The council estimates that it will receive approximately £51m through the High Needs Stability Grant in respect of historic DSG deficits and approximately £28m in respect of the forecast 2026/27 deficit. These figures remain subject to confirmation by the Department for Education.

20. In addition, the Statutory override relating to the Dedicated Schools Grant deficit balances remains in place until 31st March 2028, at which point any remaining cumulative deficit will transfer to the council. Based on current assumptions and forecasts the council would be left a deficit of £9.5m by the end of 2026/27.

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South Gloucestershire Council

SCHOOLS FORUM

5th November 2026

High Needs Working Group

South Gloucestershire Council

SCHOOLS FORUM

5th November 2026

Commissioning of School Places Strategy (Annual Review) – Attached as separate documents

South Gloucestershire Council

SCHOOLS FORUM

5th November 2026

School Budgets 2027-2028 (Presentation and spreadsheet attached as separate documents)

South Gloucestershire Council

SCHOOLS FORUM

5th November 2026

2027/28 School Formula Funding Disapplication Request – Small Schools Rent

Purpose of Report

1. To seek approval from Schools Forum for the continuation of allocating Small Schools Rent under exceptional circumstances within the Authority Proforma Tool (APT) for 2027/28 via the Disapplication process.

Policy

2. In accordance with the school funding regulations, the Council proposes to continue an adjustment for Small Schools Rent under the exceptional circumstances category in the 2027/28 funding formula.

Background

3. Within the Schools Operational Guide local authorities can apply to the Department for Education (DfE) to use exceptional circumstances relating to school premises costs, for example rent.

4. The exceptional circumstance must only relate to exceptional premises costs.

5. Local authorities should only submit applications where the value of the factor is more than 1% of a school's budget and applies to fewer than 5% of the schools in the local authority's area.

Proposal for Small Schools Rent

6. Within South Gloucestershire Council, there is one school that qualifies for Small Schools rent in line with the DfE guidance. The annual cost is £6,100 and relates to a lease agreement for property and land.

Recommendation

7. Schools Forum is asked to approve the continuation of Small Schools Rent as an exceptional circumstance within the Authority Proforma Tool (APT) for the 2027/28 funding formula and to support submission of the required disapplication request to the DfE. Should Schools Forum not support this proposal, the Council would not seek disapplication approval from the DfE for 2027/28, and the school would not receive the £6,100 exceptional allocation. The school would therefore be required to meet the annual rent cost from the reduced delegated budget.

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SCHOOLS FORUM FORWARD PLAN

Dec 2026	**03rd**	**Microsoft Teams**	
		Schools Budget Announcement	Mustafa Salih
		Schools in Financial Difficulty update (report)	Deb Luter

Jan 2027	**14th**	**In person – Cadbury Heath Primary School**	
		Early Years Funding 2026-2027 (report)	Jo Briscombe
		Q2 DSG Financial Monitoring report 2026 – 2027	Caroline Warren
		Growth, Falling rolls and Surplus Places Policies 2027-2028 To include an Update Financial position 2026-2027 Growth, Falling rolls and Surplus Places.	Caroline Warren
		Setting the School Budget 2026 – 2027 (including proposal of £2.2m block transfer) (report)	Mustafa Salih
		Current LA plans for commissioned specialist places 2026 -2027 and future years (update)	Hilary Smith

March 2027	**11th**	**Microsoft Teams**	
		F40 update	Mustafa Salih
		Q3 DSG Financial Monitoring Report 2026-2027	Caroline Warren
		Place Pressures – defer to May meeting	Hilary Smith
		High Needs Working Group Update (HNWG)	Susie Weaver

May 2027	**06th**	**In person – Badminton Road, Room 12 & 13**	
		High Needs Working Group Update (HNWG)	Susie Weaver
		Mainstream Place Numbers & Place Pressures	Mike Wheeler
		Scheme for Financing Schools – DfE Directed Changes	Caroline Warren

		South Gloucestershire Trade Union Facilities Time Pooled Fund Scheme 2027-2028	Claire Paines

July 2027	**01st July**	**Microsoft Teams**	
		Schools in Financial Difficulty Update (Report) (Maintained Schools & Academies update)	Mustafa Salih
		Funding Update (including School's supplementary grant)	Mustafa Salih
		Financial Regulations for Schools	Justine Poulton
		High Needs Working Group Update (HNWG)	Susie Weaver

ANY OTHER BUSINESS