

## Schools Forum

Date: Thursday 3 July 2025

Time: 4.30pm

Location: Teams

Chair: Pippa Osborne

### Members of the Committee

Pippa Osborne (Chair)

Julia Anwar

Dave Farr

Tania Craig

Nicky Edwards

Paul Evry

Dave Farr

Kim Garland

Florence Hiatt

Aaron Jefferies

David Jenkins

Nicola Jones

Jonathan Keohane

Ruth Laing

Louise Leader

Dave Baker (Vice Chair)

Ross Newman

Diane Owen

Elly Owen

Will Roberts

Fr. Malcolm Strange

Andy Watson

Susie Weaver

Bernice Webber

David Williams

Sue Wright

### Appropriate Officers attending:

Mustafa Salih

Hilary Smith

Deb Luter

Michelle Palmer

Justine Poulton

### Councillors attending:

Ian Boulton

Chris Sivers, Executive Director for the Department for People, Badminton Road Offices, Yate,  
South Gloucestershire, BS37 5AF  
Telephone: (01454) 863253

Enquiries to: Mustafa Salih, Service Director, Resources and Business; Telephone (01454)  
862548 or E-mail [mustafa.salih@southglos.gov.uk](mailto: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](mailto:mustafa.salih@southglos.gov.uk)
  - Also see our website [www.southglos.gov.uk](http://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 (Pippa Osborne)
3. DECLARATIONS OF INTEREST (Pippa Osborne)
4. ANY OTHER ITEMS THE CHAIR DECIDES ARE URGENT (Pippa Osborne)
5. MINUTES FROM 08<sup>TH</sup> MAY 2025 MEETING (Pippa Osborne)
6. FORUM UPDATE:
  - a. MEMBERSHIP OF THE FORUM AND TERMS OF OFFICE (Michelle Trigg)
  - b. SCHOOLS FORUM CONSTITUTION (Michelle Trigg)
7. SCHOOLS FINANCE UPDATE:
  - a. IN FINANCIAL DIFFICULTY UPDATE REPORT (MAINTAINED SCHOOLS & ACADEMIES UPDATE) (SLIDES) (Deb Luter)
  - b. FUNDING UPDATE (INCLUDING SCHOOLS' SUPPLEMENTARY GRANT (SLIDES) (Mustafa Salih)
8. OUTTURN REPORT 2024-2025 (Verbal) (Mustafa Salih)
9. FINANCIAL REGULATIONS FOR SCHOOLS (PRESENTATION) (Justine Poulton)
10. SCHEME FOR FINANCING SCHOOLS – DFE DIRECTED CHANGES (Michelle Palmer)
11. HIGH NEEDS WORKING GROUP UPDATE (Susie Weaver)
12. SCHOOLS FORUM FORWARD PLAN
13. ANY OTHER BUSINESS

# South Gloucestershire Schools Forum

## Minutes of Meeting held on 08<sup>th</sup> May 2025

Location: Teams

Chair: Pippa Osborne

### Forum Members:

Pippa Osborne (Chair)	Headteacher Christ Church Junior School
Dave Baker (Deputy Chair)	CEO, Olympus Academy Trust
Julia Anwar	Head of Business Operations, Olympus Academy Trust
Tania Craig	Executive Head Teacher, New Horizons Learning Centre
Nicky Edwards	Early Years representative
Lee Everson	South Gloucestershire NEU
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
Aaron Jefferies	Primary Governor, Coniston Primary School
Nicola Jones	Representative Special Academies
Jonathan Keohane	Headteacher Callicroft Primary School/Olympus School
Ruth Laing	Early Years, Leaf Trust (King's Forest Primary)
Louise Leader	Headteacher, Pathways Learning Centre
Ross Newman	CEO of the Leaf Trust representing Academies
Diane Owen	Chair to Academy Council at King's Oak Academy
Elly Owen	District and Branch Secretary – South Gloucestershire NEU
Andy Watson	Chair of Governors, Hanham Primary Federation
Bernice Webber	Headteacher, Old Sodbury Primary School
David Williams	Diocese of Gloucester
Sue Wright	Finance Director CSET

### Executive Councillors:

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

### Officers:

Mustafa Salih, Service Director Resources and Business  
 Hilary Smith, Service Director, Education, Learning and Skills  
 Caroline Warren, Finance Business Partner  
 Deb Luter, Senior Accountant - People (Children)  
 Jo Briscoombe,

**Guests:**

**Claire Young and Claire Hazelgrove, South Gloucestershire MPs**

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

**APOLOGIES FOR ABSENCE**

Chris Sivers, Will Roberts, Susie Weaver, Mustafa Salih

**WELCOME AND INTRODUCTIONS**

The Chair and Deputy Chair welcomed attendees.

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

We are pleased to be joined this evening by two South Gloucestershire MPs, Claire Young and Claire Hazelgrove. They are attending at our request to see a typical agenda but also gain greater understanding of the sector pressures. We will therefore be asking for examples and comments from forum representatives to help our visitors understand the reality of the financial pressures we are facing. We will also offer the MPs the chance to ask further clarification questions.

Most sectors are facing pressures. As well as schools our Early Years sector are also struggling around the changes of the free hours for parents and it is putting a huge amount of pressure on the sector. Schools are also being told the recent rise in NI pension and pay rise are being fully funded, but for many individual schools the funding is not fully covering those costs and pushing our schools into deficit.

The increased need of SEN puts tremendous pressures on our system. The DfE is giving us time to rectify our deficit through the Safety Valve measures.

Lastly, we have been and continue to be one of the poorest funded on a per pupil basis and even if we were just funded at the average for England we would be better off. Those things will come out of the agenda today and those areas are widely supported by Forum members. Thank you for your time in attending and listening to our challenges.

**3. MINUTES FROM LAST MEETING – 13<sup>th</sup> March 2025**

Agreed as a true record.

#### 4. Impact Changes to Early Years Childcare Charges Statutory Guidance on the Early Years Sector and Childcare (Jo Briscoombe)

Jo produced a PowerPoint presentation, which has been sent to members of the Forum following the meeting. Please double click the link for ease of reference.



Presentation Impact  
of Changes to EY Chil

**NE** - The need for this item arose as changes were required to happen in February at short notice, which was a shock and difficult to manage. This is going to cost parents more with less flexibility and less places and that's because the DfE has not understood what's going on on the ground and chose not to do an impact assessment. If there is no more money available then we need to remove the word 'free'. This is a national issue and will have a huge impact for all children unless we solve this.

**HS** - This isn't unique to South Glos as I attended a group of School Improvement and Education Leaders and the key topic being raised by everybody was the impact on the Early Years sector and real concerns on the impact of disadvantaged families.

#### 5. Safety Valve Update (Verbal) (Caroline Warren)

Our Quarter 1 return for 2025-2026 was submitted beginning of April 2025, based on our latest forecast for 2024-2025.

To date we haven't received any feedback from the Safety Valve team following our submission.

However, Mustafa has been contacted today by a SEND Advisor for the DfE to arrange an informal meeting.

Following on from this meeting there may be a requirement for a formal meeting with other Local Authority / DfE colleagues.

Latest return £2.8m above revised target for 2024-2025

Lots of work is continuing in the background to see where we can make further efficiencies and savings through earlier intervention, reduce out of county placements and improved SEND Support Arrangements.

We remain in line or below the national average for majority of areas of SEN spend.

We are engaging with other LAs in the Safety Valve most of who are also slipping their targets.

So far we have successfully renegotiated our targets and maintained the payments from the DfE, something which other LAs have not been as fortunate with.

More recently we are being contacted by other LAs asking us how we have managed this e.g. North Tyneside and Warwickshire.

All positive reflections on our approach.

Next Return due mid-July 2025

**CW** – We submit our return on a timeline and sometimes we get contacted by the Safety Valve team and arrange a meeting with DfE colleagues to review our progress and they recognise that LAs are incurring increasing demand and costs.

**IB** – I would like to emphasise the work that is being doing done to balance the books and meet the targets and that we are held up as an exemplar for other LAs to learn from. Despite all the hard work it's still not possible to balance the books.

**HS** – A fully comprehensive programme looking at SEND expenditure starts at early years which looks at supporting children that do not have an EHCP with new arrangements for inclusion funding for the Early Years sector and then funding transition into reception. There are some children who were going through a 20 week assessment period and they now can be supported through inclusion funding.

Across South Glos when we went through an exercise and compared our top up levels for each of our EHCPs for primary and secondary schools, we found we are still above the national average.

SEND: clusters are making sure we have the right level of SEN support for children and we are in line with the national average with the percentage of children with EHCPs and SEND support.

We looked at our provision for higher dependency and we have plans to expand more and we are working with schools and introducing more resource bases. We have expanded Warmley Park and Pegasus and plan to expand New Horizons Learning Centre (NHLC), created New Bridges school, Enable Trust, post-16 with higher numbers starting in education and going into work placements. Working with the private sector getting young people to transition to those pathways has a positive financial impact.

There is a proactive sub-group of the Forum, the High Needs Working Group looking at those next steps to bring down expenditure there is an undeniable cost on schools and staffing and children's outcomes.

**EO** – Similar picture across all schools. The LA funding is not sufficient and getting worse and we are hearing the level of SEN funding is making an impact on reducing TA and support staff and this is not fair on the children. We are seeing that it is simply not affordable for committed staff to stay in these jobs as there is simply insufficient funding.

**CY** – It would be useful to see the comments in the 'chat' and feedback from schools. It would be helpful if there is any way you could highlight figures showing the contrast



between local schools and London schools. I would be happy to follow up on this with the NEU or a meeting with South Gloucestershire LA.

**Action: HS to pull together some comparisons between our local schools and London schools and highly funded schools in other LAs.**

## 6. Scrutiny Report Update (Verbal) (Hilary Smith)

Hilary produced a PowerPoint presentation, which has been sent to members of the Forum following the meeting. Please double click the link for ease of reference.



Schools Forum 8 May  
2025 SG Schools Final

**IB** - Thank you for the scrutiny work on this and the T&F Finish. We have 3 months to consider a response to those considerations and we will be supporting many, if not all, of those recommendations and writing to the Secretary of State. When we first formed the administration we wanted to be a campaigning council and work with Schools Forum and raise the profile of education funding and continue to be a campaigning council and raised this with both Claires' and with the Minister at Whitehall to raise our concerns. It was a useful paper because it is important.

**PO** - Thank you for the continued support and collective work.

**Action: All to be shared with both Claires'.**

**EO** – the NEU recently announced a vote in favour to take strike action if there is no pay rise and the rumours are that most of the NEU members did vote in that ballot but the action is not to be against the LA but is dissatisfaction at a national level.

**DF** – Frustrated by comments about efficiency savings in schools being needed, which is as far away from the truth and it just seems a lack of understanding of the situation we are facing and the growing demand LAs are facing.

## 7. Mainstream Place Numbers Update (Hilary Smith)

**HS:** this is to summarise both the primary and secondary national offer days and where we have got to.

## Primary Schools

Total of 3,225 applications for SG reception places; 200 more than 2024/2025. 11 SG children were offered places in other LAs and 112 children from out of authority were offered places in SG. We were able to offer places to all our children.

First preferences down on last year. 91% of parents received their first reference this year compared to 92.4% last year. We were at 98.5% for primary compared to 99% last year so a slight drop. We have been able to meet those places as Manorbrook Primary school as they have breached 1 form to 2 form entry and opened the 2<sup>nd</sup> form of entry. Frenchay Primary school has moved to 2 forms from September to make sure we have sufficient places for the new housing development.

## Secondary Schools

3,432 applications received, down by 100 to 3,332. 90% of 1<sup>st</sup> preferences met compared to 83% last year. Good to meet parental preferences. One school that breached decided they would offer places. Unfortunately, this resulted in significant impact on a nearby school and that secondary school has lost those children and several hundreds of thousand pounds.

Some breaches within the local area as we still haven't got the new Lyde Green school open. This is progressing well and should be opened in September 2026. I am meeting with Trust leaders to talk to them about once we have got Lyde Green and we are working collaboratively to make sure our places meet our communities' needs.

Surplus places and falling rolls with falling birth rate and reductions are starting to impact on secondary schools.

## 8. High Needs Working Group Update (Pippa on behalf of Susie Weaver)

Future meetings of the HNWG will be set before the Schools Forum dates.

Susie sent a brief report.

HNWG met in person hosted by Kings Oak and there was time to explore the data sets and considering work underway for Theme 1. Next steps for the team would be to explore the review of the financial arrangements of PLC and the HNWG Chair then requested an update in Term 6. Expanded offer in post-16 and developed in NEET into EET pathways and an update will be shared in the autumn.

## Schools Forum Forward Plan 2025

July 2025	03 <sup>rd</sup>	Microsoft Teams	
		Membership of the Forum	Michelle Trigg
		Schools in Financial Difficulty Update (Report) (Maintained Schools & Academies update)	Mustafa Salih
		Funding Update (including School's supplementary grant)	Mustafa Salih
		Outturn Report 2024-2025 verbal update outturn report)	Mustafa Salih
		Financial Regulations for Schools	Justine Poulton
		Scheme for Financing Schools – DfE Directed Changes	Caroline Warren
		HNWG update	Susie Weaver

### 9. Any Other Business

**LE** – A draft letter on Schools Trade Union Facilities Time Pooled Fund Draft Scheme was removed from the 8<sup>th</sup> of May agenda as the timeline of the document needs further consultation with all the trade unions.

**Action: Hilary to pick this up and take back to HR colleagues to get a response for the trade unions.**

**DF** – SEN: we now have costs growing for sickness levels due to the increased pressures being put on staff in schools and is another example of the issues some of the examples getting the budgets to balance and more than happy to give some more evidence.

**Action: To send to both Claires' to gain the perspective of the wider system.**

#### Summary from Claire Hazelgrove, South Gloucestershire MP

Thank you for the important work you do every day.

I wish that we had found a whole pot of money and I hear what you are saying. Understandably it must be about money and sadly there are no simple options.

In the first few months we have invested several billions into the core and there is a government that is on the side of the teachers and all children have the right to a good education. We need to know what's going on the ground and do continue to share information and case studies. I want to be able to bring this to life on the ground. There is a lot of innovation happening.

Case studies are useful and there is so much more to do. It is not just about funding but reform and support and that would be helpful to receive feedback and ideas.

We are bottom of the league table and not sure why it keeps happening to us. The more examples you can continue to send over, for example 1 or 2 pages, illustrative case studies and the impact it is having on the ground as well, the better. Please continue to engage with us and let me know how things are going. It is so good you have this Forum tonight that shows how important it is.

**PO** – Comments in the ‘chat’ have been captured and will be shared with you both. The last decade or two we have been seeing there is no money tree and a big task ahead. We offer an open invitation for us to be invited to any specific debates or any other way to support you to fight for your constituents in South Gloucestershire.

Meeting closed.

# SOUTH GLOUCESTERSHIRE COUNCIL

## SCHOOLS FORUM

03<sup>rd</sup> July 2025

### 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 July 2025 and to seek approval for the outlined recommendations.

This report also covers the Constitution and Self-Assessment Toolkit revision.

#### Background

1. In accordance with the Schools Forum Constitution, the Forum is required to review its membership annually at the final meeting of the academic year. 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 July 2025.
  - (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 Spring 202-2025 Schools 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. As of July 2025, one Special School (PRU) will convert to Academy status. Since the current AP representative already serves on the Forum, no changes are proposed.
5. From January 2026, Crossways Infants and Juniors School will convert to Academy status and join the Leaf Trust.
6. These changes may affect future membership, but confirmation is not yet available.

7. The most recent membership list, dated July 2025, is available on the Schools Forum webpage and attached as Annex 1.
8. There is currently one vacancy on the Schools Forum:
  - Maintained Secondary Headteacher / Headteacher Representative
9. The position for Head/Head rep/s from a Secondary Academy 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**

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

- Bernice Webber – Headteacher Maintained Primary
  - Diane Owen – Chair of Academy Council All-through MAT CLF
12. The position for Head/Head rep/s from Maintained Primary School will be taken forward at the primary heads executive meeting.
  13. The position of Head/Head rep/s from an All-through MAT CLF will be taken forward by the Deputy Chair through the Academies Group.

### **Substitution Vacancies**

14. The following substitute vacancies remain:
  - Maintained Primary Governor
  - Secondary Academy
15. 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

16. Several representatives have completed their term of office:

- Maintained: 3
- Special: 1
- Academies: 6
- Diocese: 2

17. The Clerk has contacted these representatives to confirm their willingness to serve another term (4 years, as per the Constitution).

18. The Chair has approved the continuation of these representatives for a further term.

## Constitution and Self-Assessment Toolkit

19. The Chair and Clerk of the Forum arranged to undertake a joint review of the Forum's Constitution and the Self-Assessment Toolkit. During this review, several queries and points of clarification emerged. Each of these were carefully considered and addressed as part of the ongoing commitment to ensuring the Forum's governance arrangements remain clear, effective, and compliant with current guidance.

## Membership

### Disqualification

20. 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

## Election and Nomination – School Members

21. 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.
22. Maintained special school member – the governing board of each maintained special school in consultation with the headteacher.

## Substitution

23. 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.

### Self-Assessment Toolkit

24. If papers are tabled at the meeting, are they published on the website promptly after the meeting?
25. Are the minutes clear and unambiguous, with sufficient detail to illustrate the discussions, without reporting verbatim every point made?
26. The revised Constitution and Self-Assessment Toolkit are available on the School's Forum website and/or included with the meeting papers for reference.

### Recommendations

27. Schools Forum is asked to:

- a) Note the proposed changes to Forum membership.
- b) Ensure representatives provide written confirmation if they wish to continue for another Term (if not already submitted).
- c) Highlight any changes to the membership list in **Annex 1** to the report author for updating.
- d) 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](mailto:Michelle.trigg@southglos.gov.uk)



## Annex 1: South Gloucestershire Schools Forum Membership (July 2024)

Type & number of Members	No	Sub-Group Represented	Forum Representative	Establishment	Term of Office/Position
<b>Maintained school members (2 Primary Headteachers/2 Primary Governors/1 Secondary/1 Special/1 PRU representatives) = 7</b>					
Primary	1 of 4	Headteacher/Headteacher Representative	<b>VACANT</b> <del>Bernice Webber</del>	<del>Headteacher – Old Sodbury CofE Primary School</del>	<del>23/01/2020</del>
Primary	2 of 4	Headteacher/Headteacher Representative	Pippa Osborne (Chair)	Headteacher - Christ Church Junior School	03/11/2022 (2 <sup>nd</sup> term)
Primary	3 of 4	Governor	David Jenkins	Governor – Crossways Schools School will become an academy in January 2026 and join LEAF.	18-07-23 (3 <sup>rd</sup> term)
Primary	4 of 4	Governor	Aaron Jeffries	Governor – Coniston Primary School	07/07/2022
Secondary	1 of 1	Headteacher/Headteacher Representative or Governor	Kim Garland	Headteacher – Brimsham Green School	18-07-2023 (4 <sup>th</sup> term)
Special School	1 of 1	Headteacher/Headteacher Representative or Governor	Tania Craig New Horizons to represent until New replacement head starts.	<del>Lisa Parker – Headteacher Warmley Park</del>	<del>Stood down 21/01/24 (2<sup>nd</sup> term)</del> Tania to remain on the SF for 1 year
Special School Pupil Referral Unit	1 of 1	Headteacher/Headteacher Representative or Governor	Louise Leader	Headteacher - Pathways Learning Centre (PLC)	18-07-2023 (3 <sup>rd</sup> term)

(PRU) (only has to be 1)					
--------------------------	--	--	--	--	--

Type & number of Members	No	Sub-Group Represented	Forum Representative	Establishment	Term of Office/Position
<b>Academies members (7 all-through / 3 Primary / 1 Secondary / 1 Mosaic representatives) = 12</b>					
Special Academy	1 of 1	Headteacher/Headteacher Representative or Governor	Nicki Jones	Trustee for Enable Trust (New Siblands / Culverhill School)	21/01/2021 (2 <sup>nd</sup> term)
All-through MAT OAT	1 of 12	Headteacher/Headteacher Representative or Governor	Dave Baker (Vice Chair)	CEO (Olympus Academy Trust)	19-09-2023 (4 <sup>th</sup> term)
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 <sup>rd</sup> term)
All-through MAT OAT	3 of 12	Headteacher/Headteacher Representative or Governor	Jonathan Keohane	Headteacher – Callicroft Primary School (Olympus)	01-09-2024 (1 <sup>st</sup> term)
All-through MAT CSET	4 of 12	Headteacher/Headteacher Representative or Governor	Sue Wright	Finance Director (Castle School Education Trust)	01/09/2023
All-through MAT CSET	5 of 12	Headteacher/Headteacher Representative or Governor	Will Roberts	CEO (Castle school Education Trust)	01-03-2023 (3 <sup>rd</sup> term)
All-through MAT CLF	6 of 12	Headteacher/Headteacher Representative or Governor	Susie Weaver	Education Director (Cabot Learning Federation)	19/09/2023 (4 <sup>th</sup> term)
All-through MAT CLF	7 of 12	Headteacher/Headteacher Representative or Governor	<b>VACANT</b> <del>Diane Owen</del>	<del>Chair of Academy Council (Cabot Learning Federation)</del>	<del>23/09/2021 (3<sup>rd</sup> term)</del>

Primary MAT LEAF	8 of 12	Headteacher/Headteacher Representative or Governor	Ross Newman (trans from Early Years)	CEO (LEAF Trust) – 21 <sup>st</sup> May	14/06/2025 (3 <sup>rd</sup> 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 <sup>st</sup> term)
Primary MAT LEAF	10 of 12	Headteacher/Headteacher Representative or Governor	Andy Watson (trans from Primary)	Trustee (LEAF Trust)	07/07/2022 (2 <sup>nd</sup> 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)	2024 New - position moved from Primary Maintained rep
<b>Non-school members = 6</b>					
16-19 (COLL, MAT)	1 of 1	Representative	Florence Hiatt	Lead for Learning Support SGS College	10-05-24 (1 <sup>st</sup> term)
Early Years	1 of 2	Representative	Nicki Edwards	Early Years (Natural Choices Nurseries Ltd)	02/11/2023
Early Years	2 of 2	Representative	Ruth Laing	Head of Early Years and Community Leaf Trust (King's Forest Primary)	09-05-24 (1 <sup>st</sup> term)
Diocese	1 of 2	Representative	Malcolm Strange	Diocese of Bristol	18/10/2019 (2 <sup>nd</sup> term)
Diocese	2 of 2	Representative	David Williams	Diocese of Gloucester	21-01-2025 (2 <sup>nd</sup> term)
Trade Union	1 of 1	Representative	Elly Owen	Trade Union Representative (NASUWT)	05-12-2024 (1 <sup>st</sup> term)

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

Type & number of Members	No	Sub-Group Represented	Forum Representative	Establishment
<b>Substitutions</b>				
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	Tamsin Moreton	Director of Finance & Operations - Enable Trust (New Siblands / Culverhill School)
Academy Secondary	1 of 1	Member Representative	VACANT	

# **SOUTH GLOUCESTERSHIRE COUNCIL**

## **SCHOOLS FORUM**

**03<sup>rd</sup> July 2025**

### **(a) Schools in Financial Difficulty Update (Maintained Schools and Academies Update)**



SIFD Report -  
Final.pptx

# **SOUTH GLOUCESTERSHIRE COUNCIL**

## **SCHOOLS FORUM**

**03<sup>rd</sup> July 2025**

**(b) Funding Update (Including Supplementary Grant) (Verbal)**

# SOUTH GLOUCESTERSHIRE COUNCIL

## SCHOOLS FORUM

03<sup>rd</sup> July 2025

### Schools Outturn 2024-25

#### 1. Schools outturn 2024-25 and comparisons

For comparable purposes, figures relate solely to the current number of maintained schools within South Glos.

**Table 1 – Schools with cumulative deficits and the balances**

Out of a total of 57 schools	22-23 outturn	23-24 outturn	24-25 budget	24-25 revised	24-25 outturn
Number of schools and percentage	8 (14%)	11 (19%)	24 (42%)	25 (43%)	28 (49%)
Cumulative <b>deficit</b> balances	<b>£551,636</b>	<b>£1,244,304</b>	<b>£2,607,144</b>	<b>£2,916,55</b>	<b>£2,606,435</b>
Total school balances (surplus / <b>deficit</b> )	£6,303,409	£4,961,208	£1,741,646	£1,501,76	£2,713,959

Of the 28 schools who out turned a deficit:

2 had a small in-year surplus

5 had an in-year deficit of less than £35k

12 had an in-year deficit of between £35k and £100

9 had an in-year deficit of over £100k

**Table 2 – change in number of schools reporting cumulative deficit from revised to outturn**

Out of a total of 57 schools	22-23	23-24	24-25
Number of schools reporting cumulative deficits as at revised	11	18	25
Number of schools reporting deficit outturn	8	11	28

**Table 3 – change in balances from revised to outturn**

	<b>22-23</b>	<b>23-24</b>	<b>24-25</b>
Revised budget balances	£3,844,419	£4,137,923	£1,501,766
Outturn balances	£6,303,409	£4,961,208	£2,713,959

**Table 4 – Change in anticipated outturn**

	<b>Number of Schools</b>	<b>Variance range</b>
Increase in cumulative surplus from revised to outturn greater than £50k	9	£54k to £165k
Increase in cumulative surplus from revised to outturn less than £50k	13	£5k to £47k
Decrease in cumulative surplus from revised to outturn	5	£8k to £42k
Cumulative deficit at revised to cumulative surplus at outturn	2	£37k to £97k
Cumulative surplus at revised to cumulative deficit at outturn	5	£18k to £145k
Decrease in cumulative deficit from revised to outturn	14	£1k to £72k
Increase in cumulative deficit from revised to outturn	9	£3k to £15k



# **SOUTH GLOUCESTERSHIRE COUNCIL**

## **SCHOOLS FORUM**

**03<sup>rd</sup> July 2025**

**Financial Regulations for Schools (Presentation)**

# **SOUTH GLOUCESTERSHIRE COUNCIL**

## **SCHOOLS FORUM**

**03<sup>rd</sup> July 2025**

### **Scheme for the Financing of Schools – DfE Directed Changes 2025**

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

To update Schools Forum on any directed changes to the Scheme for the Financing of Schools and its application to schools maintained by South Gloucestershire Council

#### **2. Background**

Financial Regulations govern the way the Council controls and manage its financial responsibilities. Under the Schools Standards and Framework Act 1998 legislation local authorities must distribute the individual school's budget amongst their maintained schools using a formula which accords with regulations made by the secretary of state. The financial controls within which delegation works must be set out in a document by South Gloucestershire Council, this document is referred to as the Scheme for Financing of Schools ("the scheme"). This scheme sets out the financial relationship between the Authority and the schools maintained by the Authority. The scheme contains requirements relating to financial management which are binding on both the local authority and the governing bodies of schools. This includes a requirement for local authority funded schools to comply with the specified financial regulations for schools.

Financial regulations apply to every member of the governing body and member of staff at local authority-maintained schools including contractors and temporary staff engaged to carry out duties relevant to the financial management and administration of the school.

The regulations shall not override any statutory provisions that apply and complement the statutory requirements laid down in the South Gloucestershire scheme for the financing of schools.

The Financial Regulations for Schools shall only apply to maintained schools and not Academies or Free Schools. Academies and Free Schools must follow different arrangements put in place by the ESFA.

#### **3. Summary of Scheme Changes**

There are no directed changes for 2025 but there has been an update to reflect current policy position and changes in legislation.

#### **4. Changes that have occurred within the scheme to improve document or reflect current policy positions and changes in legislation:**

2.13.1	addition of an extra item where a school's budget share may be charged:	the cost of an undisputed invoice for energy where a school has entered into an agreement with the Secretary of State for the supply of energy and failed to pay such an invoice (Regulation 23 of the regulations)
--------	---	---

## 5. Recommendations

Members of the Forum are asked to note the changes for clarity to reflect latest regulations.

Author

Michelle Palmer

Tel: 01454 863207

# **SOUTH GLOUCESTERSHIRE COUNCIL**

## **SCHOOLS FORUM**

**03<sup>rd</sup> July 2025**

**High Needs Working Group Update (Verbal)**

# South Gloucestershire Council

## SCHOOLS FORUM

03<sup>rd</sup> July 2025

Schools Forum Forward Plan 2025

July 2025	03 <sup>rd</sup>	Microsoft Teams	
		Membership of the Forum & Schools Forum Constitution	Michelle Trigg
		Schools in Financial Difficulty Update (Report) (Maintained Schools & Academies update)	Mustafa Salih
		Funding Update (including School's supplementary grant)	Mustafa Salih
		Outturn Report 2024-2025 verbal update (outturn report)	Mustafa Salih
		Financial Regulations for Schools	Justine Poulton
		Scheme for Financing Schools – DfE Directed Changes	Caroline Warren
		HNWG update	Susie Weaver

Sept 2025	25 <sup>th</sup>	Microsoft Teams	
		Schools Forum Membership update	Michelle Trigg
		Outturn 2024-2025 Report	Caroline Warren
		Proposed Financial Arrangements – Falling Rolls Funding (Low Pupil Number Contingencies)	Caroline Warren
		Financial Regulations for Schools	Justine Poulton
		Place Planning	Hilary Smith
		Safety Valve update	Mustafa Salih
		Special Schools Funding update	Mustafa Salih

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

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

Dec 2025	04 <sup>th</sup>	<b>Microsoft Teams</b>	
		Schools Budget Announcement	Mustafa Salih
		Implementation of new banding and top up arrangement for special schools and alternative provision	Mustafa Salih
		Proposed Financial Amendments: Breach Funding	Caroline Warren

## ANY OTHER BUSINESS