

# - AGENDA



## SCHOOLS FORUM

Date: Thursday 26<sup>th</sup> September 2024  
Time: 4.30pm  
Place: Microsoft Teams

### Distribution

#### Members of the Committee

Pippa Osborne (Chair)	Dave Baker (Vice Chair)
Julia Anwar	Ross Newman
Debbie Beazer	Diane Owen
Nicola Bailey	Will Roberts
Nicky Edwards	Fr. Malcolm Strange
Stuart Evans	Andy Watson
Paul Evry	Susie Weaver
Kim Garland	Bernice Webber
Clare Haughton	David Williams
Aaron Jefferies	Sue Wright
David Jenkins	Ruth Laing
Nicola Jones	
Louise Leader	

#### **Appropriate Officers attending:**

Mustafa Salih  
Hilary Smith  
Caroline Warren

#### **Councillors attending:**

Ian Boulton

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)



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# 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 04<sup>TH</sup> JULY 2024 MEETING (Pippa Osborne)
6. SCHOOLS FORUM MEMBERSHIP UPDATE (Mustafa Salih/Michelle Trigg)
7. GENERAL FINANCE UPDATE - Verbal (Mustafa Salih)
  - Mainstream School funding settlement for 2025/26
  - Year 3 of New Banding and Top-Up Arrangements Review and Update
  - Safety Valve update – include LGA commissioned report and slides on LGA
  - Special Schools Funding and Access Centre funding
8. HNWG Update (Hilary Smith)
9. OUTTURN 2023-2024 REPORT (Caroline Warren)
10. PLACE PLANNING – Mainstream and SEND (Hilary Smith)
11. FREE SCHOOL MEALS ELIGIBILITY REPORT (James Alden)
12. ANY OTHER BUSINESS - 2024-2025 Forward Plan review

**South Gloucestershire Schools Forum  
Minutes of Meeting held on  
Thursday 04<sup>th</sup> July 2024  
Microsoft Teams**

**PRESENT:****Forum Members:**

Pippa Osborne (Chair)	Headteacher Christ Church Junior School
Dave Baker	CEO, Olympus Academy Trust
Julia Anwar	Head of Business Operations, Olympus Academy Trust
Nicola Bailey	Headteacher, Olympus Academy Trust
Debbie Beazer	Head of Business Operations, Leaf Trust
Tania Craig	Executive Head Teacher, New Horizons Learning Centre
Nicky Edwards	Early Years representative
Paul Evry	Chief Finance Officer, Mosaic Partnership
Kim Garland	Headteacher, Brimsham Green School
Flo Hiatt	Head of Additional Learning Support, SGSC
Aaron Jefferies	Primary Governor, Coniston Primary School
David Jenkins	Governor, Crossways Schools
Nicola Jones	Representative Special Academies
Louise Leader	Headteacher, Pathways Learning Centre
Diane Owen	Chair to Academy Council at King's Oak Academy
Lisa Parker	Primary Headteacher, Park and Parkwall Primary Federation
Fr. Malcolm Strange	Bristol Diocese
Susie Weaver	Executive Director, Cabot Learning Federation
Sue Wright	Finance Director CSET

**Executive Councillors:**

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

**Officers:**

Mustafa Salih, Service Director Resources and Business  
Hilary Smith, Service Director, Education, Learning and Skills  
Caroline Warren, Finance Business Partner  
Jo Briscoombe, Strategic Lead for Early Years and School Support (Item 7)

**Others:****WELCOME AND INTRODUCTIONS**

Attendees were welcomed by the Chair.

**APOLOGIES FOR ABSENCE**

Chris Sivers, Andrew Watson, David Williams, Bernice Webber, Will Roberts, Ruth Laing, Ross Newman

1. **DECLARATIONS OF INTEREST** – None
2. **ANY OTHER ITEMS THE CHAIR DECIDES ARE URGENT** None
3. **MINUTES FROM LAST MEETING – 09 May 2024**

One correction – Diane Owen had sent apologies but was recorded as attending. Remainder of the Minutes recorded as accurate.

4. **Update on DSG Recovery Programme Investments into Early Years (Theme 3) (Jo Briscoombe)**

Jo went through the report. This report is for information only and not a decision report.

**NE** – This is the first project management plan and am aware of the detail that has gone into this with clarity on finance, aims and ambitions of the team.

**Action: Jo to produce a summary with a link within the report and publish it on the website as it is a public document.**

5. **Schools in Financial Difficulty (Scrutiny Commission Report – School Budgets (Mustafa Salih))**

This is a draft report that will be going to the Scrutiny Commission and is a standard look at schools budgets (part of this work is looking into understanding the financial position). The Chair of the Scrutiny Commission is quite keen to set up a task force to carry on the schools funding situation. There is a sustained bit of work in this area and perhaps through that task force whether there are more actions we can take to improve. Schools Forum is working on a letter to feed into the draft report as well. We might want to do some more work on the task force on the demographic dip in primary pupils and that could be quite a significant contributor on pressures going forward.

Mustafa then went through the report.

**IB** – The Task Force came about as a result of discussions at Full Council as we weren't doing enough to fund our schools and asked you to set up a Task and Finish group to recognise what you are dealing with day to day and hoping it will come up with useful ideas of not making enough of the money work.

**Action: MS to separate out the primary and secondary figures of per pupil funding and to bring back to the September meeting of Schools Forum the feedback on responses received.**

Involvement of schools would be vital to ensure the understanding to explore all funding options.

## 6. Funding Update (Caroline Warren)

Caroline shared the report

**Action: CW to send out the report to school heads and business managers and to add a covering letter to go with the report via the Headteachers' Briefings.**

## 7. Outturn Report (Caroline Warren)

The outturn cumulative made an in-year overspend of £7.3m then we have the Safety Valve contribution of the £2m from the DfE and the Council contribution of the deficit brought forward. Outturn report at the next Forum in September.

**PO** – There are some improvements but we are obviously in a worst position so at what point do we have to renegotiate the Safety Valve or are we still meeting that target?

**MS** – Key thing is that it didn't get worse but got better. It is a large overspend and a little bit of positivity got a little bit better.

**MS** – We have effectively negotiated the Safety Valve when we submitted a new plan that's based on the outturn report and extended the period of the Safety Valve plan. I explained that when we presented at the DfE that we could go into enhanced monitoring. We haven't heard any more about that and they have carried on paying us the Safety Valve instalment and assumed that this has been approved by the DfE.

**HS** – We have been working on our productivity plan to submit to the DfE and as an LA I think we have included if the government were to implement the SEND reforms it will make a difference.

## 8. Scheme for Financing Schools (Caroline Warren) (This report is not a decision-making document and intended for information only).

This is for information only.

Caroline shared the report to notify of the changes. The scheme will be now published on the website.

## 9. HNWG Update (Susie Weaver)

Susie gave a summary of the report.

**Early identification of special educational need.** The work of the clusters has been significant in terms of supporting and we can see that coming through in the EHCPs and plans. National average still out of line with SEMH.

**Financial arrangements.** Closed and moved into the implementation phase. HNWG in full support of that.

**Commissioning.** Made some significant progress within this strand. However, some of the work has been impacted through the short term changes of staffing. It is worth noting the closure of the Sheilings school will have a negative impact on the budget.

**Effective planning and the maintained and specialist provision.** Officers have been working with Mastodon C on data and understanding this issue and the intention is to use people with expertise and Mastodon has been providing great clarity.

**Data management.** Closed. All necessary changes to the management information completed and reports available as required.

**Preparing for Adulthood.** 2 focus areas – social care leading on the development of Preparing for Adulthood and then another developing Education, Employment and Training for SEND work.

**Early Intervention/Alternative Provision.** The ability to offer support for mainstream is limited by the capacity available which is currently fully used in responding to statutory duties.

**Communication messages.** Timely progress across workstreams.

**HS** – We have included links to communication now with our Children and Young People Partnership to make sure there is clear communication from the children and arrangements we have in place for supporting children and taking the opportunity to promote that work and helping the communications.

## 10. Mainstream Place numbers (Hilary Smith)

A full report in the Autumn. There was a particular request around the position on places at the moment and obviously in secondary we haven't got Lyde Green secondary school but I think schools are dealing with a significant number of appeals and we were able to allocate places to all children but we have only been able to do that with a number of schools agreeing to breach.

Schools agreed to breach are Downend, SBL, King's Oak and Abbeywood.

There is a high level of surpluses in primary due to the falling birth rate and the only exception is the Thornbury area where Manorbrook have agreed to breach.

**NE** – Is the LA working on a future plan to use some of the surplus primary places for early years?

**HS** – We would not be wanting to open nurseries where we don't have demand and where we can see a shortfall of childcare places and where there is a need to support children for improving education outcomes. Jo has been talking to schools and supporting them to lower their admission age to operate from April and develop plans for the future.



## 11. Schools Forum Forward Plan 2024/2025

Sept 2024	26 <sup>th</sup>	<b>Microsoft Teams</b>	
		Schools Forum Membership update	Michelle Trigg
		General Finance Update (verbal) <ul style="list-style-type: none"> <li>• Mainstream School funding settlement for 2025/26</li> <li>• Year 3 of New Banding and Top-Up Arrangements Review and Update</li> <li>• Safety Valve update – include LGA commissioned report and slides on LGA</li> <li>• Special Schools Funding and Access Centre funding</li> </ul>	Mustafa Salih
		HNWG Update	Hilary Smith
		Outturn 2023-2024 Report	Caroline Warren
		Place Planning- Mainstream and SEND	Hilary Smith
		FSM (Free School Meals) Eligibility Report	James Alden

## 12. Any Other Business

**PO** - Thank you so much for being an incredibly productive and supported group and look forward to working with you in the next term.

Meeting closed

# South Gloucestershire Council

## SCHOOLS FORUM

26<sup>th</sup> September 2024

### Schools Forum Membership

#### Purpose of Report

The purpose of this report is to provide Schools Forum with an update on Membership from September 2024 and request approval of key recommendations.

#### Background

- In accordance with the Schools Forum Constitution, the Schools Forum is expected to review the membership annually at the last meeting of the academic year. This report is reviewing the membership to:
  - consider any current or upcoming vacancies, and
- For information, the SF Constitution, which is referred to in this paper, is published on our [Schools Forum page](#).
- Membership of SF has been reviewed against the 2024 Spring Schools Census Data. This is relevant for the Maintained and Academy Primary and Secondary schools for numbers. All other sectors must have at least one representative, rather than being based on pupil number.
- Table one shows the makeup of School's Forum Membership from September 2024, which is the current position.

**Table 1: 2024 SF Membership (from September 2024)**

	Pupil Numbers (after Mosaic academisation)	% of Pupil Numbers	Pro-rata of 17 SF Members to pupil Nos	Notes
Primary Maintained	9,479	25%	4.3	Assume round down to 4
Secondary Maintained	1,758	5%	0.8	Assume round up to 1
Academies	26,394	70%	11.9	Assume round up to 12
Specials				
	37,631	100%	<b>17</b>	
1 Maintained Special School			1	
1 Academy Special School			1	
1 PRU			1	
<b>Total Schools reps</b>			<b>20</b>	

5. The latest membership list is published on our Schools Forum page and is dated September 2024. It is attached to this paper at Annex 1.
6. We are holding 3 vacancies on Schools Forum:
  - One Headteacher/Headteacher Representative or Governor Special School
  - Two Secondary Academy Headteacher / Headteacher Representative.
7. The position for Headteacher/Headteacher Representative or Governor for Special School will be taken forward through the Governors Thursday email.
8. The position for Head/Head rep/s from a Secondary Academy will be taken forward by the Deputy Chair through the Academies Group.
9. In line with Education & Skills Funding Agency guidance, review of membership is a standing agenda item at each meeting.
10. The membership list at Annex 1 is subject to review by members of this group. If there are changes to be made, please highlight these to the report author. Highlighted rows will be updated to show vacancy/new term/new member.

### **Substitution Vacancies**

11. We still hold vacancies for substitute members for:
  - Maintained Primary Headteacher
  - Maintained Primary Governor
  - Secondary Academy
12. 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.

### **Trade Union Membership**

13. A request has been made by a representative of the National Education Union for the membership of the Schools Forum to be expanded to include a relevant Trade Union Representative.
14. The DfE's Schools Forum guidance states the following:

*“47. The purpose of non-schools members is also to bring greater breadth of discussion to schools forum meetings and ensure that stakeholders and partners other than schools are represented. Organisations which typically provide non-schools members are **trades unions**, professional associations and representatives of youth groups. Parent groups could also be considered. However, as there are clearly limited numbers of non-schools*

*members able to be on a schools forum, care should be taken to ensure that an appropriate representation from wider stakeholders is achieved.*

15. This confirms that Trade Union reps are allowed for and in fact can offer a valuable voice on Schools Forum. It is therefore proposed to look to add one TU rep to the membership and adjust the constitution accordingly.
16. If the Forum approves of this recommendation, then officers will seek one rep from all the relevant TU organisations and then work with the chosen Rep to go through a suitable

17. Induction session with officers and the Chair so that they could take up their place at the next Schools Forum meeting in November.

## Recommendations

18. Schools Forum is recommended to:

- a) ensure any changes to the membership list included at Annex 1 be highlighted to the report author who can update accordingly.
- b) request the Chair and Deputy Chair ensure all vacancies are filled as set out under **Updates to Membership**, to ensure that the Schools Forum is representative and quorate.
- c) Approve an addition of a Trade Union Rep as a non-school member of the Forum and ask officers to undertake the necessary nomination and induction process for a new TU rep to join the November Forum.

## Contact information

Michelle Trigg  
People's Business Support Manager  
[Michelle.trigg@southglos.gov.uk](mailto:Michelle.trigg@southglos.gov.uk)

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## Annex 1: South Gloucestershire Schools Forum Membership (September 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	Bernice Webber	Headteacher - Old Sodbury CofE Primary School	23/01/2020
Primary	2 of 4	Headteacher/Headteacher Representative	Pippa Osborne (Chair)	Headteacher - Christ Church Junior School	03/11/2022 (2 <sup>nd</sup> term) (confirmed via Pippa)
Primary	3 of 4	Governor	David Jenkins	Governor – Crossways Schools	18/07/2019 (2 <sup>nd</sup> term) (confirmed via Pippa)
Primary	4 of 4	Governor	Aaron Jeffries	Governor – Coniston Primary School	07/07/2022 (confirmed via Pippa)
Secondary	1 of 1	Headteacher/Headteacher Representative or Governor	Kim Garland	Headteacher – Brimsham Green School	18/07/2019 (3 <sup>rd</sup> term)
Special School	1 of 1	Headteacher/Headteacher Representative or Governor	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>
Special School Pupil Referral Unit (PRU) (only has to be 1)	1 of 1	Headteacher/Headteacher Representative or Governor	Louise Leader	Headteacher - Pathways Learning Centre (PLC)	18/07/2019 (2 <sup>nd</sup> term)

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 Special / 1 Mosaic representatives) = 13</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)	19/09/2019 (3 <sup>rd</sup> term)
All-through MAT OAT	2 of 12	Headteacher/Headteacher Representative or Governor	Julia Anwar	Head of Business Operations (Olympus Academy Trust)	23/09/2021 (2 <sup>nd</sup> term)
All-through MAT OAT	3 of 12	Headteacher/Headteacher Representative or Governor	VACANT Nicola Bailey (Olympus)	Headteacher – Meadowbrook Primary School (Olympus Academy Trust)	Stood down July 24 01/09/2023
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)	01/03/2019 (2 <sup>nd</sup> term)
All-through MAT CLF	6 of 12	Headteacher/Headteacher Representative or Governor	Susie Weaver	Education Director (Cabot Learning Federation)	19/09/2019 (3 <sup>rd</sup> term)
All-through MAT CLF	7 of 12	Headteacher/Headteacher Representative or Governor	Diane Owen	Chair of Academy Council (Cabot Learning Federation)	23/09/2021 (3 <sup>rd</sup> term)
Primary MAT LEAF	8 of 12	Headteacher/Headteacher Representative or Governor	Ross Newman (trans from Early Years)	CEO (LEAF Trust)	14/06/2021 (2 <sup>nd</sup> term)
Primary MAT LEAF	9 of 12	Headteacher/Headteacher Representative or Governor	Debbie Beazer	Head of Business Operations (LEAF Trust)	01/09/2023

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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)	New - position moved from Primary Maintained rep
<b>Non-school members = 5</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	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	21/01/21

Type & number of Members	No	Sub-Group Represented	Forum Representative	Establishment
<b>Substitutions</b>				



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Primary	1 of 3	Headteacher/Headteacher Representative	VACANT	Headteacher – Frenchay Primary (no longer a serving head)
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

26<sup>th</sup> September 2024

### General Finance Update (verbal)

- **Mainstream School funding settlement for 2025/26**
- **Year 3 of New Banding and Top-Up Arrangements Review and Update**
- **Safety Valve update – include LGA commissioned report and slides on LGA**
- **Special Schools Funding and Access Centre funding**

# South Gloucestershire Council

**SCHOOLS FORUM**

**26<sup>th</sup> September 2024**

**HNWG Update**

# South Gloucestershire Council

## SCHOOLS FORUM

26<sup>th</sup> September 2024

### Dedicated Schools Grant 2023/24 Outturn

#### Purpose of Report

1. To update Schools Forum on the Dedicated Schools Grant and Safety Valve Outturn position for 2023/24.

#### Dedicated Schools Grant (DSG) Funded budgets

2. The Dedicated Schools Grant is reporting an outturn cumulative overspend of £27,460k, which is an improvement of £1,789k since Quarter 3. This arises from an in year overspend of £7,334k, Safety Valve payments relating to the DSG recovery plan (£2,000k), a council contribution from the Financial Risks reserve relating the Safety Valve agreement (£333k) and a brought forward deficit balance of £22,459k.

#### DSG Funding

3. The net DSG budget at outturn excluding academies and High Needs recoupment, is £151,424k. Table 1 below shows the original funding announced as of December 2022 and the various in year adjustments against the DSG for recoupment, Early Years census changes and High Needs Block changes.

**Table 1 – DSG Funding Announcement**

DSG Budget	Net £'000
Original Budget allocation (December 2022)	270,347
Adjustments and Recoupment	
• High Needs Block Direct Funding By EFA	-6,722
• Academy Recoupment	-97,228
• School Business Rates Adjustment	-2,540
• Early Years Block – January 2023 Census	-622
• High Needs Adjustment (Free Schools)	-433
• High Needs Block Adjustment for place change return	-268
• Import / Export adjustment (July 2023)	-30
• Academy Recoupment (School conversions September / October 2023)	-11,022
• High Needs Block Adjustment Academy Recoupment (School conversions September / October 2023)	-112
• Import / Export revised adjustment (November 2023)	54

<b>Total Revised DSG (March 2024) including year-end Adjustments</b>	<b>151,424</b>
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- The DSG funding covers four funding blocks, the Schools Block, the Central Schools Services Block, the High Needs Block and the Early Years Block.
- The outturn under/overspend position for each funding block is provided in table 2 below (see column headed Outturn Unusable Reserve) and the key changes and risks in the subsequent paragraphs.

**Table 2 – Funding position by Blocks**

Funding by Blocks	Gross Budget	EFA / Other Income Budget	Budget Reserve (Usuable Approved Outturn)	Net Budget (DSG)	Gross Exp	EFA / Other Income	Outturn Unusable Reserve (In Year DSG)	Net Exp	Over / (Under)
	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s
<b>Schools Block:</b>									
<b>Total Schools Block - Primary &amp; Secondary Schools (excluding Academies)</b>	<b>97,808</b>	<b>-13,848</b>	<b>594</b>	<b>84,554</b>	<b>98,729</b>	<b>-14,500</b>	<b>325</b>	<b>84,554</b>	<b>0</b>
<b>Central Schools Services Block:</b>									
<b>Total Central Schools Services Block</b>	<b>3,343</b>	<b>-33</b>	<b>-40</b>	<b>3,270</b>	<b>3,418</b>	<b>-174</b>	<b>26</b>	<b>3,270</b>	<b>0</b>
<b>High Needs Block:</b>									
Schools & Independent Providers (including Academies)	55,006	-2,619	-9,929	42,458	52,114	-871	-8,785	42,458	0
Central Items	2,426	-132	-215	2,079	2,282	-418	215	2,079	0
<b>Total High Needs Block</b>	<b>57,432</b>	<b>-2,751</b>	<b>-10,144</b>	<b>44,537</b>	<b>54,396</b>	<b>-1,289</b>	<b>-8,570</b>	<b>44,537</b>	<b>0</b>
<b>Early Years Block:</b>									
Private, Voluntary & Independent Providers	19,427	-1,767	429	18,089	18,766	-1,455	778	18,089	0
Central Items	1,085	-149	38	974	1,020	-153	107	974	0
<b>Total Early Years Block</b>	<b>20,512</b>	<b>-1,916</b>	<b>426</b>	<b>19,063</b>	<b>19,786</b>	<b>-1,608</b>	<b>885</b>	<b>19,063</b>	<b>0</b>
<b>Total In-Year DSG &amp; EFA Funding</b>	<b>179,095</b>	<b>-18,548</b>	<b>-9,273</b>	<b>151,424</b>	<b>176,329</b>	<b>-17,571</b>	<b>-7,334</b>	<b>151,424</b>	<b>0</b>
<b>Total DSG In Year Overspend</b>									<b>-7,334</b>
<b>DSG Deficit Reserve B/F</b>									<b>-22,459</b>
<b>DSG Safety Valve Agreement 2023-2024 (£2,000k Included in table above)</b>									<b>2,000</b>
<b>DSG Safety Valve Council Contribution from Financial Risks Reserve</b>									<b>333</b>
<b>Total DSG Deficit Reserve</b>									<b>-27,460</b>
<b>DSG Reserve:</b>									<b>£'000s</b>
DSG Deficit Reserve B/F from previous years (Appendix 7 - Unusable Reserve)									<b>-22,459</b>
Approved Budget 2023/24									<b>-4,715</b>
DSG Safety Valve Agreement 2023-2024 - Forecast									<b>2,000</b>
DSG Safety Valve Council Contribution from Financial Risks Reserve									<b>333</b>
Approved increase draw on DSG Reserve at Quarter 1 (£3,985k)									<b>-4,093</b>
Approved increase draw on DSG Reserve at Quarter 2 (£315k)									<b>-315</b>
Request no change DSG Reserve at Quarter 3 (£0k)									<b>0</b>
Reduce draw on DSG unusable reserve at Outturn									<b>1,789</b>
<b>Total 2023/24 DSG Overspend Reserve</b>									<b>-27,460</b>

## Schools Block

6. The Schools Block is reporting an outturn underspend of £325k, a reduced underspend position of £269k since Quarter 3. This is mostly due to falling rolls and growth funding payments for schools being approved since Quarter 3.
7. The Early Years Block is reporting an outturn underspend of £885k, an improvement of £418k since Quarter 3. This is mostly due to underspends within Early Years staffing and non-staffing related areas and the actual claims for free childcare arrangements being less than previously forecast / funded. It should be noted that the Summer and Autumn Term claims compared to the DfE funding resulted in an underspend position however this was used to support the Spring Term claims, which compared to the DfE funding received resulted in an overspend.
8. High Needs Block is reporting an outturn overspend of £8,570k, an improvement of £1,574k since Quarter 3. The overspend position is before applying the £2,000k DSG safety valve payments received during 2023/24 and £333k council contribution.
9. The main areas where the outturn position increased or decreased by £100k or more compared to Quarter 3 relate to demand and/or price increases within the areas summarised below and supported by the changes in demand and price illustrated in the Table 3 below.
10. South Gloucestershire Special Schools and Placements made to Pathways Learning Centre (PLC) is reporting an outturn overspend of £1,648k, a reduced overspend position of £195k since Quarter 3. This is mostly due to due a provision held for an Outreach project not yet materialising, and a contingency held for possible breach funding not required.
11. Post 16 (Further Education College, Independent and Alternative Provision) is reporting an outturn overspend of £1,562k, an increase of £271k since Quarter 3. The increase is mostly due to the re-alignment of £717k alternative provision costs to post 16 further education for learners over 16 not in Secondary school education. This has been offset against a cost reduction of £383k for 38 ceased plans and additional income from updated DSG funding announcements and health of £108k.
12. Independent and Non-Maintained Special Schools is reporting an outturn overspend of £1,304k, an increase of £333k since Quarter 3. This is mostly due to an increase in the average weekly price which has been partially offset against the reduction in demand of 5 placements compared to Quarter 3.
13. Statemented Support is reporting an outturn overspend of £1,898k, an increased overspend position of £265k since Quarter 3. This is mostly due to an increase in the average weekly price compared to Quarter 3. This has been partially offset against the reduction in demand. There were 154 new assessments which resulted in a net cost of £111k after offsetting the contingency held for new placements, there has been an increase in High Incidence Payments £109k and various other changes linked to banding reviews, payment protection, transfers in and out of Primary and Secondary Education resulted in a net cost of £45k.

14. Other High Needs areas are reporting an outturn underspend of £983k, an improvement of £2,150k since Quarter 3. This is due to the re-alignment of costs to Post 16 Alternative Provision (£717k) (paragraph 11), a number of Demand Led areas where Quarter 3 figures included a contingency for possible new provisions which did not materialised such as Hospital Education Service (£76k), Early Years Inclusion Support (£260k), High Risk Group (£56k), Alternative Provision Pre 16 (£197k), Equipment and Medical Needs (£47k). There has been a re-alignment of costs charged between the DSG and Non-DSG, the utilisation of grant funding and staff vacancies resulting in a reduced spend of (£480k) plus project related costs in Early Years and High Needs Strategic planning which didn't materialise due to staffing vacancies internally and externally delaying the project start dates (£305k).

**Table 3 - High Needs Demand and Price Table**

High Needs Pressure areas	Outturn 2020/21	Outturn 2021/22	Outturn 2022/23	Quarter 1 2023/24	Quarter 2 2023/24	Quarter 3 2023/24	Outturn 2023/24
Independent and Non-Maintained Special Schools - Placements No.s	111	107	122	146	136	135	130
Average Weekly Price (38 wks)	£1,647	£1,710	£1,614	£1,576	£1,638	£1,677	£1,809
Statemented Support Provision including SG Pupils in OLA Schools No.	840	888	963	1,317	1,216	1,223	1,201
Average Weekly Price (38 wks)	£257	£273	£269	£391	£228	£226	£236
Post 16 - FE Independent Specialist Placements	33	27	28	31	32	37	37
Average Weekly Price (38 wks)	£1,007	£1,184	£1,302	£1,357	£1,347	£1,282	£1,037
Post 16 - FE Colleges	257	360	295	272	270	343	298
Average Weekly Price (38 wks)	£184	£167	£184	£228	£238	£205	£198
Post 16 Alternative Provision *	48	53	57	70	73	74	143
Average Weekly Price (38 wks)	£315	£378	£558	£599	£582	£444	£433
Post 16 - Total Placements	338	440	380	373	375	454	478
Average Weekly Price (38 wks)	£282	£255	£322	£391	£399	£332	£358
Education other than at School SENHN No.s	20	7	13	15	19	20	19
Average Weekly Price (38 wks)	£382	£681	£515	£634	£540	£516	£521
Other Alternative Provision SENAP No.s *		35	50	82	83	86	33
Average Weekly Price (38 wks)		£247	£366	£465	£519	£522	£630
OLA Special Schools No.s	79	88	104	102	107	108	109
Average Weekly Price (38 wks)	£476	£563	£606	£633	£631	£631	£611
Early Years High Needs Support No.s (EHCPs only)	36	35	23	8	9	10	30
Average Weekly Price (38 wks)	£133	£175	£201	£397	£394	£386	£170
Special Schools No.s	483	492	517	560	556	556	557
Average Weekly Price (38 wks)	£521	£561	£577	£596	£604	£613	£616
Resource Bases No.s	142	139	145	156	154	157	154
Average Weekly Price (38 wks)	£520	£570	£583	£491	£491	£488	£471
PLC No.s	150	169	170	170	170	170	170
Average Weekly Price (38 wks)	£646	£600	£622	£623	£623	£623	£603

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

## DSG Recovery Performance

15. The outturn position shows an overspend of £7,334k before applying the £2,000k DSG safety valve payment and £333k council contribution, which represents a net increase of £2,619k above the safety valve target for 2023/24.

16. The main pressure areas at outturn compared to our Safety Valve budget plan submitted to the DfE for 2023/24 relate to Independent Placements (£882k), Post 16 Education (£875k), High Needs Support in Primary and Secondary schools (£1,355k), Special Schools (£711k) and Alternative Provision (£174k). These pressures have been



partly mitigated due to improvements from other DSG block funded areas (£721k), South Gloucestershire Resource Bases (£214k), Outreach project work (£306k) and other Educational Support areas (£137k) when compared to the safety valve submission.

17. As previously reported to Schools Forum South Gloucestershire Council met with the Department for Education in December 2023 to review the latest Safety Valve position and pressures being encountered. The DfE asked the Local Authority to update the Safety Valve forecast to 2027/28 with the continuing pressures being faced by the Local Authority. An updated position was submitted to the DfE on 21<sup>st</sup> December 2023. This shows the DSG achieving an in-year surplus in 2026/27 compared to the current safety valve which reported an in-year surplus in 2025/26.

18. It should be noted that the 2026/27 in-year surplus position in the December 2023 safety valve return is after applying the final instalment from the DfE. The safety valve position for 2027/28 then reports a small in-year deficit before returning to a forecast in year surplus from 2028/29 onwards to clear the cumulative deficit.

19. For the 2023/24 financial year, we continue to report variances to Schools Forum against the previous January 2023 safety valve submission.

**Author**

Caroline Warren, Finance Business Partner  
Tel: 01454 863153

**PLACE PLANNING – MAINSTREAM AND SEND**

# South Gloucestershire Council

## SCHOOLS FORUM

26<sup>th</sup> September 2024

### PROPOSAL TO INTRODUCE A POLICY OF AUTO ENROLMENT FOR YOUNG PEOPLE ENTITLED TO BENEFITS RELATED FREE SCHOOL MEALS

#### Purpose of Report

*To adopt an 'auto-enrolment' approach to benefits related free school meals.*

#### Policy

1. The Council Plan and the People Departments Outcomes Framework share a key priority of We will Support Children and Young People to Thrive
2. The Council Plan and the supporting Tackling Inequalities Plan both include the target to reduce the gap between eligibility and take up for benefits related free school meals.
3. The financial wellbeing framework commits to tackling inequality in our communities and a key focus area is around child poverty
4. South Gloucestershire Council does not however have a policy of auto-enrolment for benefits related free school meals.

#### Background

1. We know there are significant benefits for children having meals, including for their ability to learn at school and then associated long term benefits for educational achievement and other factors.
2. Means-tested Free School Meals (FSM) have been available in England since 1944. These are intended to benefit children in terms of their health and ability to learn, and to ease financial pressures on their families.
3. The 2021 census reported that there were just over 62,000 children aged 0-18 living in South Gloucestershire, 16,000 of which are aged 0-4, 40,000 aged 5-16 and 6,000 aged 17-18.
4. Evidence shows that in our population there has been a significant increase in the proportion of children eligible for free school meals of 7% in 2017 to 15.5% in 2024, a more than doubling. However, take up does not match eligibility.

#### The issues

5. Recent analysis shows that:

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- a. The current gap between eligibility and take up remains stubborn with our current eligibility at 15.5% (6557 pupils) but take up at 10.5%.
  - b. Free School Meal applications are significantly lower than expected figures, particularly amongst Primary Cohorts.
6. This is important for a couple of key reasons.
- c. Many of our children and families are not benefiting from the Free School Meals and,
  - d. if take up is below eligibility our schools miss out on additional funding to support these young people.
7. Over a number of years a dedicated working group has been looking at how to increase take up and this has included working with schools in South Gloucestershire on a range of campaigns.
8. Currently in South Gloucestershire there is a summer campaign being run called 'What's on your plate' which focusses on both eligibility and take up of Free School Meals but also takes a broader and more holistic view of financial wellbeing.
9. Despite the work of this group, and many campaigns to raise awareness and take up, the gap between eligibility and take up remains. This is consistent with the national picture and which is driving national best practice to be many local councils moving towards a process of auto enrolment.
10. It is proposed that South Gloucestershire Council now adopt this best practice approach as soon as possible.

### What is auto-enrolment?

11. The current and common practice for access to benefits related free school meals is for parents / guardians of young people to make an application for free school meals. For many reasons this does not always take place.
12. Auto-enrolment involves the schools asking written permission, this is likely to be a few additional questions on a form already being completed at the beginning of the new school year, for the school to ask the Council to check their entitlement to benefits related Free School Meals and if they are to then apply this.
13. This means that there isn't a separate application process and the administrative burden on the school is limited. The Council has the ability to do 'bulk' checks on eligibility and therefore resource implications for the Council are also limited. We would automatically enrol that household onto FSM and notify them. The customer then receives FSM and the school are able to claim pupil premium.
14. We will of course provide an opt-out option should customers not wish to be in receipt of FSM, although practically believe those numbers to be very low.

### Other considerations

15. There is a risk that schools may not have the physical resources to manage an increase in meals, particularly in the short term, and this is report and forum provides the opportunity to discuss this in more detail.
16. The proposal being brought forward at this time means that there are areas where it is not yet clear on the full implications, detailed below, but if the implication of this policy is further delayed young people and schools will not see the benefits until the school year beginning September 2026.
17. It is recommended that the policy decision is taken at this stage to enable those schools that are able can benefit as early as possible, acknowledging that this may create a temporarily uneven situation.
18. If a young person loses their eligibility at any point, then this will be recognised by the existing system and practices in place. Where this occurs during an academic year both the young person and the school will continue to receive support for that academic year - it will not stop part way through.

### Importance of timing

19. Pupil Premium payments to schools for the following academic year are based on Free School Meal successful applications achieved in the October (Autumn) School Census. This means that if applications are made in October 2024 schools in South Gloucestershire will not benefit until September 2025.
20. It is therefore important that a decision is made now to ensure that another, nearly two years, do not pass before being able to support young people and our schools.

### National considerations

21. On 17 July 2024, the Prime Minister announced the creation of a new Ministerial Child Poverty Taskforce to break down barriers to opportunity and improve the life chances of every child. It is about ensuring a foundation of economic security for families, recognising the importance of happy and thriving childhoods, and a commitment that background must not limit opportunity.
22. The role of the Taskforce is to oversee the development and delivery of an ambitious cross government Child Poverty Strategy to reduce and alleviate child poverty. The aim is to improve children's lives and life chances now and tackle the root causes of child poverty in the long term.
23. Objectives The Ministerial Taskforce will harness all available levers to drive forward short-term and long-term actions across government to reduce child poverty, by:
  - Supporting households to increase their income including considering social security reforms that support people into work and alleviate poverty

- Helping to bring down essential household costs, build savings and tackle problem debt
- Alleviating the negative experience of living in poverty, including through supporting families and the role of public services

24. The Taskforce will deliver on its objectives by developing a UK wide Child Poverty Strategy by working closely with external partners across the UK, including the devolved governments, combined and local authorities and councils, business and civil society, to feed into the strategy.
25. The Taskforce will listen to the voices of children living in poverty and their families and will publish a full Child Poverty Strategy with metrics which can be tracked, in spring 2025.
26. It may be that auto-enrolment for Free School Meals is one of the options that arises from this work, however it is too early to tell and there are risks in waiting for the outcomes of this task force.

### Practical considerations

27. Officers have considered this proposal and believe that, with working with schools, it is achievable. Schools could amend their enrolment forms to include consent for automatic checking for eligibility for Free School Meals.
28. South Gloucestershire's admissions team is now able to undertake an automated bulk checking process, following consent, for eligibility and have committed to do this if schools are able to implement their end.
29. Schools have been supportive of the work to support families financially and try and increase take up through the work of the Free School Meals task and finish group.

### Additional benefits

30. There are a range of additional benefits to taking this approach:
- e. One less thing for families to worry about who are under a lot of stress
  - f. Some parents struggle academically and find filling forms difficult
  - g. Some parents lack awareness/experience of the FSM benefits system so unaware of the application process
  - h. Takes away embarrassment/stigma from parents having to approach the school and admit they need support (financially and support in completing forms)

### **Funding Model (if relevant)**

**Legal Implications (if relevant)**

31. The proposal to introduce an 'auto-enrolment' process into benefits related Free School Meals is legally permissible, whilst ensuring appropriate data protection, and supports compliance with Council Plan objectives.

**Financial Implications (if relevant)**

32. There are no additional costs anticipated with these proposals and initial financial projections suggest that if the gap between eligibility and take up in our primary school cohorts this could equate to £421,800 in additional funding for schools in South Gloucestershire.
33. By supporting young people and families who are impacted by financial inequality can have positive implications for the local economy.

**Recommendations**

34. To agree to the implementation of auto enrolment for benefits related free school meals in South Gloucestershire to help address inequalities and support schools.

**Author**

Name: Mark Pullin

Job Title: Service Director - Community Development.

**ANY OTHER BUSINESS - 2024-2025 Forward Plan review**

Sept 2024	26 <sup>th</sup>	<b>Microsoft Teams</b>	
		Schools Forum Membership update	Michelle Trigg
		General Finance Update (verbal) <ul style="list-style-type: none"> <li>Mainstream School funding settlement for 2025/26</li> <li>Year 3 of New Banding and Top-Up Arrangements Review and Update</li> <li>Safety Valve update – include LGA commissioned report and slides on LGA</li> <li>Special Schools Funding and Access Centre funding</li> </ul>	Mustafa Salih
		HNWG Update	Hilary Smith
		Outturn 2023-2024 Report	Caroline Warren
		Place Planning- Mainstream and SEND	Hilary Smith
		FSM (Free School Meals) Eligibility Report	James Alden

Nov 2024	14 <sup>th</sup>	<b>In person meeting – Winterbourne Academy</b>	
		Current Position on school places across schools system in South Gloucestershire Update	Hilary Smith
		High Needs Working Group Update	Hilary Smith
		School Budgets 2024-2025 (verbal update)	Mustafa Salih
		Schools in Financial Difficulty Update	Deb Lutter
Q1 Financial Performance Report 2023-2024	Caroline Warren		

Dec 2024	05 <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



<b>Jan 2025</b>	<b>16<sup>th</sup></b>	<b>Microsoft Teams</b>	
		Early Years Funding 2024-2025	Jo Briscombe
		Proposed Financial Amendments: Breach Funding	Caroline Warren
		Growth Funding Policy update	Caroline Warren
		Falling Rolls Policy 2024 – 2025 (report)	Caroline Warren
		Special Schools Funding Arrangements	Mustafa Salih
		Q2 Financial Monitoring report 2024 – 2025	Mustafa Salih
		School Budget Announcement	Mustafa Salih

<b>March 2025</b>	<b>13<sup>th</sup></b>	<b>Microsoft Teams</b>	
		F40 update	Mustafa Salih
		Q3 DSG Report 2024-2025	Mustafa Salih
		Safety Valve update	Mustafa Salih
		EHC Breakdown	Hilary Smith
		HNWG	Hilary Smith
Place Pressures	Hilary Smith		

<b>May 2025</b>	<b>08<sup>th</sup></b>	<b>Provisional Forum Date – depending on need for any decision reports</b>	
		Academisation update	Michelle Trigg
		Safety Valve update	Mustafa Salih
		HNWG update	Susie Weaver
		Mainstream Place Numbers	Hilary Smith
<b>July 2025</b>	<b>03<sup>rd</sup></b>	<b>Microsoft Teams</b>	
		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

Sept 2025	25 <sup>th</sup>	<b>Microsoft Teams</b>	
		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	Hilary Smith?
		School Budgets 2025-2026 (verbal update)	Mustafa Salih
		Schools in Financial Difficulty Update	Deb Lutter
		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