

13 March 2025

Schools Forum

Date: Thursday 13th March 2025

Time: 16.30 hrs

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

Caroline Warren

Councillors attending:

Ian Boulton

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South Gloucestershire Council – Schools Forum

13th March 2025

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 16TH JANUARY 2025 MEETING (Pippa Osborne)
6. SCHOOL FUNDING UPDATE (Verbal) (Mustafa Salih)
 - a. Safety Valve
 - b. School Budget
 - c. F40
7. Q3 DSG REPORT 2024 - 2025 (Caroline Warren)
8. GROWTH FUNDING POLICY UPDATE 2025 – 2026 (Caroline Warren)
9. FALLING ROLLS POLICY 2025 - 2026 UPDATE (Caroline Warren)
10. HIGH NEEDS WORKING GROUP UPDATE (Verbal) (Susie Weaver)
11. SCHOOLS FORUM FORWARD PLAN
12. ANY OTHER BUSINESS

South Gloucestershire Schools Forum
Minutes of Meeting held on
Thursday 16th January 2025
Winterbourne Academy, 17 High Street, Winterbourne, Bristol BS36 1JL

Forum Members:

Pippa Osborne (Chair)	Headteacher Christ Church Junior School
Dave Baker (Deputy Chair)	CEO, Olympus Academy Trust
Tania Craig	Executive Head Teacher, New Horizons Learning Centre
Paul Evry	Chief Finance Officer, Mosaic Partnership
Dave Farr	Finance Manager, Leaf Trust
Kim Garland	Headteacher, Brimsham Green Secondary School
David Jenkins	Governor, Crossways Schools
Aaron Jefferies	Primary Governor, Coniston Primary School
Nicola Jones	Representative Special Academies
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
Will Roberts	Chief Executive, CSET
Andy Watson	Chair of Governors, Hanham Primary Federation
Susie Weaver	Executive Director, Cabot Learning Federation
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)

Others:

Tamsin Moreton, Director of Finance & Operations, Enable Trust

APOLOGIES FOR ABSENCE

Chris Sivers, Julia Anwar, Nicky Edwards, Flo Hiatt, Jonathan Keohane, Fr. Malcolm Strange, Bernice Webber

WELCOME AND INTRODUCTIONS

Attendees were welcomed by the Chair.

1. DECLARATIONS OF INTEREST – None

2. ANY OTHER ITEMS THE CHAIR DECIDES ARE URGENT - None

3. MINUTES FROM LAST MEETING – 05 December 2024

Agreed as a true record.

4. CONSULTATION ON EARLY YEARS FUNDING ARRANGEMENTS FOR 2025/2026 (Jo Briscoombe)

Purpose of this Report is to share the outcomes of the recent consultation with the early years (EY) sector on the proposals for the Early Years Funding Formula for 2025/2026. To consult with the Schools Forum for the proposed model of funding allocation for early years and ask for support for the continued additional SEND funding allocated to early years projects by Schools Forum.

There is an increase this year to the pass-through rate. LAs have to pass through 96% of the funding directly to providers. Up to 4% can be retained to ensure the continued delivery of the LA statutory services for early years including for special educational needs and disability

The consultation ran from 17 December 2024 to 09 January 2025. There were a total of 180 responses from childminders, pre-schools, day nurseries and nursery classes, representing 76% of the sector registered to accept funded children. 40 additional responses were also received this year.

The sector were given 3 options and were asked to select their preferred option, as below:

Option 1	Option 2	Option 3
96.7% passported through, no rise in inclusion or deprivation, includes CM flexibility	96.7% passported through, increase to Inclusion and deprivation, no CM flexibility	96.7% passported through with no increase to inclusion and deprivation & with childminder flexibility funded from under 2s

Option 3 was selected as the preferred option by the majority of settings and childminders, with Option 2 and then Option 1 the least popular option.

In terms of monthly payments for providers other than childminders, 45% of responses were in favour of being paid monthly and 51% did not support this option.

- It is recommended that the Schools Forum note the outcome of the consultation and approve implementation of proposals put forward under Option 3, summarised below
 - 9 months to 2-year-old funding rate is set at £10.83
 - 2-year-old funding rate is set at £7.95
 - 3- to 4-year-old funding rate is set at £5.53
 - Deprivation supplement is set at 0.6% and inclusion fund supplement is set at 1.3%
 - A flexibility supplement for childminders is set at £0.14.
- It is recommended that Schools Forum support the proposals for continuation of the £200k spending for SEND projects to ensure continuity of delivery. Funding a number of crucial projects such as Speech and Language support for Early Years and would like a steer on that funding to report back to the Early Years Group.

Recommendations:

Reports and minutes of New Siblands – change referral to Enable Trust Outreach.

As a Schools Forum approve implementation of proposals for Option 3 – **approved**

As a Schools Forum support proposals of continuation of the £200k for SEND projects - **approved**

5. Dedicated Schools Grant 2024/25 Quarter 2 (Caroline Warren) for Information and Update

The DSG is forecasting an outturn overspend position of £38,884k, an increase of £3,056k since Quarter 1.

No change in the Schools Block since Quarter 1.

Central Schools Services Block is forecasting a £4k underspend position for Quarter 2.

The Early Years Block is forecasting a £100k underspend position for Quarter 2, no change since Quarter 1.

The High Needs Block is forecasting a £13,681k overspend position for Quarter 2 before applying the £2,000k DSG safety valve payment and £333k council contribution. This represents an increase of £3,716k above the latest safety valve target for 2024/2025, which is an increase of £3,060k since Quarter 1.

Independent and Non-Maintained Special Schools is reporting an additional pressure of £736k, compared to the safety valve, an increase of £693k since Quarter 1.

High Needs Support in Primary and Secondary schools is reporting an additional pressure of £897k compared to the Safety Valve, an increase of £382k since Quarter 1.

Post 16 Education is showing an additional pressure of £758k compared to the safety valve, an increase of £1,415k since Quarter 1.

South Gloucestershire Special Schools is showing an additional pressure of £621k, an increase of £246k since Quarter 1.

South Gloucestershire Resource Bases is showing an additional pressure of £203k compared to the safety valve, an increase of £12k since Quarter 1.

OLA Special Schools and Resource Bases is showing an additional pressure of £462k compared to the safety valve, an increase of £192k since Quarter 1.

Alternative Provision (AP) Pre-16 is showing an additional pressure of £509k compared to the safety valve, an increase of £387k since Quarter 1.

It should be noted that the Quarter 2 figures include a contingency provision for new placements based on named and unknown placements therefore as the year progresses these will be updated with actuals and reported to Schools Forum.

Concerns were raised around funding for schools and staff jobs.

HS – Mustafa and Hilary are preparing a briefing for Members, following Claire Young attending Parliament this week and engaging with the F40 group. We need to be careful with terminology re system being “broken”.

WR – Without the work being done in previous years we would be in a worse position. This hasn't solved the problem but has contained it. If we feel we can scan what this looks in 3-5 years' time and anticipate that. It is clear there is no more money coming through so do we have a sense of taking actions now that might have an impact before we get them. Probably not for discussion now.

HS – Some things we can do other than building extra places, direction of travel from government for more specialist places in mainstream schools, more capital investment to support that, can be some quick wins. Also look at spend on alternative provision and invest in early intervention.

WR – Next year's budgets will be tighter than this year's budget, so we need to keep up strategic joined up discussion.

Action: Talk to Susie (Chair of HNWG) re HNWG agenda, what could we be looking at, investing in and considering for 5 years' time model.

SW – I am really happy to work with and beyond the HNWG and officers to explore the longer plan and timeline as noted.

Action: Hilary and Susie to follow up.

TC – Tania asked that any additional papers are sent out 24 hours before the meeting.

6. Schools Budgets Update (Mustafa Salih)

Schools Forum agreed to approve the £2.2m transfer from the Schools Block to the High Needs Block at the previous meeting. We informed the DfE and are confident this will be approved by the Secretary of State. Additional information post the Forum: The SoS approved the £2.2m block Transfer on 5/02/2025). Schools will receive notification of the final budget figures by 28th February 2025.

We have been waiting until the DfE produced their figures for Special Schools. In the guidance LAs are required to pass on 0% increase to Special Schools with a number of grants also being rolled forward in 2026. Special Schools will receive additional funding from the DfE to cover NI costs but no information on how much that is yet.

Funding rates – historic grants have been incorporated in special school funding.

Tamsin had logged a question on one aspect of grant funding and if ACA would apply to it – MS clarified that this was quite a technical question and was not covered in DfE operational guide – officers would need to go back and seek technical advice and come back to Tamsin.

Alternative provision funding rates – we have not moved onto the new 6 banding arrangements (still 12 bands rather than 6). We need to complete this last piece of unfinished work and move the PLC to the 6 band banding rates.

A working group is being established with officers and PLC colleagues to work together to transition to the new banding rates. Any changes to funding rates will need to go through a full consultation with Schools Forum.

TC – Requested a Special School representative should be part of this working group.

PO – When it comes to the point re the consultation process, can we have a comparison against 6 banding rates to see what the difference is for PLC re how currently funded, equivalent for children and what it looks like on the new rates.

Action: Include Special School head in working group and provide comparative data as part of the Working Groups approach.

7. Current LA plans for commissioned specialist places 2025 – 2026 and future years (update) (Hilary Smith)

This item was not on the Forward Plan, a request came in and considered at the pre-agenda meeting. It has just been to Cabinet in December with the Commissioning Strategy.

This is not for a decision, just for awareness.

Mainstream Primary Schools

Changes agreed for 2025-2026. Agreement to increase the published admission number from 30 to 60 at Manorbrook.

Admissions team reviewing the position re places and will provide further update once we know. There may be further areas where breaches may be required.

Changes agreed for 2026-2027– St Stephens Infant school reduction in Published Admission Number from 90 to 60 places.

Plan to expand Lyde Green Primary School is on target to complete for September 2026 with entry of 120 pupils to reception.

Future years – Projects subject to availability of finance

Expand Charfield Primary school to two points of entry.

Create new school in Yate – increase to 2 forms of entry

St Michael's re information relating to what is LA plans for Harry Stoke area – looking at meeting needs of developments in Harry Stoke and East of Harry Stoke. Looking at potentially 1 new school.

New developments – Filton airbase

Secondary schools – 2025-2026

An increase in the published admission number of Abbeywood School from 180 to 240, currently a breach and has been for some time.

No permanent changes for mainstream secondary schools.

No plans re Brimsham Green.

To open new Lyde Green Secondary Schools in September 2026 on track.

We can start those discussions and plan for any changes in terms of what does the future look like in secondary schools.

Special Schools

Published communications strategy, shared and agreed planned places, working for 2025 - 2026 – operating at breach across all schools,

Resource bases – operating at capacity, Brimsham Green, Hearing Impaired low in terms of numbers.

Expansion New Horizons school – will invite expressions of interest.

Section 19 duties – re new developments.

Funded through High Needs block – delivered through Pathways Learning Centre.

PO – Thank you for the new item. Would like to include this annually to Schools Forum.

Questions/Comments

EO – Expressed significant concern on the impact on staffing and students from reducing places commissioned at PLC and the way she had found out about this from a Schools Forum item.

PO – I have to acknowledge that every item on our agenda relates to the complex system we work in. I do not envy the position the Council is in as having to make difficult decisions. Hilary met with Pippa, Susie and checked in with Louise before meeting today. I am sorry this has upset some members of the forum this evening, however, our role is to consult and share, representing out sectors and sharing impact, not to make decisions.

HS – Pathways Learning Centre is a Pupil Referring Unit and should operate on a flexible basis. As permanent exclusions will come down, important provision continues to be flexible.

TC – Who is doing the negotiations re Post 16 provision where expectation is to maintain education training until 18.

HS - This still sits with Hilary and having conversations with Will Pritchard and Debbie Gibbs. Patrick Ward is looking at post 16 strategy. College provision isn't giving us what we need and is a priority area.

IB – I understand that a TU member is here to represent TU members. This is about Children and the right provision for them. Also surprised if this has come as a surprise as we have both been in meetings where this has been discussed.

PO – I did raise questions with Hilary re communications to check this is happening throughout the process. Hilary confirmed that is the case and Susie to pick up through HNWG.

LL – Impact Assessment needs to be thoroughly explored, best interests of young people, but takes that balance for children's across South Glos, this is important to get right as shown by the upset, frustration and anger we have seen today. We will discuss in more depth at HNWG, impact around system in Schools Forum planning to make sure no impact to children whilst they come on line.

WR – Lyde Green Primary – still work ongoing with DfE, might need to look at that at Schools Forum re Lyde Green Access Centre, 16 rather than 12 places, Downend and Mangotsfield reduction – illustrates these decisions do have impact.

PO – Imagine same with Olympus – all colleagues here deeply feel for families and children who are not being able to access the correct placements / education, schools. Trying to manage change is a difficult and important part of all of our roles.

When change management happens, always upsetting for staff but seeing a bigger picture is key.

All of us are committed to making decisions based on generating the maximum amount of good for all pupils.

LL – there are questions around the annual record of numbers. If the reduction at PLC of 150 to 130 is from April and not September – this is still to be resolved.

PO – Number of colleagues have raised questions re technicalities – everyone should robustly check through the Paper to ensure everything is correct. The numbers that are relevant should be double checked.

8. Any Other Business

In-person meeting either annually or bi-annually for 2025.

Meeting closed

South Gloucestershire Council

SCHOOLS FORUM

13th March 2025

School Funding Update (Verbal)

1. Safety Valve
2. School Budget
3. F40

South Gloucestershire Council

SCHOOLS FORUM

13th March 2025

Dedicated Schools Grant 2024/25 Quarter 3

Purpose of Report

1. To update the Schools Forum on the Dedicated Schools Grant and Safety Valve position as at Quarter 3 2024/25.

Dedicated Schools Grant (DSG) Funded budgets

2. The net DSG budget (as at November 2024) excluding academies and High Needs recoupment, is £152,023k. The DSG is forecasting an outturn overspend position of £39,886k, an increase of £1,002k since Quarter 2. This arises from a forecast in-year overspend of £14,759k, a forecast Safety Valve payment relating to the DSG recovery plan (£2,000k), a council contribution from the Financial Risks reserve relating the Safety Valve agreement (£333k) and a brought forward deficit balance of £27,460k.

3. Details of the DSG funding announcement including adjustments for Academy Conversions (Recoupment), High Needs and Early Years Block Adjustments are provided in table 1 below.

Table 1 – DSG Funding Announcement

DSG Budget	Net £'000
Revised Allocation (July 2024)	151,093
Adjustments and Recoupment	
1. Academy Conversions (1 st July to 31 st October 2024)	-229
2. Central Schools Service Block (Copyright Licences Increase)	18
3. High Needs Block – Import/Export Adjustment	225
4. Early Years Block – Summer Term Claims 2 year old working parents and Pupil Premium	916
Total Revised DSG (November 2024)	152,023

4. The DSG funding comes from four funding block, the Schools Block, the Central Schools Services Block, the High Needs Block and the Early Years Block.

5. The overspend position by each funding block is provided in table 2 below (see column highlighted green) and the key changes and risks in the subsequent paragraphs.

Table 2 – Funding position by Blocks

Funding by Blocks	Gross Budget	EFA / Other Income Budget	Reserve (Q2 approved)	Budget Reserve (Usuable / Unusable Approved Q2)	Net Budget (DSG)	Gross Exp	EFA / Other Income	Q3 Unusable Reserve (In Year DSG)	Net Exp	Over / (Under)
	£'000s	£'000s		£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s
Schools Block:										
Total Schools Block - Primary & Secondary Schools (excluding Academies)	78,386	-9,450	0	0	68,936	77,919	-9,453	470	68,936	0
Central Schools Services Block:										
Total Central Schools Services Block	3,499	-141	0	4	3,362	3,572	-228	18	3,362	0
High Needs Block:										
Schools & Independent Providers (including Academies)	55,247	3,172	-333	-13,803	44,283	59,831	-130	-15,418	44,283	0
Central Items	2,256	-265	0	-58	1,933	2,254	-361	40	1,933	0
Total High Needs Block	57,503	2,907	-333	-13,861	46,216	62,085	-491	-15,378	46,216	0
Early Years Block:										
Private, Voluntary & Independent Providers	32,105	0	0	0	32,105	32,130	-45	20	32,105	0
Central Items	1,609	-305	0	100	1,404	1,494	-201	111	1,404	0
Total Early Years Block	33,714	-305	0	100	33,509	33,624	-246	131	33,509	0
Total In-Year DSG & EFA Funding	173,102	-6,989	-333	-13,757	152,023	177,200	-10,418	-14,759	152,023	0

Total DSG In Year Overspend	-14,759
DSG Deficit Reserve B/F	-27,460
DSG Safety Valve Agreement 2024-2025 (DfE Contribution £2,000k)	2,000
DSG Safety Valve Council Contribution from Financial Risks Reserve	333
Total DSG Deficit Reserve	-39,886

DSG Reserve:	£'000s
DSG Deficit Reserve B/F from previous years (Appendix 7 - Unusable Reserve)	-27,460
Approved Budget 2024/25	-10,041
DSG Safety Valve Agreement 2024/25 - Forecast	2,000
DSG Safety Valve Council Contribution from Financial Risks Reserve	333
Request increase draw on DSG Reserve at Quarter 1 (£660k)	-660
Request increase draw on DSG Reserve at Quarter 2 (£3,056k)	-3,056
Request Increase draw on DSG Reserve at Quarter 3 (£1,003k)	-1,002
Total DSG Deficit Reserve (Appendix 7 - Unusable Reserve)	-39,886

Schools Block

6. The Schools Block is reporting an underspend of £470k, an increase of £470k since Quarter 2. The forecast outturn is based on the latest applications for growth funding, falling rolls and surplus places. The underspend is due to a reduction in the number of schools previously expected to breach numbers and less claims for falling rolls and surplus school places due to schools not meeting the policy criteria.

Central Schools Services Block

7. The Central Schools Services Block is forecasting an £18k underspend position for Quarter 3, an increase of £14k since Quarter 2.

Early Years Block

8. The Early Years Block is forecasting a £131k underspend position for Quarter 3, an increase of £31k since Quarter 2.

High Needs Block and Safety Valve

9. The High Needs Block is forecasting a £15,378k overspend position for Quarter 3 before applying the £2,000k DSG safety valve payment and £333k council contribution, an increase of £1,517k since Quarter 2.

10. This represents an overspend of £5,237k within the High Needs Block which has been partially mitigated by improvements within other DSG Blocks, resulting in an increase of £4,718k above the latest safety valve target for 2024/2025 and a net increase of £1,002k on the total DSG since Quarter 2.

11. The main pressure areas compared to the latest Safety Valve submission to DfE relate to High Needs Support in Independent and Non-Maintained (£1,433k), Primary and Secondary schools (£1,092k), South Gloucestershire Special School Placements (£737k), South Gloucestershire Resource Bases (£115k) and OLA Special Schools and Resource Base placements (£716k) and Post 16 placements (£1,177k). These pressures have been partially mitigated with underspends forecast within the Schools, Early Years and Central Schools Services Block (£519k) and High Needs (£33k). The pressures relate to demand and/or price changes as illustrated in Table 3 and detailed below.

12. Independent and Non-Maintained Special Schools is reporting an additional pressure of £1,433k, compared to the safety valve, an increase of £697k since Quarter 2. This is due to an increase in demand of 12 placements which has been partially offset by the average weekly prices being £26 per week less compared to Quarter 2. Included in the Quarter 3 figures is a contingency provision for 7 new placements between November 2024 and March 2025 estimated at £166k.

13. High Needs Support in Primary and Secondary schools is reporting an additional pressure of £1,092k compared to the Safety Valve, an increase of £195k since Quarter 2. This is due to an increase in demand of 52 Education, Health and Care Plans (EHCPs) which has been partially offset by the average weekly price being £4 per week less compared to Quarter 2. Included in the Quarter 3 outturn figure is a contingency provision for new EHCPs of £482k to cover the period November 2024 to March 2025.

14. Post 16 Education is showing an additional pressure of £1,177k compared to the safety valve, an increase of £419k since Quarter 2. This is due to an increase the average price of £2 per week and an increase in demand of 24 placements since Quarter 2. Included in the Quarter 3 outturn figure is a contingency provision for new placements of £122k to cover the period November 2024 to March 2025.

15. South Gloucestershire Special Schools is showing an additional pressure of £737k, an increase of £116k since Quarter 2, due to an increase in demand of 6 placements, which has been partially offset by the average weekly price being £2 per week less compared to Quarter 2.

16. South Gloucestershire Resource Bases is showing an additional pressure of £115k compared to the safety valve, a reduction of £88k since Quarter 2.

17. OLA Special Schools and Resource Bases is showing an additional pressure of £716k compared to the safety valve, an increase of £254k since Quarter 2. This is due to an increase in demand of 20 placements which has been partially offset against a reduction in the average price of £63 per week.

18. It should be noted that the Quarter 3 figures include a contingency provision for new placements based on named and unknown placements therefore as the year progresses these will be updated with actuals and reported to Schools Forum.

Table 3 – High Needs Demand and Price

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

* during 2021/22 Alternative provision costs for Children in School monitored separately.

19. The Department continues to see an increase in the number of requests for Education, Health and Care Plans (EHCPs) and the cost of providing support to young people with an EHCP. As previously reported to Schools Forum during June and July, the combination of new EHCPs approved as well as the approval to extend support for existing education packages by a further year resulted in an annual cost against the DSG of £3,000k.

20. The Quarter 3 forecast includes a contingency provision for the increasing demand in new assessments, Education other than at school (EOTAS) packages and Alternative Provision from November to March.

21. Insufficient local special specialist provision results in reliance on more expensive Independent and Non-Maintained Schools, Education other than at Schools and Alternative

Provision Packages. Whilst this pressure has been partially mitigated by increasing provision at New Horizons and the opening of Two Bridges Special Free School in September 2024, the number of young people in Post 16 with Social, Emotional and Mental Health issues has increased resulting in the reliance of more costly Alternative Provision support due to insufficient specialist courses within Further Education.

22. As previously reported to Schools Forum the Department for Education (DfE) met with key staff to discuss the continuing cost and demand pressures compared to the safety valve targets following our safety valve submission back in August 2024. During the meeting the DfE suggested the Local Authority consider an increase in the school block transfer amount in future years, this was presented to Schools Forum as an option but unanimously rejected.

23. In November 2024 the council submitted an updated safety valve position which reflected the continuing demand and price increases being seen by the department. The DfE has acknowledged receipt of our latest position and confirmed they are currently reviewing the report with their expert advisers and will be in touch should further clarification or assurance be required. These ongoing pressures as well as the government's plans to remove the financial override on the DSG balance at the end of March 2026 continues to be a key financial risk to the council in future.

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

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South Gloucestershire Council

SCHOOLS FORUM

13th March 2025

Growth Funding Policy Criteria 2025-2026

Purpose of Report

1. To agree with the Forum the criteria on which growth funding is allocated to maintained and academy schools and the provisional list of schools identified to receive growth funding in 2025-2026.

Policy

2. The Dedicated Schools Grant (DSG) is an Education and Skills Funding Agency (ESFA) grant which is used in its entirety to fund the Schools Budget which in turn supports school and pupil related expenditure. The grant is ring-fenced and must be used in accordance with criteria set by the ESFA.
3. Growth Funding is included within the Schools Block allocations of the DSG.
4. Criteria for allocating growth funding must be approved by Schools Forum.

Background

5. The 2025-2026 operational guidance for setting a growth fund policy includes mandatory criteria for growth funding policies and a mandatory minimum calculation of the amount paid.
6. The mandatory criteria states that growth funding should be provided where a school or academy has agreed with the local authority to provide an extra class to meet basic need in the area (either as a bulge or an ongoing commitment). Our current and proposed growth funding policy already includes this as part of the criteria for allocating growth funding.
7. The mandatory minimum calculation must be compliant with the calculation below. The primary growth factor value will be used for all school types recognising there is one teacher pay scale and that this funding is a minimum value.

primary growth factor value (£1,550) × number of pupils × ACA

8. Our current and proposed growth funding policy calculates funding based on the basic entitlement factor for schools which is higher than the mandatory minimum for 2025-2026.

9. Funding for maintained schools is provided to cover the period from September to March before the lagged funding system 'catches up' from the subsequent April through the National Formula Funding allocations. Since academies are funded on an academic year basis, they would receive additional funding to cover a full year of growth funding before the system 'catches up' (based on 7/12ths September to March and 5/12ths April to August.)
10. In addition to the mandatory criteria detailed above the options for accessing growth funding has also been changed and now includes support for schools, of removing or repurposing surplus places. This has been captured in the growth funding policy section below.
11. Primary and Secondary Maintained Schools and academies are eligible for Growth funding based on a policy agreed by Schools Forum.

Growth Funding Policy

12. The proposed criteria for agreeing and allocating growth funding in 2025-2026 is:

(i) Permanent and Temporary Increases to meet Basic Need

13. Where schools either increase their Published Admission Number (PAN) or provide an extra class in agreement with the Local Authority (LA) and these are not captured in the October census until the following year or included in the estimated pupil numbers in the Authority Proforma Tool (AP Tool), funding will be allocated from the central growth fund.
14. PAN increases can be based on either one form of entry, or a part-time form of entry where there is a longer-term plan to increase the schools PAN up to one form of entry.
15. Increases can be based on a temporary or permanent change in the pupil admission numbers agreed with the LA.
16. Where a temporary change is agreed (i.e. a temporary bulge class is required for one year) growth funding will be calculated as follows: -
 - For academies growth funding will be calculated for the academic year and the school will receive 7/12ths by the end of November and 5/12ths in April.
 - For maintained schools growth funding will be calculated and paid for September to March only as the increase will be captured in the census numbers and Schools Budget Share from April (para 9).
17. Where a permanent change is agreed (i.e. the schools PAN is increasing permanently, on a roll through basis) and this is not captured in the October census until the following year or included in the estimated pupil numbers in the AP Tool funding,

schools will receive growth funding for the agreed roll through period (usually 7 years for Primary and 5 years for Secondary)

18. The growth funding allocation will be based on the Basic Entitlement rates for 2025-2026 multiplied by the agreed pupil number increase and pro-rata based on the agreed date of change.
19. For example, where a school has agreed with the LA to increase by 30 pupils (a one form of entry) in September the growth funding calculation would be based on 30 pupils multiplied by the Basic Entitlement for the proportion of the financial year the class runs September to March.
20. However, if a school has a PAN of 20 and agrees an increase to 30 to create one form of entry in September, the allocation of growth funding will be based on 10 pupils multiplied by the Basic Entitlement for the portion of the financial year the class runs 7/12ths September to March.

(ii) Exceptional Circumstances

21. Exceptional circumstances can arise where the LA may request /agree an increase above a school's current PAN number by any increment and mid-year, for example an unplanned closure of a local independent school as was the case previously in South Gloucestershire. In these circumstances growth funding will be calculated on a pro-rata basis for the portion of the financial year the class runs.
22. On occasions (depending on the exceptional circumstance) the LA might agree to fund a guaranteed minimum number of pupils in a specific year group. Where this type of agreement is made the LA will calculate the difference between the October census numbers and the guaranteed minimum pupil numbers for the specific year group. The Basic Entitlement rate will be applied to the pupil number differential for the agreed number of years.

(iii) Surplus Places

23. Where a school has surplus places and will be reducing PAN (in agreement with the Local Authority), therefore the school would not qualify for funding from the Falling Rolls policy, growth funding will be allocated to support the school transition to the reduced PAN.
24. The funding will provide support for KS1 classes where overall pupil numbers exceed a multiple of 30, by a minimum of 10 pupils.
25. Funding will be allocated using the minimum value as set by the ESFA.
26. For example, a school with a form entry of 60 is planning to reduce to 30 due to population changes. In September 2024 the number of pupils on roll in reception year

is 38 (as per the Autumn Census return). Therefore, funding for 22 unfilled places x by the minimum value as set by the ESFA will be allocated to the school.

(iv) New Schools

27. New primary schools receive £42,000 for pre-opening setting up costs. They will also attract £50,000 for each of the first four academic years due to diseconomies of scale and setting structures while building up numbers.
28. New secondary schools receive £63,000 for pre-opening setting up costs. They will also attract £75,000 for each of the first four academic years due to diseconomies of scale and setting structures while building up numbers.
29. New All Through Schools - New primary schools attached to an existing Secondary school to become an all through school receives £42,000 for pre-opening setting up costs plus the Primary school will attract £50,000 for each of the first four academic years due to diseconomies of scale and setting structures while building up numbers. In addition, the new all through school will receive an allocation of £50,000 per form of entry for the first academic year for the New Primary phase and £25,000 for the next three academic years (in line with previous Schools Forum agreement Sept 2015).

Growth Funding Settlement and Provisional Commitments

30. The growth funding allocation for 2025-2026 is £989,314 and included within the Schools Block Funding allocation. This is a reduction of £668,031 from the 2024-2025 allocation.
31. Whilst the Education and Skills Funding Agency (ESFA) has introduced a Falling Rolls budget within the Growth Funding Allocation, South Gloucestershire Council did not qualify for any additional funding based on the criteria used by the ESFA. It is therefore proposed that £100,000 is allocated from the growth funding allocation for 2025-2026 to support the falling rolls policy. There is sufficient funding to cover this in 2025-2026 based on the provisional list provided below (para 33).
32. The Growth Funding allocation is based on the following factors.
 - £1,570 for each primary 'growth' pupil,
 - £2,350 for each secondary 'growth' pupil, and
 - £77,225 for each new school that opened in the previous year (that is, any school not appearing on the October 2023 census but appearing on the October 2024 census).
 - An Area Cost Adjustment of 1.015% is applied to the above rates.

The table below shows the data used to calculate the growth funding allocation for South Gloucestershire Schools.

LA Name [A]	LA Code [B]	Eligible primary growth [C]	Eligible secondary growth [D]	ACA (pupil weighted for fringe LAs) [E]	Allocation for primary growth [F] = [C] * £1,570 * [E]	Allocation for secondary growth [G] = [D] * £2,350 * [E]	Number of new schools [H]	Allocation for new schools [I] = [E] * [H] * £77,225	Total growth allocation [J] = [F] + [G] + [J]
South Gloucestershire	803	234.5	258.0	1.015238	£373,775	£615,539	0	£0	£989,314

33. Below is a provisional list of schools / areas identified as likely to be eligible for growth funding in 2025-2026 financial year.

School	Change / Reason for Growth	New School Opening Date / Date of PAN increase	No of additional places @ Sept 24	April 25 - August 25 Funding	No of additional places @ Sept 25	September 25 - March 26 Potential Funding
Abbeywood	Breach Sept 24	01/09/2024	60	£125,034	0	£0
Downend	Breach Sept 24	01/09/2024	30	£62,517	0	£0
Frenchay	Increase to 1 Form Entry - all year groups	01/09/2022	7	£10,346	5	£11,188
Kings Oak	Breach Sept 24	01/09/2024	30	£62,517	0	£0
Mangotsfield Secondary	Sep 25 bulge class	01/09/2025	30	£62,517	30	£94,623
Manorbrook Primary	Sep 25 bulge class TBC	01/09/2025	9	£13,303	30	£67,130
Sir Bernard Lovell	Breach Sept 24	01/09/2024	60	£125,034	0	£0
Stoke Lodge	Increase 2 Form Entry roll through	01/09/2024	60	£82,500	60	£115,500
Christchurch Hanham	Surplus places TBC	01/09/2024	30	£19,669	26	£24,175
St Stephens Infants	Surplus places TBC	01/09/2024	34	£22,291	34	£31,613
Potential Breach Primary	In Year Breach	01/09/2025			60	£134,260
Potential Breach Secondary	In Year Breach	01/09/2025			60	£189,245
			Total	£585,728		£667,733

Summary of Growth Funding 2025-2026	Provisional
Growth Funding Available	£989,314
Allocate Funding for Falling Rolls	-£100,000
Funding Available	£889,314
Provision Growth and Surplus Places Funding	£1,253,462
Recoupment Adjustment Academy Growth	-£520,121
Forecast Commitment 2025-2026	£733,341
Surplus (-) / Deficit (+)	-£155,973

RECOMMENDATIONS

- (1) The Schools Forum is asked to approve the criteria used for the Policy and the allocation of growth funding in 2025-2026.
- (2) The Schools Forum is asked to consider a budget allocation of £100k for Falling Rolls Policy, if required.

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South Gloucestershire Council

Schools Forum – For Decision

13th March 2025

FALLING ROLLS FUND AND POLICY

Purpose of Report

- 1 To seek approval from Schools Forum of the fund amount and policy for Falling Rolls for Primary and Secondary Schools in South Gloucestershire

Recommendations

- 2 The Schools Forum is recommended to:
 - Provide views on the matters covered in this report.
 - Agree to the policy for 2025-2026.
 - Agree to the formation of a small working group of Schools Forum representatives to support where necessary any exceptional funding requests.

Background

3. In 2024-2025 the Education and Skills Funding Agency (ESFA) introduced a Falling Rolls budget which forms part of the overall Growth Funding Calculation.
4. Unfortunately, in 2025-2026 South Gloucestershire Council did not qualify for any additional funding based on the criteria used by the ESFA. However local authorities continue to have discretion over whether to operate a falling rolls fund,
5. It is proposed that £100,000 is allocated from the growth funding allocation for 2025-2026 to support a falling rolls policy.
6. The purpose of the falling rolls fund is to provide financial support to schools where there is a temporary fall in pupil numbers, but numbers are forecast to recover back to previous levels within 3-5 years as demonstrated within the Schools Capacity Assessment Report (SCAP).
7. The funding is designed to support schools to avoid the need to take costly actions due to the temporary reduction in their capacity when demographic data shows capacity will be needed for expansion in the future. For example, making staff redundant when there will be a need to fill the post in the subsequent 3 to 5 years.

8. There is a mandatory requirement whereby local authorities will only be able to provide funding where the most recent school capacity data (SCAP report) shows that school places will be required in the academic year 2025-2026 and/or the subsequent two years.
9. It should be noted that the number of years applied to the mandatory criteria has been changed by the ESFA, in 2024-2025 the guidance stated:
 - SCAP shows that school places will be required in the subsequent three to five years (this is a mandatory requirement),

this has been updated in 2025-2026 to:

 - the most recent SCAP data shows that school places will be required in 2025 to 2026 and/or the subsequent 2 years (this is a mandatory requirement).

Key Points

10. The criteria and fund amount must be agreed by the Schools Forum and applied fairly to academies and maintained schools.

Falling Rolls Policy

11. The proposed eligibility criteria and operating methodology for the SGC Falling Rolls Fund is as follows:
 - The most recent SCAP data shows that school places will be required in 2025 to 2026 and/or the subsequent 2 years (this is a mandatory requirement).
 - The eligibility threshold for surplus capacity is a decrease of greater than 5% or 5 pupils for Primary Schools (to allow for economies of scale) and 5% for Secondary Schools between the last October census and the previous years October census.
 - Funding allocations from the Falling Rolls Fund will be calculated at the Primary AWPU funding level for Primary Schools and the average of the key stage 3 and 4 AWPU funding levels for Secondary Schools per vacant space. Funding will be capped for demand where necessary.
 - At least 80% of the pupils attending the school are from the catchment area of the school.
 - Schools with excessive balances would not be eligible for funding from the Falling Rolls Fund. An excessive balance is deemed to be a revenue balance of 15% or more of delegated budget funding.
 - Schools are limited to 2 consecutive years for the receipt of funding.

- The overall funding allocation which any school could receive from the Fund over 2 consecutive years is capped at £100k to ensure overall affordability.
- This policy and method of calculating the funding allocations will be reviewed annually with Schools Forum to ensure funding for schools that meet the criteria can be covered within the available Falling Rolls budget.
- Exceptional requests from any school who does not meet the eligibility criteria for the Fund but feels that they have a strong case for the receipt of a funding allocation from the Falling Rolls Fund will be considered. This consideration will take the form of the submission of an application for funding which would be presented to a Panel of LA officers and Schools Forum representatives.

Provisional Commitments for 2025-2026

12. Based on the latest data available there is currently one South Gloucestershire School that may qualify for Falling Rolls Funding in 2025-2026.

RECOMMENDATIONS

The Schools Forum is recommended to:

- Note the background, purpose and key highlights.
- Provide views on the matters covered in this report.
- Agree to the policy and fund amount for 2025-2026.
- Agree to the formation of a small working group of Schools Forum representatives to support where necessary any exceptional funding requests.

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South Gloucestershire Council

SCHOOLS FORUM

13th March 2025

High Needs Working Group Update (Verbal)

South Gloucestershire Council

SCHOOLS FORUM

13th March 2025

Schools Forum Forward Plan 2025

March 2025	13th	Microsoft Teams	
		School Funding Update <ul style="list-style-type: none"> • Safety Valve • School Budget • F40 	Mustafa Salih
		Q3 DSG Report 2024-2025	Caroline Warren
		Growth Funding Policy 2025 – 2026 Update	Caroline Warren
		Falling Rolls Policy 2025-2026	Caroline Warren
		High Needs Working Group Update (HNWG)	Susie Weaver

May 2025	08th	Provisional Forum Date – depending on need for any decision reports	
		Academisation update	Michelle Trigg
		Safety Valve update	Mustafa Salih
		HNWG update	Susie Weaver
		Mainstream Place Numbers	Hilary Smith

July 2025	03rd	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

Sept 2025	25 th	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 th	Proposed in person meeting – venue to be confirmed.	
		Current Position on school places across schools system in South Gloucestershire Update	Hilary Smith
		High Needs Working Group Update	Susie Weaver
		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 th	Microsoft Teams	
		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
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ANY OTHER BUSINESS