

AGENDA



SCHOOLS FORUM

Date : Thursday 8th May 2014

Time : 4.30pm

Place : Badminton Road Offices, Ground Floor, Room 0015

Distribution

Members of the Committee

Richard Badley	John Goff
Dave Baker	Geoff Howell
April Begley	Janet Hoyle
Nicola Berry	Keith Lawrence (Chair)
Andy Brown	Jim Lott
Tania Craig	Sujata McNab
Fr.Eugene Campbell	Jane Millicent
Mark Dee	Max Reed
Victoria Fitzgerald	Sara-Jane Watkins
Steve Forecast	Susie Weaver
Mark Freeman	Andrew Wild
Amanda Fry/Lisa Williams	
Kim Garland	Ann Reed (sub)

Appropriate Officers

Peter Murphy
Martin Dear

Councillors

Ian Blair
James Hunt
Gareth Manson

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AGENDA

1	WELCOME AND INTRODUCTIONS	5 mins
2	APOLOGIES FOR ABSENCE	5 mins
3	EVACUATION PROCESS	5 mins
4	ANY OTHER ITEMS THE CHAIR DECIDES ARE URGENT	5 mins
5	MINUTES OF THE MEETING HELD ON 27 FEBRUARY 2014	5 mins
6	SCHOOL ENERGY SCHEMES	15 mins
7	SIR BERNARD LOVELL AND KING'S OAK ACADEMY – IN YEAR PUPIL TRANSFERS	10 mins
8	EDUCATION COMMISSION - UPDATE	10 mins
9	DFE: ANALYSIS OF SCHOOLS BLOCK FUNDING FORMULAE 2014/2015	10 mins
10	IMPLICATIONS OF THE DFE CONSULTATION ON SCHOOL FUNDING 2015/2016	15 mins
11	DFE CONSULTATION ON EDUCATION SERVICES GRANT FOR 2015/2016	10 mins
12	FUTURE TRADED ARRANGEMENTS	5 mins
13	THE SCHOOLS FORUM CONSTITUTION FROM APRIL 2014	10 mins
14	SCHOOLS FORUM WORK PROGRAMME	5 mins
15	ANY OTHER BUSINESS	5 mins

Department for Children, Adults and Health

SCHOOLS FORUM
Thursday 27 February 2014
Badminton Road Offices

PRESENT:

Julia Anwar	Head of Business, Olympus Academy Trust
April Begley	Governor Hanham High and Christchurch Primary Schools
Tania Craig	Headteacher, New Horizons Learning Centre
Victoria FitzGerald	Chair of Directors, Olympus Academy Trust
Mark Freeman	Headteacher, St Michael's Primary School, Stoke Gifford
John Goff	Governor, The Park and Parkwall Primaries
Geoff Howell	Governor, Patchway Community College, Barley Close and Callicroft Primary Schools
Keith Lawrence	Governor, Culverhill School
Jane Millicent	Headteacher, Patchway Community College
Ann Reed	Governor, Kings Forest Primary School
David Turrell,	Headteacher, Sir Bernard Lovell School

Chair: Keith Lawrence

Officers: Martin Dear Head of Business Support
 Clare Medland Head of Strategy & Development (for item 6)

Other Attendees:

1. WELCOME AND INTRODUCTIONS

Attendees were welcomed by the Chair.

2. APOLOGIES FOR ABSENCE

Dave Baker, Richard Badley, Nicola Berry, Angie Brown, Fr Eugene Campbell, Mark Dee, Steve Forecast, Janet Hoyle, Jim Lott, Sujata McNab, Max Reed, Susie Weaver, Andrew Wild

3. EVACUATION PROCESS

The Chair drew attention to the emergency evacuation procedure.

4. ANY OTHER ITEMS THE CHAIR DECIDES ARE URGENT

None

5. MINUTES OF MEETING HELD ON 16th JANUARY 2014

The Minutes were agreed as a true record.

6. CHILDREN AND YOUNG PEOPLE CAPITAL PROGRAMME REPORT 2014/15 ONWARDS

The three year Capital Programme for 2013/14, approved by Council in February last year, allocated just over £10M of additional resources to ensure that the additional places required to meet a rising pupil population were provided.

In Spring 2013 the government announced a Targeted Basic Need Programme. Bids were made for four schemes all of which were successful. Two of which were already included in the current programme. As a consequence the additional funding to support those two schemes is being held to support future capital priorities.

In December 2013, central government announced additional capital funding to support the provision of universal free school meals for infant aged pupils. The allocation for South Gloucestershire amounts to just over £7,000 per school and is only likely to meet the additional furniture and equipment required to deliver increased numbers of meals.

Demand for primary places remains high and 2015 is expected to be a peak year. Despite the action taken last year it is expected that another 90 places will be required. This will be accommodated through increasing admission numbers at some schools.

In year movers are finding it difficult to get places at school close to home and are being offered a place some distance. They can be transport implications.

A feasibility study is to be undertaken of The Grange site to establish costs for locating EOTAS services on the site and expansion of post-16 specialist provision for Warmley Park Special School. A bid for new Studio School will be submitted to the DfE. If successful, the capital costs will be funded by the DfE.

R&M works are being kept to the minimum and priority work is increasing.

The Schools Forum supported the report that is going to Children and Young People Committee on 5 March 2014 with the addition that they wanted to bring to the CYP Committee's attention that no provision has been made concerning addressing the temporary accommodation issues that currently exist.

7. SIR BERNARD LOVELL SCHOOL AND MANGOTSFIELD SCHOOL – IN YEAR PUPIL TRANSFERS

David Turrell presented a paper on In-Year Pupil transfers and highlighted the situation of pupils moving from The Grange to SBL and the financial impact this would have on the school.

After a lengthy discussion, David Turrell left the room whilst a decision was made.

MD confirmed that the funding would come out of the DSG.

The following was discussed: Need to look at the effect of in year transfers from The Grange to other schools. It was thought that the only other school will be King's Oak Academy. Look at pupil numbers at the end of March in order to gauge the size of the transfers and possible financial effect. The May count date would seem to be the appropriate cut-off date.

Will only consider pupils transferring from The Grange, and no other in year pupil transfers.

Schools Forum agreed, in principle, to a funding level of the basic entitlement; of in-year pupil transfers per year group above a certain number, yet to be determined. This would be brought back to the May meeting of the Schools Forum.

Action: It was agreed that MD would go away and look at the difference in numbers at the end of March 2014 and the count day in October 2013, and report back at the May meeting.

8. THIRD QUARTER MONITOR REPORT: REVENUE AND CAPITAL 2013/2014

Members noted this report.

9. DFE CONSULTATION ON SCHOOL FUNDING 2015/2016

Consultation still not received from the DfE. To be deferred to the next meeting.

Action: To be put on the agenda for the next meeting and to send a link to schools forum members when received.

10. SCHOOLS FORUM WORK PROGRAMME

Additional items were added to the agenda for 8th May:

- Trading Arrangements
- In-year transfers from The Grange
- DfE Consultation 2015/16
- Energy schemes

Remaining dates and agenda items were agreed.

11. ANY OTHER BUSINESS

None

Meeting closed 17.42

SCHOOL ENERGY SCHEMES

Attached are reports on the following Invest to Save energy schemes.

1. Biomass Fund
2. Replacement of older fluorescent lighting
3. Solar Photovoltaic Systems

A presentation will be made at the meeting.

RECOMMENDATION:

Schools Forum members are asked to consider the content of this report and to determine a way forward.

SIR BERNARD LOVELL SCHOOL AND KING'S OAK ACADEMY – IN YEAR PUPIL TRANSFERS

At the previous two meetings of the Schools Forum discussion has taken place around the financial strain on other schools caused by pupils moving from The Grange School and Sports College. There are two schools which are majorly affected by this, Sir Bernard Lovell School and King's Oak Academy.

This financial strain is caused by the in year admissions of pupils and hence the time lapse of the increase in pupil numbers being recognised under the normal cycle of school funding arrangements.

For a pupil to attract funding they must be registered in the October prior to the start of the financial year. Any pupil registering after the school census date in October will not attract funding for the new financial year. This means that a pupil can attend school for 17 months before they attract any funding.

At the last meeting, the Schools Forum agreed the following:

- no retrospective adjustment is available for 2013/2014
- in principle, to a funding level of the basic entitlement; of in-year pupil transfers per year group above a certain number, yet to be determined.
- The May count date would seem to be the appropriate cut-off date
- Will only consider pupils transferring from The Grange, and no other in year pupil transfers
- Will look at the difference in pupil numbers at the end of March 2014 and the count day in October 2013, and receive a report on this at the May meeting of the Schools Forum in order to gauge the size of the transfers and possible financial effect.

Details of the in year transfers since the October 2013 count date, from The Grange School and Sports College, as at the end of March 2014 is shown in Appendix A.

RECOMMENDATION:

School Forum members are asked to consider the content of this report and to agree the following, for Sir Bernard Lovell School and King's Oak Academy:

- For each school, calculate the difference in pupil numbers between the May 2014 and October 2013 count dates, of in year movers from The Grange School in years 7, 8 and 9. Apply the Key Stage 3 basic entitlement rate (£3,774) to this difference, subject to the difference being greater than XX.
- This amount then to be allocated to the school in 2014-15
- This is to be funded from the expanding schools budget.

Appendix A

DfE No	School Name	Current school for students on roll at The Grange For the Autumn 2013 census							Free School Meals Eligible 2013-14 (Y8-12)
		Y7	Y8	Y9	Y10	Y11	Y7-Y11	Y12+	
4001	BTE Academy	0	0	0	1	0	1	0	0
4003	King's Oak Academy	13	17	6	1	0	37	0	9
4124	Sir Bernard Lovell	14	16	4	1	0	35	0	6
4145	Hanham High	1	2	2	0	0	5	0	0
4147	Mangotsfield	0	0	1	0	0	1	0	0
4148	Downend	0	0	3	0	0	3	0	0
4149	<i>The Grange</i>	42	44	88	134	164	472	92	95
Left	No longer in SG school	2	2	2	1	1	8	16	4
6666	Educated at Home	0	1	0	0	0	1	0	0

EDUCATION COMMISSION UPDATE

Initial funding for the South Gloucestershire Education Partnership

Summary of Proposal

The Education Commission established by the Council in May 2013 reported formally to Councillors in January 2014. The fourteen recommendations have been endorsed by Councillors, including the formation of a South Gloucestershire Education Partnership to look at the recommendations in depth and identify solutions. Officers have identified how this Partnership should be established in a proposal to be considered by Councillors on 30 April (Appendix A). This includes the proposal that the Education Partnership “will be supported by a ‘serving officer’ who will service the Partnership and carry out actions on its behalf. This ‘officer’ may be a seconded head teacher representative”.

It is recommended that £11,000 is allocated by Schools Forum to fund the servicing of the newly formed Education Partnership for an initial period of 3 months (June to August 2014), enabling the Partnership to develop and commence work on a three-year strategic plan, including securing arrangements for future funding of the Partnership from September 2014.

Background

On 1 May 2013, the Children and Young People Committee considered a report setting out options to address the issues relating to the quality of provision and student outcomes in South Gloucestershire secondary schools. Those issues were reported to Committee on 23 January in the ‘Review of 2012 Standards and Performance Report’ and expanded on in the report ‘Secondary School Standards and Local Authority Support: Initial Report’ on 7 March 2013.

The Committee resolved: “That an Education Commission be established to investigate the model of secondary and post-16 educational provision in South Gloucestershire and the achievement of children and young people in South Gloucestershire schools in order to inform future provision planning and school improvement approaches”. The Education Commission was asked to ‘investigate and explore:

- the quality of provision in South Gloucestershire secondary schools;
- standards at Key Stage 4 and 5 and the causes of underachievement; and
- the current model and range of provision in the light of the quality and standards, the low levels of funding and the impact of falling rolls.’

The final report of the Education Commission was presented to the Children and Young People Committee on 22 January 2014. The Committee resolved:

- That the report of the Education Commission be received;
- That the recommendations of the Education Commission be endorsed;
- That officers work with schools and other partners in setting up the South Gloucestershire Education Partnership in order to look at each of the Education Commission’s recommendations in-depth, determine solutions and investigate sources of funding for the continuation of the Partnership and its work; and

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- That the Education Commission be thanked for its work and its report.

Since the publication of the Education Commission report, officers have worked with schools and other partners to implement the recommendations. Initial work has prioritised two key elements of the report, i.e. those related to developing an Education Partnership and those related to Leadership for a self-improving system.

RECOMMENDATION:

Schools Forum members are requested to

1. Approve the expenditure of £11,000 and to meet this from the Dedicated Schools Grant (DSG).
2. Request a future report on the implication Education Commission recommendations to be presented at the September meeting of the Schools Forum.

South Gloucestershire Education Partnership

The South Gloucestershire Education Partnership is representative of all schools and other education and skills providers and has responsibility and accountability for the quality of education and learning outcomes for children and young people in South Gloucestershire.

Aims

In accordance with the recommendation of the South Gloucestershire Education Commission, the Education Partnership will:

Develop a compelling and distinctive educational vision for South Gloucestershire that is shaped by schools, colleges, employers and the wider community.
(Recommendation 11)

Define and own South Gloucestershire's Performance Challenge, expressed in a new set of ambitious and stretching targets over the medium term for quality, attainment and progress, for which schools, working collaboratively, will be held to account.
(Recommendation 1)

Develop a self-improving schools framework, based on formal collaborative partnerships between schools, with collective accountability for ambitious shared educational outcomes for the area
(Recommendation 12)

Establish a planned change programme to promote the different leadership behaviour required to move from current school improvement arrangements to a self-improving school system.
(Recommendation 13)

Through the change programme and through sub groups, the Education Partnership will be responsible for ensuring the effective implementation of all of the Education Commission recommendations.

The Partnership aims to support a sustainable self-improving education system in a shared, collaborative culture of educational excellence that recognises those in schools and other providers as equal, trusted partners. It intends to build on existing networks, relationships and local partnerships to ensure that no school is isolated.

The Partnership will collectively support and challenge institutions to reach high standards and ensure continual improvement of schools in South Gloucestershire.

Functions

The primary functions are to:

- Oversee and co-ordinate school-to-school support in partnership with other partners and other school improvement agencies;

- Develop leadership capacity, including system leadership, and succession planning at all levels;
- Encourage constructive conversations about the performance and health of the wider educational system;
- Undertake a systematic analysis of the learning needs of schools.

Guiding Principles

The work of colleagues on behalf of the South Gloucestershire Education Partnership must be of the highest quality and evaluation of school performance must be fair, consistent, rigorous and based on secure range of evidence.

The Partnership and colleagues working on its behalf will:

- Develop and implement effective strategies to ensure the achievement of the Education Partnership's aims;
- Establish effective relationships that enable the promotion of a self-improving and self-supporting school system;
- Share and exchange intelligence and information which will assist in impartial evaluation and assessment of need;
- Hold each other to account and report evaluative judgements honestly and fairly, based on accurate and reliable evidence;
- Work collectively to support those schools which are underperforming in South Gloucestershire;
- Respond flexibly and appropriately to meet the needs of different partners;
- Make the best use of resources whilst ensuring high quality; and
- Act swiftly and with minimum bureaucracy.

Individual colleagues will:

- Act with integrity and moral purpose in the best interests of children, young people and adults;
- Respect all educational professionals and partners; and
- Be accountable to the Education Partnership at all times.

Roles:

Stakeholder relationship to the South Gloucestershire Education Partnership and to other stakeholders will be determined by the agreements in place with the members that they represent.

1) Schools giving support:

- Deliver school-to-school support as agreed, including through local hubs, and in accordance with each school's priorities;
- Report progress regularly;
- Share their expertise and best practice with colleagues to improve outcomes.

2) The Local Authority:

- Support partnerships across all schools to promote improvements and facilitate the development of local support networks;
- Promote the work of collaborative groups, including local hubs;
- Quality assure the work of the Partnership in providing a high standard of school to-school support;
- Intervene in schools where improvements against agreed priorities are too slow or the school is at risk of an adverse inspection outcome.

3) Schools receiving support:

- Be open to advice and support given, making available data, information and resources needed to address the agreed areas for improvements.

Servicing the Partnership

The LA will provide human resource in support of the Partnership. Time will also need to be made available by the members of the Partnership to Chair and attend meetings.

The Council will seek to facilitate the identification of initial funding. However, the budget for school improvement has been fully delegated to schools and there is an expectation schools will resource school to school support.

Structure of the Education Partnership

The Education Partnership will be governed by an Education Partnership Board. It will be supported by a combination of sub groups and short term task and finish groups.

The Board will be supported by a 'Change Group' with responsibility for developing the Partnership's role and implementing the short term recommendations of the Education Commission.

Role of the Education Partnership Board

The Partnership Board will be responsible for monitoring and evaluating the work of the Partnership and particularly the development of 'hubs' and the success of the school to school support programmes.

The Partnership Board will meet three times per year and will be responsible for the direction of the Partnership, monitoring effectiveness, identifying need for improvement and agreeing priorities and programmes. It will also be responsible for determining further actions where necessary in schools that are being supported.

The Chair will be elected by the Group. All discussions will be confidential.

The membership will consist of:

4 secondary school headteacher representatives

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- 4 primary school headteacher representatives
- 1 special school headteacher representative
- 1 further education representative
- 1 skills provider representative
- 2 Local Authority representatives (the Director for Children, Adults and Health and the Head of Education, Learning and Skills)
- 1 employer representative

Developing Capacity

As the Education Partnership develops it will be supported by a 'serving officer' who will service the Partnership and carry out actions on its behalf. This 'officer' may be a seconded head teacher representative.

In order to support the development, the Education Partnership will commission external quality assurance on a consultancy basis in order to ensure that the Partnership develops in line with Education Commission recommendations and local school needs.

The Local Authority will provide support with data and information.

DFE: ANALYSIS OF SCHOOLS BLOCK FUNDING FORMULAE 2015/2015

The DfE have issued an analysis of local authorities' Schools Block Funding Formulae. This is attached as Appendix A.

The corresponding figures for South Gloucestershire for comparison with the report are:

• Aged Weighted Pupil Unit (AWPU): Primary amount per pupil	£2,384
• Aged Weighted Pupil Unit (AWPU): KS3 amount per pupil	£3,774
• Aged Weighted Pupil Unit (AWPU): KS4 amount per pupil	£4,018
Percentage of funding through Basic Entitlement:	76%
Total explicit deprivation funding per Free School Meal (FSM): Primary: Secondary:	£606 £802
Percentage of funding through Deprivation	1.6%
Looked After Children (LAC): Amount per pupil	£500
Percentage of funding through Looked After Children	0.05%
Low Cost, High Incidence Special Educational Needs (LCHI SEN): Primary indicator amount per pupil	£1,056
Low Cost, High Incidence Special Educational Needs (LCHI SEN): Secondary indicator amount per pupil	£1,714
Percentage of funding through Low Cost, High Incidence Special Educational Needs	7.1%
English as an Additional Language (EAL): Primary indicator amount per pupil	£900
English as an Additional Language (EAL): Secondary indicator amount per pupil	£900
Percentage of funding through English as an Additional	1.1%

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Language	
Mobility: Primary amount per pupil	£0
Mobility: Secondary amount per pupil	£0
Percentage of funding through Mobility	0%
Total percentage of funding through pupil-led factors	85.3%
Lump sum	£160,838
Percentage of funding through Lump Sum	12.6%
Primary and Secondary Sparsity Lump Sum	£0
Percentage of funding through Sparsity	£0
Primary : Secondary funding ratios	1:1.35
Percentage of funding through notional SEN	9.1%

RECOMMENDATION:

Members of the Forum are requested to consider and comment on this report.

SCHOOLS BLOCK FUNDING FORMULAE 2014-15 Analysis of local authorities' Schools Block funding formulae

Please click on the link below.

Also attached as a separate document.

https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/297531/Schools_block_funding_formulae_2014-15.pdf

IMPLICATIONS OF THE DFE CONSULTATION ON SCHOOL FUNDING 2015/16

In March 2014 the Department for Education launched a consultation document entitled Fairer Schools Funding in 2015/16. The response by date was 30 April 2014. The purpose of this report is to consider the effect of the proposals on schools within South Gloucestershire.

The consultation sets out a proposal to allocate an additional £350m in 2015/16, by increasing the per pupil budgets for the least fairly funded authorities. Being a low funded authority South Gloucestershire is a major gainer. Based on DfE data the council is the sixth largest gainer at 6.3% which is equivalent to £8.6m. This equates to £248 per pupil.

In calculating this increase the DfE have used a totally different method of calculating the Schools Block element of the Dedicated Schools Grant. Rather than base an allocation on the historic spend plus model the DfE have pre-determined unit values for each of the elements of the factors within the formula. The difference between this and the old model is the deemed increase i.e. £8.6m for South Gloucestershire. The unit values are not minimum rates to be used by the authority, it is a mechanism to allocate funding.

This proposal doesn't represent implementation of a national funding formula.

This model doesn't consider the minimum funding guarantee, school rates, pupil growth and centrally retained items like school admissions, virtual school, school improvement and ongoing pension costs.

Attached as Appendix A are models that could be used for the allocation of this additional funding. The models show the amount of funding that schools would have received had the funding been made available in 2014/15.

- Model A: Replicate the DfE model using all funding factors.
No cap on Minimum Funding Guarantee gainers.
- Model B: Increases to the basic entitlement, deprivation and low attainment factors.
No cap on Minimum Funding Guarantee gainers.
- Model C: Increase to the basic entitlement factor.
No cap on Minimum Funding Guarantee gainers.

There is a note of caution since these figures are based on 2014/15 data and they will obviously change for 2015/16. Also consideration will need to be taken as to how this affects the minimum funding guarantee.

RECOMMENDATION:

Members of the Forum are requested to:

- (a) make comment and to note this report.
- (b) agree the model that will form part of the funding consultation to schools for 2015/16.

Appendix A

2015/2016 Fairer Schools Funding

School	2014/2015 Funding £	Model A		Model B		Model C	
		Variation £	Variation %	Variation £	Variation %	Variation £	Variation %
Primary							
Abbotswood Primary School	997,495	64,225	6.4%	61,778	6.2%	59,392	6.0%
The Alexander Hosea Primary School	787,158	29,665	3.8%	45,327	5.8%	48,319	6.1%
Almondsbury CE VC Primary School	919,873	77,273	8.4%	56,593	6.2%	60,398	6.6%
Bailey's Court Primary School	1,336,084	109,676	8.2%	91,401	6.8%	95,376	7.1%
Barley Close Primary School	965,322	90,022	9.3%	58,549	6.1%	57,379	5.9%
Barrs Court Primary School	998,602	88,401	8.9%	78,028	7.8%	77,896	7.8%
Beacon Rise Primary School	1,413,940	161,045	11.4%	92,421	6.5%	94,967	6.7%
Blackhorse Primary School	1,252,528	24,363	1.9%	40,792	3.3%	42,963	3.4%
Bowsland Green Primary School	1,022,468	41,336	4.0%	67,375	6.6%	67,701	6.6%

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Broadway Infant School	624,408	25,760	4.1%	37,901	6.1%	38,984	6.2%
Bromley Heath Infant School	623,641	18,937	3.0%	34,163	5.5%	36,239	5.8%
Bromley Heath Junior School	742,168	67,477	9.1%	67,170	9.1%	70,670	9.5%
Cadbury Heath Primary School	693,365	26,644	3.8%	52,284	7.5%	51,229	7.4%
Callicroft Primary School	851,389	43,784	5.1%	44,381	5.2%	38,962	4.6%
Charborough Road Primary School	895,754	48,335	5.4%	43,960	4.9%	41,867	4.7%
Charfield Primary	639,704	25,760	4.0%	36,066	5.6%	36,843	5.8%
Cherry Garden Primary School	673,304	37,159	5.5%	37,607	5.6%	37,246	5.5%
Christ the King RC VA Primary School	499,520	(822)	-0.2%	(0)	0.0%	0	0.0%
Christ Church CE VC Infant School	755,742	60,090	8.0%	59,974	7.9%	60,992	8.1%
Christ Church CE VC Junior School	965,269	73,028	7.6%	59,411	6.2%	59,405	6.2%
Christchurch, Hanham CE VC Primary School	881,540	65,737	7.5%	53,602	6.1%	53,956	6.1%
Coniston Primary School	672,536	32,947	4.9%	32,652	4.9%	29,219	4.3%
Courtney Primary School	762,922	45,097	5.9%	63,674	8.3%	61,449	8.1%
Crossways Infant School	581,098	9,822	1.7%	30,816	5.3%	32,212	5.5%

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Crossways Junior School	688,702	30,179	4.4%	38,991	5.7%	41,876	6.1%
Elm Park Primary School	935,215	66,171	7.1%	57,080	6.1%	59,190	6.3%
Emersons Green Primary School	908,084	(21,189)	-2.3%	(0)	0.0%	0	0.0%
Filton Hill Primary School	719,653	103,179	14.3%	71,900	10.0%	69,132	9.6%
Frampton Cotterell CE VC Primary School	900,977	64,877	7.2%	57,058	6.3%	59,617	6.6%
Frenchay CE VC Primary School	492,883	10,894	2.2%	24,511	5.0%	26,054	5.3%
Gillingstool Primary School	755,318	(47,078)	-6.2%	0	0.0%	0	0.0%
Hambrook Primary School	698,863	45,336	6.5%	45,683	6.5%	46,544	6.7%
Hanham Abbots Junior School	1,141,738	103,353	9.1%	64,476	5.6%	67,714	5.9%
Hawkesbury CE VC Primary School	447,477	(9,710)	-2.2%	0	0.0%	0	0.0%
Holy Family RC VA Primary School	721,213	45,347	6.3%	31,381	4.4%	29,726	4.1%
Holy Trinity CE VA Primary School	684,293	26,747	3.9%	37,947	5.5%	40,266	5.9%
Horton CE VA Primary School	340,445	1,890	0.6%	5,871	1.7%	5,916	1.7%
Iron Acton CE VC Primary School	370,599	8,630	2.3%	35,286	9.5%	34,919	9.4%
Kings Forest Primary School	1,347,396	129,245	9.6%	84,831	6.3%	82,947	6.2%

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Little Stoke Primary School	673,510	25,163	3.7%	41,826	6.2%	39,518	5.9%
Longwell Green Primary School	1,216,395	127,608	10.5%	78,411	6.4%	82,343	6.8%
Mangotsfield CE VC Primary School	1,394,795	116,547	8.4%	89,673	6.4%	94,826	6.8%
The Manor CE VC Primary School	715,085	19,578	2.7%	40,118	5.6%	41,876	5.9%
Manorbrook Primary School	661,010	4,718	0.7%	36,771	5.6%	34,830	5.3%
Marshfield CE VC Primary School	597,815	518	0.1%	26,432	4.4%	28,424	4.8%
Meadowbrook Primary School	1,385,296	105,534	7.6%	93,210	6.7%	93,374	6.7%
The Meadows Primary School	700,746	54,215	7.7%	50,369	7.2%	50,249	7.2%
North Road Primary School	394,933	3,027	0.8%	26,989	6.8%	27,063	6.9%
Old Sodbury CE VC Primary School	388,599	(193)	0.0%	26,581	6.8%	26,461	6.8%
Oldbury-on-Severn CE VC Primary School	321,479	13,133	4.1%	24,953	7.8%	24,329	7.6%
Olveston CE VC Primary School	694,675	32,681	4.7%	50,987	7.3%	52,647	7.6%
Our Lady of Lourdes RC VA Primary School	676,191	85,643	12.7%	77,024	11.4%	77,244	11.4%
The Park Primary School	1,809,566	229,091	12.7%	118,658	6.6%	113,549	6.3%
Parkwall Primary School	622,791	16,904	2.7%	6,923	1.1%	3,160	0.5%

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St Chad's Patchway CE VC Primary School	860,009	97,253	11.3%	88,006	10.2%	87,393	10.2%
Pucklechurch CE VC Primary School	766,166	39,101	5.1%	44,719	5.8%	44,292	5.8%
Rangeworthy CE VC Primary School	325,443	(5,466)	-1.7%	8,096	2.5%	8,448	2.6%
Raysfield Infant School	602,116	18,169	3.0%	32,410	5.4%	34,427	5.7%
Raysfield Junior School	738,583	42,963	5.8%	42,885	5.8%	44,896	6.1%
Redfield Edge Primary School	663,121	43,806	6.6%	65,774	9.9%	64,675	9.8%
The Ridge Junior School	760,492	43,247	5.7%	53,281	7.0%	53,099	7.0%
Samuel White's Infant School	785,484	78,211	10.0%	65,201	8.3%	67,004	8.5%
Severn Beach Primary School	437,283	2,071	0.5%	37,571	8.6%	37,529	8.6%
Shield Road Primary School	753,972	64,977	8.6%	42,066	5.6%	39,460	5.2%
St Andrew's CE VC Primary School	294,706	3,691	1.3%	8,663	2.9%	8,617	2.9%
St Anne's CE VC Primary School	1,134,277	93,020	8.2%	71,550	6.3%	73,082	6.4%
St Augustine's RC VA Primary School	894,348	85,634	9.6%	55,098	6.2%	57,982	6.5%
St Helen's CE VC Primary School	672,122	41,195	6.1%	53,890	8.0%	54,817	8.2%
St John's Mead CE VC Primary School	965,722	78,079	8.1%	60,565	6.3%	60,872	6.3%

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St Mary's, Thornbury CE VA Primary School	551,962	16,907	3.1%	29,309	5.3%	31,609	5.7%
St Mary's, Yate CE VA Primary School	978,845	98,967	10.1%	61,494	6.3%	63,217	6.5%
St Mary's, Bradley Stoke RC VA Primary School	722,546	45,586	6.3%	59,701	8.3%	60,599	8.4%
St Michael's, Stoke Gifford CE VC Primary School	1,912,761	168,723	8.8%	127,262	6.7%	127,239	6.7%
St Michael's, Winterbourne CE VC Primary School	713,938	47,026	6.6%	48,321	6.8%	48,382	6.8%
St Peter's Anglican/Methodist VC Primary School	726,386	16,845	2.3%	40,459	5.6%	40,467	5.6%
St Paul's RC VA Primary School	684,427	22,777	3.3%	19,678	2.9%	20,151	2.9%
St Stephen's Infant School	894,558	110,080	12.3%	75,678	8.5%	74,596	8.3%
St Stephen's CE VC Junior School	1,133,912	145,667	12.8%	72,306	6.4%	70,062	6.2%
Stanbridge Primary School	1,313,281	118,155	9.0%	84,359	6.4%	81,135	6.2%
Staple Hill Primary School	1,167,007	75,346	6.5%	67,694	5.8%	61,405	5.3%
Stoke Lodge Primary School	1,284,943	159,978	12.5%	83,713	6.5%	84,356	6.6%
Tortworth VC Primary School	328,928	(8,185)	-2.5%	11,945	3.6%	11,878	3.6%
Tyndale Primary School	808,372	62,389	7.7%	36,393	4.5%	32,570	4.0%
Trinity CE VC Primary School	496,580	5,521	1.1%	25,042	5.0%	26,777	5.4%

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The Tynings Primary School	944,154	88,151	9.3%	58,428	6.2%	58,184	6.2%
St Barnabas CE Primary School	795,234	42,448	5.3%	48,459	6.1%	46,541	5.9%
Watermore Primary School	780,418	(29,449)	-3.8%	39,407	5.0%	41,071	5.3%
Wellesley Primary School	688,556	31,363	4.6%	42,616	6.2%	44,508	6.5%
Wheatfield Primary School	1,288,240	111,427	8.6%	125,894	9.8%	125,884	9.8%
Wick CE VC Primary School	620,254	21,345	3.4%	33,723	5.4%	34,830	5.6%
Primary Total	73,450,719	4,734,820		4,511,517		4,529,516	

Secondary							
Abbeywood Community School	3,325,008	134,370	4.0%	87,173	2.6%	78,276	2.4%
Bradley Stoke Community School	4,084,579	278,168	6.8%	294,367	7.2%	293,628	7.2%
Brimsham Green Secondary School	4,405,838	340,940	7.7%	413,767	9.4%	413,130	9.4%
Castle Secondary School	5,766,846	285,524	5.0%	345,016	6.0%	357,747	6.2%
Chipping Sodbury VC Secondary School	2,829,197	111,189	3.9%	194,368	6.9%	192,172	6.8%
Downend Secondary School	4,402,555	453,713	10.3%	319,244	7.3%	312,621	7.1%
Hanham High School	3,927,167	219,078	5.6%	275,940	7.0%	268,385	6.8%

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King's Oak Academy	2,486,584	171,930	6.9%	89,237	3.6%	82,004	3.3%
Mangotsfield Secondary School	5,220,385	461,769	8.8%	539,103	10.3%	535,502	10.3%
Marlwood VC Secondary School	3,573,167	214,725	6.0%	270,265	7.6%	278,201	7.8%
Patchway Community College	2,855,313	267,259	9.4%	201,357	7.1%	191,513	6.7%
Sir Bernard Lovell Secondary School	4,648,937	183,763	4.0%	327,408	7.0%	328,995	7.1%
The Grange School & Sports College	2,724,920	164,857	6.0%	186,811	6.9%	185,693	6.8%
Winterbourne International Academy	6,415,978	440,359	6.9%	470,454	7.3%	490,097	7.6%
Yate International All Through Academy	3,672,444	137,544	3.7%	73,982	2.0%	62,522	1.7%
Secondary Total	60,338,918	3,865,187		4,088,490		4,070,487	
Primary & Secondary Total	133,789,638	8,600,006		8,600,007		8,600,003	

Note: brackets () denote loss

DFE CONSULTATION ON THE EDUCATION SERVICES GRANT FOR 2015/16

In March 2014 the Department for Education launched a consultation document entitled Savings to the Education Services Grant for 2015/16. The respond by date is 19 June 2014. The purpose of this report is to consider this consultation and to determine the response from the Schools Forum.

The consultation is seeking views about how local authorities and academies can achieve savings of £200m to the Education Services Grant for 2015/16. The consultation document can be accessed from the following link:

https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/298587/Consultation_Document.pdf

Currently there are different views about which services local authorities are required to provide, how they are required to provide them, and for which services they can charge maintained schools and academies. The DfE recognise that, by charging schools, the cost is simply transferred from local authorities to schools. Their view, however, is that this gives schools both greater choice (over which services they choose to buy) and greater purchasing power (because they can buy services from a competitive market).

Achieving the savings will require local authorities and academies to think innovatively about services. Before the DfE make any final decisions on the level of savings to the ESG, they want to gather views from the sector about how the grant is currently being used, how much money could be saved and the impact of making those savings. They are also interested in whether there is any further clarification or guidance that could be provided in order to help local authorities and academies deliver these savings, as well as whether there are any functions that local authorities or academies should stop doing completely.

The ESG rate for local authorities in 2014-15 is:

- £113 per pupil in a mainstream school
- £424 per planned place in a pupil referral unit
- £481 per planned place in a special school.
- £15 per pupil for all pupils irrespective of the type of school (including academies)

The ESG rate for academies in 2014-15 is:

- £140 per pupil in a mainstream school
- £525 per planned place in a pupil referral unit
- £595 per planned place in a special school

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The consultation document provides details as to how the local authorities prioritise and spend the ESG.

Annex B (attached as a separate document) illustrates the variation in planned expenditure on ESG services in 2013-14. Annex C gives the South Gloucestershire per pupil spend for 2014-15.

The DfE have identified the different ways of delivering the service as:

- Collaboration
- Charging for services
- Efficiency savings through restructuring
- Continuing savings by encouraging schools to take on increased responsibility for education services

Services funded by the Education Services Grant

School Improvement

Local authorities continue to have statutory responsibilities for educational excellence (as set out in Section 13a of the Education Act 1996). That duty states that a local authority must exercise its education functions with a view to promoting high standards.

The local authority's statutory functions do not require a highly resource intensive school improvement service. The DfE's view is that local authorities who effectively champion excellence: understand the performance of maintained schools in their area, using data to identify those schools that require improvement and intervention;

- take swift and effective action when failure occurs in a maintained school, using Warning Notices and Interim Executive Boards (IEBs) whenever necessary to get leadership and standards back up to at least "good";
- intervene early where the performance of a maintained school is declining, ensuring that schools secure the support needed to improve to at least "good";
- encourage good and outstanding maintained schools to take responsibility for their own improvement and to support other schools;
- build strong working relationships with education leaders in their area and encourage high caliber school leaders to support and challenge others;

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- delegate funding to the frontline, so that as much as possible reaches pupils;
- enable maintained schools to purchase from a diverse market of excellent providers;
- signpost where schools can access appropriate support;
- secure strong leadership and governance for maintained schools that are not providing a good enough education, by identifying and supporting successful sponsors; and
- seek to work constructively with academies and alert the Department for Education when they have concerns about standards or leadership in an academy.

There is no conclusive evidence that sustained planned expenditure in school improvement leads to improvements in school performance.

Statutory and Regulatory Duties

A list of the duties is provided in Annex A, (attached as a separate document) in summary they include:

- HR functions, such as advising school governing bodies on the management of staff, determining the conditions of service for nonteaching staff, and functions relating to the dismissal of school staff;
- finance functions including revenue budget preparation, administration of grants, and internal audit; and
- compliance with health and safety.

Education Welfare Services

Education welfare services include the employment of Education Welfare Officers (EWOs) to promote the importance of regular school attendance and investigate the causes of poor attendance. EWOs prepare cases and work with the courts on prosecutions and do this working closely with parents, carers and school staff.

EWOs also investigate and monitor employment undertaken by young people aged 16 years and under, to ensure that it is legal and safe and that it does not harm or interrupt their education.

There is a lack of evidence of a link between high expenditure on education welfare services and good outcomes at school level.

Central Support Services

This category of expenditure typically funds pupil support and extra-curricular

activities. This includes: providing clothing grants; board and lodging grants; outdoor education, including field studies; music services; and visual and performing arts services.

Asset Management

This is intended to support the effective and efficient management of school buildings and resources.

Premature Retirement costs/redundancy costs

This category of expenditure is intended to fund the costs associated with changes to school staffing structures – specifically when the school takes the decision to offer early retirement to employees, or where redundancies are necessary.

Therapies and other health related services

Local authorities currently work with health authorities to fund therapies and health services for children with additional needs. Historically, the arrangements have been that in cases where pupils require therapies in order to access education, the financial cost is met by the local authority. When the therapy is required but is not essential for the child to access education, then the cost is met by the health authority.

Monitoring National Curriculum Assessment

This category of expenditure is intended to cover the costs associated with monitoring national curriculum assessment arrangements. This includes activities such as:

- moderation of Key Stage 1 teacher assessments;
- monitoring of school arrangements to ensure that national curriculum tests and phonics checks are conducted under exam conditions; and
- an overall duty to investigate any allegations of cheating or maladministration.

The local authority provides this service for all maintained schools.

How the Savings Will Affect Academies

The basic ESG rate paid to academies in the academic year 2015-16 will reduce by the same proportion as local authorities, though protection will be applied.

Over time, local authorities and academies will receive the same ESG rate.

The local authority retained duties funding

There are some statutory functions that remain with local authorities and do not pass to academies

The duties that are covered fall into three of the ESG budget lines as listed below.

Education welfare services

Local authorities are responsible for most aspects of education welfare for children in academies. These duties include: prosecution of parents for non-attendance; tracking children missing from education; and issues relating to child employment.

Asset management

Academies do not receive capital funding to cover asset management, and therefore some degree of local authority expenditure on the management of academy buildings is to be expected, to cover services such as capital programme planning and functions relating to academy leases.

Statutory and regulatory duties

This is to cover expenditure on Local Authority retained duties relating to finance, HR and legal functions. It also includes the strategic planning of children's services.

Response to the Consultation

Responses to the consultation are to be made via the response form which is attached as annex D

RECOMMENDATION:

Members of the Forum are requested to:

- (a) comment and to discuss this report.
- (b) determine the response to the consultation

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Annex A Statutory and Regulatory Duties

Attached as a separate document.

Annex B Variation in planned expenditure on ESG services in 2013-14.

Attached as a separate document.

Annex C – South Gloucestershire Per Pupil Spend for 2014/2015

	2014/15 S251 Budget £	Spring 2014 Pupil Numbers	Per Pupil Funding £
2.0.1 Therapies and other health related services	0		
2.0.2 Central support services	0		
2.0.3 Education welfare service	141,852	39,001	3.64
2.0.4 School improvement	558,452	39,001	14.32
2.0.5 Asset management - education	276,117	39,001	7.08
2.0.6 Statutory/ Regulatory duties - education	342,597	39,001	8.78
2.0.7 Premature retirement cost/ Redundancy costs (new provisions)	0		
2.0.8 Monitoring national curriculum assessment	0		
<hr/>			
TOTAL	1,319,018	39,001	33.82

	2012/13	2013/14	2014/15
	S251	S251	S251
	Budget	Budget	Budget
	£	£	£
2.0.1 Therapies and other health related services	0		
2.0.2 Central support services	7,000		
2.0.3 Education welfare service	385,000	262,085	141,852
2.0.4 School improvement	785,000	738,547	558,452
2.0.5 Asset management - education	310,000	267,798	276,117
2.0.6 Statutory/ Regulatory duties - education	660,000	460,743	342,597
2.0.7 Premature retirement cost/ Redundancy costs (new provisions)	0	0	
2.0.8 Monitoring national curriculum assessment	50,000	0	
Total	2,197,000	1,729,173	1,319,018

Annex D



Consultation Response Form

**Consultation closing date: 19 June 2014
Your comments must reach us by that date**

Savings to the Education Services Grant for 2015-16

If you would prefer to respond online to this consultation please use the following link: www.education.gov.uk/consultations

Information provided in response to this consultation, including personal information, may be subject to publication or disclosure in accordance with the access to information regimes, primarily the Freedom of Information Act 2000 and the Data Protection Act 1998.

If you want all, or any part, of your response to be treated as confidential, please explain why you consider it to be confidential.

If a request for disclosure of the information you have provided is received, your explanation about why you consider it to be confidential will be taken into account, but no assurance can be given that confidentiality can be maintained. An automatic confidentiality disclaimer generated by your IT system will not, of itself, be regarded as binding on the Department.

The Department will process your personal data (name and address and any other identifying material) in accordance with the Data Protection Act 1998, and in the majority of circumstances, this will mean that your personal data will not be disclosed to third parties.

Please tick if you want us to keep your response confidential.	
Reason for confidentiality:	

Name:	
Please tick if you are responding on behalf of your organisation.	
Name of Organisation (if applicable):	
Address:	

If your enquiry is related to the DfE e-consultation website or the consultation process in general, you can contact the Ministerial and Public Communications Division by e-mail: consultation.unit@education.gsi.gov.uk or by telephone: 0370 000 2288 or via the Department's '[Contact Us](#)' page.

Please mark the box the best describes you as a respondent.

<input type="checkbox"/>	Maintained schools	<input type="checkbox"/>	Academies	<input type="checkbox"/>	Local authorities
<input type="checkbox"/>	Governors	<input type="checkbox"/>	Bursars	<input type="checkbox"/>	Parents
<input type="checkbox"/>	School forums	<input type="checkbox"/>	Trade union organisations	<input type="checkbox"/>	Other

Please Specify:

In responding to the questions in this consultation, we ask you to pay particular attention to any potential impacts on the protected characteristics set out in the Equality Act 2010 (sex, race, disability, age, religion or belief, sexual orientation, pregnancy and maternity, and gender reassignment).

School Improvement

- 1 a) How could the clarification of the role of local authorities in school improvement in Section 4.2 help local authorities to make savings?

Comments:

- 1 b) Is further clarification or guidance from the Department on the role of the local authority in school improvement needed in order to have a clear set of expectations?

Yes No Not Sure

Comments:

- 1 c) In addition to the examples set out in Section 3.2 of the consultation document, how else could local authorities provide school improvement more efficiently?

Comments:

- 1 d) What level of saving is it possible for your local authority to make on school improvement? If cost pressures on school improvement have changed recently, please describe below.

Comments:

- 1 e) If your local authority's expenditure is above the median (£31 per pupil) for this service, can you help us understand why this is?

Comments:

- 1 f) What would prevent your local authority from reducing costs to match the lowest spending 25% of local authorities (up to £19 per pupil)?

Comments:

Statutory and regulatory duties

- 2 a) Which statutory and regulatory duties require greater clarification or guidance?

Comments:

- 2 b) In addition to the methods set out in the case studies in Section 3.2, how else could local authorities fulfil statutory and regulatory duties more efficiently?

Comments:

- 2 c) What level of saving is it possible for local authorities to make on statutory and regulatory duties? If cost pressures on statutory and regulatory duties have changed recently, please describe below.

Comments:

- 2 d) Do you think that the Department needs to change its expectations of local authorities with regard to statutory and regulatory duties in order for savings to be realised? If so, how?

Yes No Not Sure

Comments:

- 2 e) If your authority's expenditure is above the median (£48 per pupil) for this service, can you help us understand why this is?

Comments:

2 f) What would prevent your local authority from reducing costs to match the lowest spending 25% of local authorities (-£6¹ to £28)?

Comments:

Education welfare services

3 a) Why do you think there is such significant variation in spending on education welfare?

Comments:

3 b) How do you think local authorities could provide this service more efficiently?

Comments:

¹ We do not know at this stage why this local authority has recorded a negative planned expenditure on this service and we will explore this during the consultation period.

- 3 c) What level of saving could your local authority make to education welfare? If cost pressures on education welfare have changed recently, please describe below.

Comments:

- 3 d) Is further clarification or guidance from the Department needed about our expectations in respect of education welfare services? If so, why?

Yes No Not Sure

Comments:

- 3 e) If your authority's expenditure is above the median (£14 per pupil) for this service, can you help us understand why this is?

Comments:

- 3 f) What would prevent your local authority from reducing costs to match the lowest spending 25% of local authorities (£0 to £9)?

Comments:

- 3 g) Do you agree that the duties required for this service are fulfilled by local authorities, and therefore should be covered by the local authority retained duties funding (set out in Section 6)? If not, which aspects do academies hold responsibility for and should therefore be paid for by the standard ESG rate?

<input type="checkbox"/>	Agree	<input type="checkbox"/>	Disagree	<input type="checkbox"/>	Not sure
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Comments:

Central support services

- 4 a) Are there any reasons why local authority expenditure on central support services could not be significantly reduced, if not stopped altogether? Please give details below.

Comments:

- 4 b) If you do not think this could be stopped altogether, how much of a saving could local authorities make to these services? If cost pressures on central support services have changed recently, please describe below.

Comments:

- 4 c) Is further clarification or guidance from the Department needed in order to have a clear set of expectations? If so, why?

Yes No Not Sure

Comments:

- 4 d) If your authority's expenditure is above the median (£6 per pupil) for this service, can you help us understand why this is?

Comments:

- 4 e) What would prevent your local authority from reducing costs to match the lowest spending 25% of local authorities (-£10 to £1)?

Comments:

Asset management

- 5 a) Which services are your local authority funding under the 'Asset Management' heading?

Comments:

- 5 b) Could your local authority join up asset management relating to education with asset management across all local authority services, if this is not already happening?

<input type="checkbox"/>	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	Not Sure
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Comments:

- 5 c) Are there reasons why local authority expenditure on asset management, under the standard ESG rate, could not be significantly reduced if not stopped altogether? If cost pressures on asset management have changed recently, please describe below.

Comments:

- 5 d) If you do not think this could be stopped altogether, how much could local authorities save by delivering this service in a different way?

Comments:

- 5 e) Is further clarification or guidance from the Department needed in order to have a clear set of expectations? If so, why?

<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not Sure
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Comments:

- 5 f) If your authority's expenditure is above the median (£7 per pupil) for this service, can you help us understand why this is?

Comments:

- 5 g) What would prevent your local authority from reducing costs to match the lowest spending 25% of local authorities (-£1² to £3)?

Comments:

Premature retirement costs/ redundancy costs (new provisions)

- 6 a) Are there any reasons why schools could not take financial responsibility for redundancies? Please give details below.

<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not Sure
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Comments:

- 6 b) If you are a local authority that is funding early retirement, why are you not requiring schools to do so?

Comments:

² We do not know at this stage why this local authority has recorded a negative planned expenditure on this service and we will explore this during the consultation period.

- 6 c) If your authority's expenditure is above the median (£0 per pupil) for this service, can you help us understand why you are spending that amount and what prevents you from reducing your expenditure to £0?

Comments:

Therapies and other health-related services

- 7 a) Given the high needs budget that local authorities have, and the improved joint working between health and education authorities which should result from the provisions within the Children and Families Bill, are there any reasons why funding for therapies and other health-related services should continue from ESG? If cost pressures on therapies and other health-related services have changed recently, please describe below.

Comments:

- 7 b) Is there a need for further clarification or guidance from the Department about what local authorities are expected to provide in terms of therapies and other health-related services. If so, why?

Yes

No

Not Sure

Comments:

- 7 c) If your authority's expenditure is above the median (£0 per pupil) for this service, can you help us understand why you are spending that amount and what prevents you from reducing your expenditure to £0?

Comments:

Monitoring National Curriculum assessment

- 8 a) What level of savings could local authorities make to this service?

Comments:

- 8 b) If cost pressures on monitoring national curriculum have changed recently, please describe below.

Comments:

8 c) Is further clarification or guidance from the Department needed in order to have a clear set of expectations? If so, why?

<input type="checkbox"/>	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	Not Sure
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Comments:

8 d) Given that some local authorities are charging for this service and not incurring any net expenditure, is this something your local authority could do? If not, please help us understand why.

<input type="checkbox"/>	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	Not Sure
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Comments:

How the savings will affect academies

- 9 a) What level of saving could your academy make by adopting some of the strategies we have set out in Section 5 of the consultation document?

Comments:

- 9 b) Can you provide any additional examples of methods that academies can use to increase value for money from the ESG funding?

Comments:

- 9 c) What would be the consequences of a less generous protection in 2015/16 for academies against losses in ESG than the protection offered in 2014/15?

Comments:

- 9 d) What would be the consequences of reducing the academies rate of ESG to the local authority rate in 2015/16?

Comments:

The local authority retained duties funding

- 10 a) What further savings could your local authority make from:

- i) education welfare services;
- ii) asset management; and
- iii) statutory and regulatory duties

As covered by the local authorities retained duties funding?

If cost pressures on the local authority retained duties have changed recently, please describe below.

Comments:

10 b) Is further clarification or guidance about these duties from the Department needed in order to have a clear set of expectations? If so, why?

<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not Sure
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Comments:

Thank you for taking the time to let us have your views. We do not intend to acknowledge individual responses unless you place an 'X' in the box below.

Please acknowledge this reply.	<input type="checkbox"/>
E-mail address for acknowledgement:	

Here at the Department for Education we carry out our research on many different topics and consultations. As your views are valuable to us, please confirm below if you would be willing to be contacted again from time to time either for research or to send through consultation documents?

<input type="checkbox"/> Yes	<input type="checkbox"/> No
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All DfE public consultations are required to meet the Cabinet Office [Principles on Consultation](#)

The key Consultation Principles are:

- departments will follow a range of timescales rather than defaulting to a 12-week period, particularly where extensive engagement has occurred before

- departments will need to give more thought to how they engage with and use real discussion with affected parties and experts as well as the expertise of civil service learning to make well informed decisions
- departments should explain what responses they have received and how these have been used in formulating policy
- consultation should be 'digital by default', but other forms should be used where these are needed to reach the groups affected by a policy
- the principles of the Compact between government and the voluntary and community sector will continue to be respected.

If you have any comments on how DfE consultations are conducted, please contact Aileen Shaw, DfE Consultation Coordinator, tel: 0370 000 2288 / email: aileen.shaw@education.gsi.gov.uk

Thank you for taking time to respond to this consultation.

Completed responses should be sent to the address shown below by 19 June 2014

Send by post to: Emily Barbour, Funding Policy Unit, Sanctuary Buildings, Great Smith Street, London, SW1P 3BT

Send by e-mail to: esg.CONULTATION.education.gsi.gov.uk

FUTURE TRADED ARRANGEMENTS

The purpose of this report is to inform the Schools Forum of potential developments in the area of Traded Services.

Since 1970, local authorities have traded with each other and other public bodies utilising powers within the Local Authorities (Goods and Services) Act 1970 and a range of other specific legislation. The power to charge and trade was enhanced by the Local Government Act 2003 and, most recently, through the Localism Act with the provisions set out under the general power of competence (GPC) which allows for a local authority to do anything that individuals generally might do 'for the benefit of the authority, its area or persons resident or present in its area'. The intention of the GPC is to give local authorities the opportunity to develop new and innovative business models in ways that were previously disallowed.

In 2013, the Council commissioned external consultants to help support a working group in its high level review of trading and charging. In particular, this work focused on:

- a. Identifying whether there are any significant opportunities for trading and charging that are not currently being explored.
- b. Investigating options for alternative delivery vehicle(s) for future trading activities.

This report concentrates on the implications for the Traded Services Division.

The review identified that there were currently a number of barriers to expanding income through charging or from future trading activity, in particular the perception that services have not been given the 'green light' to be more commercial and the lack of a framework setting out the Council's attitude and expectations towards this and the overall approach to charging and trading. It was felt that in order to maximise opportunities, the Council should confirm a clear commitment to its approach to charging, commercial culture and future trading (empowering more services to make the most of opportunities) and create a framework that gives services the commercial freedoms to expand, e.g. the flexibility to set competitive prices and manage resources.

Within the Traded Services Division it is recognised that there are potential opportunities to expand charging in some areas through developing a trading model in services that already have an existing presence and reputation.

The review group highlighted that Traded Services was successful and a significant asset to the Council (which is not the case in all local authorities). It was important that the Council sought opportunities to maintain this competitive advantage into the future, especially given the changing external

commercial environments, developments with neighbouring councils, and the national change in education with respect to academies. As a division within the Council, it is felt that it is constrained by the legislative framework as well as some of the existing policies and procedures which reduce flexibility and the ability to respond to market opportunities. Any future growth could start to put a strain on the Council in respect of operating within the law. This creates a clear dichotomy that if the Council wants the service to grow and become more commercial, it cannot do this within the current restrictions of the local authority. As such, the working group felt that consideration should be given to transferring Traded Services into a wholly owned local authority trading vehicle.

Establishing an arms-length trading company will help ensure compliance with existing legal requirements and will also provide the new organisation with greater commercial flexibility, vision and focus.

In February 2014, the Council determined to take forward a number of actions. This included taking forward the work to prepare a full business case to establish an arms-length delivery vehicle for Traded Services, with a view to setting up the new enterprise by the end of this calendar year.

A verbal update will be given at the meeting as to the latest position.

RECOMMENDATION:

Members of the Forum are requested to make comment and to note this report.

THE SCHOOLS FORUM CONSTITUTION FROM APRIL 2014

In February 2014, the Department for Education (DfE) issued an update and guidance on the Schools Forum Regulations. These Regulations form the basis of the Schools Forum Constitution.

The published update and guidance on the Schools Forums Regulations can be accessed by clicking on the following link.

https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/283814/Schools_Forum_Regulations_2012.pdf

The proposed changes to the Schools Forum Constitution are as follows:

- Delete the requirement to have a representative of the 14-19 partnership on the Schools Forum
- Add the requirement to have a representative of 16-19 providers on the Schools Forum
- Delete the requirement that the length of office as Chair by a Member cannot be longer than four consecutive years
- Remove all reference to the Director for Children and Young People and replace with the Director for Children, Adults and Health.

The revised Schools Forum Constitution from April 2014 is attached as Appendix A.



SCHOOLS FORUM

CONSTITUTION FROM APRIL 2014

1. INTRODUCTION

- 1.1 Every local education authority must ensure that the Schools Forum for their area is constituted in accordance with The Schools Forums (England) Regulations 2012.

2. MEMBERSHIP

- 2.1 The Forum will comprise:

- (a) Schools Membership:

11 Head Teachers (including senior members of staff) 11 Governors, and 1 Pupil Referral Unit Representative as follows:

Head Teacher Representatives (11 in total)

1 Special School Head (or senior member of staff)

5 Secondary Heads (including senior members of staff) including one representative from each of the 3 locality areas with at least one being from a school with SEN resource base. To include 3 members from academy schools.

5 Primary Heads (including senior members of staff) including one representative from each of the 3 locality areas, with at least one being from a school with a SEN resource base, small school and to include the Chair of the Primary Headteachers' Executive. To include 1 member from an academy school

Governor Representatives (11 in total)

5 Primary Phase Schools. To include 1 member from an academy school.

5 Secondary Schools. To include 3 members from academy schools.

1 Special School

Pupil Referral Unit (1 in total)

1 Pupil Referral Unit representative

(b) Non Schools Membership:

2 Diocesan representatives; 1 Church of England, 1 Roman Catholic (nominated by the relevant diocese)

1 representative of 16 - 19 providers (nominated by the 16-19 providers)

1 representative from the private voluntary and independent early years providers (nominated by the private, voluntary and independent groups and organisations that are registered for the Nursery Education Grant)

NOTE

(a) The Chair of the Children and Young People Committee, the Chair of the Policy and Resources Committee, the Director for Children, Adults and Health (or their representative), Chief Financial Officer (or their representative) and Officers who are providing specific financial or technical advice (including presenting a paper to the Forum) will have a right to attend and speak at meetings.

(b) Elected Members are able to serve on the Schools Forum either in their capacity as governors or as a non school member.

(c) Officers who have a direct role in supporting pupils are eligible to serve on the Schools Forum as non-schools members.

3. APPOINTMENT OF MEMBERS

3.1 Governor representatives will be appointed by the Governors' Association.

3.2 Secondary school head representatives (including senior members of staff) will be appointed by the Secondary Heads' Group.

3.3 Infant, junior, primary and special school head representatives (including senior members of staff) will be appointed by the Primary and Special Heads' Executive.

3.4 The Pupil Referral Unit representative will be appointed by the Governing Body of the Pupil Referral Unit.

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- 3.5 Non-schools members will be appointed by the organisations they represent.
- 3.6 Academy representatives will be appointed by the Academy Schools Trusts.
- 3.7 Each group must inform the Department for Children, Adults and Health of the method used to appoint their representative.
- 3.8 The Director for Children, Adults and Health may appoint schools or academies members to the Schools Forum if the position has been vacant for more than 4 months.
- 3.9 The Governors' Association Secondary Heads Group and the Primary and Special Heads Executive must ensure that every possible eligible member has an opportunity to be involved in the determination of their group's elective process and is given the opportunity to stand for election if they choose to do so.

Observer Status

The Education Funding Agency has observer status at the Forum with a right to participate in discussions.

4. APPOINTMENT OF SUBSTITUTE MEMBERS

- 4.1 The electing/appointing bodies are entitled to appoint designated substitutes for each representative they elect to the Forum.
- 4.2 Any Forum member who is unable to attend a meeting may ask one of the designated substitutes from their appointment group to attend on their behalf. All apologies must be given via the Chair of the Schools Forum. The Chair of the Schools Forum must be informed of any substitution.
- 4.3 Designated substitutes will always receive copies of the agenda papers for each meeting for information.

5. TERM OF MEMBERSHIP

- 5.1 Members hold office for 4 years or until they resign or cease to be qualified to be a member (if earlier). Members may be reappointed after their full term of office.
- 5.2 Membership will cease if a Member ceases to hold the office by virtue of which he/she became eligible for appointment to the Forum.

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- 5.3 Membership will cease if a Member resigns from the Forum by giving notice in writing to the Authority.
- 5.4 If a Member misses 3 meetings within an academic year then their appointment will be reconsidered by the organisation they represent.
- 5.5 If a Member is unable to attend a meeting then they must inform the Chair of the Forum, with apologies and the name of their substitute member who will attend on their behalf.

6. **APPOINTMENT OF CHAIR OF THE FORUM**

- 6.1 At the start of the academic year the chair shall be appointed by Members of the Forum.
- 6.2 An elected member or officer may not hold the office of chair of the Schools Forum.

7. **ROLE OF CHAIR OF THE FORUM**

The Chair is responsible for:

- a) Calling the meeting
- b) Agenda Setting
- c) Checking the minutes of the meeting before they are put forward at the subsequent meeting for approval

8. **ROLE OF THE DIRECTOR FOR CHILDREN, ADULTS AND HEALTH**

The Director is responsible for:

- a) Distributing papers for the meeting to members and substitute members. Ensuring that papers are available on the intranet. Papers to be distributed at least 5 working days before the date of the meeting.
- b) Contacting substitute members when they are required to attend a meeting
- c) The clerking and recording of meetings.
- d) Ensuring that relevant papers, agendas and agreed minutes are published in the public areas of the Council website.

9. **TERMS OF REFERENCE**

- 9.1 The powers of the Schools Forum are:
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- a) to agree minor changes to the operation of the minimum funding guarantee, where the outcome would otherwise be anomalous, and where not more than 50% of the authority's schools are affected. Changes affecting more than 50% of schools will be submitted to the Secretary of State for approval;
- b) to agree the level of school specific contingency at the beginning of each year;
- c) to agree arrangements for combining elements of the centrally retained Schools Budget with elements of other local authority and other agencies' budgets to create a combined children's services budget in circumstances where there is a clear benefit for schools and pupils in doing so;
- d) to agree the amounts of funding to be retained as central expenditure under five areas.
 - i. school specific contingency for the purposes of making in – year adjustments of school budget shares (for named SEN pupils and rates for instance);
 - ii. funding for Combined Services;
 - iii. funding for servicing the costs of a prudential borrowing scheme;
 - iv. funding for premature retirement and redundancy costs;
 - v. SEN Transport costs.
- e) to agree changes to the Scheme of Financial Management.
- f) to agree the criteria on which any funding retained for pupil growth is to be allocated.
- g) to agree the amount to be allocated for central schools and early years block items.
- h) to agree the Scheme for the Financing of Schools.
- i) in exceptional circumstances only:
 - i. to agree an increase in the amount of expenditure a local authority can retain from its Schools Budget above that allowed for in the regulations;

- ii. to agree an increase in centrally retained expenditure within the Schools Budget once a multi-year funding period has begun; and
- iii. to agree changes to an authority's funding formula once it has been announced prior to the start of a multi-year funding period.

9.2 Consultation with Schools Forums:

Consultation shall take place in sufficient time to allow the views expressed to be taken into account in the determination of the authority's formula and in the initial determination of schools' budget shares before the beginning of the financial year.

Consultation on school funding formula

The Local Authority shall consult on:

- (a) any proposed changes in relation to the factors and criteria that were taken into account, or the methods, principles and rules that have been adopted, in their formula made in accordance with regulations made under section 47 of the School Standards and Framework Act 1998;
- (b) the financial effect of any such change;
- (c) updating non-AWPU data within the multi-year budget cycle.

Consultation on contracts

The Local Authority shall at least one month prior to the issue of invitations to tender consult the forum on the terms of any proposed contract for supplies or services being a contract paid or to be paid out of the authority's schools budget where the estimated value of the proposed public services contract is not less than the threshold which applies to the authority in pursuance of Regulation 8 of the Public Services Contracts Regulations 2006 (b).

Consultation on financial issues

- (1) The Local Authority shall consult the forum annually in respect of the relevant authority's functions relating to the schools budget, in connection with the following:
 - (a) the arrangements to be made for the education of pupils with special educational needs;

- (b) arrangements for the use of pupil referral units and the education of children otherwise than at school;
- (c) arrangements for early years education;
- (d) administrative arrangements for the allocation of central government grants paid to schools via the relevant authority;

Consultation on other issues

- (1) The authority may consult the forum on such other matters concerning the funding of schools as they see fit.
- (2) The Director for Children, Adults and Health has the authority to change the terms of reference as new legislation is introduced.

Information about consultations

The Schools Forum will inform the governing bodies of schools maintained by the authority of any consultations carried out by the authority in respect of consultation on financial and other issues.

10. MEETINGS

- 10.1 The Forum will meet approximately every six weeks, excluding August, or at other times at its discretion. Normally the dates of meetings will be fixed annually in advance at the start of each academic year with reference to the key consultative and decision making points in the school funding cycle. A forward plan would then be produced and discussed at each meeting.
- 10.2 The Forum meetings will be held in public, except where exempt information is being discussed under the provisions of the Local Government Act 1972, as amended and that papers will be published in paper form and to the worldwide web 5 clear days in advance of meetings.
- 10.3 A pre meeting will be held half an hour before the designated meeting for the Director for Children, Adults and Health to assist members in the understanding of the agenda items.
- 10.4 Any elected member or Officer who is not a member of the Schools Forum is entitled to address this Forum (for no more than five minutes) to present a petition, make a statement, contribute views on matters under discussion or ask a question. Normally this will be at the start of the meeting. However the Chair of the Forum has the discretion to allow this to happen at the beginning of the relevant item.

10.5 The Local Authority may ask other individuals or bodies to attend specific meetings as observers. This might include expert advisors on relevant issues.

11. QUORUM

11.1 A meeting cannot take place unless at least forty per cent of the whole number of members of the Forum with voting rights are present. This excludes any vacant positions.

12. SECRETARY

12.1 The Secretary to the Forum will be an Officer from the Department for Children, Adults and Health.

13. DECISION-MAKING

13.1 The Forum will determine its own voting procedure. It is proposed to adopt the procedures already in place as set out below.

13.2 On general matters, the Forum will agree the views or advice to be submitted to the Local Authority by consensus or if this is not possible, by majority vote. If a vote is taken to arrive at a view, each full member (or substitute) present has one vote. The Chair does not have a second or casting vote. Observers attending the meeting may not vote.

13.3 On the funding formula only schools members and the private voluntary and independent early years provider member may vote.

13.4 On the subject of de-delegation maintained school members may vote in respect of their phase school only.

13.5 On the subject of the Scheme for Financing of Schools only school members from maintained schools may vote.

14. URGENT BUSINESS

14.1 The need for a decision or formal view to be expressed by the Schools Forum before the next scheduled meeting will involve the urgent business procedure.

14.2 The procedure is to contact all members either by email or other means of correspondence with the urgent item. All members will then have an opportunity to participate and make their views known by a specified date.

- 14.3 The Chair of the Forum cannot make a decision on behalf of the Forum, however the Chair may give the Local Authority a view on an urgent issue.

15. **SUB-COMMITTEES/WORKING GROUPS**

- 15.1 The Forum is allowed sub-committees or working groups, but all advice formally passed to the Local Authority must be approved by the Forum as a whole.

16. **COMMUNICATION**

- 16.1 School Forum members will regularly report back to their 'parent' group. Headteacher (including senior members of staff) and Governor representatives will also regularly report back to the cluster they represent.

- 16.2 The relevant papers, agendas and agreed minutes of meetings will be available in the public areas of the Council website.

17. **MEMBERS' EXPENSES**

- 18.1 The Local Authority will reimburse the following Members expenses:-
- (a) Actual costs incurred in any supply cover – payment for a supply head teacher (including senior member of staff) and teacher governor representatives;
 - (b) Travel expenses (at South Gloucestershire Council members rates);
 - (c) Loss of earnings
 - (d) Carer's costs (in accordance with the Council's Scheme of Members' allowances).

SCHOOLS FORUM WORK PROGRAMME

All meetings at 4.30pm at Badminton Road, Yate

3rd July 2014 Room 0012 Ground Floor	11th September 2014 Room 0012 Ground Floor
<ul style="list-style-type: none"> • Preparing for 2015/16 (if known) • Provision Outturn 2013/14 • 1st Budget Monitor 2014/15 • Schools Forum Membership, dates of future meetings and the Work Programme 2014/15 	<ul style="list-style-type: none"> • Consultation on School Funding 2015/16 • 1st Budget Monitor 2014/15

ANY OTHER BUSINESS