

AGENDA



SCHOOLS FORUM

Date : Thursday 14th January 2016

Time : 4.30pm

Place : Badminton Road Offices, Ground Floor, Room 0012

Distribution

Members of the Committee

Dave Baker	Keith Lawrence (Chair)
Lisa Parker	Louise Leader
Fr. Eugene Campbell	Jim Lott
Mark Dee	Simon Bowker
Pauline Dixon	Jane Millicent
Paul Tanner	Max Reed
Steve Forecast	Sara-Jane Watkins
Mark Freeman	Susie Weaver
Amanda Fry/Lisa Williams	Elizabeth Gibbons
Kim Garland	Bernice Webber
John Goff	Ann Reed (sub)
Geoff Howell	Will Roberts
Janet Hoyle	Rhona Allgood

Appropriate Officers

Peter Murphy
Martin Dear
Susannah Hill

Councillors

Jon Hunt
Trevor Jones

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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 3 DECEMBER 2015	5 mins
6	DEPLOYMENT OF THE DSG 2016/17	10 mins
7	COUNCIL BUDGET 2016/17	5 mins
8	CHILDREN AND YOUNG PEOPLE CAPITAL PROGRAMME REPORT 2016/17	15 mins
9	SCHOOL BALANCES	15 mins
10	EFA: SCHOOLS FORUM GUIDANCE	15 mins
11	SCHOOLS FORUM WORK PROGRAMME	5 mins
12	ANY OTHER BUSINESS	5 mins

Department for Children, Adults and Health

**SCHOOLS FORUM
Thursday 3 December 2015
Badminton Road Offices**

PRESENT:

Dave Baker	Executive Headteacher, Bradley Stoke and Abbeywood Community Schools
Simon Bowker	Chief Operating Officer, Cabot Learning Federation
Mark Dee	Executive Head, The Park & Parkwall Primaries
Steve Forecast	Governor, The Crossways Schools Federation
Mark Freeman	Headteacher, St Michael's CS VC Primary School
John Goff	Governor, The Tynings School
Geoff Howell	Governor, Patchway Community College, Barley Close and Callicroft Schools
Jim Lott	Governor, The Tynings Primary School
David Martin	Warmley Park School (rep Lisa Parker)
Jane Millicent	Patchway Community College
Jonny Walker	South Gloucestershire and Stroud College (rep Sara-Jane Watkins)
Paul Tanner	Chair of Finance and Resources Committee, Olympus Academy Trust
Susie Weaver	Headteacher, Wallscourt Farm Primary School
Bernice Webber	Headteacher, Old Sodbury CE Primary School

Chair: Steve Forecast (in the absence of Keith Lawrence)

Councillor: Trevor Jones

Officers:	Martin Dear	Head of Business Support
	Susannah Hill	Head of Education, Learning and Skills
	Sue Morgan	Senior School Improvement Adviser
	Tamsin Moreton	Schools Finance Officer

Other Attendees:

James Mepham School (<i>Item 7</i>)	Headteacher, Shield Road Primary
Steve Adams School (<i>Item 7</i>)	Deputy Headteacher, Shield Road Primary

1. WELCOME AND INTRODUCTIONS

Attendees were welcomed by the Chair.

2. APOLOGIES FOR ABSENCE

Rhona Allgood, Fr. Eugene Campbell, Pauline Dixon, Keith Lawrence, Ann Reed, Max Reed, Elizabeth Gibbons, Shaun Bailey, Lisa Parker, Sara-Jane Watkins, Jon Hunt

3. EVACUATION PROCESS

The Chair drew attention to the emergency evacuation procedure.

4. ANY OTHER ITEMS THE CHAIR DECIDES ARE URGENT

Steve Forecast was nominated as Chair in the absence of Keith Lawrence.

5. MINUTES OF MEETING HELD ON 10th SEPTEMBER 2015

The Minutes were agreed as a true record.

It was agreed that Steve Forecast would follow up any outstanding actions from the previous meeting.

6. PRESENTATION BY EDUCATION SUPPORT PARTNERSHIP

Fran Brown, Regional Development Consultant from the Education Support Partnership briefed the Schools Forum on the Education Support Partnership.

A leaflet was handed out at the meeting highlighting the support they can give to school staff who suffer from stress and those intending to leave the profession. This includes supporting individuals who find themselves in difficulties and also helping Headteachers and leaders of education with the wellbeing of staff.

She explained they were a non-profit making charity. Their costs are covered by donations and fund raising.

Training and development courses are available and these can be run specifically for South Gloucestershire schools or individual schools.

For further information please contact Fran Brown on 07811 447314 (Mobile) or email franbrown@edsupport.org.uk

7. SHIELD ROAD PRIMARY SCHOOL – BREACH FUNDING

James Mephram, Headteacher and Steve Adams, Deputy Headteacher attended for this item.

The background is that the school was approached by the Local Authority to breach their admission numbers. The school agreed to a breach in September 2015. They were told

to expect another 30 reception children. In fact, only 7 children arrived in September 2015.

In view of agreeing this breach, a brand new Reception classroom was built and another refurbished. The school recruited an additional Teacher and Teaching Assistant. This would enable the school to run two reception classes.

The school has actively tried to increase their numbers by spending school funding on open mornings/evenings/publicity. Despite these efforts the school only has 39 reception children.

There is a shortfall of £25,000 and the school seeks support and help for this amount from the Schools Forum.

Agreed

It was agreed that Shield Road Primary School would receive £22,000 (based on £2,512*21*5/12) for 2016-17.

It was also agreed that should the school require assistance in the future they would need to submit more in-depth financial information.

8. SECOND QUARTER MONITOR REPORT: REVENUE AND CAPITAL 2015/16

Revenue

MD reported that there is an anticipated overspend of £1,095,000.

There is a lot of pressure in the High Needs area, particularly post-16 placements where the EFA will not recognise any growth, so they will not give any growth funding.

Capital

The capital programmes are being delivered, generally on time. Tender prices seem to be increasing so funding is getting stretched.

9. SCHOOL FUNDING ARRANGEMENTS 2016-17

The Schools Forum was requested to endorse the decisions made by the Children and Young People Committee, on 2 December 2015, with regard to Schools funding for 2016/17. This being namely:

(1) Members of the Children and Young People Committee agreed the following, subject to the agreement of the Schools Forum:

(a) Agree the following formula factors and notional amounts for the allocation of the Schools Block

Factor	Criteria	Rate £	Notional Amount to be Allocated based on 2016/2017 DSG £000s
1. Basic per-pupil entitlement	Rates for Primary Key Stage 3 and Key Stage 4	2,512 3,977 4,234	111,220
2. Deprivation	Pupils entitled for free school meals Primary Secondary	638 846	2,612
3. Looked After Children	Based on pupils looked after for one day or more	527	62
4. Low Cost, High Incidence Special Educational Needs	Primary Sector – Early Years Foundation Stage Profile all year 4 – 7 pupils who do not achieve 78 points. For all year 1-3 pupils who have not achieved a good level of achievement. Secondary Sector all pupils who do not achieve Level 4 or above in either English or Maths at Key Stage 2	1,113 1,806	10,521
5. English as an Additional Language (EAL)	Pupils with EAL and who have entered compulsory education within the last 3 years in England. Primary Secondary	948 948	1,162
6. Lump Sum	A single rate for all schools Primary Secondary	169,484 169,484	18,474
7. Split Sites	Applicable for one primary school	93,436	93
8. Rates	Based on actual cost	Various	2,245
9. Exceptional circumstances	Allocation of rent funding on actual basis for one primary school	Various	6
10. Minimum Funding	Restrict school gains to 16%		

Factor	Criteria	Rate £	Notional Amount to be Allocated based on 2016/2017 DSG £000s
Guarantee	in order to fund the minimum funding guarantee in 2015/2016	Various	8
TOTAL			146,403

- (b) Agree that for Primary Low Cost High Needs SEN – to weight Years 1 to 3 results so that there is consistency in allocating funding across all primary year groups
- (c) Agree that for varying pupil numbers for new schools/primary phase to use the Autumn 2015 School Census pupil numbers and add 7/12ths of the planned September 2016 reception admission number.
- (d) Agree to request , from the EFA, to dis-apply the Minimum Funding guarantee where secondary schools and academies have admitted primary phase from September 2015
- (e) Agree to dis-apply start-up funding form the transitional protection calculation for Special schools, EOTAS and Resource Bases
- (f) Agree the Resource Base and Special School band rates.
- (g) Agree to move EOTAS funding to be based on the Resource Base and Special School 12 bands.
- (h) Agree that the stated support high incidence SEN funding for mainstream schools is allocated through Option 1 or Option 2
- (i) Agree to delegate to the Schools Forum to determine which option should be used in (h) above.
- (j) Agree that the funding timescale and administration, for the two nursery classes is brought in line with other early years providers
- (k) Agree the planned places for the 2016/2017 academic year for special schools and resource bases in mainstream schools.
- (2) Agree to delegate to the Director for Children, Adults and Health any minor amendments to the above recommendations, as requested by the Schools Forum at their meeting on 3 December 2015.

Under (d) a request was made as to receive information as to the effect of dis-applying the Minimum Funding Guarantee where secondary schools and academies have admitted primary phase from September 2015.

Further Information: The Education Funding Agency has developed a model which is designed to calculate an appropriate MFG exclusion value where a school is extending its age and the MFG would provide disproportionate levels of protection, e.g. protecting new primary pupils against a predominantly secondary based MFG level. The model takes the 2016-17 ratio of pupils and re-profiles last year's pupil numbers to the new ratio. It then applies the 2016-17 AWPU values to the original baseline numbers and the re-profiled baseline numbers, creating a per pupil amount for each. The MFG exclusion is then the difference between the per pupil amounts multiplied by the pupil numbers. The model does not take into account the other pupil-led factors. This would have produced an excessively complex model allocating proportions of significantly lower amounts than AWPU. The aim of the model is to produce a reasonable MFG adjustment to deal with the issue. The baseline adjustment before applying the MFG is £45,000 for Bradley Stoke Community School and £80,000 for King's Oak Academy.

Under 1(i) the Schools Forum agreed that option 2 is to be used for the allocation of the stated support high incidence SEN funding for mainstream schools.

Agreed:

The Schools Forum endorsed the decisions made by CYP Committee on 2 December 2015.

It was agreed that with regard to Statemented Support High Incidence SEN Funding - Mainstream Schools funding would consist of two allocations for the financial year:

- **April to August period based on the previous year's Autumn (2015) Census (excluding Resource Base pupils) and previous November (2015) statements (106 units plus or equivalent).**
- **September to March period based on the Autumn (2016) Census (excluding Resource Base pupils) and November (2016) statements (106 units plus or equivalent)**

10. THE STRATEGIC REVIEW OF SPECIAL EDUCATIONAL NEEDS

Susannah Hill presented this item and an SEN paper was tabled at the meeting.

Susannah gave a summary of the progress made since the first SEN Review. She referred to several sections of the paper and said a new SEN Strategy would be required.

The strategic work of the new SEN Review is being undertaken by Kate East, Consultant with emphasis on how we create places in-house rather than using out of authority placements.

Any feedback on this paper can be sent to Susannah. Email Susannah.hill@southglos.gov.uk.

11. EFA: SCHOOLS FORUM GUIDANCE

At the previous meeting, Schools Forum agreed that members would individually complete the self-assessment toolkit. These responses were then to be collated by the Chair and reported back to the next meeting.

In the absence of the Chair, Steve Forecast (deputising for the Chair) agreed to follow this up.

Agreed: Steve Forecast to collate the responses and bring back to the next meeting.

12. SCHOOLS FORUM WORK PROGRAMME 2015/2016

Agreed: 2016/17 work programme.

13. ANY OTHER BUSINESS

Steve Forecast announced that this was the last meeting Jane Millicent would be attending of the Schools Forum as she was retiring from her position as Headteacher of Patchway Community School. Jane was thanked for her input and efforts she had brought to the Forum over a number of years.

Meeting closed 16.05

DEPLOYMENT OF THE DSG 2016/2017

The purpose of this report is to enable the Schools Forum to comment and make recommendations to the Children and Young People Committee before the decision is made concerning the deployment of the Dedicated Schools Grant (DSG) for 2016/2017.

The report that will be presented to the CYP Committee will be available from 13 January 2016. A copy of this report will be sent to School Forum members on 13 January 2016.

Recommendation:

Members of the Forum are requested to make their views known in order that they can be presented to the meeting of the Children and Young People Committee on 20 January 2016.

COUNCIL BUDGET 2016/2017

South Gloucestershire Council's Policy and Resources Committee will receive a report on the Council's draft Budget proposals for 2016/2017 on the 1 February 2016. Papers for this meeting will be available from 22 January 2016.

The above report will form the basis of the final proposals that will go to Council for approval on 17 February 2016.

Note that this report does not include the deployment of the Dedicated Schools Grant.

Recommendation

Members of the Forum are recommended to determine if and how they wish to respond to the Council's budget proposals for 2016/2017.

CHILDREN AND YOUNG PEOPLE CAPITAL PROGRAMME REPORT 2016/17 ONWARDS

The purpose of this report is to enable the Schools Forum to comment and make recommendations to the Children and Young People Committee before the Committee agrees the Children and Young People Capital Programme priorities for 2016/17 onwards for inclusion in the Corporate Capital Programme.

The report that will be presented to the CYP Committee will be available from 13 January 2016. A copy of this report will be sent to School Forum members on 13 January 2016.

RECOMMENDATION:

Members of the Forum are requested to make their views known in order that they can be presented to the meeting of the Children and Young People Committee on 20 January 2016.

SCHOOL BALANCES – MARCH 2015

When considering the Outturn Report – Revenue and Capital 2014/15 including School Balances as at 31 March 2015, members of the Schools Forum agreed the following:

- 1) KL to write to schools with large surplus balances for more than two years, i.e. 8% for primaries and 5% for secondaries and encourage them to raise it with the Governors of the schools and ask if they have a plan to reduce the amount.
- 2) KL to contact Chipping Sodbury School and ask them to attend a future meeting of the School Forum in order to explain their large deficit balance and their plans to reduce the deficit to zero.
- 3) KL to set up a small group in order to determine the questions to be asked to Chipping Sodbury School
- 4) KL to write to the Trusts of South Gloucestershire Academy Schools in order to ascertain academy school balances. This to be an annual exercise.

At the Schools Forum meeting on 10 September 2015, it was agreed that Steve Forecast would follow up these outstanding actions.

Steve has identified that of the eighty seven locally maintained mainstream schools, there are twenty-seven that have filed an outturn balance of over 8% primary and 5% secondary. Also, there were thirty-seven schools over the threshold for 2015, twenty-nine of these going in an upward direction.

Schools Forum members need to discuss what this means and what the benefit now is of writing to schools.

One option, in order to keep the admin of this to a minimum, is that the Schools Forum write to those nineteen schools that are above for two years and continuing upwards. The nineteen schools are:

Alexander Hosea
Barley Close Community Primary
Barrs Court Primary School
Broadway Infants' School
Crossways Junior
Emersons Green
Frenchay C of E School

Hawkesbury CE VC Primary
Holy Family Catholic Primary
Horton CE Primary
Iron Acton CEVC Primary School
Mangotsfield CE Primary School
Oldbury on Severn CE VC Primary School
St Mary's Catholic Primary Sch, Bradley Stoke
Stanbridge Primary School
The Meadows Primary School
Watermore Primary
Wick CEVC Primary School
Brimsham Green

Further details of Funding Allocations, School Balances and proposed letters are included in Appendices A, B and C respectively.

RECOMMENDATION:

Members of the Forum are requested to make their views known and determine the way forward.

APPENDIX A

Schools Formula Funding Allocations for Financial Year 2013/14 and 2014/15.

Please note this does not include Growth Funding agreed by Schools Forum or Resource Base and Special School funding.

URN	Current LAESTAB	School Name	Financial Year 2013/14 Schools Budget Share	Financial Year 2014/15 Schools Budget Share
Total			£77,733,145	£77,916,305
132199	8032008	Abbotswood Primary School	1,020,679	997,495
109023	8032185	Alexander Hosea	802,248	787,158
109157	8033042	Almondsbury C/E School	892,425	919,873
131225	8032341	Bailey's Court	1,300,786	1,336,084
109047	8032216	Barley Close Community Primary	864,812	965,322
109136	8032333	Barrs Court Primary School	973,100	998,602
109133	8032329	Beacon Rise	1,360,959	1,413,940
109121	8032317	Blackhorse Primary School	1,204,999	1,252,528
130257	8032340	Bowsland Green	971,325	1,022,468

109057	8032231	Broadway Infants' School	620,007	624,408
109029	8032192	Bromley Heath Infant School	622,441	623,641
109028	8032191	Bromley Heath Junior School	738,194	742,168
109019	8032180	Cadbury Heath Primary	714,157	693,365
109114	8032308	Cherry Garden Primary School	678,221	673,304
109166	8033051	Christ Church C o E VC Infants	744,292	755,742
109165	8033050	Christ Church C of E VC Junior	966,306	965,269
109163	8033048	Christ Church Hanham CofE Primary	782,597	881,540
109267	8033436	Christ the King R.C. School	492,816	499,520
131698	8032002	Coniston Primary	716,689	672,536
109054	8032227	Courtney Primary School	751,524	762,922
109049	8032220	Crossways Infants School	549,259	581,098
109040	8032208	Crossways Junior	712,985	688,702
109117	8032313	Elm Park Primary School	960,320	935,215

131767	8032007	Emersons Green	840,929	908,084
109013	8032171	Filton Hill	703,181	719,653
109160	8033045	Frampton Cotterell Church of England Primary School	844,770	900,977
109178	8033067	Frenchay C of E School	490,274	492,883
109126	8032322	Gillingstool Primary School	705,061	755,318
109024	8032186	Hambrook School	660,338	698,863
109016	8032174	Hanham Abbots	1,109,028	1,141,738
109161	8033046	Hawkesbury CE VC Primary	430,615	447,477
109266	8033435	Holy Family Catholic Primary	700,448	721,213
109249	8033410	Holy Trinity	687,889	684,293
109262	8033431	Horton CE Primary	331,976	340,445
109162	8033047	Iron Acton CEVC Primary School	350,248	370,599
131507	8033440	Kings Forest	1,306,595	1,347,396
131699	8032003	Little Stoke Primary	660,042	673,510

109030	8032194	Longwell Green County Primary	1,185,068	1,216,395
109164	8033049	Mangotsfield CE Primary School	1,394,145	1,394,795
109176	8033064	Manor C of E School	698,167	715,085
130978	8032339	Manorbrook Primary	655,973	661,010
109168	8033053	Marshfield CE VC Primary School	608,912	597,815
109025	8032187	North Road Community Pmy Sch	399,252	394,933
109175	8033061	Old Sodbury School	344,592	388,599
109169	8033054	Oldbury on Severn CE VC Primary School	311,520	321,479
109170	8033055	Olveston School	674,314	694,675
109265	8033434	OUR LADY OF LOURDES R.C.V.A.	661,089	676,191
109020	8032181	Parkwall Primary School	635,927	622,791
109171	8033056	Pucklechurch CE VC Primary	805,613	766,166
109172	8033057	Rangeworthy	333,331	325,443
109053	8032225	Raysfield Infants' School	625,021	602,116

109052	8032224	Raysfield Junior School	689,108	738,583
109011	8032168	Redfield Edge Primary School	691,353	663,121
109026	8032188	Ridge Junior School	759,323	760,492
109033	8032199	Samuel White's Infant School	808,166	785,484
109014	8032172	Shield Road Primary School	715,207	753,972
109181	8033072	St Andrew's C of E VC Primary	280,340	294,706
109159	8033044	St Anne's C of E School	1,132,937	1,134,277
109268	8033437	St Augustine of Canterbury Catholic Primary	910,382	894,348
109174	8033059	ST BARNABAS CE PRIMARY SCHOOL	746,906	795,234
109179	8033070	St Chad's Patchway C.E. Primary School	854,819	860,009
109158	8033043	St Helen's CE Primary	671,936	672,122
109229	8033127	St Johns Mead	917,101	965,722
109264	8033433	St Mary's C.E. Primary School	967,184	978,845
131410	8033300	St Mary's Catholic Primary Sch	708,931	722,546

109263	8033432	St Mary's CE Primary School	560,247	551,962
109228	8033126	St Michaels CEVC	1,743,649	1,912,761
109225	8033123	St Michael's Winterbourne	705,689	713,938
109269	8033438	St Pauls	712,026	684,427
132927	8033441	St Peter's Anglican/Methodist VC Primary School	721,837	726,386
109046	8032215	St Stephen's Infants' School	888,788	894,558
109167	8033052	St Stephen's Junior School	1,113,277	1,133,912
109134	8032331	Stanbridge Primary School	1,298,431	1,313,281
109018	8032179	Staple Hill Primary	1,164,288	1,167,007
109010	8032167	The Meadows Primary School	690,054	700,746
109017	8032176	The Park Primary	1,712,257	1,809,566
109034	8032200	The Tynings School	871,779	944,154
109180	8033071	Tortworth V C Primary School	334,883	328,928
109182	8033073	Trinity CE Primary School	496,145	496,580

135783	8033442	Tyndale Primary	829,358	808,372
136066	8032011	Watermore Primary	789,778	780,418
109113	8032306	Wellesley Primary School	688,111	688,556
131705	8032005	Wheatfield Primary School	1,260,734	1,288,240
109177	8033065	Wick CEVC Primary School	605,895	620,254
109319	8034146	Brimsham Green	4,475,466	4,405,838
109324	8034502	Chipping Sodbury School	3,182,536	2,829,197
109322	8034149	The Grange School and Sports College	3,438,765	2,724,920

ANALYSIS OF SCHOOLS BALANCES 2013/2014 - 2014/15**APPENDIX B**

	2013/2014 Total Revenue Balances	2014/2015 Total Revenue Balances	Movement between 2013/2014 and 2014/2015 balances
	£	£	£
Abbotswood Primary School	59,292	81,930	22,638
The Alexander Hosea Primary School	134,443	148,459	14,016
Almondsbury CE VC Primary School	36,613	69,788	33,176
Bailey's Court Primary School	98,758	151,368	52,609
Barley Close Primary School	97,111	142,224	45,113
Barrs Court Primary School	142,651	156,775	14,124
Beacon Rise Primary School	192,863	180,022	(12,840)
Blackhorse Primary School	60,813	87,686	26,873
Bowsland Green Primary School	62,631	(5,707)	(68,338)
Broadway Infant School	63,685	73,412	9,726
Watermore Primary School	79,200	81,717	2,517
Bromley Heath Infant School	48,529	43,116	(5,413)
Bromley Heath Junior School	80,174	61,393	(18,781)
Cadbury Heath Primary School	77,811	31,007	(46,804)
Callicroft Primary School	5,560	9,881	4,321
Cherry Garden Primary School	39,518	47,631	8,113
Christ the King RC VA Primary School	56,291	37,074	(19,218)
Christ Church CE VC Infant School	30,882	29,499	(1,383)
Christ Church CE VC Junior School	69,232	47,061	(22,171)

Christchurch, Hanham CE VC Primary School	23,721	38,298	14,576
Coniston Primary School	9,692	(41,683)	(51,375)
Courtney Primary School	(20,380)	(2,141)	18,239
Crossways Infant School	8,061	51,693	43,632
Crossways Junior School	75,625	95,397	19,772
Elm Park Primary School	42,116	(25,573)	(67,689)
Emersons Green Primary School	75,327	87,121	11,794
Filton Hill Primary School	3,468	14,993	11,525
Frampton Cotterell CE VC Primary School	23,205	25,876	2,670
Frenchay CE VC Primary School	58,828	76,012	17,183
Gillingstool Primary School	39,036	40,755	1,719
Hambrook Primary School	102,863	79,772	(23,091)
Hanham Abbots Junior School	41,166	66,390	25,224
Hawkesbury CE VC Primary School	90,784	97,520	6,737
Holy Family RC VA Primary School	134,795	166,573	31,778
Holy Trinity CE VA Primary School	13,099	30,979	17,880
Horton CE VA Primary School	37,223	54,005	16,782
Iron Acton CE VC Primary School	77,475	87,322	9,847
Kings Forest Primary School	125,093	120,198	(4,895)
Little Stoke Primary School	21,888	23,920	2,032
Longwell Green Primary School	19,435	25,526	6,090
Mangotsfield CE VC Primary School	169,995	288,634	118,639
The Manor CE VC Primary School	28,160	45,098	16,938
Manorbrook Primary School	38,842	31,035	(7,807)
Marshfield CE VC Primary School	38,937	30,675	(8,263)
The Meadows Primary School	64,249	67,724	3,475

North Road Primary School	20,427	14,942	(5,485)
Old Sodbury CE VC Primary School	14,796	25,396	10,600
Oldbury-on-Severn CE VC Primary School	25,070	34,934	9,864
Olveston CE VC Primary School	(5,417)	15,611	21,027
Our Lady of Lourdes RC VA Primary School	(1,212)	13,072	14,283
The Park Primary School	162,642	132,437	(30,206)
Parkwall Primary School	89,815	55,910	(33,905)
St Chad's Patchway CE VC Primary School	111,700	96,320	(15,381)
Pucklechurch CE VC Primary School	57,978	86,940	28,962
Rangeworthy CE VC Primary School	19,847	17,513	(2,334)
Raysfield Infant School	32,661	20,311	(12,350)
Raysfield Junior School	37,516	56,034	18,517
Redfield Edge Primary School	41,670	47,877	6,207
St Peter's Anglican/Methodist VC Primary School	48,266	86,196	37,930
The Ridge Junior School	55,362	40,984	(14,378)
Samuel White's Infant School	5,630	(2,360)	(7,990)
Shield Road Primary School	30,154	68,236	38,082
St Andrew's CE VC Primary School	(3,883)	18,007	21,891
St Anne's CE VC Primary School	43,117	11,936	(31,181)
St Augustine's RC VA Primary School	1,623	(13,337)	(14,959)
St Helen's CE VC Primary School	42,925	34,692	(8,233)
St John's Mead CE VC Primary School	72,304	113,295	40,991
St Mary's, Thornbury CE VA Primary School	47,441	13,068	(34,373)
St Mary's, Yate CE VA Primary School	72,014	112,998	40,984
St Mary's, Bradley Stoke RC VA Primary School	154,942	169,840	14,897
St Michael's, Stoke Gifford CE VC Primary School	128,064	128,587	523

St Michael's, Winterbourne CE VC Primary School	118,748	90,591	(28,157)
St Paul's RC VA Primary School	53,838	41,679	(12,159)
St Stephen's Infant School	19,571	40,671	21,100
St Stephen's CE VC Junior School	87,253	106,764	19,511
Stanbridge Primary School	174,891	203,453	28,562
Staple Hill Primary School	88,993	90,637	1,644
Tortworth VC Primary School	24,046	24,189	143
Tyndale Primary School	12,426	38,876	26,450
Trinity CE VC Primary School	36,563	2,289	(34,274)
The Tynings Primary School	29,668	(6,109)	(35,777)
St Barnabas CE Primary School	37,523	58,811	21,288
Wellesley Primary School	82,395	77,753	(4,642)
Wheatfield Primary School	88,977	99,529	10,552
Wick CE VC Primary School	57,274	72,953	15,680
Total Primary	4,996,379	5,391,979	395,600
SECONDARY			
Brimsham Green Secondary School	451,439	467,695	16,256
Chipping Sodbury VC Secondary School	(862,486)	(935,493)	(73,008)
The Grange School & Sports College	66,746	(116,375)	(183,121)
Mangotsfield Secondary School	519,078	411,101	(107,978)
Sir Bernard Lovell Secondary School	331,686	708,337	376,650
Total Secondary	506,464	535,265	28,800

SPECIAL			
Culverhill School	385,981	423,917	37,936
Warmley Park School	197,464	193,425	(4,039)
New Siblands School	3,977	102,434	98,457
New Horizons Learning Centre	(51,018)	(22,937)	28,081
Education Other Than At School	25,569	295,510	269,941
Total Special	561,972	992,349	430,377
TOTAL FOR ALL SCHOOLS			
	6,064,816	6,919,593	854,777
Small Schools Association & Leadership Academy	9,604	11,692	2,088
DSG c/f	833,456	289,230	(544,226)
Schools Loans	(136,849)	(137,625)	(776)
School estimated interest to be allocated to schools	6,680	6,553	(126)
	6,777,706	7,089,443	311,736

APPENDIX C

To: Chair of Governors, Head Teachers, and {list of schools with high balances}

I write on behalf of the South Gloucestershire Schools Forum, the role of which you will be aware is to provide overview, guidance and decisions on the funding of schools and academies.

In pursuance of this role the Forum reviews outstanding revenue balances. During the most recent review the Forum noted that your school has reported balances in excess of general guidelines (8% for primaries and 5% for secondaries) for the past two consecutive years.

A major role of the Forum is to ensure that schools are utilising funds in the most efficient manner and to that end asks you to provide copies of your plans to reduce this amount. Would you please provide this by the end of January 2016.

Thank you for your assistance.

Steve Forecast
On behalf of the Schools Forum Chair

To: Chair of Governors, Chipping Sodbury School

I write on behalf of the South Gloucestershire Schools Forum, the role of which you will be aware is to provide overview, guidance and decisions on the funding of schools and academies.

In pursuance of this role the Forum reviews outstanding revenue balances. During the most recent review the Forum noted that Chipping Sodbury School reported a significant deficit out turn, in the region of £940k, and that this was an increased deficit from the previous year (c£862k).

A major role of the Forum is to ensure that schools are utilising funds in the most efficient manner and to that end invites you to attend a Forum meeting on (MARTIN PLEASE INSERT THE BEST DATE HERE) to explain the deficit balance and your plans to reduce the deficit to zero.

Thank you for your assistance.

Steve Forecast
On behalf of the Schools Forum Chair

To: Head Teachers of all Academies in South Gloucestershire

I write on behalf of the South Gloucestershire Schools Forum, the role of which you will be aware is to provide overview, guidance and decisions on the funding of academies and schools.

In pursuance of this role it is important that members of the forum have a complete picture of how funds are being utilised. To that end, yearend financial results are reviewed for all maintained schools. This exercise is now to extend to academies.

I would therefore be grateful if you would provide the last year end operational balances for your academy. The Forum is aware that financial reports are made available on your web site, so you could provide the link to the relevant document, but with the number of organisations to be covered it would aid us greatly if you would provide the figures with relevant dates.

Thank you for your assistance, the information can be provided via email to the local authority.

Steve Forecast
On behalf of the Schools Forum Chair

EFA: SCHOOLS FORUM GUIDANCE

The Schools Forum, at its meeting on 2 July 2015, considered a report on Schools Forum Guidance that had been issued by the Education Funding Agency.

The documents are:

- Schools Forum – Operational and good practice guide
 - Schools Forum – Powers and responsibilities 2015 to 2016
 - Schools Forum – Structure
- And
- Schools Forum – Self-assessment toolkit – attached as Appendix A

At that meeting the Schools Forum agreed that members were to individually complete the self-assessment toolkit. These responses were then to be collated by the Chair and reported to the meeting on 10 September 2015. This item was then deferred until this meeting.

This update will be provided by Steve Forecase.

Recommendation

Members of the Forum are requested to consider the collated responses and determine any actions required.

Schools forum self-assessment toolkit

This toolkit provides local authority officers and elected members with a framework for assessing the strengths and weaknesses of their schools forum. The toolkit is designed as a set of questions which can be considered by individuals or the forum as a whole.

Question	Yes / No	Notes
1. Are meeting dates set in well advance and details (including time and venue) published in an accessible manner to enable interested parties to plan their attendance?		
2. Are meetings timed to coincide with key dates? (e.g. reporting of funding formula)		
3. Are meetings held in an accessible venue to enable observers to attend easily?		
4. Is there a dedicated website link for schools forum, is it current and regularly updated?		
5. Are the agenda and papers publicly available on the authority's website at least 6 working days in advance of the meeting?		
6. Are the papers published as a single document, so that users can download easily?		
7. If papers are tabled at the		

Question	Yes / No	Notes
meeting, are they published on the website promptly after the meeting?		
8. Are draft minutes published a reasonable time (e.g. within 2-3 weeks) after the meeting, rather than waiting until the following meeting?		
9. Are the minutes clear and unambiguous, with sufficient detail to illustrate the discussions, without reporting verbatim every point made?		
10. Is the constitution clear and appropriate? Including e.g. <ul style="list-style-type: none"> - a clear process for ensuring proportional representation - the process for electing members and their tenure - the timescale for review is clearly set out - the process for dealing with repetitive non attenders 		
11. Is there an induction pack or training programme available for new members?		
12. Is the election process clear and transparent? i.e. representatives are elected only by the group they are representing, whether phase-specific for maintained schools, or by the proprietors of academies for academy members.		

Question	Yes / No	Notes
13. Do the papers contain clear recommendations and indicate in a consistent manner whether the item is for information, consultation or decision?		
14. Is it clear to observers who attendees at the forum are representing? (e.g. by use of name plates, indicating sector)		
15. Does the chair manage the meeting well, ensuring that all are able to contribute to the agenda items, that no bias towards any sector is evident and that no single person or organisation is able to dominate the discussion?		
16. Is there inclusive participation in discussions for all phases and types of members?		
17. Do members actively canvass views and objectively represent their whole peer group at the forum and provide feedback after meetings?		
18. Where votes are required, is it clear who is eligible to vote for different items?		
19. Where votes are required, are the arrangements for recording the votes clear and unambiguous?		
20. Is there a system in place for a decision if votes are tied?		

Question	Yes / No	Notes
21. Is the operational & good practice guide used to regularly review the forum's adherence to good practice?		

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SCHOOLS FORUM WORK PROGRAMME 2016

All meetings at 4.30pm at Badminton Road, Yate

<p style="text-align: center;">14th January 2016 Room 0012 Ground Floor</p> <ul style="list-style-type: none"> • Earmarked Capital Programme 2016/17 • Council Budget 2016/17 • Deployment of the DSG 2016/17 	<p style="text-align: center;">25th February 2016 Room 0012 Ground Floor</p> <ul style="list-style-type: none"> • 3rd Budget Monitor 2015/16 • The Schools Forum Constitution from April 2016 • Education Commission Update
<p style="text-align: center;">5th May 2016 Room 0012 Ground Floor</p> <ul style="list-style-type: none"> • Trading Arrangements • Analysis of Schools Block Funding Formulae 2016/17 	<p style="text-align: center;">14th July 2016 Room 0012 Ground Floor</p> <ul style="list-style-type: none"> • Preparing for 2017/18 (if known) • Provisional Outturn 2015/16 • Schools Forum Membership • Date of future meetings and the Work Programme 2016/17
<p style="text-align: center;">15th September 2016 Room 0012 Ground Floor</p> <ul style="list-style-type: none"> • DfE Consultation on School Funding 2017/18 • Allocation of Schools Block Growth Funding • 1st Budget Monitor 2016/17 • Education Commission Update 	

ANY OTHER BUSINESS