

AGENDA



SCHOOLS FORUM

Date: Thursday 26th March 2020
Time: Meeting postponed
Place: Papers only

Distribution

Members of the Committee

Dave Baker	Keith Lawrence
Penny Chislett	Louise Leader
Nicky Edwards	Sarah Lovell (Chair)
Mark Freeman	Pippa Osborne
Kim Garland	Diane Owen
Clare Haughton	Lisa Parker
Steve Moir	Will Roberts
Richard Aquilina	Susie Weaver
Carl Lander	Simon MacSorley
Bernice Webber	Malcolm Strange
Julia Anwar (Sub)	Rhys Buckley
Linda Porter	Susan Brobyn
David Jenkins	

Membership update:

Bernice Webber has been re-elected for another term by the Primary Heads Exec representing the Primary Maintained Sector.

Appropriate Officers attending:

Mustafa Salih
Hilary Smith

Councillors attending:

Erica Williams
Trevor Jones

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AGENDA

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SCHOOLS FORUM

Minutes of Meeting held on Thursday 23rd January 2020 Council Offices – Badminton Road

PRESENT:

Sarah Lovell (Chair)	Finance Director, Cabot Learning Federation
Dave Baker (Vice Chair)	CEO, Olympus Academy Trust
Nicky Edwards	Natural Choice Nurseries
Kim Garland	Headteacher, Brimsham Green
Clare Haughton	Paige Park Pre-School
Pippa Osborne	Headteacher Christ Church Junior School
Diane Owen	Chair, King's Oak Academy
Stuart Evans	South Gloucestershire and Stroud College
Richard Aquilina	Governor - Bailey's Court
Macolm Strange	Diocese Rep
Will Roberts	CEO – Castle School Education Trust (CSET)
Susan Brobyn	Director of Finance and Operations, CSET
Karl Hemmings	Headteacher – Emersons Green Primary
Julia Anwar (sub)	Finance Director, Olympus Academy Trust

Officers:

Mustafa Salih, Head of Financial Management and Business Support
 Caroline Warren, Finance Business Partner – CAH Children
 Management Accounts
 Stuart Thomas, SEND Financial Planning Lead
 Hilary Smith, Head of Education, Learning and Skills
 Tanya Smith, Strategic Lead, Place Planning & Commissioning
 Dave Perry – Chief Executive, South Glos Council
 Erica Williams – Lead Member for Education, Skills & Employment

1. WELCOME AND INTRODUCTIONS

Attendees were welcomed by the Chair.

2. APOLOGIES FOR ABSENCE

Susie Weaver, David Jenkins, Steve Moir, Keith Lawrence, Bernice Webber,
 Linda Porter, Lisa Parker, Carl Lander

3. EVACUATION PROCESS

The Chair drew attention to the emergency evacuation procedure

4. ANY OTHER ITEMS THE CHAIR DECIDES ARE URGENT

None.

5. MINUTES FROM PREVIOUS MEETING.

Minutes agreed as a true record.

Completed Actions:

Confirmed that letters regarding schools budget were sent out to schools and Governors.

Action Carried Forward:

Funding challenges in Early Years (EY) to be discussed at the EY working group with support from Hilary Smith (HS) and/or Mustafa Salih (MS)/finance.

6. HIGH NEEDS WORKING GROUP – HNWG (Dave Baker-DB)

Noted that the group has been in operation for 12 months – reflected on progress and forward planning from the council.

Felt it was appropriate to update the terms of reference of the group up to the end of this academic year. People will be invited to present to the group on progress of various projects/initiatives.

Stuart Thomas (ST) will work with **HS** in outlining a template for reporting progress to the Schools Forum. Kim and Pippa will be looking at the terms of reference with Susie Weaver who is HNWG chair.

Action – Revised terms of reference to be provided at the next schools forum

7. EARLY YEARS CONSULTATION (Rachel Webb - RW)

MS presented this in the absence of RW.

This is part of the annual budget-setting process which will be passed onto Cabinet in February. Forum were asked to note the outcome of the consultation and make a recommendation on options.

Nicky Edwards (NE) – Early years working group would like to make it noted that:

- The 8p was insufficient to support the sector but recognised that South Glos proposed to pass all 8p across to provider which has not been the case for all local authorities .
- Cutting back on deprivation to pay more money for childminders was agreed by the early years working group.
- Nothing was changed from the consultation by it coming to the working group.
- 30% responses for this consultation was low.
- Outcome favoured supporting the child minders.
- It is a National problem – 2% is not sufficient to support the sector.

The forum expresses its concern over the insufficient financing of the early years sector

but agreed the recommendation in option 2 outlined in page 13 of the forum report. One member abstained from voting.

2year old rate	NEG Rate	Base	Inclusion Fund	Deprivation Supplement	Flexibility Supplement for childminders
£5.23	£4.07		2 % £386,600	0.9% £128,970	£0.14 <i>Base Rate £4.07 + supplement £0.14 = Hourly Rate £4.21. (£0.08 increase)</i>

CW – pointed out that there is an error on page 11. The Deprivation supplement should be £140,710 not £133,627 as reported. It was also pointed out that the Inclusion Fund figure in the table above should read £286,600.

Action: MS will contact F40 group to see if there is appetite to campaign for more funding in the early years sector.

8. PLACE PLANNING COP STRATEGY 2019 (Tanya Smith - TS)

This is a draft report. The document can be used to pick up trends in the area of any school/setting.

Key messages:

- There has been growth across the primary sector.
- There has been rapid growth in certain areas e.g. Patchway, Bradley Stoke, Frenchay.
- There was a downturn 2018/19 but this will recover from 2020 onwards
- For secondary school planning, the focus should be on the year 6 cohort coming through. Demand has exceeded capacity. However, we have a number of children who go out of county.
- New houses will only be taken into account when they are occupied. They are treated separately but not ignored.
- Half-way along the process of developing new schools there is the opportunity for trusts to come forward and develop new school provision.
- Projecting special school places will never be perfect and is very difficult to do.
- For primary schools the focus should be on the reception cohort coming through.

Pippa Osbourne (PO) - Charlton Hayes area has many empty spaces and is currently under capacity. This will be the case over the next few years.

TS - This will pick up over the coming years.

HS - There is a significant growth within South Glos. but this is in pockets of areas. There has been discussion about this in the council's small school strategy group.

NE - Questioned how section 106 opportunities for new early years settings are marketed? Is this a fair market and is it known amongst providers? Is the early years sector likely to be

dominated by the big early providers rather than the smaller locally run ones?
 TS – Agreed the S106 process was fairly rigid and perhaps didn't support a variety of providers

Action – EY Working Group to discuss new provision process

Dave Baker thanked Tanya Smith for her service to the Schools Forum as this was probably her last meeting before leaving her post.

9. GROWTH FUNDING 2020-21 (Caroline Warren-CW)

CW asked the Schools forum to note the report and agree the criteria.

Growth funding formula section – No comments or questions from forum members were made around this section.

Clarification – Basic Entitlement rate what is it made up of? It is part of the schools formula funding rates, this does not include any of the additional factors and is just the basic Age Weighted Pupil Unit (AWPU).

Page 79:

2 adjustments have been made in the report since:

Frenchay should be 10 places and John Cabot 15 places rather than the 30 places indicated in the report.

The schools forum approved the growth criteria

Schools Specific contingent fund:

£300k is set aside annually for schools that are in financial difficulty which require more help than through the normal standard recovery plan.

Diane Owen (DO) – Indicated her concern over how schools can access the money and how schools can apply for it.

MS - Schools in Financial Difficulty (SIFD) group for maintained schools, identify schools and work with them on a one to one basis, if there are schools that meet the criteria then it is recommended that they apply for the contingency fund. This is the process for maintained schools. To date there are a handful of schools that fall under this criteria. Academies are able to access the fund providing they meet the criteria in the report.

PO - It would be good to know about the schools that have been turned down from the contingency fund, how are they now?

Finance conference in June 2020 – opened to all Heads and business managers – key messages need to be shared. All Academies are welcomed and it will be kept as broad as possible.

WR - Is there a deadline for SIFD applications? A shorter window for applications would provide better decision-making.

MS – There needs to be a gateway from the academies as part of the process before it comes to the council/forum for consideration. Academy representatives agreed to oversee this.

Forum Approved that the £300k to be used for the following year. One member abstained.

Action: 2019/20 YTD spend report to be provided at the next forum meeting including the impact on students

Action: Chair and Vice Chair to consider timeline and reporting conditions of the SIFD fund and will bring a proposal to the next forum.

10. FUNDING SETTLEMENT 2020-21 (Caroline Warren - CW)

Still waiting for decision from the Secretary of State on the transfer of money between blocks.

Overall allocation is £219m

Schools Central Services Block has been reduced – this is being challenged.

The impact of this will not affect schools directly

MS – Is networking with other LA's to hear from them on the outcomes of their transfer requests.

Letter has been sent to the Secretary of State and the Chancellor of the Exchequer regarding our transfer and the reduction to the Central Services budget. Leader of the council is engaging with our Local MP's.

DfE meeting scheduled on 11th Feb to look at our sustainability plan, the transfer requested is a key part of the plan.

DB – Government is clear that there is an expectation that £3,750 and £5k minimum per pupil funding is delivered, so we need to be looking at a plan B. What will the council do if the transfer is refused?

MS - The council will make a decision at the start of Feb (cabinet), as officers we are positive about the recovery plan, we are seeing some green shoots of recovery.

PO – Asked Dave Perry (DP) On the council's perspective regarding carrying a deficit DSG and would an increase be considered to continue the high needs working group strategies?

DP is working with other LA's and chief execs in lobbying the government to recognise the issue of the continued deficit.

There are some missed communication opportunities in sending joint messages.

How will the decision from the Secretary of State be communicated?

Schools Forum will be informed immediately.

RA – What was the response from schools following the letter sent in December regarding the DSG consultation?

MS – Only 2 responses received objecting to the recommendation made by forum

It is not achievable for us to meet before the next forum if the Secretary of State makes a decision.

11. UPDATE ON THE READY RECKONER (Duane Chappell/Hilary Smith)

HS – The application of the Ready Reckoner (RR) is having a positive difference but has some capacity challenges:

- Time consuming for Educational Psychologists (EPs) to deliver specific reports.
- There has been EP recruitment challenges within the council.
- The drive needs to be accelerated, it is making a difference, and there is a capacity issue.

PO – The RR is fair but when learning support assistants are being split amongst a group of students this does make it problematic, synchronising where children are placed makes it easier, when pupils are split across the school it becomes difficult to share an LSA.

HS – The RR has made it clearer and more transparent, we are not receiving any complaints.

Karl Hemming (KH) – As the number of LSAs has been reduced this has made it difficult managing the RR. Be aware negative feedback may be coming.

Page 86 – Recommendations were approved by the Forum.

DB – Duane Chappell was recognised for the work she has done for the forum and it was confirmed that she has left South Glos Council.

12. INDEPENDENT SECTOR (Duane Chappell/Hilary Smith)

- We are seeing an increasing number of pupils entering the independent sector.
- There is an impact from our social care colleagues on the high needs block.
- There are big financial implications on the high needs block, a process is being developed to look at this. This is not going to be a quick win, negotiations are needed with the independent sector in negotiating prices and child places within the sector. We are trying to develop our workforce and we need to get capacity right.
- We need to promote our local special schools, they are 100% good (Ofsted). We need to influence parents' choices.

DO – How do we measure the impact?

DB – This has been looked at as part of the work of the HNWG and some of the outcomes were concerning.

The forum approved the recommendations in the report.

Outstanding Actions Summary from Forum Meeting:

Actions	Who	Update
HNWG- Template for reporting progress to the Schools Forum. Kim and Pippa will be looking at the terms of reference.	Stuart Thomas (ST) will work with Hilary Smith (HS)	Draft Template and Terms of Reference has been completed – This has not been taken to HNWG yet (Last meeting cancelled). Next meeting due end of April – this will then be presented at Forum
Contact F40 group to see if there is appetite to campaign for more funding in the early years sector.	Mustafa	Has contacted F40 Group they will be campaigning for more funding
Contingency Fund: Impact of money spent on previous SIFD schools.	Mustafa	A paper will be produced for a future Forum meeting. ST to put in future forward plan
To take forward dates for looking at schools in financial difficulty. Will come back with a proposal for the next forum meeting on the process which needs to have some clarity and timeframe.	SL/Mustafa/SIFD group	Item on this Forum meeting – all actions will be addressed.
Funding challenges in Early Years (EY) to be discussed at the EY working group with support from Hilary Smith (HS) and/or Mustafa Salih (MS)/finance.	Hilary Smith	Arranging to meet with Nicky Edwards to discuss.

SOUTH GLOUCESTERSHIRE COUNCIL

SCHOOLS FORUM

26th March 2020

**Department of Education Visit (DfE)
Secretary of State's Decision on Block Transfer
Proposals for the future spend of the transfer amount**

Purpose of Report:

1. To update the Forum on:
 - The recent visit from the DfE regarding the Dedicated Schools Grant (DGS) recovery plan.
 - The Secretary of State's and Cabinet decision following South Gloucestershire's DSG disapplication request.
 - Recommendations for the future spend of the agreed transfer amount.

Background:

2. Following the submission of South Gloucestershire's detailed DSG Recovery Plan on 27 June 2019 further evidence was requested by the Education and Skills Funding Agency (ESFA) on 30 October around the savings proposals requiring more detailed narrative together with a follow up visit on 11 March 2020 (Appendix).
3. To support a system wide change the following items were presented to schools through the budget consultation, forum members and DfE as initiatives which would flow directly back to schools/providers.

<https://www.southglos.gov.uk/documents/Schools-Budget-202021-Sch-Forum-Report-4-Nov2019001.docx>

- £1m to continue the Cluster Funding pilots and move it from a pilot to a permanent feature of the South Gloucestershire SEND system
- £0.3m to allow the High Risk Group to put in place support to significantly reduce exclusions (target should be zero exclusions)
- £0.3m to support SEND pupils in the Early Years sector
- £0.2m to provide an uplift to Special School and Resource Base rates

- £0.2m to be directed by the Schools Forum/HNWG to support System wide change
4. The Schools Forum met on 21 November 2020 and unanimously supported a continued £2.9m transfer from the Schools Block to the High Needs Block. Forum members by 9 votes to 5 also voted in favour of transferring a further £2million supporting the system wide change highlighted in the previous paragraph. 1 voter abstained.

Minutes from forum meeting

<https://www.southglos.gov.uk/documents/Schools-Forum-Minutes-21-Nov-19.pdf>

5. Following the Forum meeting a disapplication request for a £4.9m transfer from the Schools Block to the High Needs Block was made to the Secretary of State.

DfE visit 11 March 2020 and Secretary of State Decision:

6. Four officials visited Badminton Road: Keith Howkins, ESFA, Head of Funding Policy Implementation Unit, Keith Thompson, DfE SEND Adviser, John Edmunds, DfE Funding Policy Unit and Hanna Bottomley, ESFA Funding Stakeholder Engagement Team.
Officers present from the council: Mustafa Salih, Hilary Smith, Caroline Warren, Stuart Thomas.
7. Keith Howkins confirmed an approval of a £2.2m transfer. Nationally only 3 transfer requests have been approved. South Gloucestershire's was the highest percentage agreed and was in large part because of School Forum support and it was to invest in improvements to the system not just to cover overspending budgets (paragraph 3). The £2.2m was simply calculated from the request for £4.9m less the extra growth to the High Needs Block of £2.7m.
8. All DfE/EFSA members did not raise a significant concern about the size of our deficit and that they agreed that we may effectively have a historic deficit that will be hard to solve. They said that the current DfE led review of SEND will be looking at the issue of Local Authorities (LA's) that have large historic deficits. They also mentioned that there were a number of LA's with much larger relative deficits than South Gloucestershire's.
9. The DfE will be dropping their requirement for LA's to submit Deficit Recovery Plans but may require some LA's to provide Deficit Management Plans. In their opinion they thought our initiatives to reduce the deficit like the Ready Reckoner and Cluster Boards and the impact they were having were all really good and wanted us to share it with other LA's. There was nothing more that they suggested we could be doing and a follow up meeting will be arranged in 6 months. John Edmunds when questioned on examples of good practice in relation to Alternative Provision did point towards Portsmouth and Nottinghamshire LA and later provided contact details.

10. Sarah Lovell Chair of the Forum attended and thoroughly explained the partnership approach being taken by the Council with schools over this problem.
11. The settlement for school funding for the following year 2021/22 had still to determine the split between school block funding and High Needs Block funding. South Gloucestershire will need to continue lobbying for the gap in funding for High Needs to be fully recognised for 2021/22.
12. In terms of the positive impact on our DSG for next year the DfE said it's £4.9m extra than what we might have otherwise had and the real impact will be:

-£2.9m loss of existing transfer
+£2.2m Addition of new transfer approval
+£2.7m Growth in High Needs as per government funding settlement
= £2m net extra resource to go into the High Needs Block of the DSG.

13. Following approval from South Gloucestershire Cabinet Schools and Forum members were informed of the above decision:

<https://www.southglos.gov.uk/documents/Letter-to-Schools-on-Final-Schools-Budget-202021-14feb20.pdf>

For Forum Member Consultation:

Following the new transfer decision of £2.2m rather than the requested £4.9m forum members are asked to consider and offer views on the amended proposals for focusing investment as follows:

14. Continue funding the £1m Cluster Pilot with funding for High Risk pupils being included in the £1m spend (£150,000 top-sliced from the £1m for High Risk Pupils remainder to be spent on Cluster groups).

Further detail on the progress of the Cluster Pilot can be found in a later report together with an explanation of how money is distributed amongst Clusters.

Progress and outcomes will continue to be reported back to the Schools Forum on a regular basis.

15. £0.2m to provide an uplift to Special Schools and Resource Base rates. Over the past two years this sector has seen a reduction in base banding rates.
16. Review the previously planned investment in Early Years as part of a broader review of the best way to support SEND in the early years sector that also covers

the EYs Inclusion Fund. This review would be done in partnership with the Early Years Consultative Group.

Action: ST to ask for formal written feedback from the DfE visit. This will be shared with the Forum.

South Gloucestershire Council

SCHOOLS FORUM

26 March 2020

UPDATE ON SEND SUPPORT CLUSTER PILOT INITIATIVE

Purpose of Report

1. The purpose of this report is to
 - (i) provide Schools Forum with details on the current position on the SEND Support Cluster Pilot Project and associated developing response to reduce the number of pupil exclusions in the area; and
 - (ii) seek Schools Forum member, specifically School and Multi-Academy Leader, leader support in encouraging full participation across the area

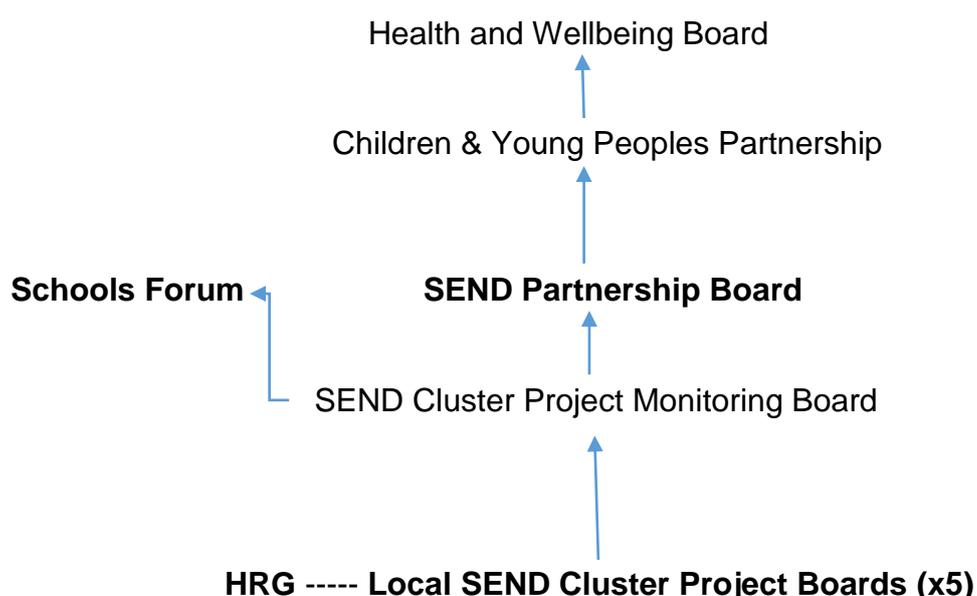
Background

2. South Gloucestershire schools currently have a rate of exclusions of children and young people that exceeds the regional and national average. In the 2017 Ofsted/CQC Inspection of local arrangements for Special Educational Needs and/or Disabilities (SEND), the high, and increasing, rates of exclusions from local schools for pupils with SEN and/or disability, particularly at secondary level was identified as a serious weakness requiring the local authority to set out how this would be addressed in its Written Statement of Action.
3. A strategy for establishing effective arrangements for special education needs in the local area which was co-produced by the Local Authority; the Clinical Commissioning Group; and Parent and Carer Forum in consultation with stakeholders was published in March 2018. This includes the intention to develop a school-led response to building capacity across the education system for children with special education needs to improve education outcomes and reduce exclusions.
4. The school-led arrangements have been designed as clusters of primary and secondary schools located in specific geographical areas which reflect the primary care (health) footprint working together in collaboration to respond to the identified needs of their school SEND population.
5. The local Schools Forum supported this model of collaboration and agreed to allocate a total of £1 million to the cluster project on the basis that the clusters would improve educational outcomes; reduce exclusions and also build the capacity of the workforce to better meet the needs of pupils at SEND support. The latter being to reduce the exceptionally high number of children and young

people with Education Health Care Plans which has arisen as a consequence of relatively poor support at SEN support.

6. Schools Forum agreed that all schools would be organised into 5 or 6 clusters; each cluster receiving a share of £1 million based on the numbers of pupils in the cluster; and that the project would operate as a pilot initially of 2 of these clusters to establish the most effective approach.
7. Two clusters were established in November 2018 and became operational from March/April 2019. The clusters covered the Bradley Stoke/Filton/Patchway area and Frampton Cotterill/Brimsham Green/Yate area. Each cluster has a cluster board chaired by a cluster lead headteacher which uses pupil data for all schools in the cluster to identify priority needs and develop a strategic response to meeting the needs. This response includes training and development of staff; improved access to services; commissioning of specific and targeted interventions; and support for parents.
8. In July 2019 Schools Forum agreed that the pilot should be rolled out across the local authority area, still operating as a pilot but to include all schools organised into five clusters. This means that all five clusters are ready to commence delivery by the agreed 1 April 2020 target date (subject to the position on the current Covid19 emergency) so that the agreed strategy for improving local arrangements for children and young people at SEND support can be delivered across all areas.
9. An overarching local authority officer cluster monitoring board has also now been extended to include the five cluster headteacher leaders and these will meet termly to monitor performance; share learning and determine impact on the experience of children and young people in the local area.
10. It has also been agreed that one of the five headteacher leaders will join the SEND Partnership Board so that the Board can support and challenge the initiative and ensure focus is maintained on this key element of the overall SEND strategy including alignment with partner developments to maximise impact.
11. Concerns have been raised by schools at how the initiative can be sustained given the financial position of the local authority in relation to expenditure on special educational needs and provisions supported from the High Needs funding block allocated by the Department for Education (DfE).
12. However, now that all five clusters have been established, the potential to use financial resources strategically and much more efficiently and effectively is significant. This is dependent on local authority and school leaders from the primary and secondary phases committing to driving the initiative forward in each geographical area. Overall success will require high levels of participation and commitment by local schools to the principles that are being developed for the strategy.

13. At a meeting on 11 February 2020 with the DfE and Education and Skills Financial Authority (ESFA) to discuss the Local Authority deficit recovery plan for High Needs, those present expressed support for the project. DfE representatives noted the potential to positively impact on the financial challenges associated with expenditure on special educational needs and other High Needs areas. They were able to appreciate the benefits that can be delivered through school-led strategic commissioning arrangements, subject to a majority of schools buy-in to the approach. The model is also being promoted by the DfE as good practice to other local authorities across the region and beyond.
14. Subsequent to the meeting ESFA confirmed their support to transfer of £2.2 million of funding from the Schools Block to High Needs in order to deliver key elements of the deficit recovery plan. Therefore, it is possible to sustain the project for at least one more academic year. The project could be sustained longer-term subject to achieving savings associated with a reduction in exclusions by meeting need in the local areas and reduction in EHC Plans by meeting need at SEN support.
15. There are a number of complimentary initiatives to respond the issue of exceptionally high exclusions in the local area and one that is directly aligned to the cluster project is the High-Risk Group (HRG).
16. This is a multi-agency approach with the objective of considering a referral from a school of a case involving a child or young person at high risk of exclusion, in order to identify a short-term intervention to prevent exclusion. Funding is allocated from the cluster allocation to support the intervention. Procedures and funding arrangements are in place between the cluster initiative and HRG to ensure that the two work together as part of a cohesive strategy and that funding is targeted in line with strategic priority objectives.
17. Governance arrangements for the project are therefore:



1. **Current Performance and Learning: Feedback from pilot cluster leads and evidence of impact**

(i) **Feedback from Patchway Cluster Board (November 2018 – March 2020).**

A detailed report has been received from the headteacher leader of the Patchway cluster and key points from that report are included below.

There is excessive amount of time taken in dealing with large number of claims for small amounts of expenditure incurred by schools. This is not considered an efficient use of resources (personnel and finance) and it has been recommended that the fund should only be used for strategic developments including:

- Training and development of Lead SENCOs with a specific and well-defined role
- Improving access to identified priority services, for example: Speech and Language Behaviour Support; Primary Mental Health
- Intervention programmes for children at high risk of exclusion (i.e. those referred to High Risk Group)
- Programme of cyclical whole school SEND reviews for every school
- Improved access to high quality Alternative Provision within a local area

The terms of reference of the individual Cluster Board needs to be clearly defined with an agreed and manageable meeting schedule. Demands on cluster lead time are excessive and in order for the project to be sustained appropriate administrative, data analysis; financial management and enabling support should be identified, including via the local authority.

A review of the Terms of Reference of the Cluster Board will be completed and shared with all cluster leads at the monitoring board to ensure that there is a common understanding of expectations and to address some of the practical issues highlighted.

Identified strengths of the initiative so far include:

- The establishment of strong SEN support networks
- Collaborative working between Headteachers on a geographical basis
- Improved access to and targeting of services, specifically Speech and Language and Behaviour support

(ii) **Feedback to SEND Partnership Board**

In December 2019 the Headteacher leaders for the two established clusters attended the SEND Partnership Board to present a summary of the cluster initiative to the board which identified the following:

Positive outcomes achieved so far:

- Secondary and primary schools engaged and working together
- Access to high quality training and support
- SENCo groups value the support and opportunity of working together
- Extensive sharing of best practice across the cluster
- Shared understanding of priority needs of children and young people in the area (SEMH and ASD)
- Attracting significant interest of health partners and consequently opportunity to link with partners – for example lead paediatrician
- Welcomed by parents and providing opportunity for parental engagement in relation to behaviour.

Challenges associated with the initiative:

- Significant time involved in setting up;
- Significant demand on lead headteacher
- Risk of becoming too bureaucratic
- Need to establish a secure process for accessing support for SEMH in order to prevent exclusion
- Difficulty in accessing good quality alternative provision and/or effective support services
- Easy identification of evidence based best practice responses/interventions to meet needs.

There are strong indications from the feedback that the initiative is proving to be an effective way forward even though there have been numerous challenges faced by those involved in the pilot. However, none of the challenges are insurmountable and they can all be overcome through effective partnership arrangements between the local authority and schools and by ensuring sufficient administrative and enabling capacity is built into the project and/or local authority teams as necessary.

(iii) **Revisit of Ofsted/CQC Inspection of Local Arrangements for SEND (10-12 February 2020)**

The SEND strategy including details of the development of the SEND Support Cluster Initiative were shared with the Inspection team during the revisit which took place between 27 January and 13 February.

Inspectors expressed their views on the significant benefits and potential of the initiative to deliver improvements to local arrangements for SEND.

A detailed analysis was completed in relation to exclusions and it was evident that the initiative is having a positive impact – especially in the Winterbourne/Yate Cluster. Inspectors were critical of the local authority in not moving to establish the model beyond the pilot phase. It was therefore

explained that this was mainly due to the financial situation and that at the time the authority and schools were awaiting the outcome of the application to transfer funding from the school block to high needs block in order to support the initiative going forward.

2. Other considerations and associated developments

- (i) Feedback from cluster leads and also secondary heads has highlighted a need to further develop access to alternative provision and support services within the local area.
- (ii) Therefore, a task and finish group for improving access to Alternative Provision and associated services has been established which includes primary and secondary headteacher representatives from each of the clusters. This group is looking at ways to reduce permanent and fixed term exclusions and enable children and young people to be retained on roll of their home school. This means that they will continue to be educated within their local community whilst accessing appropriate support including alternative provision.
- (iii) The intention is that this will reduce dependency on Pathways Learning Centre (PLC) so that in the future this provision is used exclusively for a smaller number of children and young people who cannot be educated in their home school. The aim is for the work of the group to start to impact from the start of the new academic year in September.
- (iv) Local authority officers are also working with PLC to ensure that the placement and associated financial arrangements for the provision are robust and the provision has the necessary capacity to respond to the specified needs of the pupils that should be placed at PLC.
- (v) A leadership challenge with schools has been underway since 2018, building leadership capacity and driving a culture change with a greater focus on inclusion. This is being taken forward as “The South Glos’ Way” with a challenge to all schools to commit to inclusive behaviour and a collective responsibility for children and young people across the local area.
- (vi) A South Glos Way toolkit has been developed and will be released for trialling by the clusters in May (subject to the current Covid19 emergency situation). The toolkit will be launched to all schools in June (subject to the emergency situation) and will be fully operational from the start of the new academic year in September. This toolkit is a fully comprehensive digital resource with a specific focus on SEND Support, providing all practitioners within the local area access to evidence based best practice approaches for all relevant priority aspects of the educational offer.
- (vii) Finally to ensure there is greater coherence between school improvement and special educational needs the Strategic Lead for School Improvement

and Commissioning; the Strategic Lead for Inclusion and interim Strategic Leads for SEND are working together as a single team to ensure a consistent focus on leadership capacity generally and for SEND across the maintained schools system, sharing and promoting best inclusive practice. Officers are involved in termly inclusion intelligence meetings where best practice and concerns are identified and shared so that a collective team response can be developed.

3. Summary

- (i) The local authority is committed to working in partnership with schools to ensure that there are high aspirations for all children and young people across all schools in the local area and that there is opportunity for all children to achieve their potential.
- (ii) This will only be achieved if all schools are willing to collaborate, share best practice and engage in agreed strategies as necessary. It is evident that there is significant appetite across South Gloucestershire for partnership working and to ensure that the finite resources provided for education are used to best effect for the benefit of local children and young people.

4. Recommendations

It is recommended that Schools Forum:

- (i) Note the current position on the SEND Support Cluster Pilot Initiative and associated developing response to reduce the number of pupil exclusions in the area; and
- (ii) Request that forum members representing schools encourage full participation in the initiative across the area.

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NEW STAFFING STRUCTURE

Paper to follow.

SOUTH GLOUCESTERSHIRE COUNCIL

SCHOOLS FORUM

26th March 2020

Schools in Financial Difficulty (SIFD)

Purpose of Report:

1. To consult the Schools Forum regarding proposed communications with schools covering:
 - A letter for all maintained schools containing a reference document, process map and detail on the support arrangements established by the Council to support schools in, or at risk of being in, financial difficulty.
 - A letter to all Academy's setting out how they can also apply for contingency funding if they find themselves in financial difficulty.

Background:

2. With increasing financial challenges and the rising number of schools who had either submitted an in year deficit and were projecting significant future deficits a SiFD management group was established. The purpose of this group was to agree the annual criteria for the identification of SiFD schools and to direct and monitor the outcomes of the SiFD work undertaken by Integra, Schools Finance. This was formalised through a service level agreement (SLA) in 2018/19 between Children's Adults and Health CAH and Integra.
3. Following Schools Forum on 17th September 2019 additional clarity was requested to be shared with schools over the identification of a School in Financial Difficulty and the process and requirements that needed to be followed.
Item 11, page 5
<https://www.southglos.gov.uk/documents/Schools-Forum-Minutes-FINAL-version-sept19.pdf>
4. Further detail was also requested from Schools Forum on 23rd January regarding the timeline for applying for contingency funding and the application process itself.
Item 9, Page 4/5
<https://www.southglos.gov.uk/documents/Schools-Forum-Minutes-23-Jan-20.pdf>

The following document illustrates a copy of the reference document to be sent out to all Maintained Schools and Business Managers. This is then followed by a further letter to all Academies outlining the application process for also applying for contingency funding.

The paragraph *What is the Schools Specific Contingency?* and Appendix 2 of this document specifically illustrates the information needed for applying for contingency funding from the Schools Forum – *Requiring Forum Approval*.



Department for Children, Adults and Health

To: Head Teachers, School Business
Managers of Maintained Schools

Date:
Your Ref:
Our Ref: letters/SiFD Explanation
Enquiries to: Mustafa Salih
Tel: 01454 862548
E-mail: Mustafa.salih@southglos.gov.uk

Schools in Financial Difficulty – Reference Document

Setting the Scene

The Local Authority (LA) appreciate that schools are facing increasing financial pressures however, there needs to be an early warning system in place and a financial management framework that is capable of alerting the LA, School Leaders and Governing Boards to emerging financial issues requiring action.

The LA is responsible for setting and monitoring the financial framework for maintained schools, this is set out in the [Scheme for the Financing of Schools](#). In addition to the Scheme a process of challenge and support has been put in place to provide a co-ordinated approach between Corporate Finance (CF), Officers from Integra Schools Finance (SFO), Education Learning and Skills (ELS) and School Leaders. The intention of this process is to identify financial concerns at an early stage and provide timely support and challenge to enable schools to manage their finances. The process of identifying schools is undertaken by a Schools in Financial Difficulty (SiFD) project board.

Current situation

All maintained schools are required to submit a three year balanced budget plan. The plan must be agreed by the Governing Body by 31 May each year. Those schools that are unable to balance their budgets must submit a recovery plan by the same date. The recovery plan will be considered in line with the Scheme for Financing of Schools as set out below.

Whilst most schools are identified as SiFD following their budget plan submission in May the project group also analyse each schools financial position following receipt of revised budget submissions which must be returned to the LA no later than 30 November each year.

In addition to the above, schools that anticipate at any time during the financial year that they may incur a deficit by the end of that year, must notify Corporate Finance in writing as soon as this position becomes known (Financial Regulations for Schools par 1.44).

Whilst most schools are financially sound, each year, the SiFD project board identify a number of schools that need to manage and address either a short term or medium-term financial risk in their school.

Table 1 below summarises, for the last 3 financial years, the total number of primary schools and the average value of year-end deficits. Whilst the number of primary schools returning year-end deficits has only increased slightly the average value of the deficits has increased from £16k to £34k.

Table 1

CIVICA Year End Carry Forward	2016/17	2017/18	2018/19
Number of maintained primary schools with YE deficit	9	9	10
Average primary deficit	-£16,738	-£21,204	-£34,705
Number of maintained Secondary schools with YE deficit	1	1	1
Secondary deficit	£1,397,896	£1,324,413	£931,659

The criteria used by the Local Authority to identify these schools is reviewed each year by the SiFD project board. The criteria remain broadly consistent year on year, only the percentages or thresholds change to reflect the financial context for schools.

The 2019/20 criteria were:

Group 1	Deficit budget submitted in 19/20, 20/21 and 21/22 (not SiFD in 18/19)
Group 2	(SiFD in 18/19) Deficit budget submitted in 19/20 or surplus of <£10k with deficit submissions for 20/21 and 21/22

What is the Scheme for Financing Schools

The Scheme sets out the financial relationship between the Local Authority and schools maintained by the Authority. The Scheme contains requirements relating to the financial management and associated issues which are binding for both the Local Authority and the Governing Bodies of schools.

In managing their delegated budgets schools must abide by the Authority's requirements on financial controls and monitoring as set out in the Scheme. In respect of the submission of budget plans and the need to set a balanced budget or a licensed deficit the following paragraph extracts apply:

Para 2.3 Submission of Budget Plans

Each school is required to submit their budget plan approved by the full Governing Body by the 31 May of each year in a format to be determined by the authority which will, as far as possible, take into account Consistent Financial Reporting. In submitting their budget plan, the governing body should also include their assumptions underpinning their plan. Revised plans approved by the Governing Body must be completed and forwarded as soon as practical after 31 October but no later than 30 November in the financial year to which it relates.

When considering their budget plans, the Governing Body are able to take full account of the estimated deficit/surplus at the previous 31st March.

Para 4.5 Planning for Deficit Budgets

Schools are not permitted to plan for a deficit, unless they have the agreement of the Director for Children, Adults and Health and the Chief Financial Officer (see 4.9 below).

Para 4.9 Licensed Deficits

Where a school has experienced a large unexpected expenditure or reduction in budget share, they may, with agreement of the Director for Children, Adults and Health and the Chief Financial Officer, plan for a deficit budget.

The deficit may not be longer than a period of three years and once a deficit has been agreed, it is not possible for a school to either extend the deficit period or apply for a further agreed deficit within the time period of the agreement in place.

This arrangement will only be agreed in order to allow the school to readjust its financial position and to avoid unnecessary redundancies or staff reductions. It does not cater for falling budget allocations due to either continuing falling pupil numbers or overall budget reductions of the Authority.

Schools will need to demonstrate a viable recovery plan which will see them with surplus balances within the permitted timescale of the deficit. The deficit will be no more than 10% of the school's annual budget share.

This arrangement will be funded by the collective surplus of school balances held by the Authority on behalf of schools. The total of all schools deficits will not exceed 25% of the school balances.

If a school has a licensed deficit, the school can spend amounts received by it in respect of Specific Grants on purposes as they think fit and providing it meets grant conditions, unless the proposed expenditure is unreasonable in the school's financial circumstances.

Para 2.15 Notice of Concern

The Authority may issue a notice of concern to the governing body of any school it maintains where, in the opinion of the Chief Finance Officer and the Chief Education Officer/Director of Children's Services, the school has failed to comply with any provisions of the Scheme, or where actions need to be taken to safeguard the financial position of the Authority or the school.

Such a notice will set out the reasons and evidence for it being made and may place on the governing body restrictions, limitations or prohibitions in relation to the management of funds delegated to it.

These may include but are not limited to:

- insisting that relevant staff undertake appropriate training to address any identified weaknesses in the financial management of the school;*
- insisting that an appropriately trained/qualified person chairs the finance committee of the governing body, or (if no finance committee exists) leads the governing body on finance matters;*
- placing more stringent restrictions or conditions on the day to day financial management of a school than the Scheme requires for all schools – such as the provision of monthly accounts to the Authority;*
- insisting on regular financial monitoring meetings at the school attended by officers of the Authority;*

- *requiring a governing body to buy into a local authority's financial management systems, or other services provided by the Authority which are relevant to financial management difficulties at the school; and*
- *imposing restrictions or limitations on the manner in which a school manages extended school activity funded from within its delegated budget share – for example by requiring a school to submit income projections and/or financial monitoring reports on such activities.*

The notice will clearly state what these requirements are and the way in which and the time by which such requirements must be complied with in order for the notice to be withdrawn. It will also state the actions that the Authority may take where the governing body does not comply with the notice.

What happens if a School is identified as a School in Financial Difficulty

The SiFD project board undertakes high level financial monitoring of each maintained schools delegated budget position at least twice per financial year. Any school that meets the SiFD criteria is notified in writing by Corporate Finance. The scope of any remedial action will be set out in a letter and will be proportionate reflecting the schools financial position.

Corporate Finance commission and centrally fund support from Integra Schools Finance for SiFD. The support will provide the School with an appropriate level of challenge and support and will examine the rationale, assumptions and viability of your submitted recovery plan.

Where it is apparent that the school is experiencing medium term difficulties that can be readily managed and the school returns to a surplus, a licenced deficit can be agreed that allows for a temporary overspend that is fully repaid within three years. A flow chart is attached at appendix 1 detailing the budget plan process for schools, how the identification of SiFD schools fits within this and also the point at which additional Schools Finance Officer support and challenge can be accessed.

What happens if our deficit is not licenced?

If the deficit is not licenced, Corporate Finance may ask for further information from the school or governing board. This could include a requirement to update and/or provide additional information/evidence to support the viability of your actions as set out in any recovery plan. In some circumstances you may be required to submit evidence of planned actions taking place throughout the financial year.

The Scheme for Financing of Schools does not allow for unlicensed deficits.

In some circumstances schools could submit a funding application to the Head of Financial Management and Business Support to access financial assistance from the Schools Specific Contingency. Schools must meet the criteria set out below.

What is the Schools Specific Contingency?

In partnership with the Schools Forum a contingency was established in 2017/18 to support maintained and academy schools experiencing financial difficulties. This contingency is available each year on an ongoing basis subject to consideration by the Forum each year. The ability to access this funding by a

school deemed to be in financial difficulty is very tightly controlled and in accordance with the following criteria.

Firstly, a licensed deficit should be considered and only when a school cannot produce a recovery plan within the licensed deficit criteria and falls into one or more of the categories below would additional assistance from the Schools Specific Contingency be considered:

- School is in Special Measures;
- School is in Notice to Improve/Serious Weaknesses/Causing concern;
- End of key stage assessments below national for the last 3 years;
- Pupil progress in English and maths below expected levels;
- Ofsted judgement – Requires Improvement;
- Pupil number variations significantly outside of reasonably expected levels.

Schools can submit a case to the Head of Financial Management and Business Support who would make the decision to approve funding in conjunction with the Head of Education Learning and Skills and the Director of Children’s Adults and Health. A recommendation would then go to the Schools Forum to make a final decision to grant funding or not.

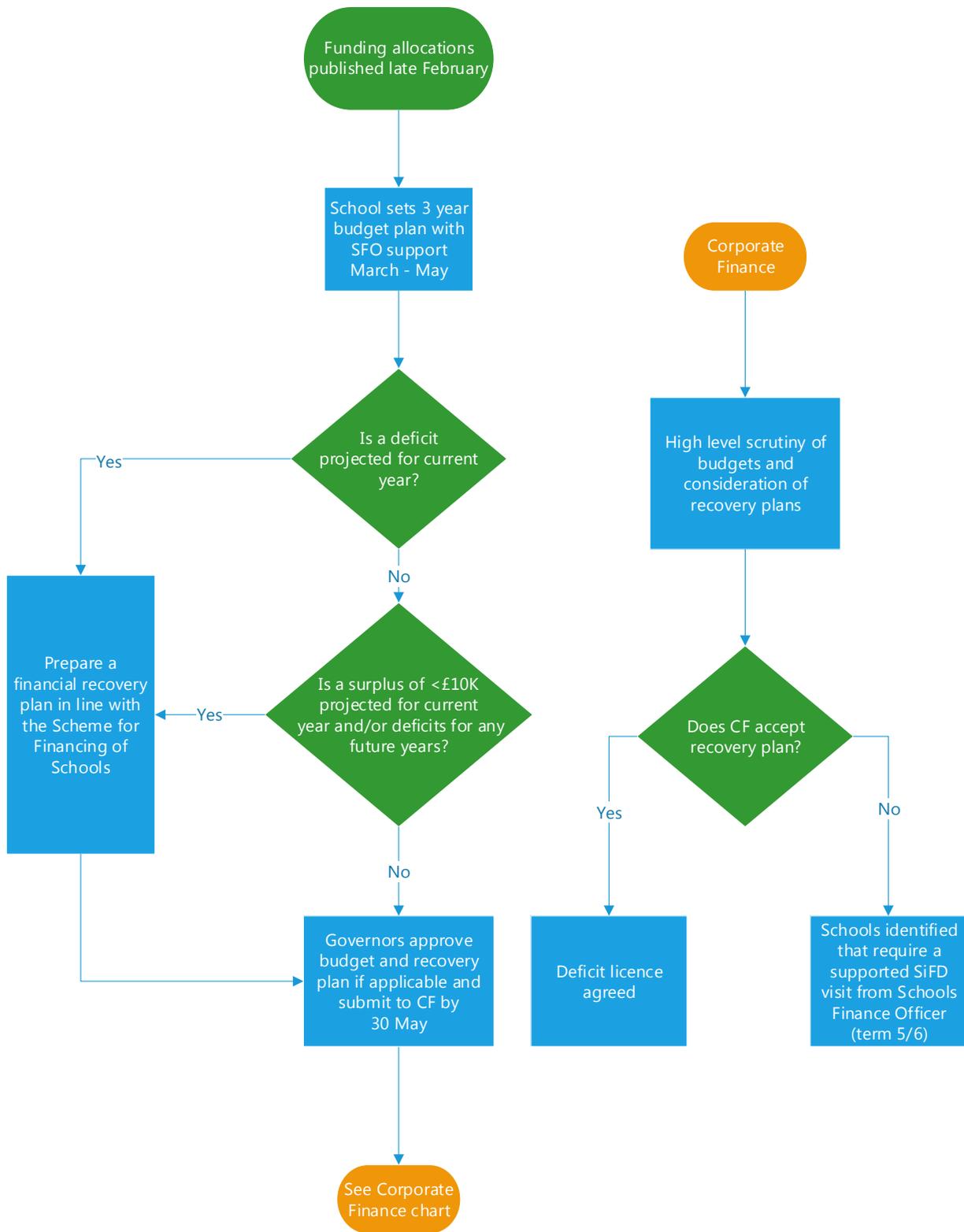
Applications must be made by the end of July and January for consideration by Schools Forum in September and March respectively.

Applications must include the required financial information and accompanying narrative explanation set out in Appendix 2.

Reference documents

[Scheme for the Financing of Schools](#)
[Financial Regulations for Schools](#)

Budget Plan Process for Schools



Appendix 2 – Schools Specific Contingency Application

School/Academy Name:

Financial Year (starting 2 financial years prior to year of application)					
APT NOR (Pupil Nos) (APT = Authority Proforma Tool)					
Income:					
APT Budget Share					
Other Income					
Total Income					
Expenditure:					
Teaching Staff					
Other Staff					
Total Staffing costs					
Premises Costs					
Other Costs					
Total Premises and Other Costs					
Total Costs					
In-Year Over(+)/Under(-)spend					
Cumulative Over(+)/Under(-) spend					

Application Details (to include the following information):

- Detail on how much is requested and what the requested funding will be spent on:
- Detail on measures taken to reduce any overspend:
- Impact on standards and pupils if the funding is not granted:
- A deficit recovery plan (including the requested funding) structured as the table above confirming that (and when) the School will return to a balanced budget with the benefit of the requested funding.

Signature

Head Teacher:

Chair of Governors:

Date application discussed and approved by Full Governing Board:



Department for Children, Adults and Health

To: Academy CEO's, Academy Head
Teachers and Business Managers

Date:
Your Ref:
Our Ref: Letters/SiFD Explanation
Enquiries to: Mustafa Salih
Tel: 01454 862548
E-mail: Mustafa.salih@southglos.gov.uk

Academies in Financial Difficulty

The Local Authority (LA) appreciates that Academies as well as Maintained schools face increasing financial pressures.

If it becomes apparent that your Academy is facing these pressures in some circumstances an application to the Schools Specific Contingency fund can be made via the Academy's CEO.

What is the the Schools Specific Contingency?

In partnership with the Schools Forum a contingency was established in 2017/18 to support maintained and academy schools experiencing financial difficulties. This contingency is available each year on an ongoing basis subject to consideration by the Forum each year. The ability to access this funding by a school deemed to be in financial difficulty is very tightly controlled and in accordance with the following criteria.

Firstly, a licensed deficit should be considered and only when a school cannot produce a recovery plan within the licensed deficit criteria and falls into one or more of the categories below would additional assistance from the Schools Specific Contingency be considered:

- School is in Special Measures;
- School is in Notice to Improve/Serious Weaknesses/Causing concern;
- End of key stage assessments below national for the last 3 years;
- Pupil progress in English and maths below expected levels;
- Ofsted judgement – Requires Improvement;
- Pupil number variations significantly outside of reasonably expected levels.

Academies can submit a case to the Schools Forum via the Academy CEO.

Applications must be made by the end of July and January for consideration by Schools Forum in September and March respectively.

Appendix 2 – Schools Specific Contingency Application

School/Academy Name:

Financial Year (starting 2 financial years prior to year of application)					
APT NOR (Pupil Nos) (APT = Authority Proforma Tool)					
Income:					
APT Budget Share					
Other Income					
Total Income					
Expenditure:					
Teaching Staff					
Other Staff					
Total Staffing costs					
Premises Costs					
Other Costs					
Total Premises and Other Costs					
Total Costs					
In-Year Over(+)/Under(-) spend					
Cumulative Over(+)/Under(-) spend					

Application Details (to include the following information):

- Detail on how much is requested and what the requested funding will be spent on:
- Details on measures taken to reduce any overspend:
- Impact on standards and pupils if the funding is not granted:

- A deficit recovery plan (including the requested funding) structured as the table above confirming that (and when) the School will return to a balanced budget with the benefit of the requested funding.

Signature

Head Teacher:

Academy CEO:

Chair of Governors:

Date application discussed and approved by Full Governing Board:

South Gloucestershire Council

REPORT TO: Schools Forum

Internal Audits of Local Authority Maintained Schools During 2019/20

Purpose of Report

1 To provide Schools Forum members with details of the work of internal audit services in schools, including what is covered in an audit, the schools visited and information on common trends occurring in audit findings and recommendations.

Recommendation

The Schools Forum:

- is invited to review, note and comment on the contents of this report.
- Is invited to consider asking Academy CEOs to *conduct a similar exercise with Multi Academy Trusts (MAT's) and share these findings with MAT's and the Schools Forum.*

Policy

2 The Council has a responsibility to ensure that all schools have adequate internal controls in place to minimise their most significant risks and safeguard against fraud and/or misappropriation. Schools have a responsibility to ensure they achieve value for money and that school funding is only used for the benefit of their students. Internal Audit services will conduct internal audit visits to schools on behalf of the Director of Children, Adults and Health to ensure that schools are complying with the scheme for the financing of schools, the financial regulations for schools and that any significant risks are being effectively managed and mitigated as far as practicable.

Background

3 Throughout 2019, Internal Audit Services has increased the amount of schools that have been visited, with 19 primary schools across South Gloucestershire being audited. This has increased from previous years, see table below.

Year	School's Visited
2016	11
2017	8
2018	12
2019	19

An internal audit of a school comprises of: an arrangement letter setting out details of the areas to be audited; a request for documentation in advance to assist the review; a short visit to the school site to undertake interviews of key staff and perform checks and testing; and then a final compilation of findings and an end of audit meeting with the Head and Chair of Governors. After the conclusion of the visit an internal audit report will be issued to outline the findings and opinion of the audit and provide an action plan with any recommendations arising together with a prioritisation, timescale and responsible officer. The areas currently reviewed as part of a school internal audit are as follows: Governance & Finance, Purchasing & Income, Payroll & HR, Asset Management and Data Security. An opinion of the school's processes is issued within the audit report, the 5 possible opinions are listed below.

High Standard	<i>Systems and processes are excellent providing good assurance. Significant strengths have been identified and are to be commended. Any recommendations will serve to further strengthen existing arrangements.</i>
Reliable Standard	<i>There are very few significant matters arising from the audit, systems of control are good and provide reasonable assurance. Recommendations made serve to strengthen what are reasonably reliable procedures.</i>
Improvements Required	<i>Existing procedures need to be improved in order to ensure that they are fully reliable. Extensive recommendations have been made but the issues are not of such a significance to represent a major risk to the Council.</i>
Significant Improvements Required	<i>Existing procedures are weak and reasonable assurance could not be provided over a number of areas. Prompt action is necessary to improve the situation and avoid unnecessary risks.</i>
Fundamental Weaknesses Identified	<i>The matters arising from the audit identify that there are fundamental weaknesses which place doubt on the reliability of the procedures reviewed. Urgent action is necessary to improve the current situation and reduce risk exposure.</i>

It is pleasing to report that throughout 2019, there were no schools who received the opinions Significant Improvements Required or Fundamental Weaknesses Identified. Appendix A provides details of the policy documentation that schools are ordinarily required to have, the listing clearly shows those policies which will be examined as part of an internal audit.

A follow up review of the progress of the school and how the recommendations are implemented is also conducted. This is completed roughly six months to one year after the initial audit visit. An updated action plan is issued to the school with a request for an update on progress and supply of any supporting evidence. If internal audit determine that either the progress is insufficient or the school is unable to supply sufficient evidence, a follow up site visits maybe undertaken. After this review is completed, a follow up report is issued along with an updated opinion of the school.

Results

4 The majority of schools visited by Internal Audit Services last year were reported to be a reliable standard. The table below shows the opinions issued with audit reports for primary schools during 2019. Even though 2019 saw an increase in school visits, the opinions issued in 2018 followed a similar pattern compared with 2019. However, it is worth noting that in 2019 three schools were deemed to be a high standard, compared with just one school the previous year.

High Standard	Reliable Standard	Improvements Required	Significant Improvements Required	Fundamental Weaknesses Identified
3	11	5	0	0

Internal Audit Opinions for 2019/20 School Visits.

In order to provide some analysis of trends in audit reports, common recommendations have been displayed in the table below.

Recommendation	Percentage (%)
Purchase orders should be raised on CIVICA prior to receiving an invoice	63.2%
Various Asset Register Recommendations – including creating an Asset Register, conducting annual checks or to improve the detail included	63.2%
To improve controls of lettings process (this is due to findings such as: missing letting agreements, incorrect charges, late payments and invoicing in arrears)	52.6%
To create a Risk Register and / or Risk Management Policy	47.4%
Evidence of disposals (i.e. waste disposal notes) should always be retained	36.8%
To create a Write Off and Disposals Policy	36.8%
To provide financial reports about Breakfast & After School Club performance to Governors	31.6%
To create a Freedom of Information Policy	31.6%
To create a Buildings and Maintenance Plan to aid with financial planning	31.6%
To create a Software Inventory / improve the level of detail in one provided during audit	26.3%
To make sure petty claim claims aren't reimbursed above two thirds the imprest limit	21.1%

To ensure that all employee personnel files are complete and there is no missing documentation	21.1%
To conduct benchmarking exercise / report	21.1%
To create / maintain a staff training record	21.1%

The most common recommendation issued to primary schools during 2019 was to ensure that purchase orders were raised on CIVICA prior to receiving an invoice. CIVICA is the payments system that is used throughout the council, including all schools. This was reported for 63.2% of primary schools. Out of the 12 schools who received this recommendation, only 3 schools weren't forecast a deficit carry forward within 3 years and 2 schools were already in a deficit position. This has been a common recommendation for a number of years. Internal Audit is currently working closely with the Council's Finance Department, specifically those who help manage CIVICA, to devise strategies that will improve control over electronic payments within schools.

Across 2019, there were various different recommendations issued regarding asset registers held within primary schools. This type of recommendation was reported for 63.2% of primary schools. As a collective, these recommendations highlight a common weakness within primary schools. Examples of these recommendations include: to create an asset register, to conduct annual checks of asset registers, for the Head Teacher to certify the asset register annually or to improve the level of detail included within the document. The most common finding was that the school's weren't checking / reconciling the asset register on an annual basis; this was found in almost a third of the schools visited. It is worth noting that a number of the schools had recently converted council issued manual inventories into electronic spreadsheets. For schools that hadn't managed to complete this, a basic template or advice was provided by the auditor.

As well as numerous recommendations throughout 2019 being related to asset registers, there were a numbers findings regarding the Write Off and Disposals Policy. It was found that 36.8% of schools needed to create a Write Off and Disposals Policy. There were also 3 schools who had drafted a policy, but hadn't yet completed and ratified the document. Combining these recommendations means that 57.9% of the schools had a recommendation about this document. Additionally, over a third of the schools visited weren't retaining evidence of disposals (i.e. waste disposal notes). Whilst schools were using the correct contractors to dispose of items holding data, such as laptops, they weren't always obtaining confirmation that it had been done correctly and retaining this on file.

Schools not holding a Software Inventory or lacking detail within their document was a frequent finding. This was formally issued as a recommendation within the audit report action plan for 5 schools during 2019. If you also include schools that had a point raised within the report about the Software Inventory, this amounts to 57.2% of schools. Internal Audit has made contact with Integra who have confirmed that they do not hold software inventories for schools

Similar to asset registers, the lack of controls surrounding lettings procedures within schools has led to a variety of differing recommendations. However recommendations regarding lettings as a whole, were present in 52.6% of audit reports issued in 2019. The recommendation most frequently issued surrounding lettings was hire fees within lettings policies / agreements not matching what the school is actually charging in practice. This was the case for 6 of the schools (31.6%). Other findings for the lettings process were missing hire agreements, late payments and the school issuing invoices in arrears.

Another common subject for recommendations is regarding Risk Management. Roughly half of the schools visited within 2019 were reported to not having a Risk Management Policy and/or a Risk Register. There is a template Risk Register on the Council's website which schools can be directed to, but also auditors may show examples of other schools Risk Registers to aid with the development of this document.

Proposed:

Conduct a similar exercise with Multi Academy Trusts (MAT's) and share these findings with MAT's and the Schools Forum.

Author

Louis James – Audit Officer

Departmental Contact

Justine Poulton – Audit Manager 01454 865443

Background Papers

Internal Audit Reports 2019/20
Scheme for the financing of schools
Financial Regulations for schools

Appendix A –
School Policy Requirements – Internal Audit
February 2020 – for review by Schools Forum

Policy	Description	Reviewed as Part of Internal Audit Visit? (Y/N) Plus Any comments
Instrument of government	Section 20 of the Education Act 2002 requires all maintained schools to have an instrument of government which determines the constitution of the governing body and other matters relating to the school Part of the 2012 Constitution Regulations makes provision regarding the contents and form of the instrument and the procedure for making and reviewing it.	N, but we will ask details of the school around what makes committees and FGB quorate so that minutes can be checked.
Terms of Reference for Committees (but not full governing body)	A document to outline the scope, responsibilities including any delegated decision making passed to the committee by FGB.	Y
Register of Business and Pecuniary Interests -	The requirement that local authorities keep a register of any business or other personal interests for the governors, headteachers and any other key decision making staff.	Y
Code of Conduct Governors	A document setting out how Governors will ensure compliance with standards in public life. Relates to ethics and behaviour, potential for action if code not adhered to.	Y
Policy & register on	This is a new ask of schools. It is a	Y (New)

Policy	Description	Reviewed as Part of Internal Audit Visit? (Y/N) Plus Any comments
acceptance of gifts	requirement in the Financial Regulations but to date we haven't asked for evidence of it. We will accept evidence of this if contained within another policy.	
Governors' allowances (schemes for paying)	We do not currently audit Governor Allowances	N
Schedule of Delegated Authority	Details of delegated authority for the school and limits for purchasing. This is a requirement in the scheme for financing of schools and financial regulations for schools.	Y
Risk Management Policy / Risk Register	Academy Trusts are required to have very robust risk management arrangements. We have been looking to develop this approach with maintained schools. There is currently no mandatory requirement and we have been recommending this as best practice.	Y
Health & Safety Policy and Associated key Risk Assessments.	Schools are required to have an individual health and safety policy. Internal Audit do not audit cover this area. It is understood that the council, as part of their statutory responsibilities will soon be arranging for checks to be conducted at maintained schools to ensure they have sufficient arrangements in place.	N
Premises management documents	Most schools cover this in a 3 year building maintenance plan.	Y (to demonstrate plans for spending

Policy	Description	Reviewed as Part of Internal Audit Visit? (Y/N) Plus Any comments
	For local-authority-maintained schools, both local authorities and schools have responsibilities for the repair and maintenance of premises.	of devolved capital)
Disposals and Write offs policy.	This policy would ensure compliance with financial regulations for schools. It can be merged with another policy.	Y
Business Continuity Plan / School Development Plan	Linking to the schools priorities, including buildings. It is a requirement in the Schools Financial Value Standard that schools have BCPs.	Y
School Complaints Policy	Recommended annually Governing body, individual governor or headteacher	N
Charging and remissions Policy	Schools could consider combining policies. Could encompass breakfast and after school club charging arrangements, lettings and school trips.	Y
Breakfast and Afterschool Club Policy	Policy or procedure documents Including, current charges and debt recovery procedures. Could be merged into a charging and remissions policy.	Y
School Meals Policy	Charging information, payment term, and debt recovery procedures. Could be merged into a charging and remissions policy.	Y
Lettings Policy	To confirm schools approach to lettings, which organisations qualify for any reductions or	Y

Policy	Description	Reviewed as Part of Internal Audit Visit? (Y/N) Plus Any comments
	concessions and to clarify responsibilities. Could be merged into a charging and remissions policy.	
Finance Policy / Purchasing Policy	This will be about value for money, policy for using procurement cards for low value purchases, quotation and tender limits.	Y
Single Central Record	Safeguarding requirements.	N
Teachers' Pay Policy	Revised arrangements for the appointment of headteachers and calculating leadership group pay came into force with effect from September 2014.	N
Safer Recruitment Policy	If the school subscribes to Integra, do you have access to the Safer Recruitment in Schools and Academies policy?	Y
Safeguarding/ Child Protection Policies	Statutory guidance: Keeping children safe in education	N
Asset Disposal Policy	Is there an Asset Disposal Policy which is reviewed regularly at FGB? This policy could be merged into a finance/purchasing policy.	Y
Freedom of Information Policy	The Freedom of Information Act 2000 gives a right of access to information held by public bodies, including schools (Schedule 1, Part IV), who must comply with the Act and produce a Publication Scheme (Section 19).	Y
Data Protection Policy	To ensure that the school has appropriate	Y

Policy	Description	Reviewed as Part of Internal Audit Visit? (Y/N) Plus Any comments
	arrangements in place to meet their Data Protection responsibilities as a controller of data.	
Internet Usage Policy / E-Safety Policy	To ensure that the school has robust policies in place for the safe use of the internet.	Y, we will check there is one.
IT Policy	This should include IT security, unloading of software, back up & and firewall protection information.	Y we will check there is one
Whistleblowing Policy	Schools are now covered by the council policy	N
Counter Fraud, Bribery & Corruption Policy	New policy following FR review. New requirement – there is a template policy available for schools.	Y

South Gloucestershire Council

SCHOOLS FORUM

26th March 2020

Dedicated Schools Grant 2019-20 Quarter 3

Purpose of Report

1. To update the Schools Forum on the Dedicated Schools Grant 2019-20 Quarter 3 position and progress against the original 4 year DSG deficit recovery plan.

Dedicated Schools Grant (DSG) Funding

2. The net current DSG budget, excluding academies and High Needs recoupment, is £133,287k.

DSG Budget	Net £'000
Original Budget Allocation (December 2018)	207,952
Adjustments and Recoupment	
• High Needs Block Direct Funding By EFA	-5,190
• Academy Recoupment	-69,321
• Early Years January 2019 Census Adjustment	-154
Total Revised DSG (March 2019)	133,287

Dedicated Schools Grant (DSG) Current Position

The DSG is reporting an outturn overspend position of £16,399k. This arises from an in-year outturn overspend of £4,752k and a brought forward deficit balance of £11,647k. Details of the key pressure areas are included in the block summaries below. It should be noted that the outturn projection includes a savings target of £309k for 2019/20. This target has been based on the original amount of £1,247k calculated for the DSG Deficit Recovery plan submitted to the Department for Education on 28th June 2019 with a pro-rata reduction based on the current outturn position for the remaining months (November to March 2020) and reduced for one-off in year savings identified. If these savings are not fully achieved by 31st March 2020 it will impact on the current overspend position.

3. The overspend position by funding block is provided in the table below.

Funding by Blocks	Gross Budget	EFA / Other Income Budget	Overspend Reserve	Net Budget (DSG)	Gross Exp	EFA / Other Income	Overspend Reserve	Net Exp	Over / (Under)
	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s
Schools and Central Schools Block:									
Primary & Secondary Schools (excluding Academies)	92,605	-9,845	0	82,760	92,769	-10,122	0	82,647	-113
Central Items	4,333	-158	0	4,175	4,353	-167	0	4,186	11
Total Schools and Central Schools Block	96,938	-10,003	0	86,935	97,122	-10,289	0	86,833	-102
High Needs Block:									
Schools & Independent Providers (including Academies)	32,890	-613	-4,752	27,525	32,933	-717	-4,752	27,464	-61
Central Items	2,622	-165		2,457	2,800	-253		2,547	90
Total High Needs Block	35,512	-778	-4,752	29,982	35,733	-970	-4,752	30,011	29
Early Years Block:									
Private, Voluntary & Independent Providers	15,549	0	0	15,549	15,630	-3	0	15,627	78
Central Items	851	-30	0	821	845	-29	0	816	-5
Total Early Years Block	16,400	-30	0	16,370	16,475	-32	0	16,443	73
Total In-Year DSG & EFA Funding	148,850	-10,811	-4,752	133,287	149,330	-11,291	-4,752	133,287	0
Total DSG In Year Overspend (Approved Reserve - £3,384k + Forecast outturn £1,368)									4,752
DSG Deficit Reserve B/F									11,647
Total DSG Deficit Reserve									16,399
DSG Reserve:									£'000s
DSG Deficit Reserve B/F from previous years (Appendix 7)									-11,647
Approved Budget 2019/20									-3,384
Approved Increase draw on DSG Reserve at Quarter 1 (£1,368k)									-1,368
Total DSG Deficit Reserve (Appendix 7)									-16,399
Total 2019/20 DSG Overspend Reserve									-16,399

Funding Transfer between Blocks

4. The DSG is funded from three blocks: The Schools Block, the High Needs Block and the Early Years Block.

5. There was a funding transfer of £2,900k from the Schools Block to the High Needs Block to support demand led pressures. This funding has targeted Special Schools, Independent and Non-Maintained Special Schools and Post 16 Placements.

DSG Recovery Plan

6. The CAH department is committed to reducing the DSG overspend and is working to deliver better efficiencies in SEND spend. Despite many signs of positive impact achieved to date it became apparent during the work to set the 2019/20 Schools Budget that the original four year plan could not be met due to growing numbers of pupils with SEND and increasing complexity of need. A new plan would need to be developed in partnership with School Leaders. This position was reported to Cabinet when the 2019/20 Schools Budget was approved. In addition the DfE has also signalled a change in its approach to DSG deficits and has consulted Local Authorities on changing the relevant regulations to require Local Authorities to carry

forward any DSG Overspend to the Schools Budget in future years with the DfE's intention being that all DSG overspends are recovered solely from DSG income and with no set timescale for the length of this recovery process. An updated DSG Sustainability Plan is currently being produced in collaboration with School Leaders and the Parent and Carers Forum through the High Needs Working Group and the Schools Forum.

7. The revised recovery plan will take into consideration the significant additional funding from 2020/21 announce by Government on 30 August 2019.

Schools and Central Schools Services Blocks

8. The Schools and Central Schools Services Blocks is forecasting an outturn underspend of £113k an increased underspend of £100k since Quarter 2. This is due to a provision being made for schools to increase their Pupil Admissions Number (PAN) in September 2019, however some schools did not increase and therefore the provision is no longer required.

High Needs Block

9. The High Needs Block is forecasting an outturn overspend of £4,781k before applying the approved reserve transfer. This is an increase of £113k since Quarter 2. The overspend includes the DSG deficit recovery plan savings target of £309k which is a risk if the savings are not achieved.

10. The main pressures within high needs areas are provided below. It should be noted that when the 2019/20 budgets were set, they included the approved DSG deficit reserve transfer. To understand the true overspend position between DSG funding and expenditure, the position for each service area is shown before applying the approved reserve transfer.

Independent and Non-Maintained Special School Placements

11. Independent and Non-Maintained Special School Placements is forecasting an outturn overspend of £1,216k, a decrease of £196k since Quarter 2. The budget was based on 129 placements at an average weekly cost of £1,191. The forecast outturn is based on 119 current learners and a provision for 5 new placements from November 2019 to March 2020 (3 planned placements and 2 unplanned) at an average weekly cost of £1,497. The forecast includes revised updates for the 5 learners reported at Quarter 2 where end dates were being reviewed by the 0-25 team.

Statemented Support (including Other Local Authority (OLA) and Equipment)

12. Statemented Support is forecasting an outturn overspend of £2,195k, an increase of £100k since Quarter 2. This is mostly due to 34 new placements (£95k), and a net increase of £5k from package changes, movers in and out of authority, school transfers and a review of contingency for new placements. The budget was based on 656 learners at an average weekly cost of £167. The outturn is based on

715 learners made up of 675 current learners as at November 2019 and a contingency provision for 40 new starters (December to March). The average weekly cost based on the forecast outturn is £234.

Special Schools and Resource Bases - OLA

13. Special Schools and Resource Bases - OLA is forecasting an outturn overspend of £319k an increase of £113k since Quarter 2 mostly due to 4 new placements, 3 leavers and package changes. The budget was based on 55 learners at an average weekly cost of £429. The outturn is based on 56 current placements and a provision for 2 known new placements in December 2019 at an average weekly cost of £537.

Post 16 Placements

14. Post 16 Placements is forecasting an outturn underspend of £182k, an increased underspend of £272k since Quarter 2. The underspend is due to changes in packages/contingency provisions resulting in a net reduction of £95k, a reduction of £157k relating to learners at South Gloucestershire and Stroud College based on the actual charges being less than the original estimate and a reduction in the element 2 payment for City of Bristol College of £20k. The forecast is based on 257 current learners and a provision for 5 new placements from November 2019 to March 2020 (3 named placements and 2 unnamed placements). The 9 learners with expected end dates of July 2019 where costs were included to the end of the financial year as at Quarter 2 have been reviewed by the 0-25 team and the destinations confirmed and forecasts updated.

Special Schools and Resource Bases

15. Special Schools and Resource Bases are forecasting an outturn overspend of £703k, an increase of £225k since Quarter 2. The changes since Quarter 2 are due to new starters (£53k), leavers (£95k), package changes resulting in a net increase of £56k, Pathway Learning Centre new cases funded by 0-25 team costing £160k, plus a net reduction of £10k for movers in and out of authority. In addition there were 4 young people of school leaving age where an additional year has been agreed costing £61k. The budget was based on 630 placements at an average cost of £453 per week. The outturn is based on 647 learners at an average cost of £579 per week.

Pathways Learning Centre

16. Pathways Learning Centre (PLC) is forecasting an outturn overspend of £1,057k, no change since Quarter 2. The forecast outturn is based on July 2019 actual payments plus an estimate for September to March 2020 including an adjustment for known starters and leavers. The estimate is based on the historical pupil profile and funding levels from 2018/19. The number of pupils attending the unit fluctuates from month to month. Typically pupil numbers are lower at the start of the academic year and increase as the year progresses. It should be noted that PLC is supporting a number of young people with Education, Health and Care Plans

(typically 30-40) whose needs are not currently being met in South Glos Mainstream, Special Schools, and Resource Bases and in some cases other OLA Special Schools due to the complexity of these young people. It is reasonable to assume that many or all of these young people may have been placed in an Independent Specialist provision, if PLC were not available. PLC has met the needs of these young people and supported the Local Authority's wider agenda of reducing OLA placements. Expenditure for these pupils contributes approx. £680k of the PLC overspend compared to an approx. cost of £1,800k if the same pupils were placed in Independent Specialist placements.

A review of the funding and functions of the PLC is underway. One of the anticipated outcomes is to reduce the number of excluded pupils with the introduction of SEND cluster funding to all schools from September 2019 which will reduce the current overspend position. The aim of the SEND Cluster Fund initiative is to ensure earlier identification of, and better outcomes for, children at SEN Support level in schools and to support schools where pupils with behaviour needs have been identified. The review is starting to see a reduction in exclusions – especially in the secondary phase, although the pace of change is not as fast as expected. The SEN Support Cluster Pilot is one element of the strategy to reduce exclusions and the department is also moving forward with a system-wide approach to develop a Commitment to Inclusion – expressing the way in which the council will ensure that in the near future there is consistent highly effective inclusive leadership and practice as “The South Glos Way”. This involves: building leadership capacity; developing more appropriate systems, procedures and protocols; considering how to develop an Alternative Curriculum offer through new Alternative Provisions (AP). A draft digital resource has been produced for consideration by LA officers with the intention of releasing for consultation with schools in the 2020. This will be an important toolkit for schools to ensure there is clarity about expectations in meeting the needs of children with special education needs and greater consistency generally across the system. The department is also designing a workforce development programme to build the necessary leadership capacity and common understanding of expectations. Discussions are continuing with schools about the development of alternative provisions at a local cluster level to support early intervention; children being retained in their local community; and reduction in exclusions. In the meantime savings are being achieved through some of the new financial arrangements that have been implemented since the start of the financial year.

Other High Needs Areas (including savings target)

17. Other high needs areas are forecasting an outturn underspend of £527k, which includes the estimated savings target of £309k. The overspend position will increase if the savings target is not achieved.

18. The table below shows the outturn spend position for the High Needs budget areas that are currently under pressure.

High Needs Budget Pressure Areas Only	2014/15	2015/16	2016/17	2017/18	2018/19		2019/20	
	Outturn £'000	Outturn £'000	Outturn £'000	Outturn £'000	Outturn £'000	Number placed March 2019	Forecast Outturn £'000	Number placed March 2020 Est.
Independent and Non-Maintained Special Schools - Placements	3,745	4,217	5,463	5,419	5,976	115	7,056	124
Statemented Support (including High Incidence Payments)	4,781	5,368	6,121	6,376	6,897	647	6,342	715*
Post 16 High Needs Placements	1,949	2,422	3,157	3,211	2,870	268	2,846	262
South Gloucestershire Special Schools (Gross of ESFA direct funding)	7,085	8,084	8,773	9,606	10,100	595	11,738	647
South Gloucestershire Resource Bases (Gross of ESFA direct funding)	2,803	3,190	3,286	3,412	2,265		2,517	
PLC	2,004	1,645	1,765	2,347	2,585	154	2,905	187
Total	22,367	24,926	28,565	30,371	30,693	1,779	33,404	1,935
Annual % Change		11.44%	14.60%	6.32%	1.06%		8.83%	

* Transfer of £1m from Statemented Support in 2019/20 for the SEND Cluster Funding Initiative

Pressure on the above demand driven High Needs areas has increased in 2019/20 mostly due to a delay in the implementation of the SEND Cluster Fund and opening of Pegasus Special Free School.

19. The SEND Cluster Fund was originally planned to be ready for full implementation across the local authority by April 2019. Due to the innovative nature of this project, which requires significant partnership working between schools and the local authority it took longer than anticipated to establish the original two pilots. The department are now undertaking steps to roll out to all schools. Headteacher leads have been identified for all five clusters. Briefings have been held so that schools in the roll out understand expectations. A memorandum of understanding has been produced so that there is a formal agreement in place between the boards and the LA so that all parties have a mutual understanding of objectives and partner commitment to the initiative. Cluster boards are being established for the 3 new clusters and delivery across the borough will commence in January 2020. Once fully embedded this should have a positive impact on the number of pupil exclusions referred to Pathways Learning centre (PLC) and the escalation of needs for pupils at SEND Support level.

20. The opening of Pegasus Special Free School was delayed by a year due to problems incurred during the building process which was led and funded by the Education and Skills Funding Agency. This impacted on the department's plans to place young people locally and increased the number of young people being placed out of area. When a new school opens, pupils are phased in over several years to ensure the correct skill sets and facilities are fully embedded to meet future demand. Although the school is currently supporting pupils with very complex needs, the number it can currently admit is limited and a year behind the department's original plan. The place capacity will increase over the coming years which will ensure the

school grows at a pace that can adequately support the predicted growing pupil numbers with complex need.

Early Years Block

21. The Early Years Block is reporting a forecast outturn overspend of £73k, a decrease of £8k since Quarter 2. This is based on Summer Term actual payments, Autumn Term initial payment of 70%, a forecast for final Autumn Term claims and an estimate for Spring Terms claims based on the previous year. The outcome of the January 2020 census may deliver additional funding which will reduce this overspend.

SCHOOLS FORUM FORWARD PLAN

14th May 2020 @ 4.30 Room 0012, Badminton Road Offices	9th July 2020 @ 4.30 Room 0012, Badminton Road Offices
<ul style="list-style-type: none"> • Resource Base/Access Centre consultation update (possible) (Hilary Smith) • Small School Strategy (Andrew Best) • Forum training for new members 2nd hour (Sarah Lovell/Mustafa Salih) 	<ul style="list-style-type: none"> • Decision on extending the use of the Ready Reckoner for Resource Bases/Access Centre - School Forum Approval pending pilot (Kate East)

ANY OTHER BUSINESS

Feedback and comments from this paper can be made via email by 31st March to:

Stuart.thomas@southglos.gov.uk

All comments will be fed back and shared with Sarah Lovell, Dave Baker, Mustafa Salih and Hilary Smith.

Feedback and views will also be shared with all Forum members.

