

AGENDA



SCHOOLS FORUM

Date : Thursday 3rd November 2016

Time : 4.30pm

Place : Badminton Road Offices, Ground Floor, Room 0012

Distribution

Members of the Committee

Rhona Allgood
Dave Baker
Sally Bowd
Simon Bowker
Mark Dee
Pauline Dixon
Steve Forecast
Mark Freeman
Kim Garland
Elizabeth Gibbons
John Goff
Geoff Howell
Liz Jardine
Emma Jarman

Keith Lawrence (Chair)
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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 ON 15 SEPTEMBER 2016	5 mins
6	TRADED SERVICES – UPDATE	5 mins
7	PUPIL NUMBER PROJECTIONS – UPDATE	5 mins
8	SCHOOL FUNDING ARRANGEMENTS FOR 2017/18 - CONSULTATION 1	10 mins
9	SCHOOL FUNDING ARRANGEMENTS FOR 2017/18 - CONSULTATION 2	15 mins
10	DATES OF FUTURE MEETINGS AND THE SCHOOLS FORUM WORK PROGRAMME 2016/17	5 mins
11	ANY OTHER BUSINESS	5 mins

Department for Children, Adults and Health

SCHOOLS FORUM
Thursday 15 September 2016
Badminton Road Offices

PRESENT:

Dave Baker	Executive Headteacher, Bradley Stoke and Abbeywood Community Schools
Sally Bowd	Early Years Working Group (Voluntary Sector)
Sarah Lovell	Representing Simon Bowker, Cabot Learning Federation
Mark Dee	Executive Head, The Park & Parkwall Primaries
Steve Forecast	Governor, The Crossways Schools Federation
Mark Freeman	Headteacher, St Michael's CE VC Primary School
Kim Garland	Headteacher, Brimsham Green School
Stuart Hill	Representing Rhona Allgood, CSET
Elizabeth Gibbons	C of E Diocese
Liz Jardine	Early Years Working Group (Private Sector)
Keith Lawrence	Governor, Culverhill School
Louise Leader	Headteacher, Pathways Learning Centre
Gavin Murray	Representing Emma Jarman, SG&S College
Ann Reed	Governor, New Horizons Learning Centre and Culverhill School
Max Reed	Governor, The Ridge, School
Peter Smart	Headteacher, The Castle School
Paul Tanner	Chair of Finance and Resources Committee, Olympus Academy Trust
Susie Weaver	Principal, Wallscourt Farm Academy
Bernice Webber	Headteacher, Old Sodbury CE VC Primary School

Chair: Keith Lawrence

Councillor: Trevor Jones

Officers: Martin Dear Head of Business Support
 Helean Hughes Acting Head of Education, Learning and Skills
 Sonya Miller Head of Integrated Children Services

Tamsin Moreton	Schools Finance - Integra
Michelle Jones	Business and Finance, Early Years (Item 9)
Rachel Webb	Senior Advisor, Early Years (Item 9)

Other Attendees:

(Items 7 & 8)	Will Roberts, CEO, CSET
(Item 8)	Mark Fuller, Headteacher, Downend School

1. WELCOME AND INTRODUCTIONS

Attendees were welcomed by the Chair.

2. APOLOGIES FOR ABSENCE

Rhona Allgood, Simon Bowker, Pauline Dixon, John Goff, Geoff Howell, Jon Hunt, Emma Jarman, Jim Lott, Adrian Vye

3. EVACUATION PROCESS

The Chair drew attention to the emergency evacuation procedure.

4. ANY OTHER ITEMS THE CHAIR DECIDES ARE URGENT

None.

5. MINUTES OF MEETING HELD ON 14 JULY 2016

Item 11: SCHOOLS FORUM MEMBERSHIP

Exploration of vacancies for Academy Secondary Headteachers and Governors and Primary Governors is ongoing.

The rest of the Minutes were agreed as a true record.

Note: Chipping Sodbury sub group yet to meet.

6. TRADED SERVICES UPDATE

This item was deferred until the next meeting on 3rd November 2016.

7. EDUCATION COMMISSION UPDATE

Will Roberts gave an update on the progress made with respect to the three year plan.

He summarised a paper which went to Schools Forum members:

- a) The structure of the Education Partnership.
- b) Conscious that the Education Partnership is moving into its final year of funding from the Schools Forum.
- c) Originally it was a 3 year funding package agreed by the Schools Forum.
- d) Strategies about the hub model has continued to ensure schools work effectively together in geographical groups.
- e) Initial analysis suggest GCSE results improved significantly in 2016.

As a Forum, the Chair congratulated Will Roberts on the work that had been achieved and was happy that Schools Forum were part of this success which has proved fruitful.

Agreed:
Schools Forum agreed to note the report

8. DOWNEND SCHOOL – REQUEST FOR ADDITIONAL FUNDING

Will Roberts and Mark Fuller, Headteacher of Downend School attended for this item.

Schools Forum received a paper to support the request for additional funding.

Will summarised the paper.

The school was asked by the LA to consider admitting additional students for 2016/17. Their planned admission number was 210 and they were asked to take an additional 30 students, representing a total of 240.

The lag in funding will result in a one-off shortfall of funding of £127,007 for the financial year 2016-17.

The request was made in order to support the curriculum changes required for the additional 30 students in Year 7.

It was noted that the paper later on the agenda regarding the Allocation of Schools Block Growth Funding – 2016/17 allocated Downend School an amount of £69,595.

A question arose as to the funding of Academy Schools since their funding, from the EFA, is based on the academic year. (Martin looked into this post the meeting. Academy Schools are funded for the year of growth by receiving their 5/12ths allocation in the next financial year as a matter of course. It is a full year effect)

Agreed:
Members felt that they were not in a position to agree any additional above the normal allocation of growth funding.

9. EARLY YEARS NATIONAL FUNDING – DfE CONSULTATION

MD said the National Funding Formula was very welcome. He thanked Sally and Liz for providing the answers to the questions.

It was not an easy consultation as the Early Years National Funding is a few years behind schools. A briefing note was presented to the Schools Forum showing proposed response to the consultation.

The consultation paper was sent to the DfE on behalf of the Schools Forum on 21st September 2016.

The Chair thanked all those who did the work.

Note the same response was sent on behalf of the Council

Agreed:

Members agreed that the response should be sent to the DfE.

10. FIRST QUARTER MONITOR REPORT: REVENUE AND CAPITAL 2016/17

The First Quarter Monitor 2016/17 shows a predicted overspend of £5.8m, this is predominantly in the high needs block. This is because the high needs block spending has increased in just about every area.

This is a great concern for 2016/17 which means a knock on effect for 2017/18 as the overspend will need to be clawed back and the need to ensure that the High Needs Block spending is within budget for 2017/18.

Appendix A shows a draft report going to CAH Committee on 21st September 2016.

The Capital Programme is progressing to timetable and the budgets seem to be ok.

Appendix B shows a draft report going to CAH Committee on 21st September 2016.

Agreed:

Schools Forum agreed to note the report

11. HIGH NEEDS BLOCK AND THE 0-25 SERVICE

MD highlighted issues in the High Needs Block and the 0-25 Service. Actions are required so that the estimated overspend can be met in future years within the High Needs Block.

The six items were looked at which shows more pupils wanting the service and with the cost per pupil going up. These were:

- Post 16 High Needs Placements
- Education Health and Care Plans(ECHPs)
- Education Out of Authority Placements
- Special Schools and Resource Bases
- Early Years High Needs Support
- Schools Block

There is a role here to play for the Schools Forum, Schools and the LA.

Sonya Miller, Head of Children's Services, introduced herself to the Schools Forum. She has recently taken over responsibility for the 0-25 Service.

She said urgent action was being taken to address costs and reassessments of pupils who have gone out of area, and brought back and the number of Post 16 placements coming through. There is also the issue of parental expectations and the role of Tribunals.

It was proposed that two working be formed. One to look at what can be done immediately re the financial overspend position. This will be looking at cutting the ECHP rate, reducing Special School and Resource bases funding, transfer of funds from the Schools Block. This group will agree the cuts that the Council will then consult all schools on. This will need to happen before the December 2016 meeting of the Schools Forum
The second group is more medium/longer term and will look at processes and how support for vulnerable pupils is funded.

The first group will consist of;

Keith Lawrence
Louise Leader
Paul Tanner
Mark Freeman
Erica Wolstenholme (SENCO)

The Second Group will consist of:

Sally Bowd
Tamsin Moreton

School SENCO
Peter Smart
Lisa Parker

Agreed:

Members agreed the following actions:

- 1) **A subgroup to look at the financial overspend and prepare a consultation with Schools.**
- 2) **A subgroup to look at the longer term as to how support for vulnerable pupils is funded.**

12. ALLOCATION OF SCHOOLS BLOCK GROWTH FUNDING – 2016/17

The Schools Forum was recommended to approve the funding allocations as detailed in the report.

The Chair asked for any comments. None were received so the funding allocations were approved and agreed.

It was requested that there should be future agenda items on pupil projections.

Agreed:

Members agreed the allocation of the Schools Block Growth Funding and to add to the Agenda for the next meeting an item on pupil number projections.

13. CONSULTATION ON SCHOOL FUNDING – 2017/18

The DfE has announced that the introduction of the national funding formula will be deferred by a year to 2018/19. The DfE will consult with local authorities, school, academies and other interested bodies during the autumn of 2016/17.

There are minor amendments to school funding 2017/18. These amendments need to go out to schools for consultation.

Agreed:

The Schools Forum agreed the content of the letter to be sent to schools

14. APPRENTICESHIP LEVY – 2017/18

The Government has committed to increase the quantity and quality of apprenticeships and aims to reach 3 million starting apprenticeships by 2020.

To fund the increase, the Government is introducing the 'apprenticeship levy' from 1st April 2017.

A working group will be set up to understand how the Council can utilize the new apprenticeship resource. The project team will be responsible for delivering an apprentice strategy to ensure the council meets its obligations and maximizes opportunity from the levy investment.

A further report will be presented to the School Forum once further / final DfE guidance is released, which should be in the autumn.

Mark Freeman agreed to talk to the LA HR colleagues as his school has been involved with the Apprenticeship scheme.

Agreed:

Schools Forum agreed to note the report and that Mark Freeman will talk to the Head of HR at the Council

15. DATES OF FUTURE MEETINGS AND THE SCHOOLS FORUM WORK PROGRAMME 2016/17

The work programme was reviewed

Agreed:

Members agreed to add two items to the 3rd November 2016 agenda:

- **Traded Services (brought forward from 15 September 2016 meeting).**
- **Pupil Number Projections.**

16. ANY OTHER BUSINESS

Martin Dear announced that he would be retiring on the 18th October 2016.

Martin was thanked for his work within the Schools Forum.

Early Years representatives thanked Martin for his support and clarity around Early Years.

Meeting closed at 18.15

TRADED SERVICES UPDATE

Verbal update to be given by Susanna Hinnell, Managing Director, Integra.

PUPIL NUMBER PROJECTIONS – UPDATE

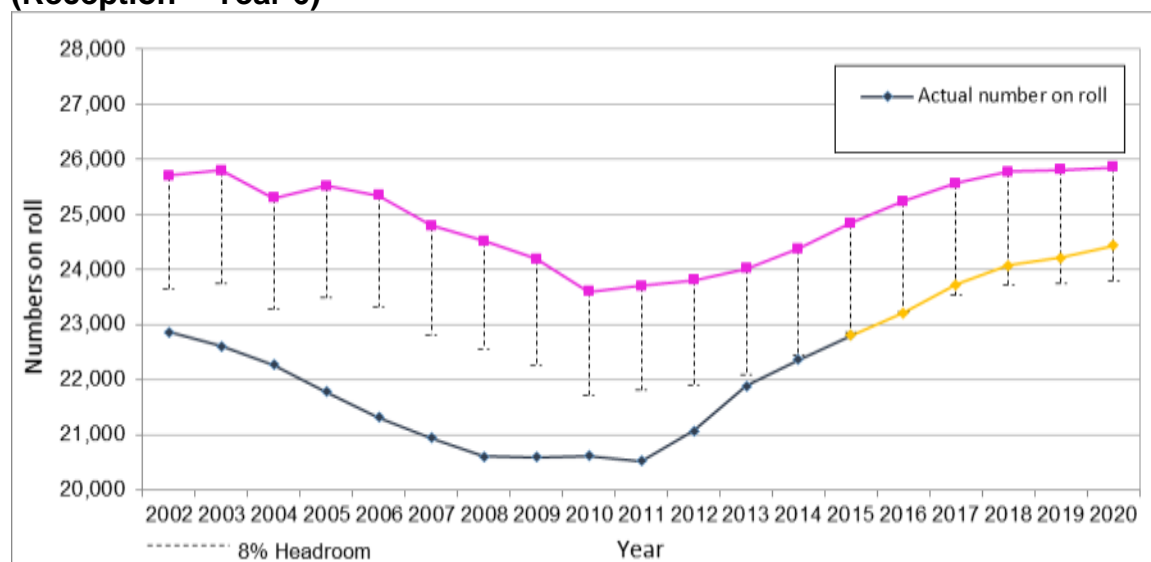
Schools Forum

Primary and Secondary Pupil Projections Summary - November 2016

1. Primary Pupil Projections

1.1 There are currently 22,800 primary school aged pupils on roll across Infant, Junior and Primary schools in South Gloucestershire (Autumn School Census 2015). The graph below (Fig 1) shows that between 2002 - 2008 numbers on roll in the primary phase were in sharp decline. 2009 marked the end to the downturn and numbers since 2011 have increased annually. Demand for places is projected to continue to increase to the period 2020 and numbers in 2017 are expected to exceed the recommended 8% surplus capacity margin. The 8% surplus capacity margin is a number of places needed to maintain some level of flexibility in our schools enabling admission authorities to provide local places for local children, meet the needs of in-year movers and maximise the achievement of parental preferences. In school place planning terms, it is good practice to plan for an equivalent number of places.

Fig 1 Primary pupil projections compared with the availability of places (Reception - Year 6)



2. Availability of Places - SG Primary Schools

2.1 The table below (Fig 2) sets out the latest pupil projections compared with the number of places available in South Gloucestershire primary schools. The number of places is calculated using the Admission Number Capacity. This is calculated by adding together the admission number for each year group for each school.

2.2 The data show that current surpluses are equivalent to just under 2000 places across the age range. In order to maintain a surplus margin of 8% (a margin which will maximise the achievement of preferences and provide local places for local children) the Council would need to increase the availability of places in each year ranging from the equivalent of just one class in 2016 to 680 places in 2020.

Fig 2 Availability of Places Reception – Year 6

Reception – Year 6	2015	2016	2017	2018	2019	2020
Pupil Projection	22800*	23211	23718	24071	24215	24431
Total Number of Places (ANC)	24838	25237	25564	25771	25811	25851
Surplus Places	1993	1991	1811	1665	1561	1385
% Surplus Margin	8.0	7.9	7.1	6.5	6.0	5.4
No. of places short of 8% margin	-6	28	234	397	504	683

**Actual as at Autumn Census 2015, ANC = Admission Number Capacity*

For the purposes of pupil place planning, South Gloucestershire divides the primary phase schools into 7 planning Areas. A summary description of each of the areas is set out below.

Area 1	Sevenside, Thornbury, Almondsbury & Surrounding Villages (14 schs)
Area 2	Yate, Chipping Sodbury & Surrounding Villages (18 schs)
Area 3	Winterbourne and Surrounding Villages(7 schs)
Area 4	Filton, Bradley Stoke, Patchway and Stoke Gifford (16 schs)
Area 5	Downend, Mangotsfield, Emersons Green and Pucklechurch (9 schs)
Area 6	Kingswood and Hanham(10 schs)
Area 7	Cadbury H, Warmley, Longwell Gn, Oldland Commons & Surrounding Villages (11 schs)

3. Area Level Primary Pupil Projections (Reception – Year 6)

3.1 The table below (Fig 3) sets out that demand overall is expected to increase by 7% (approximately 1630 children) within this plan period. This is not a uniform pattern of demand. There is considerable variation in demand across all 7 planning areas as follows:

- demand for places is projected to fall in schools across Areas 1 and 3;
- demand for places is expected to steady increase across Area 2 indicating growth of 6% overall;
- Area 4 remains the Council's most significant growth area with a projected 16% increase in demand between 2015 – 2020;
- demand for places is expected to increase in schools across Area 5 between 2016 – 2018 and remains steady to 2020;
- growth is sustained across schools in Area 6 with a projected 13% increase in demand within the period.

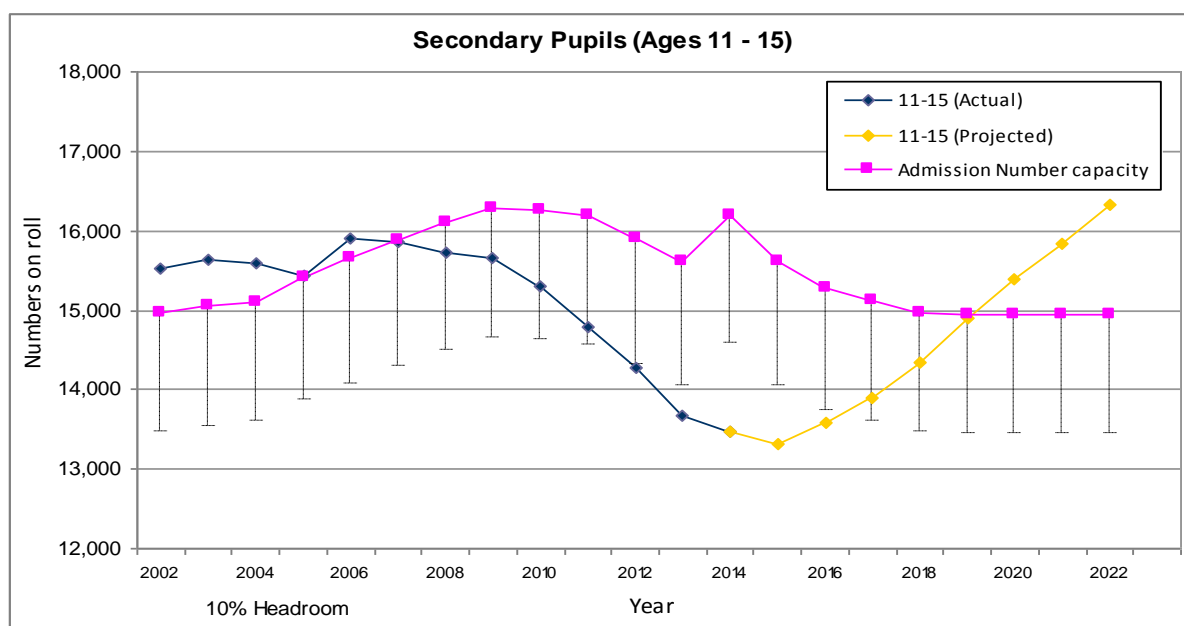
Fig 3 Area Level Primary Pupil Projections

Area	2015	2016	2017	2018	2019	2020	Number and Percentage Increase
1	2437	2447	2465	2414	2376	2346	-91 (4%)
2	3478	3542	3561	3638	3637	3680	202 (6%)
3	1587	1612	1621	1616	1581	1565	-22 (-1%)
4	5153	5308	5557	5730	5870	5977	824 (16%)
5	3378	3409	3514	3524	3517	3514	136 (4%)
6	4190	4303	4414	4538	4638	4733	543 (13%)
7	2577	2590	2586	2611	2596	2616	39 (2%)
Total	22800	23211	23718	24071	24215	24431	1631 (7%)
No. yearly increase		411	507	353	144	216	
% Increase		2%	2%	1%	1%	1%	

4. Secondary Pupil Projections

4.1 In the secondary phase there are 15,586 secondary aged pupils on roll (11-18 age range School Census Autumn 2015). The global secondary pupil place projections set out in the graph below (Fig 4) show an end to the downward trend in 2016 as demand for places starts to increase annually for this plan period.

Fig 4 Secondary pupil projections compared with the availability of places (Year 7- 11)



5. Availability of Places - SG Secondary Schools

5.1 The table below (Fig 5) sets out the latest pupil projections compared with the number of places available in South Gloucestershire secondary schools. The number of places is calculated using the Admission Number Capacity.

5.2 The table shows that:

- the availability of places will decrease year on year as higher demand for places feeds through;
- there are c.2800 surplus places across the age range (18% surplus places).
- the Year 7 cohort is projected to increase from c.2500 to c.2800;
- by 2019 the proportion of surplus places will be below the recommended 8% margin and by 2021 there is a projected deficit of places.

Fig 5 Availability of Places 7-11

Year 7 – Year 11	2015*	2016	2017	2018	2019	2020	2021	2022
Pupil Projection	12765	12979	13254	13623	14079	14538	14960	15420
Total Number of Places (ANC)**	15614	14940	14940	14970	14940	14940	14940	14940
Surplus Places	2849	1961	1686	1347	861	402	-20	-480
% Surplus Margin	18.2	13.1	11.3	9.0	5.8	2.7	-0.1	-3.2
No. of places short(-)/in excess of 8% margin	1600	766	491	149	-334	-793	-1215	-1675

**Actual as at Autumn Census 2015 **ANC Admission Number Capacity*

For the purposes of pupil place planning South Gloucestershire Local Authority divides the secondary phase schools into 5 Groups as follows:

Group 1	Thornbury & Alveston (2 schs)
Group 2	Yate and Chipping Sodbury (3 schs)
Group 3	Filton, Patchway, Bradley Stoke and Stoke Gifford (3 schs)
Group 4	Winterbourne, Downend, Mangotsfield & Emersons Green (4 schs)
Group 5	Southern Kingswood, Hanham, Longwell G, Oldland Common & Warmley (3 schs)

6. Group Wide Projections Secondary Schools Year 7 - 11

6.1 The data set out in the table below (Fig 6) provides a summary analysis of the projections for each of the secondary school planning Groups. Looking at the projections to the period 2022, demand for secondary school places in South Gloucestershire is expected to increase across all 5 planning groups. The data show that there is an overall increase in demand of 21% (2650 pupils). The most significant increase is projected across Group 4 schools covering Mangotsfield, Winterbourne, Downend and King's Oak (1200 children) followed by Group 5 schools (530 children). Growth in demand for places across schools in Groups 1 and 2 is less significant and is projected at 11% by 2022.

Fig 6 Group Level Secondary Pupil Projections (Year 7– Year 11)

Area	2015	2016	2017	2018	2019	2020	2021	2022	Number and Percentage Increase
1	1900	1863	1848	1863	1935	1982	2040	2102	202 (10.6%)
2	2020	2016	2001	2036	2091	2123	2186	2254	234 (11.6%)
3	2186	2251	2299	2375	2440	2521	2595	2675	489 (22.4%)
4	4062	4199	4405	4575	4769	4961	5104	5262	1200 (29.5%)
5	2597	2650	2701	2774	2844	2951	3035	3127	530 (20.4%)
Total	12765	12979	13254	13623	14079	14538	14960	15420	2655 (20.8)
No. yearly increase		214	275	369	456	459	422	460	
% Increase		1.7%	2.1%	2.8%	3.3%	3.3%	2.9%	3.1%	

Notes to the Projections:

- These projections are indicative of the overall pattern of demand i.e. the trend and not exact numbers.
- The projections reflect the level of basic need in South Gloucestershire. This means that the figures are derived from the Area Health Authority's data of GP registrations (pre-school age children). Numbers are rolled forward using 3 year weighted average ratios. The methodology reflects the movement of children in/out of South Gloucestershire.
- Some element of new house building is included in the projections though this is limited to housing completions using data from the Residential Land Availability Survey. The methodology discounts a proportion of these to ensure accuracy and this in turn allows for a phased child yield.
- The impact of new house building yet to be completed is not included in these projections. The impact of new house building is set out in the Council's Infrastructure Delivery Plan and included in the Commissioning of Places Strategy. A summary is set out below.

7. Major New Housing Development in South Gloucestershire

7.1 The level of growth in South Gloucestershire has given rise to 18,000 homes being created since 1991 and the creation of some 30,000 jobs. The scale of growth brings with it major challenges with a significant pressure for more housing and development and pressure more generally on South Gloucestershire's infrastructure. The Council's Core Strategy sets out the Council's approach to managing growth in the next 15 years.

7.2 The Core Strategy is the main planning document for guiding and managing new development and change. The Strategy makes provision for a

total of 28,000 new homes. Around 5,000 have already been built and 23,000 new homes will be built in a 15 year period at an average rate of 1,200 dwellings each year. The Council is pursuing the necessary financial contributions from developers for the provision of additional school provision as required, though the timing, mix and location of new housing will be critical in determining what new school provision should be provided and where. A map identifying the location of all new housing developments is provided at **Appendix 1**. A snap-shot of the major developments is provided here.

7.3 The new neighbourhoods proposed in the Core Strategy are shown in the table below (Fig 7). Early indications are that the phasing of the new neighbourhoods is post 2016 and so any additional school places required as a result, are also likely to be required beyond the lifetime of this Strategy. The department is already in discussions with developers as part of the master planning for the future delivery of the new neighbourhoods and will continue to monitor the impact of proposals on educational provision as plans progress.

Fig 7 Core Strategy – New Neighbourhoods

	No. Dwellings	Pupil Yield Primary	Pupil Yield Secondary	Phasing
Cribbs/Patchway	5,700	2,052	1,026	Beyond 2016
East of Harry Stoke	2,000	720	360	Beyond 2016
North Yate	3,000	1,080	540	Beyond 2016
Frenchay	450	162	81	Beyond 2016
Thornbury	500	180	90	Up to 2018
Total	11,650	4,194	2,097	

7.4 Figure 8 sets out the major sites identified in the existing Local Plan. To 2016, the focus will be the development of existing commitments allocated in the South Gloucestershire Local Plan (the Core Strategy replaces the Local Plan). It is planned that most new development will take place within the communities of the North and East Fringes of Bristol urban area. These developments are expected to come forward in advance of the development of the new neighbourhoods.

Fig 8 Major sites identified in the existing Local Plan

	No. of Dwellings	Pupil Yield Primary	Pupil Yield Secondary
Filton Northfield (Charlton Hayes)	2,400	864	432
Walls court Farm (Cheswick)	665	275	138
Land East of Coldharbour Lane	500	180	90
Harry Stoke	1,200	432	216
Emersons Green East	2,550	918	459
Total	7,415	2,669	1,335

7.5 Although the Core Strategy provides a guide as to the timing of the major Local Plan sites (to 2016), the exact timescales and associated build-out rates for the delivery of each of the major developments remain uncertain. In the medium to long term a number of new primary schools are planned. The provision of additional secondary school provision is less clear cut and depends largely on the timescales for development.

Summary of new housing development and impact on school infrastructure

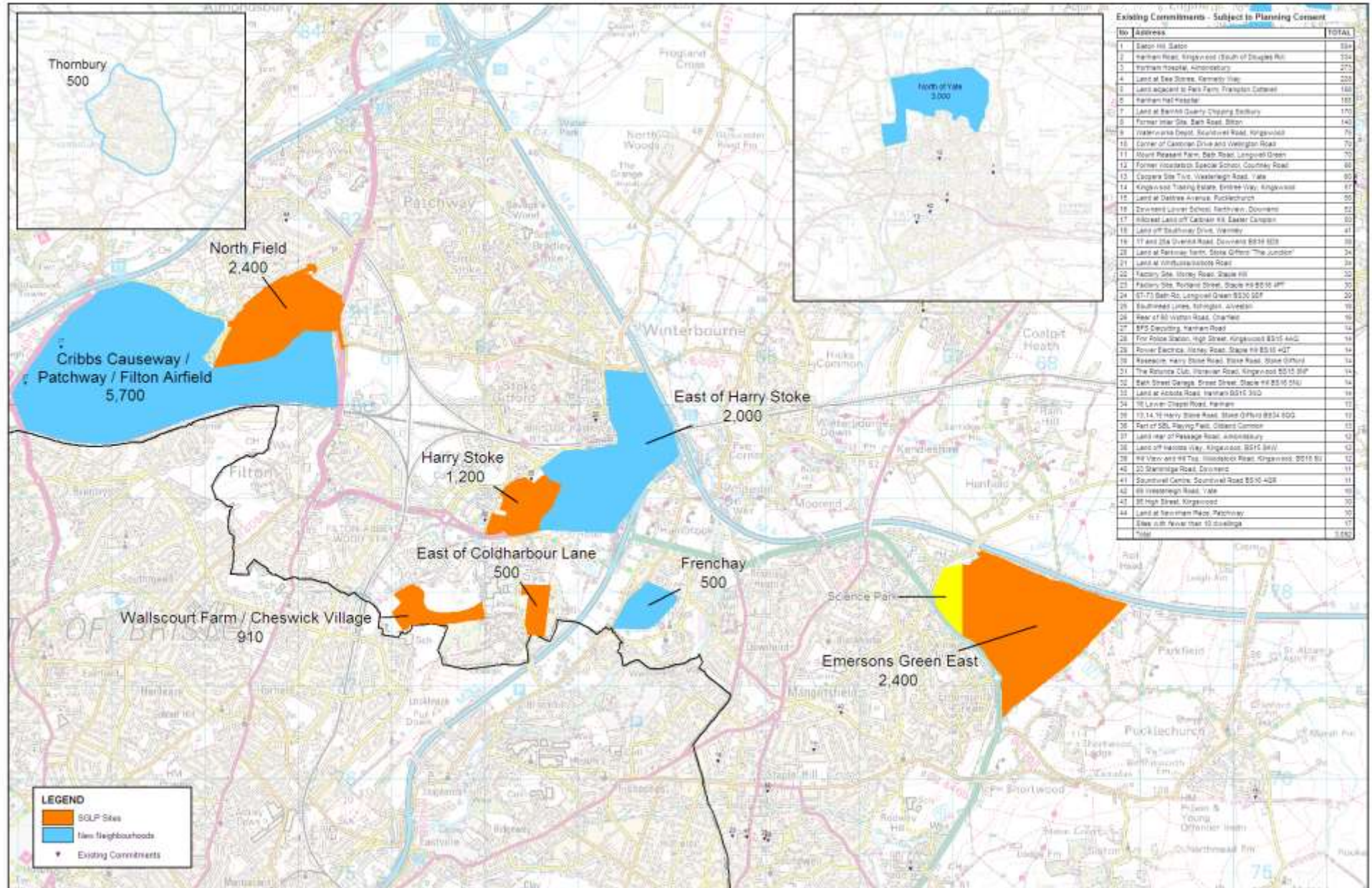
7.6 The programme of new house building planned in South Gloucestershire is set out in the Council's Core Strategy. The Core Strategy provides for:

- c. 28,000 new homes planned by 2027
- c.1,700 new homes per year for 12 years
- Since 2006 c. 8,000 new homes have been built

7.8 Growth generated by major new house building generates the need for the following:

- 21 new nurseries (30 - 60 place)
- 16 new primary schools (2 FE on average)
- 2-3 new secondary schools

SOUTH GLOUCESTERSHIRE CORE STRATEGY - MAJOR SITES



Existing Commitments - Subject to Planning Consent

No	Address	TOTAL
1	Salon Hill Station	234
2	Hamman Road, Kingswood (South of Douglas Rd)	324
3	Hamman Road, Kingswood	273
4	Land of Sea Downs, Hamman Hill	223
5	Land adjacent to Park Farm, Transton Cottrell	188
6	Hamman Hill Station	188
7	Land at Hamman Quarry Clipping Railway	170
8	Former near Site, Bath Road, Stone	140
9	Waterworks Depot, Southwell Road, Kingswood	76
10	Corner of Cannon Drive and Wellington Road	70
11	Mount Pleasant Farm, Bath Road, Longwood Green	70
12	Former Incinerator, Special School, Courtney Road	68
13	Coopers Site Two, Westleigh Road, Yate	60
14	Kingswood Trading Estate, Entire Way, Kingswood	47
15	Land at Daffins Avenue, Puckchurch	30
16	Disused Lower School, Northview, Downens	22
17	Industrial Land off Calbarin via Easter Campus	20
18	Land off Southway Drive, Hamman	21
19	17 and 20a Duffield Road, Downens B24 6D	28
20	Land at Parkway, Bath, Stone Office 'The Junction'	24
21	Land at Northwell Road	24
22	Factory Site, Stone Road, Stone Hill	20
23	Factory Site, Northwell Street, Stone Hill B20 6PF	20
24	67-71 Bath St, Longwood Green B20 2DF	20
25	Southwell Lanes, Northwell, Stonehill	18
26	Road off 60 Weston Road, Charlton	18
27	BFD Driveway, Hamman Road	16
28	Four Robes Station, High Street, Kingswood B20 6AG	14
29	Power Electric, Stone Road, Stone Hill B20 6DT	14
30	Residence, Harry Stone Road, Stone Road, Stone Hill	14
31	The Riverside Club, Hamman Road, Kingswood B20 6PF	14
32	Bath Street Garage, Street Street, Stone Hill B20 6AF	14
33	Land at Abells Road, Hamman B20 6D	14
34	16 Laver, Clippell Road, Hamman	13
35	13, 14, 16 Harry Stone Road, Stone Office B24 6D	13
36	Part of SBL Playpit Field, Oldens Common	13
37	Land near of Passage Road, Kingswood	13
38	Land off Indossa Way, Kingswood B20 6JF	13
39	18 View and 18 Top, Stonehill Road, Kingswood B20 6D	13
40	22 Stonehill Road, Downens	11
41	Southern Centre, Southwell Road B20 6D	11
42	66 Westleigh Road, Yate	10
43	85 High Street, Kingswood	10
44	Land at Newham Place, Patchway	10
	Site with Review for 10 dwellings	17
	Total	2,852

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South Gloucestershire Council

SCHOOLS FORUM

3 NOVEMBER 2016

SCHOOLS FUNDING ARRANGEMENTS FOR 2017/2018 – CONSULTATION 1

Purpose of Report

1. To consult on proposals regarding the Schools Funding Formula for 2017/18.

Policy

2. Local Authorities must distribute funding to their maintained schools using a formula which accords with the regulations made by the Secretary of State, and enables the calculation of a budget share for each maintained school. The financial controls within which delegation works are set out in the Scheme for the Financing of Schools.

Background

3. The Department for Education (DfE) has announced that the introduction of the national funding formula for schools will be deferred by a year to 2018/19. The DfE has announced that it will launch a second related consultation with local authorities, schools, academies and other interested bodies during the autumn of 2016/17.
4. In the interim, the DfE has introduced a small number of changes to funding for 2017/18 and this report takes into account those changes and where applicable sets out related proposals.
5. The funding proposals contained in this report follow a consultation undertaken with all Schools.

Proposal Regarding Primary Low Cost High Incidence (Prior Attainment)

5. The Early Years Foundation Stage Profile (EYFSP) changed in 2013 from those who did not achieve 78 points to pupils not achieving a good level of development. Since the introduction of the new measure, the EFA has allowed LAs to weight results to ensure that funding delivered through the prior attainment factor is not disproportionately affected by the year groups assessed under the new framework. South Gloucestershire has weighted the new measure results.

6. Attainment data for the 2017/18 formula is not yet available but it is anticipated that this anomaly will continue. The 2017/18 formula will incorporate four years data on pupils not achieving a good level of development and the EFA has indicated that they will continue to allow weighting to ensure that funding allocated to the primary prior attainment factor is not disproportionately affected by year groups 1 to 4 assessed under the new framework.

It is proposed to weight Years 1 to 4 results so that there is consistency in allocating funding across all primary year groups

Proposal Regarding Secondary Low Cost High Incidence (Prior Attainment)

7. In 2016 KS2 assessments are the first which assess the new, more challenging national curriculum. At a national level, a higher number of the year 7 cohort in financial year 2017/18 will be identified as having low prior attainment. The EFA intend to use a national weighting to ensure that this cohort does not have disproportionate influence within the overall total.
8. The weightings are not yet available but local authorities will not be able to adjust this weighting at a local level. The DfE has indicated that Local Authorities should adjust the secondary low attainment rate to maintain their low prior attainment funding at previous year's levels.

It is proposed to keep the Secondary Low Cost High Incidence (prior attainment) total budget the same as 2016/17 by adjusting the funding rate.

Proposal Regarding Varying pupil numbers – new schools/primary phase

9. School regulations require that LA's should estimate pupil numbers for all schools and academies where they have opened in the previous seven years and are still adding year groups. Bradley Stoke, King's Oak, Lyde Green and Wallscourt Farm academies are growing schools and the EFA will request revised pupil numbers.

It is proposed to use the Autumn 2016 School Census pupil numbers and add 7/12ths of the planned September 2017 reception admission number (PAN)

Proposal Regarding Minimum Funding Guarantee (MFG) application to dis-apply Regulations

10. There are two all through academies that began admitting primary aged pupils from September 2015 and are building up numbers. Currently, the pupil unit rate in the MFG calculation for these schools is weighted towards secondary pupils. As the number of primary pupils increases there may be over protection as secondary

pupils attract higher per pupil funding. For 2016/17 the Schools Forum agreed to request a MFG disapplication. This was subsequently agreed by the DfE.

It is proposed to request the DfE to agree a MFG disapplication for 2017/18 where all through schools and academies are building up primary phase numbers

Early Years Block funding changes 2016/17

11. It is proposed that there is no change to the Early Years Single Funding Formula subject to any changes that may be required as a result of the current consultation being undertaken by the DfE regarding the introduction of a National Early Years Single Funding Formula. The outcome of that consultation and any resulting changes are not known at this stage.

Summary of Consultation Outcome

12. The following table summarises the outcome of the Consultation undertaken with Schools and the proposed recommendations that will be put forward to the Children Adults and Health Committee on 7 December 2016 for approval:

Table 1

		Number of Responses				
1	Primary Low Cost High Incidence (Prior Attainment): Proposal to weight Years 1 to 4 results so that there is consistency in allocating funding across all primary year groups:					
		Primary	Secondary	Special	Total	Recommendation
	Agree	21	4	1	26	AGREE
	Disagree	6	2	0	8	
2	Secondary Low Cost High Incidence (Prior Attainment): Proposal to keep the Secondary Low Cost High Incidence total budget the same as 2016/17 by adjusting the funding rate?					
		Primary	Secondary	Special	Total	Recommendation
	Agree	19	4	1	24	AGREE
	Disagree	6	2	0	8	
3	Varying pupil numbers – new schools/primary phase: Proposal to use the Autumn 2016 School Census pupil numbers and add 7/12ths of the planned September 2017 reception admission number (PAN)?					
		Primary	Secondary	Special	Total	Recommendation
	Agree	22	4	1	27	AGREE
	Disagree	6	2	0	8	

4	MFG application to dis-apply regulations: Proposal to request a MFG disapplication where secondary schools and academies have admitted primary phase from September 2015					
		Primary	Secondary	Special	Total	Recommendation
	Agree	19	4	1	24	AGREE
	Disagree	7	2	0	9	

13. Based on the responses received from schools the Forum is recommended to agree the proposals as per the Recommendation column in the table above.

Return to the Education Funding Agency

14. There is a requirement to make a return to the Education Funding Agency (EFA) on 20 January 2017, of the factors that will be used in the allocation of the schools block.

Consultation

15. Consultation has taken place with schools and the Schools Forum. Table 1 in this report provides details of the responses received from Schools.
16. The recommendations are in accordance with the schools responses.

Financial Implications

17. The School Finance Regulations set out the arrangements which Local Authorities must follow when allocating the DSG funding to schools.
18. As the support for schools and other pupil related services expenditure is funded by the dedicated schools budget there is no charge to the Council Budget. Hence there is no charge to the Council Tax payer.
19. The DSG is forecast to overspend in 2016/17. Any overspend will need to be recovered from future year DSG funding.

Legal Implications

20. There is a legal requirement for the local authority to
- submit the final school pro-formas and underlying data to the Education Funding Agency by the 20 January 2017.
 - confirm with schools their budget allocations for 2017/2018 by 28 February 2017

21. The Chief Financial Officer, after the end of the financial year, must confirm to the DfE that the grant conditions have been met.

RECOMMENDATIONS

- 1) The Schools Forum is asked to note and give its view on the proposals and recommended actions set out in Table 1 of this report.

Author

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Tel: 01454 863197

Background Papers

1. Letter to Schools – School Funding Arrangements for 2017/2018 - dated 17 September 2016.
2. Education Funding Agency Paper – Schools revenue funding 2017 to 2018 – Operational guide – dated July 2016

Schools Funding Arrangements for 2017/18 – Responses from Schools

SCHOOLS FUNDING ARRANGEMENTS CONSULTATION 2017/18

Responses from Schools

	Primary (including Academies)				Secondary/All Through (including Academies)				Special (including Alternative Provision)			
	Y	N	Don't Know	No Response	Y	N	Don't Know	No Response	Y	N	Don't Know	No Response
Number of schools responded	28			64	6			11	1			4
DSG Deficit Recovery Plan: Option 1 Option 2												
Primary Low Cost High Incidence. Do you agree with the proposal to weight Years 1 to 4 results so that there is consistency in allocating funding across all primary year groups?	21	6	0	65	4	2	0	11	1	0	0	4
Secondary Low Cost High Incidence. Do you agree to the proposal to keep the Secondary Low Cost High Incidence total budget the same as 2016/17 by adjusting the funding rate?	19	6	0	67	4	2	0	11	1	0	0	4
Varying pupil numbers – new schools/primary phase. Do you agree to the proposal to use the Autumn 2016 School Census pupil numbers and add 7/12ths of the planned September 2017 reception admission number (PAN)?	22	6	0	64	4	2	0	11	1	0	0	4
MFG application to dis-apply regulations. Do you agree with the proposal to request a MFG disapplication where secondary schools and academies have admitted primary phase from September 2015?	19	7	0	66	4	2	0	11	1	0	0	4
Comments	8				2				0			

SCHOOL FUNDING ARRANGEMENTS FOR 2017/18 - CONSULTATION 2

South Gloucestershire Council

SCHOOLS FORUM

3 NOVEMBER 2016

SCHOOLS FUNDING ARRANGEMENTS FOR 2017/2018 – CONSULTATION 2

Purpose of Report

1. To consult on proposals regarding the Schools Funding Formula for 2017/18.

Policy

2. Local Authorities must distribute funding to their maintained schools using a formula which accords with the regulations made by the Secretary of State, and enables the calculation of a budget share for each maintained school. The financial controls within which delegation works are set out in the Scheme for the Financing of Schools.

Background

3. This report sets out the proposed actions to resolve the Dedicated Schools Grant (DSG) budget deficit that has increased over the last 2 years.
4. The funding proposals contained in this report are the subject of a live consultation with all Schools. The outcome of this consultation will be reported to the Schools Forum at its next meeting on 1 December 2016.

DSG Overspend

5. In 2015/16 the Schools Budget, which is 100% funded by the ring-fenced DSG overspent by £1.2m and the cumulative overspend is forecast to reach £7.7m by the end of March 2016/17.
6. The overspend across each DSG Block is shown in Table 1 below:

Table 1

	DSG Budget 2016/17	Forecast Expenditure 2016/17	Forecast Over(+)/ Under(-)spend
	£000	£000	£000
Schools Block	149,559	151,503	1,944
High Needs Block	27,793	33,583	5,790
Early Years Block	12,007	12,007	0
Total	189,359	197,093	7,734

7. The main areas/causes of the overspend are as follows:

- **Schools Block:** £1,675k costs related to the closure of the Grange School. While the closure would have benefited other Schools who gained additional pupils and therefore funding and avoided redundancy costs of their own there are residual costs arising from the School's ongoing deficit and redundancy costs. This has to be covered from within the overall level of DSG Funding. The remainder of the Schools Block overspend (£269k) relates to breach payments to Schools that have expanded to cope with demand in specific areas.
- **High Needs Block:** the areas of overspend within this Block are:
 - Stated Support: £1,523k
 - Post 16 Placements: £2,204k
 - Independent/Non-Maintained Placements: £1,021k
 - Special Schools and Resource Bases: £917k
 - Early Years High Needs Support: £125k

8. South Gloucestershire's DSG funding is currently the sixth lowest in England and is of major concern to the Council and no doubt to Schools. This relatively low level of funding has increased the pressure on the DSG and the Council is taking every action it can to raise this matter with central government. The Council is an active member of the F40 campaign group that represents the 40 lowest DSG funded local authorities. This group has been active in making the case for extra funding for LAs like South Gloucestershire.

9. The Leader of the Council has also recently written to the Secretary of State for Education to set out the challenging position facing South Gloucestershire Schools. The Government's proposals to move to a National Schools Funding Formula is anticipated to result in additional DSG funding and should that happen that growth would immediately be deployed to ensure the chosen deficit recovery plan is adhered to, which would result in either a shorter recovery period or a reduction in the savings required.

10. The Council will also be working with the Schools Forum to take a more robust position on Schools with large balances as it would not be right for some Schools to be faced with more severe reductions while other Schools are potentially sitting on excessive balances.

Proposals Regarding the DSG Deficit Recovery Plan

11. The regulations relating to the DSG state that any overspend of the DSG should be carried forward and become the first call in setting next year's DSG Budget. The Schools Forum has been working in conjunction with the Council to develop a plan to recover the deficit over a reasonable time scale with the formation of two Schools Forum Working Groups. The first group has been developing short term measures to start reducing the growing overspend and this report takes into account the measures this group has identified.

12. A second group is looking at longer-term measures that will involve reviewing all aspects of SEND funding for Schools. Any proposals flowing out of this group's work would be the subject of further consultations with the Schools Forum, all schools and reported to the Children Adults and Health Committee.

13. The Short Term Measures Group reviewed three DSG deficit recovery options for 2017/18 and beyond, which are set out in this report. Each option assumes a realistic increase in DSG each year.

14. For all options any required reduction in funding has been spread evenly across the Mainstream School sector and the Special Schools/Resource Base sectors based on current spending levels. For example Option 2 reduces funding for mainstream Schools by 2.1% and similarly reduces funding for Special Schools/Resource Bases by 2.1%.

Option 1

15. Recovery of the deficit in one year by making the deficit the first call on next year's DSG Budget. The financial impact over the coming years would be as follows:

Table 2

	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21
	£000	£000	£000	£000	£000	£000
DSG Budget	188,077	189,359	190,650	191,949	193,258	194,575
In-Year DSG Expenditure	189,581	195,878	195,878	182,916	191,949	193,258
Reduction in Expenditure - Target			-12,962	9,033	1,309	1,317
Net Expenditure	189,581	195,878	182,916	191,949	193,258	194,575

In-Year Over(+)/Under(-) spend	1,504	6,519	-7,734	0	0	0
Opening DSG Reserve Over(+)/Under(-) spend	-289	1,215	7,734	0	0	0
Closing DSG Reserve Over(+)/Under(-) spend	1,215	7,734	0	0	0	0

16. This option shows that to recover a deficit of £7.734m in one year would require a reduction in funding for Schools of £12.962m in 2017/18. The advantage of this approach is that future years would not require further reductions and some growth could potentially be passed onto schools in 2018/19 and beyond. However the scale of reduction in one year would cause severe financial turbulence for Schools and was therefore not an option that was put forward for consultation with Schools but it does highlight the challenging scale of the problem and the need to take action as soon as possible.

Option 2

17. This option shows a longer term recovery period with an initial reduction in funding of £3.5m in 2017/18 and further reductions of £3.5m in 2018/19 and £2m in 2019/20.

Table 3

	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21
	£000	£000	£000	£000	£000	£000
DSG Budget	188,077	189,359	190,650	191,949	193,258	194,575
In-Year DSG Expenditure	189,581	195,878	195,878	192,378	188,878	186,867
Reduction in Expenditure - Target			-3,500	-3,500	-2,011	7,708
Net Expenditure	189,581	195,878	192,378	188,878	186,867	194,575
In-Year Over(+)/Under(-) spend	1,504	6,519	1,728	-3,071	-6,391	0
Opening DSG Reserve Over(+)/Under(-) spend	-289	1,215	7,734	9,462	6,391	0
Closing DSG Reserve Over(+)/Under(-) spend	1,215	7,734	9,462	6,391	0	0

18. The advantages of this option is that the reduction in 2017/18 is more manageable at £3.5m and the DSG is brought back into balance over the next 3 years which is the normal time scale for recovering deficit budgets for Schools. This allows for some growth to be added back to School Funding in 2020/21.

Option 3

19. This option sets out a smaller reduction in 2017/18 of £2m but a longer recovery period with balance being achieved in 2020/21. Further reductions of around £2m each year would be required over 2018/19 to 2020/21.

Table 4

	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21
	£000	£000	£000	£000	£000	£000
DSG Budget	188,077	189,359	190,650	191,949	193,258	194,575
In-Year DSG Expenditure	189,581	195,878	195,878	193,878	191,878	189,878
Reduction in Expenditure - Target			-2,000	-2,000	-2,000	-2,814
Net Expenditure	189,581	195,878	193,878	191,878	189,878	187,064
In-Year Over(+)/Under(-) spend	1,504	6,519	3,228	-71	-3,380	-7,511
Opening DSG Reserve Over(+)/Under(-) spend	-289	1,215	7,734	10,962	10,891	7,511
Closing DSG Reserve Over(+)/Under(-) spend	1,215	7,734	10,962	10,891	7,511	0

20. This option represents the minimum reduction needed to meet the Council's current budget strategy; any longer recovery period would not be sustainable within the Council's Medium Term Financial Plan.

21. The results of the consultation with all Schools regarding Option 1 and Option 2 above will be reported to the 1 December Schools Forum. The Mainstream, Special School and Resource Base funding rates arising from adopting the preferred Recovery Plan will also be set out for the Forum to review at the December meeting.

Return to the Education Funding Agency

22. There is a requirement to make a return to the Education Funding Agency (EFA) on 20 January 2017, of the factors that will be used in the allocation of the schools block.

Consultation

23. Consultation is currently taking place with schools, trade unions and the Schools Forum the deadline for consultation responses is 18 November 2016
24. At the next meeting of The Schools Forum on 1 December 2016 the Forum will be consulted on the proposed deficit recovery plan that will be taken forward to the 7 December 2016 Children Adults and Health Committee which will make the final decision on which option is taken forward.

Financial Implications

25. The School Finance Regulations set out the arrangements which Local Authorities must follow when allocating the DSG funding to schools.
26. As the support for schools and other pupil related services expenditure is funded by the dedicated schools budget there is no charge to the Council Budget. Hence there is no charge to the Council Tax payer.
27. The DSG is forecast to overspend in 2016/17. Any overspend will need to be recovered from future year DSG funding.

Legal Implications

28. There is a legal requirement for the local authority to:
- submit the final school pro-formas and underlying data to the Education Funding Agency by the 20 January 2017.
 - confirm with schools their budget allocations for 2017/2018 by 28 February 2017
29. The Chief Financial Officer, after the end of the financial year, must confirm to the DfE that the grant conditions have been met.

RECOMMENDATIONS

- 1) The Schools Forum is asked to note and provide its views on the DSG Deficit Recovery Plan options set out in this Report.

Author

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Tel: 01454 863197

Background Papers

3. Letter to Schools – School Funding Arrangements for 2017/2018 - dated 17 September 2016.
4. Education Funding Agency Paper – Schools revenue funding 2017 to 2018 – Operational guide – dated July 2016

SCHOOLS FORUM WORK PROGRAMME 2016/17

All meetings at 4.30pm at Badminton Road, Yate

1st December 2016 Room 0012 Ground Floor	19th January 2017 Room 1009, First Ground Floor
<ul style="list-style-type: none"> • 2nd Budget Monitor 2016/17 • Schools Funding Arrangements for 2017/8 – Consultation 2 • Local Authority Early Years – Strategy and Development 	<ul style="list-style-type: none"> • Earmarked Capital Programme 2017/18 • Council Budget 2017/18 • Deployment of the DSG 2017/18
2nd March 2017 Room 0012 Ground Floor	11th May 2017 Room 0012 Ground Floor
<ul style="list-style-type: none"> • 3rd Budget Monitor 2016/17 • The Schools Forum Constitution from April 2017 • Education Commission Update 	<ul style="list-style-type: none"> • Analysis of Schools Block Funding Formulae 2017/18 • Education Commission Update • Traded Services Update • Chipping Sodbury - Outturn 2016/17
13th July 2017 Room 0012 Ground Floor	14th September 2017 Room 0012 Ground Floor
<ul style="list-style-type: none"> • Preparing for 2018/19 (if known) • Provisional Outturn 2016/17 (including school balances) • Schools Forum Membership • Date of future meetings and the Work Programme 2017/18 	<ul style="list-style-type: none"> • DfE Consultation on School Funding 2018/19 • Allocation of Schools Block Growth Funding • 1st Budget Monitor 2017/18 • Education Commission Update • Traded Services Update

ANY OTHER BUSINESS