

# AGENDA



## SCHOOLS FORUM

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Date : Thursday 5<sup>th</sup> December 2013

Time : 4.30pm

Place : Badminton Road Offices, Ground Floor, Room 0012

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### Distribution

#### Members of the Committee

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

#### Appropriate Officers

Peter Murphy  
Martin Dear

#### Councillors

Ian Blair  
James Hunt  
Gareth Manson

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# AGENDA

1	WELCOME AND INTRODUCTIONS	5 mins
2	APOLOGIES FOR ABSENCE	5 mins
3	EVACUATION PROCESS	5 mins
4	ANY OTHER ITEMS THE CHAIR DECIDES ARE URGENT	5 mins
5	MINUTES OF THE MEETING HELD ON 17 OCTOBER 2013	5 mins
6	SPECIAL SCHOOLS AND RESOURCE BASE FUNDING 2014/2015	10 mins
7	WATERMORE PRIMARY SCHOOL – SPLIT SITE ANALYSIS	10 mins
8	CALLICROFT PRIMARY SCHOOL – BREACH FUNDING	10 mins
9	SCHOOL BROADBAND 2015 ONWARDS	15 mins
10	SCHOOL MEALS	15 mins
11	SCHOOL RATES	5 mins
12	MINIMUM FUNDING GUARANTEE AND GAINING SCHOOLS	15 mins
13	SECOND QUARTER MONITOR REPORT: REVENUE AND CAPITAL 2013/2014	5 mins
14	WORK PROGRAMME	5 mins
15	ANY OTHER BUSINESS	5 mins

**Department for Children, Adults and Health**

**SCHOOLS FORUM  
Thursday 17 October 2013  
Badminton Road Offices**

**PRESENT:**

Richard Badley	Headteacher, Mangotsfield Secondary School
Dave Baker	Executive Headteacher, Bradley Stoke and Abbeywood Community Schools
April Begley	Governor Hanham High and Christchurch Primary Schools
Tania Craig	Headteacher, New Horizons Learning Centre
Mark Dee	Executive Head, The Park & Parkwall Primaries
Steve Forecast	Governor, The Crossways Schools Federation
Mark Freeman	Headteacher, St Michael's Primary School, Stoke Gifford
John Goff	Governor, The Park & Parkwall Primaries
Geoff Howell	Governor, Patchway Community College, Barley Close and Callicroft Primary Schools
Janet Hoyle	Headteacher, Watermore Primary School
Jim Lott	Governor, Stanbridge Primary School
Jane Millicent	Headteacher, Patchway Community College
Max Reed	Governor, Abbotswood Primary School

**Chair:** Keith Lawrence Governor, Culverhill School

**Officers:** Martin Dear Head of Business Support

**1. WELCOME AND INTRODUCTIONS**

Attendees were welcomed by the Chair, Keith Lawrence.

**2. APOLOGIES FOR ABSENCE**

Keith Geary, Ann Reed

**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 MEETINGS HELD ON 12<sup>TH</sup> SEPTEMBER 2013**

April Begley had given apologies for absence from this meeting.

**Schools Forum Membership**

Additions/changes to the Schools Forum Membership as follows:

Academies (Primary)

Susie Weaver, Headteacher, Wallscourt Farm.

Academies (Governors)

Geoff Howell to become Academy representative.

Victoria Fitzgerald to become Academy representative. She is Vice Chair of the Olympus Academy Trust.

**Action: Martin Dear to send a letter of welcome to Susie and Victoria.**

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

**Update on Academies (Secondary)**

Jane Millicent to become Academy representative.

6. **FINAL DEDICATED SCHOOLS GRANT (DSG) 2013/2014**

South Gloucestershire's final DSG for 2013/2014 is £173,311,000. This varies by £12,000 from the First Monitor Report presented to the Schools Forum on 12<sup>th</sup> September 2013. The increase is for three additional pupils in the Early Years Block.

A return will be made to the Education Funding Agency (EFA) by the Chief Finance Officer on the 31<sup>st</sup> October 2013.

The Schools Forum considered and noted the report.

7. **SCHOOL FUNDING ARRANGEMENTS FOR 2014/2015**

MD circulated consultation responses from schools on the School Funding Arrangements for 2014/2015.

There were 12 responses from Primary Schools and 7 from Secondary Schools.

It was agreed not to recommend the use of the sparsity factor as only 2 schools would be eligible.

The Schools Forum asked for a report at their meeting which showed the effect of capping the gainers at various rates and not just 1.5%. Tania Craig said that further work the Special Schools was required in developing the new banding system. Tania Craig to arrange a meeting with officers of Special Schools and Schools with Resource Bases. Tania Craig to report back to the next meeting of the Schools Forum.

A return will be sent to the EFA on 31<sup>st</sup> October 2013 with the final return in January 2014.

## 8. **SCHOOLS FORUM WORK PROGRAMME**

Dates and agenda items of future meetings were agreed.

## 9. **ANY OTHER BUSINESS**

### i. **Watermore School – Split School Analysis**

KL circulated copies of a letter from Watermore School who had requested that this letter be discussed at Schools Forum.

After discussion, MD suggested members of the Forum should receive further information.

**Action: It was agreed that KL would write to Watermore School Governors and speak to the Headteacher regarding the impact of running two sites. It was agreed to bring this back to the next meeting of the Schools Forum.**

### ii. **School Funding Level**

Richard Badley raised the issue of low level funding in South Gloucestershire compared to other authorities and asked if it would be worthwhile to write to the Government about this on a regular basis.

MD said that F40 is our lead into the DfE and that the Schools Forum will be kept informed of any developments.

### iii. **Free School Meals**

Questions were raised regarding the increase of Free School Meals for all infant aged children and how the LA will fund this.

MD said there would be an increase of 60,000 free school meals a week. The LA is waiting for legislation which is due out in the Autumn.

**Action: Schools Forum members were asked to put in writing any questions/concerns to MD who would then arrange for Kay Knight to come and talk to the Schools Forum on 5<sup>th</sup> December.**

ii. **Agenda Items for Schools Forum**

A request was made if there would be an opportunity for Schools Forum members to bring agenda items to future meetings.

**Action: It was agreed that items could be sent to either KL or MD and perhaps for a small group to have a preliminary meeting before the main Schools Forum meeting.**

iii. **School Balances**

Steve Forecast and Mark Dee had met with KL to discuss school balances.

KL will be writing to schools that are in breach. He also asked if a presentation should be made to CYP Committee about the principle and rules concerning individual schools with large balances.

**Action: It was agreed that there should be a submission made to CYP Committee. MD would make a submission to the CYP Lead Members first before going to CYP Committee. KL to produce a paper and send to MD for comment.**

**Meeting closed 18.10**





## **SPECIAL SCHOOLS AND RESOURCE BASE FUNDING 2014/2015**

At the last meeting of the Schools Forum a discussion took place concerning the proposals for the funding of Special Schools and Resource Bases. During the discussion it became apparent that the Forum wished to receive further information regarding the schools concerned. It was agreed that Tania Craig, Special School Headteacher representative would meet officers of Special Schools and Schools with Resource Bases.

Tania would then report back to the Schools Forum at this meeting.

Unfortunately Tania is unable to attend today; however Lisa Parker, Headteacher, Warmley Park School and Andrew Buckton, New Siblands School will attend the meeting for this item.

### **RECOMMENDATION:**

Members of the Forum are requested to comment and consider this report and make their views known.



## **WATERMORE PRIMARY SCHOOL – SPLIT SITE ANALYSIS**

At the last meeting of the Schools Forum a short discussion took place concerning the letter received by the Chair of the Schools Forum from Watermore Primary School.

It was agreed to have a further discussion at this meeting about the impact of running a school from two sites.

Attached is the latest information that has been received from Watermore Primary School.

### **RECOMMENDATION:**

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

22<sup>nd</sup> November 2013

Dear Keith

**For the attention of the Schools Forum**

The governors of Watermore are grateful to have the opportunity to further put our case to the Schools Forum for consideration of an increase in the Split Site Allowance. I am writing on behalf of my governors to answer the specific questions that you have asked us in relation to our request for a review of the split site allowance.

Who first proposed the amalgamation?

Several years ago, Highcroft Junior School proposed to Brockeridge Infants School that they should consider joining together in some form or another, due to falling rolls and an increasingly unsustainable financial future for both schools. Highcroft put various suggestions on the table for discussion, hard and soft federation and amalgamation. After lengthy discussions, Brockeridge would agree only on the condition that there was an amalgamation and also on the assurance that there would be a new build on the Highcroft site. Brockeridge governors made it quite clear that they would not agree to an amalgamation without the assurance of a future new build. The local authority was fully involved at all stages, and held consultation meetings for parents and the community. Over years of discussions, various plans for the development of the Highcroft site were drawn up. The last of these, approximately five years ago, had two different options. One was for a total new build at the Highcroft site; the second was for a remodelling, updating and extension of the Highcroft building. Given the state of the existing building (with identified needs including re-roofing, re-wiring, a new boiler and insulation), it was felt that a re-build was preferable as it would cost close to the same figure to remodel the existing.

Neither governing body, of Highcroft or Brockeridge, would have agreed to amalgamation if they had not had the local authority's commitment (at that time) to including a new build of some kind for Watermore.

When I was appointed in 2010 as the first headteacher for Watermore, this was on the basis of a new build as described above, explained to me as having a likely timescale of three to five years. The vision for the new school, held by the governors, staff, parents and pupils of both previous schools, was to be on one site, and the local authority supported this vision.

Within months the capital programme was slashed, and this vision saw no sign of becoming a reality.

What additional costs can you identify which you incur over and above the usual split sites arrangements?

Attached to this letter, please find a breakdown of the additional costs that we incur as a result of being on one site.

You state that savings have already been made in staffing etc. Please detail.

There was some voluntary reduction in support staff at the point of amalgamation (general assistant and admin assistant at Highcroft). Since January 2011, the following cuts in staffing have also been made:

- Reduction in teaching staff of 1.4 fte (on top of another 1 fte due to a reduction in class numbers)
- Reduction in administrative support of 8 ¼ hours per week
- Reduction in caretaking hours by 12 ½ hours per week
- Reduction in lunch break supervisors by 7 ½ hours per week
- Reduction in teaching assistants on permanent contracts by 1¾ hours per week (despite an increase in children with statements of SEN, also retained to cover PPA instead of teachers)

We have reduced staffing significantly, and if we are honest in some areas further than we really need. (For instance caretaking and administrative support, which are extremely stretched). This has been a gradual reduction year on year, as the start-up boost to the finances has been eaten away. As our budget currently stands, we are projected a deficit budget and we can see nowhere else to make cuts in staffing. In addition to reductions in staffing, we have been prudent with our, reducing costs wherever we can, but we have found it extremely difficult to be financially efficient working over two sites. Our two premises are a major issue, as both Highcroft and Brockeridge had done only essential repairs and maintenance for several years, expecting a new build. We have had major expenditure on repairing roofs and maintaining our heating plant, for instance. We receive only one pot of capital funding, despite being on two sites. £6,000 for two buildings in poor condition does not allow us to make repairs suggested in health and safety inspections (e.g. resurfacing decaying playground surfaces).

Where are you with any representations to the authority re closing and selling one site to finance work on the other site to accommodate the whole school?

Richard Pearce, Vice Chair of Governors and chair of Finance, has been in communication with Claire Medland and so far we have not been able to progress this. However, we are determined to reach this conclusion and have recently formed a new committee to work towards this end.

Please set out the staffing structure you have in place at each site

EYFS / KS1	KS2
(3 classes, 2 statemented children)	(4 classes, 4 statemented children)
Headteacher (works across both sites)	
SENCO 0.4 (works across both sites)	
Senior teacher TLR2 (0.9 class teacher)	Deputy Head (0.6 class teacher, also provides cover)
2 fte additional class teachers	3.4 fte additional class teachers
Senior administrator	Admin assistant
1.9 fte teaching assistants	2.7 fte teaching assistants
LA cleaning contract	2 cleaners
LA catering contract	LA catering contract

Are you able even approximately able to show a budget figure for each site?

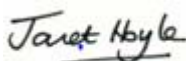
This has proved impossible to do within this time scale, as our Finance Officer has been unable to give us any extra time due to budget reviews. However, we have been able to give accurate estimates of the additional cost of being on two sites.

The main facts are:

- We brought into this financial year £88,464. This figure is high because we have been prudent in using the 'start up' grant to subsidise the first three years of Watermore. We are forecast to carry forward into next year £50,043 even having set the tightest of budgets. This means that we are not able to run our school on the budget given. There is a shortfall of £38,000 this year.
- The attached spreadsheet shows that by our calculations the additional cost of working across to sites is £81,947 this year. This is over £20,000 more than the split site allowance.
- We need significant extra funding to avoid having to make cuts that would have a detrimental effect on our pupils' learning and our working environment.
- As outlined in the previous letter from my governors, we have a leadership model that is not sustainable working across two sites. To provide an additional day per week of non-class-based leadership time would cost us an additional £10,000, which we cannot afford.

I am happy to provide any additional information that you feel the Forum needs in order to consider this request.

Yours sincerely



Department for Children, Adults & Health - Schools Forum

5<sup>th</sup> December 2013

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Janet Hoyle  
On behalf of Watermore Governing Body



Area of expenditure		Notes	Estimate for one site	Notes	Additional cost
Staff: Caretakers	£14,133		£9,893	Reduction from 25 to 17 1/2 hours	£4,240
Staff: Cleaners	17,729	£9,129 (2 x 12.5) hours & £8,600 cleaning contract	£10,954	30 hours cleaning	£6,775
Staff: Admin	£39,119	Senior administrator 34.25 hrs Admin assistant 28.75 hrs	£27,476	Senior administrator 34.25 hrs Admin assistant 10 hrs	£11,643
Staff: Lunch break supervisors	£25,246	58.68 hrs	£20,087	46.69 hrs	£5,159
Staff: Leadership team		3 days leadership / week		2 days leadership / week	£11,780
Energy costs: Electricity	£9,800		£5,600	Based on KS2 cost x 1.4	£4,200
Energy costs: Gas	£5,000	KS2 site only	£7,500		
Energy costs: Fuel Oil	£13,000	KS1 site only	0		£10,500
Energy costs: Kitchens					
Water	£3,964		£2,774	KS2 cost x 1.4	£1,190
Admin costs & equipment	5,500	2 sites	3,500	1 larger site, estimate	£2,000
General repairs and maintenance	10,000	High due to poor condition of both buildings	4,000	On the basis of improved building quality	£4,000
Health and safety	1,000		600		£400
Grounds maintenance	£6,110	2 grounds contracts	£4,200	KS2 site only	£1,910
Waste removal	£2,000		£1,300	2/3 no of bins	£700
Service contracts	3,300		£1,800	savings on 2 sites	£1,500
Contracts: other					
ICT support: curriculum	8,000		6,000		£2,000
ICT support: admin - server backup				reduction for one server	£200
ICT support: admin - server				replace one / 4yrs instead of 2	£1,000
Curriculum ICT equipment	10,500		6,000	Reduce to one ICT suite / share resources across both KS	£3,500
Traded service: insurance	£5,606			estimate	£1,200

Traded services: cash collection	£1,550			estimate	£500
Education resources costs	16,000	includes furniture	10,000	estimate	£6,000
Occasional costs - shows etc	1,500			estimate	£750
Books and publications	2,000		1,200	ability to share resources	£800
				Total	£81,947.00

## **CALLICROFT PRIMARY SCHOOL – BREACH FUNDING**

A request to consider the funding at Callicroft Primary School has been received by the Chair of the Schools Forum.

The paper received from the Callicroft Primary School is attached at Appendix A.

This paper will be presented to the Schools Forum by the Headteacher of the School.

### **Recommendation:**

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

### Submission to Schools Forum re breach funding at Callicroft Primary

#### Background

Callicroft was approached by the LA in 2011/12 to breach numbers from 30 to 60 in 2012/13. This was agreed by the Headteacher and governing body at that time.

A small capital project to remove a classroom wall and erect folding doors took place in the summer holidays.

In September 2012 only 35 pupils joined the Reception year. Due to infant class sizes, this meant that two Reception classes had to be created. This also meant that an additional teacher, an additional teaching assistant and an additional LBS had to be employed.

This cohort are now Year 1 and remain in two classes. The class sizes of surrounding year groups will not allow for creating mixed age classes.

Callicroft is in an extremely vulnerable position. The substantive Headteacher left her post in October 2012. Two interim headteachers were then in place until a seconded headteacher took up position in June 2013. The school was at risk of being placed in an OfSTED category. However, has now been judged as RI and is being closely monitored by HMI.

#### Issues

- The school only received breach funding for one year.
- The school must continue to have two classes for this cohort, at least until they move into KS2.
- Ghost funding no longer exists for infant classes.
- This creates a significant shortfall in the school budget.

#### Conclusion

The request to breach numbers came from the LA and their plans to address the need for more pupil places in the local area.

It was known to the LA that admission numbers were not as high as predicted before pupil place allocation. The breach should have been shelved at this point.

The school is now funding the extra class teacher and teaching assistant without any additional funding from the LA.

The school could have all children in one class in this exceptional circumstance but the governors and SLT feel this would increase the vulnerability of the school, impact adversely on results and would be detrimental to the children's education.

Therefore, the school requires additional funding.

It should be noted that this is not a falling roll situation but a request to breach numbers that was ill conceived.

### Costs to school

	Reception Sept 12 - March 13	Reception April 13 - Aug 13	Year 1 Sept 13 - March 14	Year 1 April 14 - Aug 14	Year 2 Sept 14 - Mar 15	Year 2 April 15 - Aug 15
Class Teacher (M6) progressing to UPS1 in Yr 2	£22,423.00	£16,165.00	£22,862.00	£16,326.00	£25,057.00	£17,897.00
Full time TA (H9)	£8,985.00	£7,400.00				
Part time TA (H10)			£4,802.00	£3,494.00	£4,892.00	£3,494.00
Lunch Supervisor (H13)	£1,272.00	£1,076.00	£1,507.00	£1,096.00	£1,535.00	£1,096.00
<b>Total per period</b>	<b>£32,680.00</b>	<b>£24,641.00</b>	<b>£29,171.00</b>	<b>£20,916.00</b>	<b>£31,484.00</b>	<b>£22,487.00</b>
<b>Financial Year</b>	Apr 12 - March 13	Apr 13 - March 14	Apr 14 - March 15	April 15 - March 16		
	£32,680.00	£53,812.00	£52,400.00	£22,487.00		

### Funding to school

2012/13

£17,489	expanding schools
£17,343	infant class sizes
<b>Total £34,832</b>	



## **SCHOOL BROADBAND 2015 ONWARDS**

The school broadband contract is due for renewal at the end of March 2015.

Schools ICT Services are now in a position to seek comments from the Schools Forum before consulting with schools on the proposals for the future provision of school broadband from March 2015.

Appendix A provides further details.

### **RECOMMENDATION:**

Members of the Forum are requested to make their views known.

## **SOUTH GLOUCESTERSHIRE SCHOOLS BROADBAND AND INTERNET ACCESS**

### **BROADBAND & INTERNET SERVICES 01APR15 TO 31MAR20**

#### **INTRODUCTION**

##### **Background**

The vision is for South Gloucestershire to have in place an arrangement where all children and young people have capable, safe, appropriate and well supported access over broadband connectivity to the internet and to services in support of learning and administration whilst at school or at young people's settings. The existing contract for these services with the South West Grid for Learning ends on 31st March 2015.

The council recently conducted a further competition using the Government Procurement Services Framework RM 860 for PSN connectivity services to deliver new, innovative and cost effective network services to meet the current and future network requirements.

##### **Objectives**

The current economic landscape and the coalition Government's 'efficiency and reform' agenda have created an environment within which all Public Sector organisations are required to examine more closely than ever how they deliver services to users, employees and citizens alike. The objective of the invitation to tender (ITT) was to:

- Reduce the expenditure on the current network significantly in the order of 30%+
- Reduce and simplify the network management overhead that is placing additional strain on IT and network management resources.
- Provide an efficient and effective connectivity service that delivers performance, reliability and availability to all schools.
- Remove current practice of using Council & school sites as aggregation locations to negate any disruptive changes in the future.
- Appoint a preferred supplier to enable collaborative working and PSN compliant connectivity to all sites within the region.
- Establish a service continuity and value for money roadmap for the schools network and support requirements beyond March 2015.
- Provide a security architecture that delivers a service at a minimum of II2 where required.



## Competition

The Council received 5 completed Invitation to Tenders which were evaluated for price and quality on a 70:30 (Price: Quality) mix. The combined scores from the evaluation are shown below:

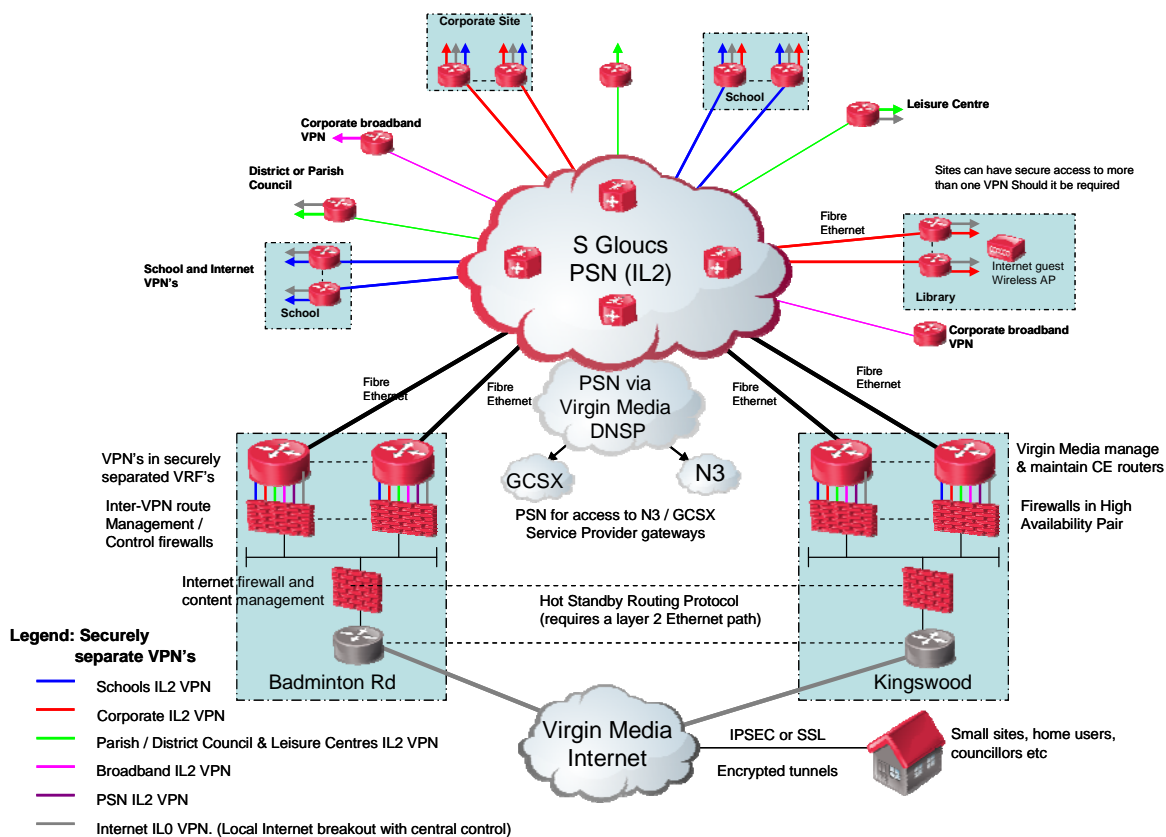
	<b>BT</b>	<b>Eircom</b>	<b>Logicalis</b>	<b>MDNX</b>	<b>Virgin Media</b>
Price Score	44.33	8.29	22.40	29.25	62.40
Quality Score	7.96	13.58	12.20	17.58	23.04
<b>TOTAL</b>	<b>52.29</b>	<b>21.88</b>	<b>34.60</b>	<b>46.83</b>	<b>85.44</b>
Rank	2	5	4	3	1

The outcome clearly shows that Virgin Media have offered the most cost effective solution. The fully managed IPVPN proposal from Virgin Media Business will exceed on both of these objectives as demonstrated in their response to the published ITT.

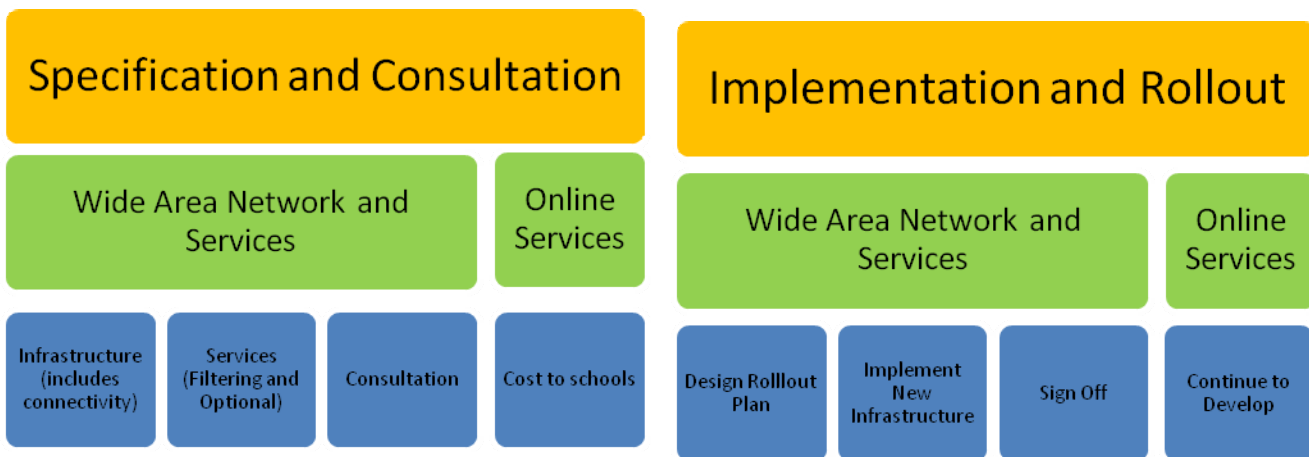
The solution provides a more all-inclusive approach to the way these services are delivered in line with the Council's Target Operating Model (standardise, simplify and share services). Traded and Support Services' delivery model for the future broadband seeks a fresh approach to the provision of the services and where necessary shares services to reduce costs.

## Project Specific

The nature of the solution offered by Virgin Media allows all South Gloucestershire Council sites, Schools, Parish/District Councils, Leisure Centres and library's to procure from the same framework and share the same technology for connectivity. In particular the proposal will allow both Schools and the Council to work securely offering services across the network without dependency on site connectivity. This will enable established trading relationships to continue and provide the flexibility in the future to provide additional services. The costs submitted by Virgin Media are fixed for the term of the contract.



The project will be split into 2 phases:



**Specification and Consultation November 2013 – April 2014**

This phase will deal with finalising costs associated with the new Wide Area Network (WAN) Services, filtering, optional and online services in order to take to Schools and Academies for consultation.

**November 2013 - Specification**

Finalise project costs in the following areas:

- Main Virgin contract – Connectivity
- Internet Backhaul and Transit
- Internet Content Filtering
- Secure File Transfer
- Remote Access
- Traded Services Costs
- IT Hardware

The new broadband infrastructure will be a fully managed service delivered solely by Traded ICT, with its own dedicated account manager at Virgin Media.

**January– April 2013 – Consultation**

Following the finalisation of all the costs associated with the project, full consultation with every school will take place in the New Year to ensure a full understanding of the offering and to secure a commitment to the migration.

**May 2014 – March 2015 Implementation and Rollout**

In partnership with Virgin Media a full project rollout plan will be drawn up for implementation in early 2015, with parallel running of the networks until all schools are migrated by the end of March 2015.



## **SCHOOL MEALS**

At the last meeting of the Schools Forum a short discussion took place concerning the Government's proposal to provide free school meals to all infant aged pupils from September 2014.

School Forum Members were requested to put in writing any questions to Martin Dear. These questions would then provide a basis of a further discussion at this meeting. Seven questions have been received and these are attached with a response in Appendix A. Also attached is the letter that has been sent to Primary School Headteachers which included a school meal audit questionnaire, see appendix B.

### **RECOMMENDATION:**

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

## School Meals Question and Answers

1. How much is the school meal grant to local authorities (overall/per pupil)?  
 The School meal grant was £241,000, equating to £11.51 per pupil, which was delegated to schools in April 2013 as part of the meals budget.

2. How is this currently used? What is the split between admin; investment in improving infrastructure; subsidising food costs etc?

The Government required the money to be targeted on direct staff employment, food costs and training, in order to keep the selling price of meals at an affordable level for families just above the FSM threshold. A number of catering providers have, directed most of this money into higher-level training programmes, whereas South Gloucestershire has followed the Government directive in keeping meal prices at an affordable level for those less well off, by directing the main body of money to staff employment and food costs.

3. How is money currently allocated to local authorities for FSM children? How much is this worth per FSM pupil? How does this change if numbers go up/down?

The money is incorporated into the DSG and identification of the meals budget is based on historical data culminating in a budget of £2,039,000 (excluding utilities) being delegated to Primary schools in April 2013 on the following basis:

- £10,900 lump sum per school
- £11.51 per pupil meal grant
- £1.75 per FSM entitlement

The majority of the utilities budget was delegated to schools some ten years ago. However, the remaining (albeit small) sum was incorporated into the delegations to schools in April 2013.

4. How does the price of school meals in South Glos compare with other authorities (not just neighbouring)

According to data collected by the Children's Food Trust twelve months ago, the average price of a school meal in England was £1.98

5. How many schools have opted out of the catering service?

One: St Michael's CEVC Primary School, Stoke Gifford

6. Where schools opt out of the LA catering service, how would any changes in FSM numbers (up or down) be met?

Changes would be made once per year (in April).

7. How does the catering service intend to meet the challenge of free school meals for all KS1 children from Sept 2014:
- Capacity of current kitchens to double numbers
  - Infrastructure: space; equipment
  - Staffing

Please see letter sent to schools in November 2013; audit questionnaire now being addressed in schools.



## Department for Children, Adults and Health

To: Headteachers of all Infant and  
Primary Schools in South Gloucestershire

Date: 4 November 2013

Your Ref:

Our Ref:

Path:

Enquiries to: Kay Knight

Tel: 01454 863246

Fax: 01454 863955

E-mail: [kay.knight@southglos.gov.uk](mailto:kay.knight@southglos.gov.uk)

Dear Colleague

### **Proposal to Provide Free School Meals to all Infant Pupils (from September 2014)**

You will no doubt be aware of the Government's proposal to provide free school meals to all infant pupils from September 2014.

Unfortunately, we have been unable to access any information on this proposal from the DfE, but it has been confirmed that an announcement, providing details, will form part of the Government's Autumn Statement (usually delivered early in December).

However, in preparation for the potential changes that this would bring – and the need to ensure bespoke arrangements for each school – I am initiating a service audit of the catering provision at each school. In the first instance, this will involve an analysis of our current service provision to you.

Along with the audit, I have raised other associated issues that have to be addressed across other areas of the Council (such as Health & Wellbeing ; handling enquiries from parents regarding free school meal entitlement ; the funding to schools that is based on FSM eligibility (deprivation funding) ; SIMS administration; availability of Capital funding ; Pupil Premium etc.)

The information gathered from the above, together with full details of the Government's proposals, will enable meaningful consultation to take place with Headteachers on the requirements for implementation, considering the



ramifications both to the catering service and the school. Due to the diversity and variance of service provision across all schools, I believe that such consultation needs to be carried out on an individual basis and therefore Catering Managers will shortly be seeking to arrange an appointment with you in the New Year to progress this matter.

Please be assured that I will provide you with further information as it becomes available.

Yours faithfully



Kay Knight  
Head of Traded Services

## School Meal Audit Questionnaire

**School Name:**

**Catering Manager:**

**Potential Additional Daily Meals:**

### 1 General Questions

1.1 What services are currently delivered in the school:

	Service Times	
	From	To
Breakfast		
Tuck		
Lunch		
Staff Basket		
After School		

1.2 Please give details of staffing in the Kitchen

Job Title	Hours Worked (per week)	Start Time	Finish Time

1.3 Can Existing Staff accommodate additional working hours (earlier or later, excluding Breakfast)?

Staff Name	Post Held	Yes/No

1.4 In the opinion of the Unit Manager, how many extra hours/staff would be required to facilitate the additional number of meals?

	Additional Hours for New Staff (pw)	Additional Hours for Existing Staff (pw)
Unit Manager's Opinion		
Catering Manager's Opinion		

## 2 Dining Facilities

2.1 Do any Sandwich Eaters eat their lunch in the Dining Room?

2.2 How many Sandwich Eaters to a table?

2.3 How many School Lunch Eaters to a table?

2.4 Does the school mix Sandwich Eaters and School Lunch Eaters on tables?

		Number per Table
Yes		
No		

2.5 Are Sandwich Eaters accommodated anywhere other than in the Dining Room?

		If so, where?
Yes		
No		

2.6 Is the Dining Room Sole Purpose, or Dual Use? (Please provide details)

Sole Purpose	
Dual Use	

2.7 Who sets up and dismantles tables/chairs etc for the lunchtime service?

	Catering Staff	School Staff
For Sandwich Eaters		
For School Lunches		

2.8 Is there enough space in the Dining Room for a Hot Trolley to be used as a Service Point?

Yes	
No	

2.9 If so, is a power socket available to accommodate a Trolley?

Yes	
No	

2.10 What is currently used to serve the food?

	Yes	No
B/S Service from Unheated Counter		
Bain Marie Counter with no heated storage below		
Bain Marie Counter with heated storage below		
Hot Trolley in Dining Room		

2.11 If needed, is there enough space in the Dining Room or Kitchen to store a Hot Trolley?

	Yes	No
Dining Room		
Kitchen		

2.12 How is Food Waste dealt with in the Dining Room?

--

2.13 Are Plates or Airline Trays used by the Infants?

	Yes	No
Plates		
Airline Trays		

### 3 Kitchens

3.1 Based on current storage facilities, how many deliveries (per week) would you need to accommodate the new meal numbers?

	No. of Deliveries Needed	Current No of Deliveries
Fresh Meat		
Frozen/Chilled Food		
Grocery Provisions		
Fruit & Veg		

3.2 Is there sufficient space to store additional cutlery and crockery for the increased meal numbers?

Yes	
No	

3.3 Is there sufficient light equipment (pots, pans, tins, utensils etc) in the kitchen to accommodate the increased meal numbers?

Yes	
No	

3.4 Are the washing-up facilities in good order, to facilitate the additional meal numbers?

Yes	
No	

3.5 Is there sufficient cooking equipment, in good order, to facilitate the additional meal numbers?

Yes	
No	

Comments

--

3.6 What menu changes might be needed to facilitate the additional meal numbers within existing equipment resources?

--

3.7 Does the kitchen currently have an office?

Yes	
No	

3.8 Would you require additional refuse arrangements?

Yes	
No	

3.9 Are any external areas available for storage purposes (eg for siting a shed)?

Yes	
No	

#### 4 Other Issues

4.1 If there are any other issues that you think will affect the increased meal numbers, please use the space below to give us your comments. We would welcome your input.

--

Signed:.....

Date:.....

## SCHOOL RATES

Prior to 2013/2014 school rates were adjusted in year to reflect actual cost.

Under the 2013/14 schools funding arrangements, funding for school rates allocations were based on estimated costs within the School Block Formula. Any variations between estimated costs and actual costs were to be adjusted in the following financial year. However, the DfE have now revised the 2013/14 funding arrangements and in-year school rates funding adjustments are now permitted.

The 2013/14 budget allocated to schools for school rates was £2,524,000. Since at the time of allocating funding to Schools no in year adjustment was allowed no central provision was made for this.

Appendix A provides details of the variances for Schools between estimated and actual school rates costs.

Members of the Schools Forum will need to decide if an in year adjustment should be made. If there is agreement for an in year adjustment then the funds required to implement this will either come from an underspend when closing the accounts or will create an overspend going into 2014/2015.

### **Recommendation:**

Members of the Forum are requested to decide if they wish to make an in year adjustment or not.

## SCHOOLS BUSINESS RATES CHARGES AND FUNDING ANALYSIS

School Name+D33	Financial Year 2013/2014		
	Financial Year - Schools Block Formula Allocation £ (a)	Actual Business Rates costs in year £ (b)	Variation relates to Financial Year 2013/14 £ (d)
Blackhorse Primary School	37,680	49,455	11,775
Callicroft Primary	18,016	17,870	(146)
Courtney Primary School	34,148	33,912	(236)
Frenchay C of E School	2,002	1,964	(38)
Hambrook School	6,712	6,584	(128)
Iron Acton CEVC Primary School	1,554	1,525	(30)
Manor C of E School	21,770	21,763	(6)
Manorbrook Primary	12,599	13,621	1,021
Meadowbrook Primary	42,155	39,513	(2,642)
North Road Community Primary School	3,580	3,511	(68)
Old Sodbury School	2,967	2,911	(57)
Oldbury on Severn CE VC Primary School	2,449	2,402	(47)
Rangeworthy	3,438	3,373	(66)
Severn Beach C.P. School	8,007	7,854	(153)
St Andrew's C of E VC Primary	1,884	1,848	(36)
St Barnabas CE Primary School	15,072	12,888	(2,184)
Staple Hill Primary	37,680	50,314	12,634
Tortworth V C Primary School	3,956	3,881	(76)
Trinity CE Primary School	5,417	5,313	(104)
Watermore Primary	16,485	16,339	(146)
<b>Primary Total</b>	<b>277,570</b>	<b>296,838</b>	<b>19,268</b>
Hanham High School	114,863	114,855	(8)
The Grange School and Sports College	95,566	95,558	(8)
The Sir Bernard Lovell School	79,811	138,599	58,788
<b>Secondary Total</b>	<b>290,240</b>	<b>349,012</b>	<b>58,772</b>
Abbeywood Community School	45,923	48,042	2,120
Bradley Stoke Community School	28,731	45,923	17,192
The Ridings Federation Winterbourne International Academy	31,679	31,675	(5)
<b>Academy Total</b>	<b>106,333</b>	<b>125,639</b>	<b>19,306</b>
<b>TOTAL OVERALL</b>	<b>674,142</b>	<b>771,489</b>	<b>97,347</b>



## MINIMUM FUNDING GUARANTEE AND GAINING SCHOOLS

At the last meeting of the Schools Forum a short discussion took place concerning the effect on restricting schools gaining from the formula changes to an increase of 1.5% each year.

A report was requested to be presented at this meeting of the effect of changing the percentage amount.

In order to achieve a net nil budget the increase in funding to the 'gaining schools' needs to be met from within the Schools Block of the Dedicated Schools Grant. For the purposes of this report it has been assumed that this will mean a reduction in the Per Pupil rate for Basic Entitlement (age weighted pupil unit). The change in the rates is shown in the table below.

	Basic Entitlement		
	Primary £	KS3 £	KS4 £
2013/14 Schools Block Formula with 1.5% MFG Gain Cap	2,392.10	3,782.40	4,026.01
2% MFG Gain Cap	2,375.24	3,755.74	3,997.63
2.5% MFG Gain Cap	2,366.94	3,742.61	3,983.66
3% MFG Gain Cap	2,361.14	3,733.45	3,973.91
No MFG Gain Cap	2,344.51	3,707.15	3,945.91
Variation			
2% MFG Gain Cap	- 16.86	- 26.66	- 28.38
2.5% MFG Gain Cap	- 25.16	- 39.79	- 42.35
3% MFG Gain Cap	- 30.96	- 48.95	- 52.10
No MFG Gain Cap	- 47.59	- 75.25	- 80.10

Attached, as Appendix A, is the table showing the impact for all schools of varying the percentage level.

### Recommendation:

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

School Name+D33	Financial Year 2013/2014 - Schools Block Formula with MFG 1.5% Gain Cap		
	Financial Year - Schools Block Formula Allocation £	Minimum Funding Guarantee Allocation £	Minimum Funding Guarantee % change between years %
Abbotswood Primary School	1,020,679	(11,739)	2.97%
Alexander Hosea	802,248	0	0.41%
Almondsbury C/E School	892,425	0	0.09%
Bailey's Court	1,300,786	368	-1.53%
Barley Close Community Primary	864,812	2,197	-1.83%
Barrs Court Primary School	973,100	(31,538)	5.68%
Beacon Rise	1,360,959	0	-0.33%
Blackhorse Primary School	1,204,999	40,623	-5.60%
Bowsland Green	971,325	(5,337)	2.22%
Broadway Infants' School	620,007	(27,232)	7.85%
Bromley Heath Infant School	622,441	0	1.35%
Bromley Heath Junior School	738,194	(40,065)	8.89%
Cadbury Heath Primary	714,157	(31,693)	7.80%
Callicroft Primary	848,829	(3,788)	2.10%
Charborough Road Primary School.	914,863	0	1.47%
Charfield Primary (converted to academy September 2013)	663,171	(1,591)	1.84%
Cherry Garden Primary School	678,221	0	-0.12%
Christ Church C o E VC Infants	744,292	(27,484)	6.54%
Christ Church C of E VC Junior	966,306	(6,641)	2.39%
Christ Church Hanham CofE Primary	782,597	(20,501)	5.02%
Christ the King R.C. School	492,816	28,969	-10.40%
Coniston Primary	716,689	0	-0.84%
Courtney Primary School	751,524	(32,356)	7.66%
Crossways Infants School	549,259	7,910	-3.62%
Crossways Junior	712,985	(15,896)	4.58%
Elm Park Primary School	960,320	0	1.29%
Emersons Green	840,929	54,038	-9.85%
Filton Hill	703,181	(26,423)	6.81%
Frampton Cotterell Church of England Primary School	844,770	0	-1.27%
Frenchay C of E School	490,274	0	-0.61%
Gillingstool Primary School	705,061	60,051	-13.97%

Hambrook School	660,338	(20,197)	5.79%
Hanham Abbots	1,109,028	29,654	-4.72%
Hawkesbury CE VC Primary	430,615	35,993	-15.59%
Holy Family Catholic Primary	700,448	0	0.88%
Holy Trinity	687,889	(16,580)	4.83%
Horton CE Primary	331,976	4,853	-4.40%
Iron Acton CEVC Primary School	350,248	(17,558)	11.38%
Kings Forest	1,306,595	(18,674)	3.31%
Little Stoke Primary	660,042	(8,674)	3.40%
Longwell Green County Primary	1,185,068	0	0.05%
Mangotsfield Primary School	1,394,145	0	1.15%
Manor C of E School	698,167	(2,812)	2.07%
Manorbrook Primary	655,973	(27,306)	7.44%
Marshfield CE VC Primary School	608,912	12,451	-4.44%
Meadowbrook Primary	1,285,945	(19,252)	3.37%
North Road Community Primary School	399,252	(9,530)	5.78%
Old Sodbury School	344,592	(8,163)	6.24%
Oldbury on Severn CE VC Primary School	311,520	(15,231)	12.23%
Olveston School	674,314	(22,079)	6.12%
Our Lady of Lourdes R.C.V.A.	661,089	(48,436)	11.74%
Parkwall Primary School	635,927	28,157	-7.78%
Pucklechurch CE VC Primary	805,613	0	0.96%
Rangeworthy	333,331	6,860	-5.61%
Raysfield Infants' School	625,021	5,161	-2.66%
Raysfield Junior School	689,108	(5,857)	2.69%
Redfield Edge Primary School	691,353	(36,382)	8.90%
Ridge Junior School	759,323	(21,161)	5.29%
Samuel White's Infant School	808,166	(28,662)	6.23%
Severn Beach C.P. School	417,728	(18,876)	9.53%
Shield Road Primary School	715,207	(1,097)	1.72%
St Andrew's C of E VC Primary	280,340	(57)	1.55%
St Anne's C of E School	1,132,937	(543)	1.56%
St Augustine of Canterbury Catholic Primary	910,382	(9,370)	2.81%
ST Barnabas CE Primary School	746,906	(11,017)	3.53%
St Chad's Patchway C.E. Primary School	854,819	(54,178)	9.85%
St Helen's CE Primary	671,936	(23,355)	6.40%
St Johns Mead	917,101	(21,272)	4.53%
St Mary's C.E. Primary School	967,184	(16,585)	3.66%
St Mary's Catholic Primary School	708,931	(13,965)	4.20%
St Mary's CE Primary School	560,247	0	-0.01%
St Michaels CEVC	1,743,649	(37,606)	4.06%

St Michael's Winterbourne	705,689	(22,334)	5.88%
St Pauls	712,026	14,253	-4.15%
St Peter's Anglican/Methodist VC Primary School	721,837	(1,087)	1.71%
St Stephen's Infants' School	888,788	(15,362)	3.78%
St Stephen's Junior School	1,113,277	(23,399)	4.12%
Stanbridge Primary School	1,298,431	(14,475)	2.87%
Staple Hill Primary	1,164,288	(5,620)	2.12%
Stoke Lodge Primary (converted to academy October 2013)	1,204,451	0	0.66%
The Meadows Primary School	690,054	(26,716)	6.98%
The Park Primary	1,712,257	0	-0.10%
The Tynings School	871,779	(3,036)	1.95%
Tortworth V C Primary School	334,883	3,997	-3.89%
Trinity CE Primary School	496,145	0	0.63%
Tyndale Primary	829,358	23,319	-5.23%
Watermore Primary	789,778	15,703	-4.11%
Wellesley Primary School	688,111	(15,474)	4.64%
Wheatfield Primary School	1,260,734	(84,527)	9.91%
Wick CEVC Primary School	605,895	0	0.50%
<b>Primary Total</b>	<b>71,971,365</b>	<b>(654,232)</b>	
Brimsham Green	4,475,466	(152,492)	5.29%
Chipping Sodbury School	3,182,536	(23,675)	2.34%
Hanham High School	3,872,946	(17,683)	2.01%
Mangotsfield	5,206,592	(205,348)	5.89%
Marlwood	3,959,203	(56,787)	3.09%
Patchway Community College (converted to academy November 2013)	3,209,954	34,813	-2.69%
The Grange School and Sports College	3,438,765	0	0.99%
The Sir Bernard Lovell School	4,409,687	0	0.50%
<b>Secondary Total</b>	<b>31,755,149</b>	<b>(421,172)</b>	
Abbeywood Community School	3,407,594	212,037	-8.18%
Bradley Stoke Community School	4,117,074	0	0.15%
Downend School	4,834,255	(54,778)	2.72%
King's Oak Academy	2,832,790	144,946	-7.01%
The Castle School	5,907,072	119,144	-3.60%
The Ridings Federation Winterbourne International Academy	6,368,983	0	1.04%
The Ridings Federation Yate International Academy	3,515,405	157,671	-6.28%
<b>Academy Total</b>	<b>30,983,173</b>	<b>579,020</b>	
<b>TOTAL OVERALL</b>	<b>134,709,687</b>	<b>(496,384)</b>	

Supplementary Analysis		
MFG Losers Protection	1,043,168	
MFG Gains Cap	(1,539,552)	
Total MFG	(496,384)	

MFG Gain Cap change based on 2013/14 Schools Block Formula			
School Name+ D33	2% MFG Gain Cap		
	Revised Schools Block Formula £	MFG Gain Cap based on 2% £	variation 2013/2014 Schools Block Formula and Revised Schools Block Formula £
Abbotswood Primary School	1,024,685	(2,574)	4,006
Alexander Hosea	798,151	0	(4,097)
Almondsbury C/E School	887,501	0	(4,923)
Bailey's Court	1,300,786	7,770	-
Barley Close Community Primary	864,812	6,328	-
Barrs Court Primary School	976,870	(22,626)	3,769
Beacon Rise	1,353,423	0	(7,536)
Blackhorse Primary School	1,204,999	46,794	-
Bowsland Green	971,824	0	499
Broadway Infants' School	622,150	(22,087)	2,144
Bromley Heath Infant School	619,390	0	(3,052)
Bromley Heath Junior School	740,906	(33,273)	2,712
Cadbury Heath Primary	716,671	(25,773)	2,514
Callicroft Primary	849,009	0	180
Charborough Road Primary School.	910,614	0	(4,249)
Charfield Primary (converted to academy September 2013)	661,609	0	(1,562)
Cherry Garden Primary School	675,085	0	(3,136)
Christ Church C o E VC Infants	747,018	(20,998)	2,726
Christ Church C of E VC Junior	967,923	0	1,617
Christ Church Hanham CofE Primary	785,506	(13,647)	2,909
Christ the King R.C. School	492,816	30,857	-
Coniston Primary	713,721	0	(2,967)
Courtney Primary School	754,149	(26,241)	2,625
Crossways Infants School	549,259	10,422	-
Crossways Junior	715,569	(9,585)	2,584
Elm Park Primary School	955,228	0	(5,092)
Emersons Green	840,929	57,882	-
Filton Hill	705,671	(20,628)	2,490

Frampton Cotterell Church of England Primary School	843,264	3,013	(1,506)
Frenchay C of E School	488,116	0	(2,158)
Gillingstool Primary School	705,061	62,664	-
Hambrook School	662,691	(14,607)	2,353
Hanham Abbots	1,109,028	35,673	-
Hawkesbury CE VC Primary	430,615	37,460	-
Holy Family Catholic Primary	697,346	0	(3,102)
Holy Trinity	690,380	(10,666)	2,491
Horton CE Primary	331,976	5,881	-
Iron Acton CEVC Primary School	351,137	(15,388)	888
Kings Forest	1,311,761	(6,832)	5,166
Little Stoke Primary	662,318	(3,565)	2,277
Longwell Green County Primary	1,178,308	0	(6,761)
Mangotsfield Primary School	1,386,204	0	(7,941)
Manor C of E School	697,590	0	(577)
Manorbrook Primary	658,273	(22,073)	2,299
Marshfield CE VC Primary School	608,912	15,267	-
Meadowbrook Primary	1,291,097	(7,323)	5,152
North Road Community Primary School	400,366	(6,864)	1,114
Old Sodbury School	345,452	(6,106)	860
Oldbury on Severn CE VC Primary School	312,229	(13,544)	709
Olveston School	676,701	(16,285)	2,388
Our Lady of Lourdes R.C.V.A.	663,454	(42,699)	2,364
Parkwall Primary School	635,927	30,534	-
Pucklechurch CE VC Primary	801,650	0	(3,962)
Rangeworthy	333,331	7,922	-
Raysfield Infants' School	625,021	8,179	-
Raysfield Junior School	691,508	0	2,400
Redfield Edge Primary School	693,812	(30,517)	2,459
Ridge Junior School	762,116	(14,574)	2,794
Samuel White's Infant School	811,196	(21,266)	3,030
Severn Beach C.P. School	418,903	(16,082)	1,176
Shield Road Primary School	713,218	0	(1,989)
St Andrew's C of E VC Primary	279,672	0	(668)
St Anne's C of E School	1,127,376	0	(5,561)
St Augustine of Canterbury Catholic Primary	913,951	(778)	3,569

ST Barnabas CE Primary School	749,621	(4,778)	2,715
St Chad's Patchway C.E. Primary School	858,064	(46,516)	3,245
St Helen's CE Primary	674,319	(17,583)	2,383
St Johns Mead	920,609	(13,010)	3,508
St Mary's C.E. Primary School	971,016	(7,460)	3,831
St Mary's Catholic Primary School	711,519	(7,903)	2,588
St Mary's CE Primary School	557,550	0	(2,698)
St Michaels CEVC	1,750,987	(20,523)	7,338
St Michael's Winterbourne	708,241	(16,309)	2,552
St Pauls	712,026	17,541	-
St Peter's Anglican/Methodist VC Primary School	719,569	0	(2,268)
St Stephen's Infants' School	892,151	(7,447)	3,363
St Stephen's Junior School	1,117,739	(13,171)	4,462
Stanbridge Primary School	1,303,715	(2,531)	5,284
Staple Hill Primary	1,164,682	0	394
Stoke Lodge Primary (converted to academy October 2013)	1,198,061	0	(6,390)
The Meadows Primary School	692,490	(20,925)	2,436
The Park Primary	1,703,304	0	(8,953)
The Tynings School	870,347	0	(1,432)
Tortworth V C Primary School	334,883	5,025	-
Trinity CE Primary School	493,920	0	(2,226)
Tyndale Primary	829,358	26,927	-
Watermore Primary	789,778	19,210	-
Wellesley Primary School	690,576	(9,503)	2,464
Wheatfield Primary School	1,265,760	(72,707)	5,025
Wick CEVC Primary School	603,097	0	(2,799)
<b>Primary Total</b>	<b>71,999,616</b>	<b>(271,618)</b>	<b>28,247.00</b>
Brimsham Green	4,495,601	(104,912)	20,135
Chipping Sodbury School	3,187,639	0	5,103
Hanham High School	3,868,407	0	(4,539)
Mangotsfield	5,230,005	(149,988)	23,413
Marlwood	3,977,041	(14,311)	17,837
Patchway Community College (converted to academy November 2013)	3,209,954	52,244	-
The Grange School and Sports College	3,418,746	0	(20,019)
The Sir Bernard Lovell School	4,382,739	0	(26,947)



<b>Secondary Total</b>	<b>31,770,132</b>	<b>(216,967)</b>	<b>14,983.00</b>
Abbeywood Community School	3,407,594	230,316	-
Bradley Stoke Community School	4,092,463	0	(24,611)
Downend School	4,856,672	(3,358)	22,417
King's Oak Academy	2,832,790	160,209	-
The Castle School	5,907,072	155,419	-
The Ridings Federation Winterbourne International Academy	6,327,937	0	(41,045)
The Ridings Federation Yate International Academy	3,515,405	176,565	-
<b>Academy Total</b>	<b>30,939,933</b>	<b>719,151</b>	<b>(43,239)</b>
<b>TOTAL OVERALL</b>	<b>134,709,681</b>	<b>230,566</b>	<b>(9)</b>

Supplementary Analysis		
MFG Losers Protection	1,210,102	
MFG Gains Cap	(979,536)	
Total MFG	230,566	
Primary - Variation from 2013/14 Schools Block Formula - highest loser		(8,953)
Primary - Variation from 2013/14 Schools Block Formula - highest gainer		7,338
Secondary - Variation from 2013/14 Schools Block Formula - highest loser		(26,947)
Secondary - Variation from 2013/14 Schools Block Formula - highest gainer		23,413
Academy - Variation from 2013/14 Schools Block Formula - highest loser		(41,045)
Academy - Variation from 2013/14 Schools Block Formula - highest gainer		22,417

MFG Gain Cap change based on 2013/14 Schools Block Formula			
	2.5% MFG Gain Cap		
School Name+D33	Revised Schools Block Formula £	MFG Gain Cap based on 2% £	variation 2013/2014 Schools Block Formula and Revised Schools Block Formula £
Abbotswood Primary School	1,024,719	0	4,040
Alexander Hosea	796,134	0	(6,114)
Almondsbury C/E School	885,078	0	(7,347)
Bailey's Court	1,300,786	11,414	-
Barley Close Community Primary	864,812	8,361	-
Barrs Court Primary School	980,639	(16,325)	7,539
Beacon Rise	1,349,713	0	(11,247)
Blackhorse Primary School	1,204,999	49,832	-
Bowsland Green	969,441	0	(1,884)
Broadway Infants' School	624,294	(18,466)	4,288
Bromley Heath Infant School	617,887	0	(4,554)
Bromley Heath Junior School	743,618	(28,553)	5,424
Cadbury Heath Primary	719,184	(21,583)	5,027
Callicroft Primary	847,233	0	(1,596)
Charborough Road Primary School.	908,522	0	(6,340)
Charfield Primary (converted to academy September 2013)	660,057	0	(3,114)
Cherry Garden Primary School	673,541	0	(4,680)
Christ Church C o E VC Infants	749,744	(16,421)	5,452
Christ Church C of E VC Junior	965,449	0	(857)
Christ Church Hanham CofE Primary	788,414	(8,796)	5,817
Christ the King R.C. School	492,816	31,787	-
Coniston Primary	713,248	987	(3,441)
Courtney Primary School	756,774	(21,898)	5,250
Crossways Infants School	549,259	11,659	-
Crossways Junior	718,154	(5,166)	5,169
Elm Park Primary School	952,721	0	(7,598)

Emersons Green	840,929	59,774	-
Filton Hill	708,161	(16,511)	4,980
Frampton Cotterell Church of England Primary School	843,264	5,237	(1,506)
Frenchay C of E School	487,437	383	(2,837)
Gillingstool Primary School	705,061	63,950	-
Hambrook School	665,044	(10,660)	4,707
Hanham Abbots	1,109,028	38,637	-
Hawkesbury CE VC Primary	430,615	38,182	-
Holy Family Catholic Primary	695,819	0	(4,629)
Holy Trinity	692,872	(6,490)	4,983
Horton CE Primary	331,976	6,388	-
Iron Acton CEVC Primary School	352,025	(13,869)	1,776
Kings Forest	1,315,306	0	8,711
Little Stoke Primary	664,489	0	4,447
Longwell Green County Primary	1,174,979	0	(10,089)
Mangotsfield Primary School	1,382,294	0	(11,850)
Manor C of E School	695,922	0	(2,245)
Manorbrook Primary	660,572	(18,329)	4,599
Marshfield CE VC Primary School	608,912	16,653	-
Meadowbrook Primary	1,295,083	0	9,138
North Road Community Primary School	401,480	(4,987)	2,228
Old Sodbury School	346,312	(4,656)	1,720
Oldbury on Severn CE VC Primary School	312,939	(12,353)	1,419
Olveston School	679,089	(12,221)	4,776
Our Lady of Lourdes R.C.V.A.	665,818	(38,675)	4,729
Parkwall Primary School	635,927	31,704	-
Pucklechurch CE VC Primary	799,700	0	(5,913)
Rangeworthy	333,331	8,445	-
Raysfield Infants' School	625,021	9,665	-
Raysfield Junior School	689,807	0	699
Redfield Edge Primary School	696,271	(26,381)	4,918
Ridge Junior School	764,910	(9,913)	5,587
Samuel White's Infant School	814,226	(16,086)	6,060
Severn Beach C.P. School	420,079	(14,110)	2,351
Shield Road Primary School	711,699	0	(3,508)
St Andrew's C of E VC Primary	279,316	0	(1,025)

St Anne's C of E School	1,124,372	0	(8,565)
St Augustine of Canterbury Catholic Primary	912,255	0	1,873
ST Barnabas CE Primary School	752,337	(328)	5,430
St Chad's Patchway C.E. Primary School	861,309	(41,097)	6,489
St Helen's CE Primary	676,702	(13,532)	4,766
St Johns Mead	924,117	(7,162)	7,016
St Mary's C.E. Primary School	974,847	(1,023)	7,663
St Mary's Catholic Primary Sch	714,107	(3,605)	5,177
St Mary's CE Primary School	556,222	0	(4,026)
St Michaels CEVC	1,758,325	(8,388)	14,676
St Michael's Winterbourne	710,793	(12,047)	5,105
St Pauls	712,026	19,159	-
St Peter's Anglican/Methodist VC Primary School	717,917	0	(3,920)
St Stephen's Infants' School	895,514	(1,843)	6,726
St Stephen's Junior School	1,122,201	(5,871)	8,923
Stanbridge Primary School	1,302,968	0	4,537
Staple Hill Primary	1,162,109	0	(2,179)
Stoke Lodge Primary (converted to academy October 2013)	1,194,915	0	(9,536)
The Meadows Primary School	694,927	(16,837)	4,872
The Park Primary	1,698,897	0	(13,360)
The Tynings School	868,147	0	(3,632)
Tortworth V C Primary School	334,883	5,531	-
Trinity CE Primary School	492,824	0	(3,321)
Tyndale Primary	829,358	28,703	-
Watermore Primary	789,778	20,937	-
Wellesley Primary School	693,040	(5,313)	4,928
Wheatfield Primary School	1,270,785	(64,337)	10,051
Wick CEVC Primary School	601,719	0	(4,177)
<b>Primary Total</b>	<b>72,040,343</b>	<b>(56,444)</b>	<b>68,976.00</b>
Brimsham Green	4,515,736	(71,263)	40,270
Chipping Sodbury School	3,178,494	0	(4,042)
Hanham High School	3,857,466	0	(15,480)
Mangotsfield	5,253,419	(110,844)	46,826
Marlwood	3,979,220	0	20,016
Patchway Community College (converted to academy November 2013)	3,209,954	60,827	-

The Grange School and Sports College	3,408,889	0	(29,876)
The Sir Bernard Lovell School	4,369,471	0	(40,216)
<b>Secondary Total</b>	<b>31,772,649</b>	<b>(121,280)</b>	<b>17,498.00</b>
Abbeywood Community School	3,407,594	239,316	-
Bradley Stoke Community School	4,080,344	0	(36,730)
Downend School	4,845,750	0	11,494
King's Oak Academy	2,832,790	167,724	-
The Castle School	5,907,072	173,281	-
The Ridings Federation Winterbourne International Academy	6,307,727	0	(61,256)
The Ridings Federation Yate International Academy	3,515,405	185,868	-
<b>Academy Total</b>	<b>30,896,682</b>	<b>766,189</b>	<b>(86,492)</b>
<b>TOTAL OVERALL</b>	<b>134,709,674</b>	<b>588,465</b>	<b>(18)</b>

Supplementary Analysis		
MFG Losers Protection	1,294,404	
MFG Gains Cap	(705,939)	
Total MFG	588,465	
Primary - Variation from 2013/14 Schools Block Formula - highest loser		(13,360)
Primary - Variation from 2013/14 Schools Block Formula - highest gainer		14,676
Secondary - Variation from 2013/14 Schools Block Formula - highest loser		(40,216)
Secondary - Variation from 2013/14 Schools Block Formula - highest gainer		46,826
Academy - Variation from 2013/14 Schools Block Formula - highest loser		(61,256)
Academy - Variation from 2013/14 Schools Block Formula - highest gainer		11,494

MFG Gain Cap change based on 2013/14 Schools Block Formula			
3% MFG Gain Cap			
School Name+D33	Revised Schools Block Formula £	MFG Gain Cap based on 2% £	variation 2013/2014 Schools Block Formula and Revised Schools Block Formula £
Abbotswood Primary School	1,022,945	0	2,265
Alexander Hosea	794,725	0	(7,523)
Almondsbury C/E School	883,384	0	(9,040)
Bailey's Court	1,300,786	13,960	-
Barley Close Community Primary	864,812	9,782	-
Barrs Court Primary School	984,409	(10,786)	11,308
Beacon Rise	1,347,634	514	(13,325)
Blackhorse Primary School	1,204,999	51,955	-
Bowsland Green	967,777	0	(3,548)
Broadway Infants' School	626,438	(15,290)	6,431
Bromley Heath Infant School	616,838	0	(5,604)
Bromley Heath Junior School	746,330	(24,438)	8,136
Cadbury Heath Primary	721,698	(17,898)	7,541
Callicroft Primary	845,992	0	(2,837)
Charborough Road Pri School.	907,061	0	(7,802)
Charfield Primary (converted to academy September 2013)	658,972	0	(4,198)
Cherry Garden Primary School	672,462	0	(5,759)
Christ Church C o E VC Infants	752,470	(12,401)	8,179
Christ Church C of E VC Junior	963,721	0	(2,585)
Christ Church Hanham CofE Primary	791,323	(4,530)	8,726
Christ the King R.C. School	492,816	32,436	-
Coniston Primary	713,248	2,008	(3,441)
Courtney Primary School	759,399	(18,073)	7,875
Crossways Infants School	549,259	12,523	-
Crossways Junior	720,738	(1,300)	7,753
Elm Park Primary School	950,970	0	(9,350)
Emersons Green	840,929	61,097	-
Filton Hill	710,651	(12,884)	7,470
Frampton Cotterell Church of England Primary School	843,264	6,791	(1,506)
Frenchay C of E School	487,437	1,126	(2,837)

Gillingstool Primary School	705,061	64,849	-
Hambrook School	667,398	(7,193)	7,060
Hanham Abbots	1,109,028	40,707	-
Hawkesbury CE VC Primary	430,615	38,686	-
Holy Family Catholic Primary	694,752	0	(5,697)
Holy Trinity	695,363	(2,821)	7,474
Horton CE Primary	331,976	6,741	-
Iron Acton CEVC Primary School	352,913	(12,540)	2,664
Kings Forest	1,313,009	0	6,414
Little Stoke Primary	663,514	0	3,473
Longwell Green County Primary	1,172,654	0	(12,415)
Mangotsfield Primary School	1,379,563	0	(14,582)
Manor C of E School	694,756	0	(3,411)
Manorbrook Primary	662,872	(15,021)	6,898
Marshfield CE VC Primary School	608,912	17,621	-
Meadowbrook Primary	1,292,751	0	6,806
North Road Community Primary School	402,594	(3,339)	3,342
Old Sodbury School	347,173	(3,384)	2,581
Oldbury on Severn CE VC Primary School	313,648	(11,307)	2,128
Olveston School	681,477	(8,661)	7,164
Our Lady of Lourdes R.C.V.A.	668,183	(35,150)	7,093
Parkwall Primary School	635,927	32,522	-
Pucklechurch CE VC Primary	798,337	0	7,276
Rangeworthy	333,331	8,811	-
Raysfield Infants' School	625,021	10,703	-
Raysfield Junior School	688,618	0	(490)
Redfield Edge Primary School	698,730	(22,750)	7,377
Ridge Junior School	767,704	(5,814)	8,381
Samuel White's Infant School	817,255	(11,554)	9,089
Severn Beach C.P. School	421,255	(12,377)	3,527
Shield Road Primary School	710,638	0	(4,569)
St Andrew's C of E VC Primary	279,066	0	(1,274)
St Anne's C of E School	1,122,272	0	(10,665)
St Augustine of Canterbury Catholic Primary	910,527	0	144
ST Barnabas CE Primary School	751,453	0	4,546
St Chad's Patchway C.E. Primary School	864,553	(36,333)	9,734
St Helen's CE Primary	679,085	(9,983)	7,150
St Johns Mead	927,625	(2,018)	10,524
St Mary's C.E. Primary School	974,048	0	6,864
St Mary's Catholic Primary School	716,518	0	7,587

St Mary's CE Primary School	555,294	0	(4,954)
St Michaels CEVC	1,763,361	0	19,711
St Michael's Winterbourne	713,346	(8,300)	7,657
St Pauls	712,026	20,290	-
St Peter's Anglican/Methodist VC Primary School	716,763	0	(5,074)
St Stephen's Infants' School	895,791	0	7,003
St Stephen's Junior School	1,126,088	0	12,811
Stanbridge Primary School	1,300,677	0	2,246
Staple Hill Primary	1,160,311	0	(3,977)
Stoke Lodge Primary (converted to academy October 2013)	1,192,717	0	(11,734)
The Meadows Primary School	697,363	(13,246)	7,309
The Park Primary	1,695,817	0	(16,440)
The Tynings School	866,610	0	(5,169)
Tortworth V C Primary School	334,883	5,885	-
Trinity CE Primary School	492,059	0	(4,087)
Tyndale Primary	829,358	29,944	-
Watermore Primary	789,778	22,143	-
Wellesley Primary School	695,504	(1,643)	7,392
Wheatfield Primary School	1,275,810	(56,974)	15,076
Wick CEVC Primary School	600,756	0	(5,139)
<b>Primary Total</b>	<b>72,067,974</b>	<b>93,086</b>	<b>96,601.00</b>
Brimsham Green	4,535,871	(41,699)	60,405
Chipping Sodbury School	3,172,113	0	(10,423)
Hanham High School	3,849,831	0	(23,115)
Mangotsfield	5,276,832	(76,455)	70,239
Marlwood	3,970,754	0	11,551
Patchway Community College (converted to academy November 2013)	3,209,954	66,816	-
The Grange School and Sports College	3,402,011	0	(36,754)
The Sir Bernard Lovell School	4,360,212	0	(49,474)
<b>Secondary Total</b>	<b>31,777,578</b>	<b>(51,338)</b>	<b>22,429.00</b>
Abbeywood Community School	3,407,594	245,597	-
Bradley Stoke Community School	4,071,889	0	(45,186)
Downend School	4,835,785	0	1,530
King's Oak Academy	2,832,790	172,968	-
The Castle School	5,907,072	185,744	-
The Ridings Federation Winterbourne International Academy	6,293,625	0	(75,358)
The Ridings Federation Yate International Academy	3,515,405	192,362	-



<b>Academy Total</b>	<b>30,864,160</b>	<b>796,671</b>	<b>(119,014)</b>
<b>TOTAL OVERALL</b>	<b>134,709,712</b>	<b>838,419</b>	<b>16.00</b>

Supplementary Analysis		
MFG Losers Protection	1,354,581	
MFG Gains Cap	(516,162)	
Total MFG	838,419	
Primary - Variation from 2013/14 Schools Block Formula - highest loser		(16,440)
Primary - Variation from 2013/14 Schools Block Formula - highest gainer		19,711
Secondary - Variation from 2013/14 Schools Block Formula - highest loser		(49,474)
Secondary - Variation from 2013/14 Schools Block Formula - highest gainer		70,239
Academy - Variation from 2013/14 Schools Block Formula - highest loser		(75,358)
Academy - Variation from 2013/14 Schools Block Formula - highest gainer		1,530

No MFG Gain Cap			
School Name+D33	Revised Schools Block Formula £	No MFG Gain Cap £	variation 2013/2014 Schools Block Formula and Revised Schools Block Formula £
Abbotswood Primary School	1,017,856	0	(2,823)
Alexander Hosea	790,905	222	(11,343)
Almondsbury C/E School	881,325	2,796	(11,100)
Bailey's Court	1,300,786	21,260	0.00
Barley Close Community Primary	864,812	13,856	0.00
Barrs Court Primary School	990,123	0	17,023.00
Beacon Rise	1,347,634	7,947	(13,325)
Blackhorse Primary School	1,204,999	58,041	0.00
Bowsland Green	963,004	0	(8,321)
Broadway Infants' School	638,768	0	18,761.00
Bromley Heath Infant School	613,828	0	(8,614)
Bromley Heath Junior School	766,743	0	28,549.00
Cadbury Heath Primary	736,237	0	22,079.00
Callicroft Primary	842,433	0	(6,396)
Charborough Road Primry School.	902,870	0	(11,993)
Charfield Primary (converted to academy September 2013)	655,863	0	(7,308)
Cherry Garden Primary School	671,524	2,155	(6,696)
Christ Church C o E VC Infants	761,163	0	16,872.00
Christ Church C of E VC Junior	958,765	0	(7,541)
Christ Church Hanham CofE Primary	791,962	0	9,365.00
Christ the King R.C. School	492,816	34,299	0.00
Coniston Primary	713,248	4,935	(3,441)
Courtney Primary School	774,029	0	22,505.00
Crossways Infants School	549,259	15,001	0.00
Crossways Junior	718,363	0	5,378.00
Elm Park Primary School	945,947	0	(14,372)
Emersons Green	840,929	64,888	0.00
Filton Hill	720,276	0	17,095.00
Frampton Cotterell Church of England Primary School	843,264	11,248	(1,506)
Frenchay C of E School	487,437	3,254	(2,837)
Gillingstool Primary School	705,061	67,427	0.00
Hambrook School	671,398	0	11,060.00
Hanham Abbots	1,109,028	46,644	0.00

Hawkesbury CE VC Primary	430,615	40,133	0.00
Holy Family Catholic Primary	691,692	0	(8,757)
Holy Trinity	694,808	0	6,920.00
Horton CE Primary	331,976	7,756	0.00
Iron Acton CEVC Primary School	364,190	0	13,941.00
Kings Forest	1,306,423	0	(172)
Little Stoke Primary	660,721	0	679.00
Longwell Green County Primary	1,169,880	3,895	(15,188)
Mangotsfield Primary School	1,371,730	0	(22,415)
Manor C of E School	691,413	0	(6,753)
Manorbrook Primary	674,999	0	19,025.00
Marshfield CE VC Primary School	608,912	20,398	0.00
Meadowbrook Primary	1,286,066	0	121.00
North Road Community Primary School	404,403	0	5,151.00
Old Sodbury School	349,376	0	4,784.00
Oldbury on Severn CE VC Primary School	323,990	0	12,471.00
Olveston School	686,779	0	12,465.00
Our Lady of Lourdes R.C.V.A.	700,007	0	38,918.00
Parkwall Primary School	635,927	34,867	0.00
Pucklechurch CE VC Primary	794,429	0	(11,184)
Rangeworthy	333,331	9,858	0.00
Raysfield Infants' School	625,021	13,680	0.00
Raysfield Junior School	685,208	0	(3,899)
Redfield Edge Primary School	718,121	0	26,768.00
Ridge Junior School	769,776	0	10,453.00
Samuel White's Infant School	824,502	0	16,337.00
Severn Beach C.P. School	432,035	0	14,308.00
Shield Road Primary School	707,595	0	(7,612)
St Andrew's C of E VC Primary	278,351	0	(1,989)
St Anne's C of E School	1,116,252	0	(16,685)
St Augustine of Canterbury Catholic Primary	905,571	0	(4,811)
ST Barnabas CE Primary School	747,977	0	1,071.00
St Chad's Patchway C.E. Primary School	896,529	0	41,710.00
St Helen's CE Primary	685,725	0	13,790.00
St Johns Mead	924,953	0	7,852.00
St Mary's C.E. Primary School	968,827	0	1,642.00
St Mary's Catholic Primary School	713,092	0	4,161.00
St Mary's CE Primary School	554,487	1,854	(5,761)
St Michaels CEVC	1,753,749	0	10,099.00
St Michael's Winterbourne	718,219	0	12,531.00
St Pauls	712,026	23,533	0.00

St Peter's Anglican/Methodist VC Primary School	713,453	0	(8,384)
St Stephen's Infants' School	891,301	0	2,513.00
St Stephen's Junior School	1,120,401	0	7,123.00
Stanbridge Primary School	1,294,108	0	(4,323)
Staple Hill Primary	1,155,156	0	(9,133)
Stoke Lodge Primary (converted to academy October 2013)	1,186,415	0	(18,037)
The Meadows Primary School	707,300	0	17,246.00
The Park Primary	1,692,134	5,147	(20,123)
The Tynings School	862,203	0	(9,576)
Tortworth V C Primary School	334,883	6,899	0.00
Trinity CE Primary School	489,864	0	(6,282)
Tyndale Primary	829,358	33,503	0.00
Watermore Primary	789,778	25,602	0.00
Wellesley Primary School	693,687	0	5,576.00
Wheatfield Primary School	1,326,083	0	65,348.00
Wick CEVC Primary School	597,995	0	(7,900)
<b>Primary Total</b>	<b>72,206,457.00</b>	<b>581,098</b>	<b>235,090.00</b>
Brimsham Green	4,550,494	0	75,028.00
Chipping Sodbury School	3,153,790	0	(28,746)
Hanham High School	3,827,909	0	(45,038)
Mangotsfield	5,321,769	0	115,177.00
Marlwood	3,946,447	0	(12,757)
Patchway Community College (converted to academy November 2013)	3,209,954	84,013	0.00
The Grange School and Sports College	3,382,261	0	(56,504)
The Sir Bernard Lovell School	4,333,628	0	(76,059)
<b>Secondary Total</b>	<b>31,726,252.00</b>	<b>84,013</b>	<b>(28,899)</b>
Abbeywood Community School	3,407,594	263,630	0.00
Bradley Stoke Community School	4,053,808	6,200	(63,266)
Downend School	4,807,172	0	(27,084)
King's Oak Academy	2,832,790	188,026	0.00
The Castle School	5,907,072	221,530	0.00
The Ridings Federation Winterbourne International Academy	6,253,132	0	(115,851)
The Ridings Federation Yate International Academy	3,515,405	211,001	0.00
<b>Academy Total</b>	<b>30,776,973.00</b>	<b>890,387</b>	<b>(206,201)</b>
<b>TOTAL OVERALL</b>	<b>134,709,682.00</b>	<b>1,555,498</b>	<b>(10)</b>

Supplementary Analysis		
MFG Losers Protection	1,555,498	
MFG Gains Cap	0	
Total MFG	1,555,498	
Primary - Variation from 2013/14 Schools Block Formula - highest loser		(22,415)
Primary - Variation from 2013/14 Schools Block Formula - highest gainer		65,348
Secondary - Variation from 2013/14 Schools Block Formula - highest loser		(76,059)
Secondary - Variation from 2013/14 Schools Block Formula - highest gainer		115,177
Academy - Variation from 2013/14 Schools Block Formula - highest loser		(115,851)
Academy - Variation from 2013/14 Schools Block Formula - highest gainer		0



## **SECOND QUARTER MONITOR REPORT: REVENUE AND CAPITAL 2013/201**

This report provides information on the forecast of the outturn for 2013/14 for the Dedicated Schools Grant and the capital budget.

It includes income and expenditure to the end of 30 September 2013 and known commitments at that date.

The DSG reported in this second monitor is £173.299m.

A reduction to the DSG is expected later this year for schools that become academies during 2013/14.

At this stage in the financial year the 2013/14 outturn for the DSG is an overall breakeven position. Further details are provided in Appendix A.

The position with capital funding is that total scheme costs are within total budgets. There is an unallocated balance of £554,000 which is held in mitigation against future shortfalls within the capital programme and/or will be used to address other risks or urgent priorities. Further details are provided in Appendix B.

### **Recommendation**

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

**EXTRACTS FROM CHILDREN AND YOUNG PEOPLE COMMITTEE REPORT;  
6 NOVEMBER 2013**

**REVENUE**

**DSG Funded Budgets**

This is the first year of the new block funding arrangements - the budget is split across three blocks – the schools block, the high needs block and the early years block.

£648,000 of funding was transferred from the schools central block to the high needs block to fund pressures within special educational needs budgets. The funding and projected outturn per block is provided in the table below.

<b>DSG Blocks</b>	<b>DFE Funding £'000</b>	<b>Funding Transfer</b>	<b>Revised Budget</b>	<b>Projected Outturn £'000</b>	<b>Variance £'000</b>
<b>Schools Block</b> Primary & Secondary Schools Central Items	137,937	-648		135,365 1,924	
<b>Total Schools Block</b>	<b>137,937</b>	<b>-648</b>	<b>137,289</b>	<b>137,289</b>	<b>-</b>
<b>High Needs Block</b> Allocated to Schools & Independent Providers Central Items	24,407	648		23,254 1,801	
<b>Total High Needs Block</b>	<b>24,407</b>	<b>648</b>	<b>25,055</b>	<b>25,055</b>	<b>-</b>
<b>Early Years Block</b> Allocated to Private Voluntary Independent Provides Central Items	10,955			9,777 1,178	
<b>Total Early Years Block</b>	<b>10,955</b>	<b>0</b>	<b>10,955</b>	<b>10,955</b>	<b>-</b>
<b>Total DSG</b>	<b>173,299</b>	<b>0</b>	<b>173,299</b>	<b>173,299</b>	<b>-</b>

**Schools Block**

The schools block is currently reporting a break even position at outturn.

**High Needs Block**

The high needs block is currently reporting a break even position at outturn however the budgets in this area are volatile and will require careful monitoring throughout the year. The key demand led areas include independent and non-maintained special



schools, special school / resource bases, statemented support and post 16 high needs.

The DFE funded South Gloucestershire Council for 148 post 16 high needs places. CAH officers are currently meeting with a number of colleges to agree the actual places required. Should the number of places exceed 148 there will be a budget pressure. We will not have a clear indication of these figures until the new academic year data arrives from colleges.

## **Early Years Block**

The early years block is currently reporting a break even position. The key demand led areas are the two, three and four year old nursery education budgets. Actual uptake compared to budgeted uptake will require careful monitoring as the year progresses.

Any pressures on the DSG block funded budgets will be met from next year's funding allocations. It will not directly fall on the Council Tax payer.

**EXTRACTS FROM CHILDREN AND YOUNG PEOPLE COMMITTEE  
REPORT: 6 NOVEMBER 2013**

**CAPITAL**

**Progress on current schemes**

There are currently no significant scheme delays to report within the approved education programme for the Department for Children, Adults and Health.

Appendix 1 lists the planned and forecast completion dates, total approved scheme costs and details of spending against budget this year for all projects with total scheme costs greater than £100k.

The following table provides a comparison of the total planned spending for the year against the latest outturn forecast.

Forecast figures as at 30 Sept 2013 (Quarter 2)			
Budget (£'000s)	Outturn Forecast (£'000s)	Variation (£'000s)	Spend to date (£'000s)
14,591	14,474	-117	6,546

The variation reported in the first monitor was £16k, therefore the movement from the first to the second monitor is (a negative) -£133k. The significant movements on individual projects are shown in paragraph 9.

**Variations in Total Scheme Costs and Scheme Delivery**

Variance on total scheme costs (further detail provided in Appendix 2):

	£'000
Approved Total Scheme Costs (Budget) at 1 April 2013	120,156
Budget adjustments per Appendix 2	15
<b>Approved Total Scheme Costs (Budget) at 30 September 2013</b>	<b>120,171</b>
Variance on Total Scheme Costs at 30 September 2013	-1,385
<b>Current Forecast of Total Scheme Costs</b>	<b>118,786</b>

Approval of the virements and new schemes (paragraphs 10 and 12) by the Policy and Resources Committee will have no impact on the variance on total scheme costs.

Once scheme costs are finally determined, the variance on total scheme costs will be subject to a virement approved by the Policy and Resources Committee.

The significant changes in variance in total scheme costs on individual schemes from the first to the second monitor are:

<b>Project</b>	<b>Total Scheme Budget</b>	<b>Variance at Q1</b>	<b>Variance at Q2</b>	<b>Change from Q1 to Q2</b>
	(£'000)	(£'000)	(£'000)	(£'000)
Pucklechurch Primary – extension and remodelling phase 2	700	0	-124	-124
Beacon Rise Primary – extension to 3FE	4,100	0	-500	-500

Explanations for the changes in variance from the first to the second monitor are:

#### **Pucklechurch Primary – extension and remodelling phase 2**

The final account has been agreed with the main contractor at £124k less than the previous prudent prediction.

#### **Beacon Rise Primary – extension to 3FE**

Historically, there has been coal mining in the vicinity of the site and therefore a contingency was added into the budget estimate to allow for ground stabilisation. However, it has been possible to locate the 6 classroom block in a position where ground investigations indicate that the building will be bearing on clay, so traditional foundations can be designed and the £500k contingency will not be required.

As the scheme has been developed there has been significant rationalisation which may result in a further reduction in the budget required.

## Variations in 2013/14 Payments

The significant changes in variances in the 2013/14 payments budget from the first to the second monitor report are:

Project	2013/14 Payments Budget  (£'000)	Variance at Q1  (£'000)	Variance at Q2  (£'000)	Change from Q1 to Q2  (£'000)
Pucklechurch Primary – extension and remodelling phase 2	71	0	-60	-60
Beacon Rise Primary – extension to 3FE	1,032	0	-413	-413
Chipping Sodbury – ASD resource base	150	0	250	250

Explanations for the changes in variances from the first to the second monitor are:

### **Pucklechurch Primary – extension and remodelling phase 2**

Please refer to explanation under paragraph 8.

### **Beacon Rise Primary – extension to 3FE**

Please refer to explanation under paragraph 8.

### **Chipping Sodbury – ASD resource base**

The scheme was reviewed, with works targeted for completion in March 2014. Detailed programming was carried out to identify a way of achieving the required date, resulting in the increase expenditure forecast for 2013/14. Overall the scheme is within budget.

## **Virements**

Approval for the following virements (also summarised in Appendix 4) will be requested through the Policy and Resources Committee on 25 November 2013:

- A virement of £30k from the unallocated contingency to undertake urgent interim boiler work at Frampton Cotterell Primary (see also paragraph 12, New Schemes).
- A virement of £14k from the unallocated contingency to undertake essential work to roof lights at Mangotsfield Primary (see also paragraph 12, New Schemes).

- Eight virements to the unallocated contingency relating to the allocation of section 106 resources to existing schemes (see also paragraph 14).

### **CYP Unallocated Contingency**

The unallocated contingency following the first monitor was £167k, reflecting the decision by the Policy and Resources Committee on 30 September 2013 to hold £1M separately to support future year's revenue or capital pressures.

The unallocated contingency will increase by £387k if the virements detailed in paragraph 10 and Appendix 4 are approved by the Policy and Resources Committee on 25 November.

The balance of £554k returns the unallocated contingency to a normal level of provision; this amount will be held in mitigation against potential resource shortfalls within the agreed capital programme, and/or will be used to address other risks or urgent priorities.

### **New Schemes**

It is necessary to request formal approval for any new schemes that were not approved in the February 2013 Council report or in subsequent Policy and Resources Committee capital monitoring reports. The following new schemes are funded from available resources:

<b>Scheme</b>	<b>Amount (£'000)</b>	<b>Funding Source</b>	<b>Constraints</b>	<b>Intended Use (Approval Sought)</b>
Frampton Cotterell Primary	30	Unallocated balance	None	Urgent work to improve boiler reliability
Mangotsfield Primary	14	Unallocated balance	None	Essential health and safety work to repair and improve leaking roof lights (windows)

## Total Scheme Costs and Current Payments – (All schemes with total scheme costs &gt;£100K)

## Appendix 1

Scheme/Block Allocation (in excess of £100k)	Planned (p) Contractual (c) Forecast (f) Completion date	TOTAL SCHEME COSTS			2013/14 PAYMENTS				Comments
		Budget	Forecast	Variation overspend (+)	Budget	Forecast	Variation Overspend (+)	Spend to date	
		(£'000)	(£'000)	(£'000)	(£'000)	(£'000)	(£'000)	(£'000)	
Wick Primary – refurbishment and remodelling	Feb 2014 (c) Feb 2014 (f)	1,380	1,380	0	1,048	1,048	0	426	Works are progressing in line with the programme for completion in February 2014 and within budget. The temporary classroom units will be removed in summer 2014.
Hambrook Primary – refurbishment and extension	Aug 2014 (c) Aug 2014 (f)	3,555	3,555	0	2,287	2,287	0	861	Works are progressing in line with the programme for completion in Summer 2014 and within budget. The temporary classroom units will be removed in summer 2014.
Filton Hill Primary – refurbishment and remodelling	Aug 2016 (p) Aug 2016 (f)	1,200	1,200	0	1	1	0	1	The 2013/14 to 2015/16 capital programme report included a revised timescale with completion in 2016. Initial design works only during 2013/14.
Barley Close Primary – hall extension and nursery accomm	Oct 2013 (c) Oct 2013 (f)	805	805	0	712	717	5	374	Works to the nursery were completed on time in July 2013. The hall extension is on programme to finish in October 2013.
Barley Close Primary – four class extension	Jun 2014 (p) Jun 2014 (f)	1,270	1,270	0	0	0	0	0	Programmed to complete in September 2014, although CAH has requested that the date is brought forward to June 2014.
Barley Close Primary – replacement of water services	Mar 2016 (p) Mar 2016 (f)	110	110	0	0	0	0	0	Work programmed for 2015/16.
Beacon Rise Primary – six class extension and kitchen rebuild	Dec 2014 (p) Dec 2014 (f)	4,100	3,600	-500	1,032	619	-413	201	Planning application for the kitchen extension has been submitted. Current programme for completion is late August 2014 for kitchen extension and December 2014

Scheme/Block Allocation (in excess of £100k)	Planned (p) Contractual (c) Forecast (f) Completion date	TOTAL SCHEME COSTS			2013/14 PAYMENTS				Comments
		Budget	Forecast	Variation overspend (+)	Budget	Forecast	Variation Overspend (+)	Spend to date	
		(£'000)	(£'000)	(£'000)	(£'000)	(£'000)	(£'000)	(£'000)	
									for 6 classroom extension. Ground stabilisation and enabling works not required because classroom block relocated, resulting in a £500k saving and reduced forecast spending in this financial year.
Christchurch Primary – four class extension	Sep 2015 (p) Sep 2015 (f)	1,900	1,900	0	67	67	0	0	Programmed to complete in September 2015.
The Tynings Primary – four class extension	Aug 2015 (p) Aug 2015 (f)	2,090	2,090	0	482	482	0	100	Enabling works carried out in summer holidays. Very favourable tenders have been received. These are currently being analysed and as a result there may be a reduced budget requirement (this will be clarified in the next monitor).
Mangotsfield Primary – extension to 3FE	Sep 2015 (p) Sep 2015 (f)	3,500	3,500	0	187	187	0	0	Programmed to complete in September 2015.
Stoke Lodge Primary – five class extension in temporary accommodation	Sep 2015 (p) Sep 2015 (f)	1,700	1,700	0	50	50	0	0	Programmed to complete in September 2015.
Parkwall Primary – rewire, heating, replacement of water services	Sep 2013 (c) Nov 2013 (f)	1,090	1,090	0	1,010	1,010	0	715	Main works completed on programme, enabling school to start at the beginning of term. Biomass boiler planned to complete during October half term, resulting in an amended forecast completion date.
Crossways Junior – cladding and roof	Aug 2014 (p) Aug 2014 (f)	300	300	0	192	192	0	27	Roofing works complete. Cladding works to follow.
Stanbridge Primary – re-cladding and part window replacement	Aug 2014 (p) Aug 2014 (f)	230	230	0	116	116	0	0	Works programmed for 2014.

		TOTAL SCHEME COSTS			2013/14 PAYMENTS				Comments
Scheme/Block Allocation (in excess of £100k)	Planned (p) Contractual (c) Forecast (f) Completion date	Budget	Forecast	Variation overspend (+)	Budget	Forecast	Variation Overspend (+)	Spend to date	
		(£'000)	(£'000)	(£'000)	(£'000)	(£'000)	(£'000)	(£'000)	
Chipping Sodbury ASD Resource Base	Mar 2014 (p) Mar 2014 (f)	500	500	0	150	400	250	2	Tenders were received in October. On programme for completion in March 2014.
Additional Primary Accommodation (Basic Need) (schemes under £500k)	Mar 2014 (p) Mar 2014 (f)	1,395	1,382	-13	949	954	5	425	Schemes at several schools to install temporary accommodation and improve existing accommodation to increase capacity.
Devolved Formula Capital	Mar 2016 (p) Mar 2016 (f)	1,811	1,811	0	1,171	1,171	0	504	Funding devolved to schools.
Advance Design Fees	Mar 2016 (p) Mar 2016 (f)	174	174	0	74	74	0	3	Ongoing development and feasibility work.
Early Years Capacity Building Grant	Aug 2014 (p) Aug 2014 (f)	357	357	0	180	180	0	76	To support the capital investment necessary in the childcare sector to deliver free entitlement places for two year olds.
Secondary Urgent Responsive Works	Mar 2015 (p) Mar 2015 (f)	1,000	1,000	0	400	400	0	0	Being used for essential secondary R&M schemes in 2013/14 and 2014/15.
Primary Planned Maintenance	Mar 2016 (p) Mar 2016 (f)	3,970	3,970	0	0	0	0	0	Unallocated budget held for schemes in 2014/15 and 2015/16.
Future Schools' Capital work	Mar 2016 (p) Mar 2016 (f)	2,000	2,000	0	0	0	0	0	Unallocated budget held for schemes in 2015/16.
Schemes under £100k	Various	324	323	-1	99	99	0	134	
<b>Completed Schemes</b>									



		TOTAL SCHEME COSTS			2013/14 PAYMENTS				Comments
Scheme/Block Allocation (in excess of £100k)	Planned (p) Contractual (c) Forecast (f) Completion date	Budget	Forecast	Variation overspend (+)	Budget	Forecast	Variation Overspend (+)	Spend to date	
		(£'000)	(£'000)	(£'000)	(£'000)	(£'000)	(£'000)	(£'000)	
New Horizons Primary School	Nov 2011	2,984	2,869	-115	182	182	0	76	Work complete.
Gillingstool Primary and New Siblands Primary – Replacement School	Aug 2010	10,166	10,103	-63	115	115	0	-3	Works complete. Contractor's final account agreed.
St Peter's Primary – replacement school	Feb 2011	5,115	5,115	0	143	143	0	21	Third parties were engaged to rectify outstanding works and defects during summer 2013. Property Services are seeking recovery of all costs.
Abbeywood School BSF Pathfinder Project	Jan 2011	29,735	29,366	-369	146	146	0	0	Account for the main contractor has been agreed within budget, generating some saving. Some payment has been withheld pending resolution of some contractual matters. Some sundry accounts remain to be agreed.
Staple Hill Primary – replacement school	Sep 2011	6,726	6,566	-160	117	117	0	2	Final accounts agreed. Underspend results mainly from the car park contract.
New Siblands Secondary	Jun 2012	5,827	5,829	2	109	110	1	-35	All works complete. Some defects rectified during summer 2013, some remain outstanding.
Staple Hill – CC/Nursery reinstatement	July 2012	1,242	1,113	-129	59	59	0	22	Works complete.
Yate International Academy – redevelopment	Aug 2012	16,370	16,370	0	771	771	0	446	Works complete.
Sir Bernard Lovell School – rewire	Aug 2012	445	445	0	23	23	0	3	Works complete.
Pucklechurch Primary – extension and remodelling (phase 2)	Nov 2012	700	576	-124	71	11	-60	-25	Works complete. The final account has been agreed with the main contractor £124k less than the previous worst case prediction.

		TOTAL SCHEME COSTS			2013/14 PAYMENTS				Comments
Scheme/Block Allocation (in excess of £100k)	Planned (p) Contractual (c) Forecast (f) Completion date	Budget	Forecast	Variation overspend (+)	Budget	Forecast	Variation Overspend (+)	Spend to date	
		(£'000)	(£'000)	(£'000)	(£'000)	(£'000)	(£'000)	(£'000)	
Sir Bernard Lovell School – roofing	Jan 2013	1,200	1,205	5	46	51	5	5	Works complete.
St Michael's Primary Stoke Gifford – remodelling and extension (phase 1)	Apr 2013	967	970	3	114	117	3	13	Works complete.
Shield Road Primary – re-roofing (phase 1) plus windows	Aug 2013	200	179	-21	55	34	-21	32	Works complete.
Warmley Park – boiler plant replacement and heating	May 2013	446	473	27	0	27	27	31	Works complete.
Downend Secondary – replacement boiler plant	Aug 2013	990	1,032	42	297	345	48	325	Works complete.
Short Breaks for Disabled Children Grant	Aug 2013	307	307	0	223	223	0	205	Works complete.
The Tynings Primary – rewire and replacement of water systems	Sep 2013	350	350	0	338	344	6	258	Completed during the summer.
Stoke Lodge Primary – KS1 re-roofing	Sep 2013	150	154	4	144	148	4	85	Works complete.
Raysfield Junior – rewire, heating, replacement of water services	Sep 2013	590	615	25	565	588	23	524	Rewire was completed on programme enabling school to start at the beginning of term. Some remedial decorations are on-going.
Raysfield Infant – rewire, heating, replacement of water services	Sep 2013	600	600	0	575	573	-2	456	Rewire was completed on programme, enabling school to start at the beginning of term. Corridor ceilings to cover high level services and snagging by contractor to be carried out during future half terms, possibly continuing to Easter 2014.

		TOTAL SCHEME COSTS			2013/14 PAYMENTS				Comments
Scheme/Block Allocation (in excess of £100k)	Planned (p) Contractual (c) Forecast (f) Completion date	Budget	Forecast	Variation overspend (+)	Budget	Forecast	Variation Overspend (+)	Spend to date	
		(£'000)	(£'000)	(£'000)	(£'000)	(£'000)	(£'000)	(£'000)	
Manorbrook Primary – roofing	Sep 2013	200	201	1	191	192	1	182	Works complete.
Beacon Rise Primary – rewire Severn block	Sep 2013	100	100	0	100	100	0	74	Rewire was completed on programme enabling school to start at the beginning of term. Some remedial decorations are on-going in accordance with the programme agreed with the school.
		<b>120,171</b>	<b>118,786</b>	<b>-1,385</b>	<b>14,591</b>	<b>14,474</b>	<b>-117</b>	<b>6,546</b>	



## SCHOOLS FORUM WORK PROGRAMME

All meetings at 4.30pm at Badminton Road, Yate

16 <sup>th</sup> January 2014 Room 1001 First Floor	6 <sup>th</sup> March 2014 Room 0015 Ground Floor
<ul style="list-style-type: none"> <li>• Earmarked Capital Programme 2014/15</li> <li>• Council Budget 2014/15</li> <li>• Deployment of the DSG 2014/15</li> <li>• DfE Consultation on School Funding 2015/16</li> </ul>	<ul style="list-style-type: none"> <li>• Hold for possible 2014/15 Budget Implications</li> <li>• 3<sup>rd</sup> Budget Monitor 2013/14</li> <li>• Dedicated Schools Grant 2014/15</li> </ul> <p><b>Items to be moved to 8<sup>th</sup> May</b></p>

8 <sup>th</sup> May 2014 Room 0015 Ground Floor	3 <sup>rd</sup> July 2014 Room 0012 Ground Floor
<ul style="list-style-type: none"> <li>• Trading Arrangements</li> </ul>	<ul style="list-style-type: none"> <li>• Preparing for 2015/16 (if known)</li> <li>• Provision Outturn 2013/14</li> <li>• 1<sup>st</sup> Budget Monitor 2014/15</li> <li>• Dates of future meetings and the Work Programme 2014/15</li> </ul>

11 <sup>th</sup> September 2014 Room 0012 Ground Floor
<ul style="list-style-type: none"> <li>• Consultation on School Funding 2015/16</li> <li>• School Framework Programme</li> <li>• 1<sup>st</sup> Budget Monitor 2014/15</li> </ul>



**ANY OTHER BUSINESS**