

# Cabinet

## Supplementary Information



**Date:** Tuesday, 23 January 2024

**Time:** 4.00 pm

**Venue:** The Council Chamber - City Hall, College Green, Bristol, BS1 5TR

### 22. Dedicated Schools Grant budget proposals 2024/25

(Pages 2 - 68)

**Issued by:** Amy Rodwell, Democratic Services

City Hall, Bristol, BS1 9NE

E-mail: [democratic.services@bristol.gov.uk](mailto:democratic.services@bristol.gov.uk)

**Date:** Wednesday, 17 January 2024





# Decision Pathway – Report Template

**PURPOSE:** Key decision

**MEETING:** Cabinet

**DATE:** 24 January 2024

<b>TITLE</b>	Dedicated Schools Grant (DSG) 2024/25 Budget Proposals
<b>Ward(s)</b>	ALL
<b>Author:</b> Travis Young	<b>Job title:</b> Finance Business Partner – Children and Education
<b>Cabinet lead:</b> Cllr Craig Cheney and Cllr Asher Craig	<b>Executive Director lead:</b> Denise Murray, Director of Finance
<b>Decision maker:</b> Mayor <b>Decision forum:</b> Cabinet	
<b>Purpose of Report:</b> <p>The Dedicated Schools Grant (DSG) is the ring-fenced grant from government that provides each local authority with an allocation of funding for schools and services for pupils.</p> <p>This report outlines the 4 blocks of the DSG, sets out the proposed use of the DSG and how associated grants are to be applied during 2024/25. The Bristol Schools Forum must be consulted on all aspects of the use of the Dedicated Schools Grant (DSG) and the School Funding Regulations limit the scope for how funding may be used. Schools Forum has some responsibilities to determine a small number of specific budgets and the decisions on the amount of funding to distribute to schools and early years settings. The distribution mechanisms, the proposed spend on central services and the High Needs budget are matters to be determined by the council.</p>	
<b>Evidence Base:</b> <p>The deadline for confirmation of schools budget shares to mainstream maintained schools is 29 February 2024 and local authorities should ensure that they have procedures in place to meet the requirement, which includes gaining political approval of budgets.</p> <p>Full Council will consider the 2024/25 budget resolutions on Tuesday 20 February 2024. Council allocates resources to schools and other educational settings in accordance with the National Funding Formula and other locally agreed factors for schools and early years settings. There is an expectation in the annual budget that the cost of schools and educational settings will be contained within the level of the DSG, but a specific reserve has been created to support a deficit until 2025/26 if spending continues at the levels currently estimated without further external funding and/or if recovery plan activities do not deliver cost reductions.</p> <p>The council has presented papers to Schools Forum and have consulted with schools and settings to consider the methodology for distributing the funding available for 2024/25 and addressing the financial issues facing Bristol schools, including academies and the pressure in the High Needs Block. This paper reflects the strategy that has been discussed with the Schools Forum in the context of the available funding and forecasted need for 2024/25.</p> <p>In December 2023, the final allocations of DSG from the ESFA took account of an overall 56,460 pupils in October 2023 (21,789 secondary @ £6,873.45, an increase of 413) and 34,671 primary @ £5,200.70, a reduction of 330 compared to October 2022. The overall increase in the DSG for 2024/25 is £28.8 million or 6.2%. The Growth Fund</p>	

allocation of £2.0 million for 2024/25 is a decrease of £0.3 million from the 2023/24 allocation of £2.0 million and the confirmed funding for High Needs is £89.5 million which is £2.9 million or 3.3% increase from £86.5 million allocation in 2023/24.

The council must submit to the Education and Skills Funding Agency (ESFA) formula driven allocations for mainstream schools by 22 January 2024, however it is recognised that given this timeline these figures may be subject to ratification or amendment by cabinet and council.

Schools Forum met to consider the same issues at its meeting on 16 January 2024 and any feedback from that meeting will be conveyed to Cabinet and Council, prior to the forthcoming meetings. As outlined above officers must publish funding rates for Early Years settings as well as publish allocations to maintained schools no later than 29 February 2024.

The key papers submitted to Schools Forum on 16 January 2024 are provided as appendices for reference:

- **Appendix A1: DSG Budget Monitor**, explaining the latest budget monitoring (at Period 7) position for 2023/24.
- **Appendix A2: DSG 2024/25** details the 2024/25 funding levels, discusses the use of the four DSG blocks in 2024/25, the transfer of funding from Schools Block to High Needs Block and the use of the Central Services Block for 2024/25. Further detail on the High Needs Block and Early Years is provided below. Use of the Schools Block is covered in more detail in Appendix A3.
- **High Needs Block**, the High Needs Block has received an increase in funding (3.3%) but remains under considerable pressure. The current level of demand and extrapolated trends, indicates that the increased allocation will not cover spending at the same level as this year and does not provide sufficient funding for growth, additional needs or historic shortfalls. This is likely to result in growth of the deficit in the DSG in 2024/25.

The ESFA's Schools Revenue Funding Operational Guide allows the transfer of up to 0.5% in 2024/25 from the Schools Block to other blocks with Schools Forum approval and we are utilising this flexibility. For the 2023/24 budget, £1.6 million was transferred from the Schools Block to the High Needs Block, and this funding was allocated to fund the continuation of the High Needs transformation journey focused on the continuing improvement in SEND provision, with particular focus on sustainable school-led programmes and addressing the deficit in the High Needs Block.

Schools Forum has agreed to the 0.5% transfer for 2024/25 (£1.721m), this funding will be ring-fenced to support the pressures within the High Needs Block.

As a result of the continuing pressure on the High Needs Block, the council has an overall DSG deficit which is currently forecast to reach £56.1 million by 31 March 2024. On 29 November 2020 Statutory Instrument (SI) No.1212 came into force which amended the current accounting regulations to allow a statutory override whereby all such DSG deficits can be carried over in a separate dedicated account and therefore do not become a charge to the council's revenue account for the term of the statutory override. The SI is time-limited with an end date of 31 March 2026 and councils are expected to use this period to develop and implement changes to allow the High Needs Block to reach a sustainable position. There is no statutory undertaking requiring councils to underwrite DSG deficits and DfE has not provided any clarity regarding how, when or if the deficit will be funded in the longer term. The council therefore would have to ensure there are adequate usable reserves to cover any DSG deficit and a clear plan for sustainability when preparing the council's accounts if the period of the SI is not extended by government beyond 2026.

The DSG Conditions of Grant require any local authority with an overall DSG deficit to produce and

maintain a DSG Management Plan (DMP). The table below gives a summary of the council's current DMP.

	2024-25	2025-26	2026-27	2027-28	In year balance achieved
Overall DSG position	2024-25	2025-26	2026-27	2027-28	2028-29
Income/surpluses are shown as negatives	Forecast £000s	Forecast £000s	Forecast £000s	Forecast £000s	Forecast £000s
<b>Brought Forward Unmitigated deficit</b>	<b>56,076</b>	<b>88,392</b>	<b>130,997</b>	<b>179,370</b>	<b>234,441</b>
<b>Unmitigated annual funding gap</b>	32,315	42,606	48,373	55,071	60,023
<b>Carried Forward Unmitigated deficit</b>	<b>88,392</b>	<b>130,997</b>	<b>179,370</b>	<b>234,441</b>	<b>294,464</b>
<b>Annual Indicative Proposed Mitigations</b>	<b>(9,559)</b>	<b>(19,630)</b>	<b>(32,247)</b>	<b>(45,196)</b>	<b>(58,577)</b>
<b>Other income</b>	<b>(2,655)</b>	<b>(3,131)</b>	<b>(3,704)</b>	<b>(4,106)</b>	<b>(4,475)</b>
<b>Mitigated annual funding gap</b>	<b>20,102</b>	<b>19,844</b>	<b>12,421</b>	<b>5,769</b>	<b>(3,029)</b>
<b>Brought Forward deficit</b>	56,076	76,179	96,023	108,444	114,213
<b>Carried Forward Mitigated deficit</b>	<b>76,179</b>	<b>96,023</b>	<b>108,444</b>	<b>114,213</b>	<b>111,184</b>

The DMP consists of an initial unmitigated forecast of the overall DSG deficit which is based on extrapolating existing trajectories for demand, complexity of needs and constraints on specialist provision and also incorporates an assumed reduction in the existing backlogs in both assessing the needs of children and young people and their subsequent placement in specialist SEND provision.

Extensive work with key stakeholders has continued during 2023/24 to develop and validate the set of viable mitigations which will, collectively, enable the council to reduce, and eventually eliminate, the ongoing overspends on the DSG High Needs Block. These mitigations have been modelled and their combined effect can be seen in the Annual Indicative Proposed Mitigations and the Mitigated Annual Funding gap lines in the table above. Overall, the successful delivery of all the proposed mitigations is projected to result in the DSG achieving an in-year balanced position during 2028/29. A summary of the mitigations and their associated savings can be found in Appendix 4.

In January 2023, BCC received £1 million of grant funding through the Department for Education's Delivering Better Value (DBV) in SEND Programme. Two workstreams were developed to deliver this programme. Workstream 1 is focused on strengthening relationships between schools and families. Workstream 2 is focused on developing more effective means of spending HNB funding to improve outcomes for children and young people with SEND. A delivery partner was commissioned to undertake this element of the programme. A full review of existing non-statutory HNB funding arrangements was completed between August and October 2023. Following this review three options were presented as part of a full consultation which closed on 15 December 2023. Recommendations are in the process of being finalised and will be presented to Cabinet on 6 February for a key decision.

Ongoing negotiations are taking place with the Department for Education with the aim of reaching a suitable agreement for the repayment of the DSG historic deficit. Further updates on the outcomes from these negotiations will be presented to Cabinet in due course.

A progress report for the council's plan for managing the DSG deficit was previously presented to Cabinet on 3 October 2023 under Item 22 on the agenda: Dedicated Schools Grant (DSG) High Needs Block Recovery Plan. The papers relating to this item can be found here:

The proposed mitigations that were within the previous High Needs Block Recovery Plan can also be found in Appendix 5. These were also shared with Schools Forum on 28 November 2023. The proposed mitigations within the current DSG Management Plan have been developed further from those presented in the previous High Needs Block Recovery Plan and those shared with Schools Forum on 29 November 2023.

- **Early Years Block:** the Early Years allocation changes throughout the year as funding is based on participation, based on census data collected each January only, updated by ESFA once the spring 2024 census figures are known. The 2024/25 allocation includes £14.996 million of new funding being new 2-year old and under entitlement to 15 hours of free childcare for eligible parents, and an extension of pupil premium and DAF to eligible 2 year olds and under. Overall, the change in early years funding is a £17.748 million increase when compared to 2023/24.
- The release of the block allocations also included the first indication of the hourly rates for 2024/25. For 3 & 4 year olds the rate will increase by 17p to £5.97 from £5.80 in 2023/24. The 2 year old rate will increase by £2.36 to £8.25. The under 2 year old rate will be £11.24 which is new for 2024/25. These are the rates used to calculate funding to the LA. The Maintained Nursery School supplementary funding will increase to £4.64 per hour; this is equivalent to an indicative increase of £0.613 million in funding based on part-time participation numbers of 1,177 for 15 hours per week, 38 weeks per year. The Teachers Pay and Pensions Grant (TPPG) continues to reside in the Early Years Block as per 2023/24. The Early Years team confirm that no funding will be retained and the same payments to schools and academies will continue through the payment workbook at the same rate of £0.05 per funded hour. TPPG is already included in the MNS supplement
- **Appendix A3: Schools Block** sets out how much funding is available and following consultation with schools and endorsement from the Schools Forum sets out how it should be distributed through the funding formula for mainstream schools. The funding allocations for mainstream schools are paid directly to them each month; the funding allocations for academies and free schools are recouped by the Education and Skills Funding Agency from the DSG before it is received by the council. The paper also recommends the creation of a Growth Fund of £2.0 million.
- The DSG allocation budget for 2024/25 is summarised in Table 1 below:

DSG Blocks	Balance brought forward from 2023/24 (forecast) £m	2024/25 DSG Allocation £m	Movement between blocks £m	Final DSG budget 2024/25 £m	Estimated spend 2024/25 £m	Carry forward balance at end of 2024/25 £m
School Block	(0.787)	(344.325)	1.721	(342.604)	342.604	(0.787)
De-delegation	(0.528)			-	-	(0.528)
Central Services Block	-	(2.696)	-	(2.696)	2.696	-
High Needs Block	57.085	(89.535)	(1.721)	(91.256)	111.358	77.187
Early Years	0.307	(55.180)		(55.180)	55.180	0.307
<b>Total</b>	<b>56.076</b>	<b>(491.736)</b>	<b>-</b>	<b>(491.736)</b>	<b>511.838</b>	<b>76.179</b>

In considering the DSG net carry forward deficit reserve the council should also note that LA maintained schools' balances forecast position illustrated in Table 2 below is NOT included within Table 1 above.

Table 2 2023/24 Bristol LA Maintained Schools Financial Summary	2023/24 Closing Balance forecast as at Q2	2023/2024 In Year balance forecast as at Q2	Number of Schools with cumulative deficit as at 31/3/2024	Number of Schools with deficit variance to Q1
Nursery	7,215,354	165,269	11 of 12	no change
Primary	-1,907,703	998,676	5 of 28	no change
Primary with Nursery Class	-275,696	461,531	3 of 12	up one
SECONDARY	-21,118	370,547	1 of 2	up one
SPECIAL	-491,730	297,665	2 of 5	up one
PRU	-325,124	178,822	0 of 1	no change
<b>Sub Total</b>	<b>4,193,983</b>	<b>2,472,511</b>	<b>22 of 60</b>	
Bristol LA CC	640,499	99,167	1 of 1	no change
<b>Sub Total inc CC</b>	<b>4,834,482</b>	<b>2,571,678</b>	<b>23 of 61</b>	
<b>Total</b>	<b>4,834,482</b>	<b>2,571,678</b>		

As illustrated in Table 2, the main challenges are within maintained nursery schools (MNS). In order to support developing sustainable operating models for MNS, the Early Years Service (EY) continues to work with nursery headteachers and governors to utilise funding agreed with Schools Forum in November 2023 to underwrite the deficit situation whilst recovery plans are developed.

All schools forecasting deficit positions have been notified to produce robust recovery plans to secure their long-term financial sustainability. Discussions are being held with schools' leadership team and schools' governing bodies to explore solutions. Education and Financial Service colleagues are working closely with the schools on their recovery programmes.

To date two nursery schools and one primary school have approved licenced deficit plans, with the remainder continuing to develop satisfactory recovery plans, with the primary school plan achieving a recovered position in 2025/26 and the two nursery school plans recovering by 2027/28.

To support schools whilst they recover their financial situations, the LA proposed, with endorsement from Schools Forum, the use of bridging funding of £1.102 million of earmarked reserves to underwrite the deficit. This £1.102 million is composed of funding from the closed school surplus (£0.517m), the schools in financial difficulty reserve (£0.335m) and from TWS reserves (£0.250m). An additional grant of £0.675 million has also been made available by the ESFA for the support of maintained schools (including nursery schools) in financial difficulty. The ESFA provides separate alternative dedicated support directly to academies that are in financial difficulty. This additional funding stream increases the financial support available to underwrite the schools with deficit positions and in difficulty to £2,047 million. With this funding and the reversal of school revenue contributions to capital the maintained schools will be in an overall small surplus position.

**Table 3 - funding to support LA Maintained schools in financial difficulty**

	<b>Funding Source</b>	<b>Description (£'000)</b>	<b>Available Budget (£'000)</b>	<b>Proposed redesignation funding amount (£'000)</b>
1	2022-23 Schools Block surplus	£270k growth fund underspend and £517k surplus from closed schools	787	517
2	De-delegation surplus	Schools in financial difficulty	335	335
3	TWS reserves		250	250
		<b>subtotal</b>	<b>1,372</b>	<b>1,102</b>
4	ESFA grant for schools in financial difficulty	additional funding for LA maintained schools in Financial difficulty	675	675
		<b>Total</b>	<b>2,047</b>	<b>1,777</b>
<b>Total Possible funding to facilitate temporary financial support for LA maintained schools in financial difficulty</b>				

**Cabinet Member Recommendations:**

**Cabinet is asked to recommend the following proposals to Full Council:**

**To approve 2024/25 DSG budget:**

**1. Schools Block (detail in Appendix A3)**

- a. the Schools Block budget be set at £342.604 million for 2024/25, as per Table 1 above
- b. £1.721 million of the overall Schools Block DSG is transferred to the High Needs Block to support the growing demand
- c. the basis for distributing the funding to mainstream schools be as set out and agreed by Schools Forum (Appendix A3)
- d. the Growth Fund for established schools expanding in September 2024 be set at £2.0 million (a component of the total Schools Block budget).

**2. Central School Services Block (detail in Appendix A2)**

- a. Following Schools Forum agreement, approve the Central School Services Block budget is set at £2.696 million for 2024/25.

**3. High Needs Block (detail in Appendix A2)**

- a. Approve the High Needs Block budget be set at £91.256 million for 2024/25 as per Appendix A2, after receiving transfers of £1.721 million from Schools Block.

**4. Early Years Block (detail in Appendix A2)**

- a. Approve the Early Years Block budget be set at £55.180 million for 2024/25, noting that spend and DSG income will fluctuate, according to participation levels in each of the three school terms
- b. Approve that funding for Early Years should be distributed in line with the arrangements explained in the report to Schools Forum (Appendix A2).

**Cabinet to note the following:**

**5. Overall position - note**

- a. the 2024/25 DSG overall allocation of £491.736 million.
- b. That the forecast DSG expenditure in 2024/25 is £511.838 million, with a forecast accumulated deficit of £76.179 million
- c. The Education Service will continue to work with the Schools Forum and the respective Task and Finish Groups (High Needs Task and Finish Group; Early Years Task and Finish Group) to explore sustainable mitigation options to bring the DSG budget to an affordable position over the medium term. This will include the implementation of the proposed changes to the current non-statutory top-up funding model. Recommendations will be presented to Cabinet for a key decision on 6 February 2024. This follows a recent city-wide consultation which closed on 15 December 2023 outlining a set of options to reform current funding models.

- d. Bristol Schools Forum (SF) feedback on 2024/25 DSG budget (that will be published separately following receipt):

**Corporate Strategy alignment:** Funding schools and educational provision appropriately is part of the Fair and Inclusive theme in the Corporate Strategy.

**City Benefits:** The financial strategy aims to use available funding for education to best effect, by distributing resource for early years providers, maintained schools, academies and free schools fairly and sustainably in partnership with Schools Forum.

**Consultation Details:**

- Consultation with schools on Schools Block activities for 2024/25, with respect to transfers, funding formula and de-delegated items took place in October/November 2023 and the results of this informed the Schools Forum discussions in November 2023 and January 2024. Further details on consultation outcome are available in Appendix 2 and Appendix 3.
- As part of the Delivering Better Value in SEND Programme (DBV) a full city-wide consultation to review High Needs Block 'Top Up' funding took place in November/December 2023. The results of this consultation will inform a set of recommendations which will be presented to Cabinet for a key decision on 6 February 2024. Early Years settings were consulted on the basis of the EYNFF in December 2023 and results were considered at Schools Forum on 16 January 2024 when agreeing the EYNFF rates and Early Years Block budgets for 2024/25.

<b>Revenue Cost</b>	<b>£491.736 million</b>	<b>Source of Revenue Funding</b>	Dedicated Schools Grant 2024/25
<b>Capital Cost</b>	<b>£Nil</b>	<b>Source of Capital Funding</b>	N/A
<b>One off cost</b> <input type="checkbox"/>	<b>Ongoing cost</b> <input checked="" type="checkbox"/>	<b>Saving Proposal</b> <input type="checkbox"/>	<b>Income generation proposal</b> <input type="checkbox"/>

**Required information to be completed by Financial/Legal/ICT/ HR partners:**

**1. Finance Advice:**

As detailed in the report.

**Finance Business Partner:** Travis Young, 3 January 2024

**2. Legal Advice:**

The recommendations are lawful. As outlined within Appendix 2 and Appendix 3, the report confirms consultation has taken place with schools and early years settings and the Schools Forum in relation to the decisions to be taken in accordance with the requirements of the Schools Forums (England) Regulations 2012.

The responses to the consultation including the report from the Schools Forum must be taken into account by Cabinet when taking the decision. Cabinet should also be satisfied that proper consultation has taken place in that (i) proposals were consulted on are at a formative stage (ii) sufficient reasons have been given for the proposals and (iii) adequate time has been allowed for consideration and response.

Cabinet must also consider the Public Sector Equality duty which requires the decision maker to consider the need to promote equality for persons with "protected characteristics" and to have due regard to the need to i) eliminate discrimination, harassment, and victimisation; ii) advance equality of opportunity; and iii) foster good relations between persons who share a relevant protected characteristic and those who do not share it.

The Equalities Impact Assessment provides an analysis for this purpose and should be carefully considered by Cabinet in making decisions.

A decision can be made where there is a negative impact if it is clear that it is necessary, it is not possible to reduce or remove the negative impact by looking at alternatives and the means by which the aim of the decision is being implemented is both necessary and appropriate.



Section 11 of the Children Act 2004 requires Cabinet to ensure that when taking decisions affecting children they have regard to the need to safeguard and protect them and promote their welfare. The Equalities Impact Assessment provides an analysis of the impact on children and should be carefully considered by Cabinet in making decisions.

**Legal Team Leader:** Husinara Jones Team Manager/Solicitor 11 January 2024

**3. Implications on IT:** There are no direct IT implications, save for the need for DSG funded services to meet necessary IT and digital costs within their approved funding envelope.

**IT Team Leader:** Alex Simpson – Lead Enterprise Architect

**4. HR Advice:** There are no significant HR issues arising from this report for Bristol City Council employees.

**HR Partner:** Lorna Laing, 12<sup>th</sup> January 2024

<b>Director sign off</b>	Reena Bhogal-Walsh – Director of Education	16/01/2024
<b>Cabinet Member sign-off</b>	Cllr Craig Cheney / Cllr Asher Craig	16/01/2024
<b>CLB Sign-off</b>	CLB	16/01/2024
<b>For Key Decisions - Mayor's Office sign-off</b>	Mayor's Office	17/01/2024

<b>Appendix A – Further essential background / detail on the proposal</b>	<b>YES</b>
<b>Appendix A – Details of consultation carried out - internal and external</b>	<b>YES</b>
<b>Appendix C – Summary of any engagement with scrutiny</b>	<b>NO</b>
<b>Appendix D – Risk assessment</b>	<b>NO</b>
<b>Appendix E – Equalities impact assessment of proposal</b>	<b>YES</b>
<b>Appendix F – Eco-impact screening/ impact assessment of proposal</b>	<b>YES</b>
<b>Appendix G – Financial Advice</b>	<b>NO</b>
<b>Appendix H – Legal Advice</b>	<b>NO</b>
<b>Appendix I – Combined Background papers</b>	<b>NO</b>
<b>Appendix J – Exempt Information</b>	<b>NO</b>
<b>Appendix K – HR advice</b>	<b>NO</b>
<b>Appendix L – ICT</b>	<b>NO</b>

**Bristol Schools Forum**  
**2023/24 DSG forecast report as at October 2023 (Period 07)**

<b>Date of meeting:</b>	16 <sup>th</sup> January 2024
<b>Time of meeting:</b>	5.00 pm
<b>Venue:</b>	Virtual

## **1 Purpose of report**

- 1.1 This report provides information of the 2023/24 DSG position as at Period 07 (P07) to end of October 2023.

## **2 Recommendation**

### **2.1 Schools Forum is invited to:**

- a) note the P07 forecast position for the DSG as at end of October 2023
- b) note that the forecast position for maintained schools remains as reported at November School Forum.

## **3 2023/24 DSG forecast position**

The DSG ended the 2022/23 financial year with a cumulative deficit of £39.680m including £24.650m deficit brought forward from the prior years.

As illustrated in Table 1 (with further details set out in Appendix 1), the 2023-24 gross allocation for DSG is £452.3m (net amount £196.6m after deduction for academies recoupment, NNDR and direct funding of high needs places by ESFA) per ESFA announcement on 20<sup>th</sup> July 2023.

The DSG continues to forecast an overspend of £16.396m in 2023/24, this being no change from the P6 reported position. The main driver of forecast overspend remains High Needs top-up and Independent non-maintained placement costs resulted from increasing EHCP, complexity of Children with SEN and lack of sufficiency. The mitigated cumulative deficit forecast position at the end of 2023/24 could reach £56.076m.

Early Years continues to forecast an in-year overspend of £0.912m, and is driven from increasing demand in EY's SEN £0.640m and the EY & Nursery Improvements programme overspending of £0.269m. The programme overspend is intended and will be mitigated with use of the EY transformation funding carried forward from 2022-23.

**Summary DSG position as at 2023/24 Period 7 (P7)**

<b>Table 1 - Bristol Dedicated Schools Grant 2023/24</b>	<b>2022/23 B/f balance</b>	<b>Gross DSG funding / Budget 2023/24*</b>	<b>P07 Gross DSG forecast outturn</b>	<b>In-year variance as at P07</b>	<b>Cumulative C/f forecast position as at P07</b>
<b>£'000</b>					
Schools Block	(787)	323,851*	323,851**	(0)	(787)
De-delegation	(527)		(1)	(1)	(528)
Central School services Block	8	2,717	2,709	(8)	
Early Years	(605)	37,432	38,344	912	307
High Needs Block	42,520	86,675	103,230	16,555	59,075
High Needs Transformation	(928)	1,627	2,677	1,050	122
Funding	0	(452,302)	(452,302)	0	0
<b>Total (Unmitigated position)</b>	<b>39,680</b>		<b>18,508</b>	<b>18,508</b>	<b>58,188</b>
Mitigations (budget vs. forecast in 2023-24)		(3,180)	(2,112)		(2,112)
<b>Total - Mitigated position</b>	<b>39,680</b>		<b>16,396</b>	<b>18,508</b>	<b>56,076</b>

\* Bristol gross DSG Allocations, including recoupment and deductions for NNDR, and for direct funding of high needs places directly passported to schools by ESFA totalling £255.752m as of 20th July 2023.  
\*\*Following the closure of St Barnabas the schools block is likely to underspend by £283,653, work is underway to ascertain the final schools balances in 2023/24.

**LA Maintained Schools forecast position.**

As reported to September School Forum, 2022/23 was challenging for the sector, and the financial health of LA maintained schools deteriorated by £5.279m during the 2022-2023 year, and ending with £1.765m cumulative deficit.

As reported in November, the 2023/24 LA maintained schools' forecast financial position has deteriorated from the position as reported at Q1. Q2 forecasts show an overall worsening movement of £1.258m from the Q1 reported position, with outturn forecast at deficit of £4.834m. The summarised position is shown in Table 2 below.

Please note that school balances are distinct from the DSG and so these figures are NOT included within DSG Schools' Block figure in Table 1 above.

**Table 2**

Table 2 2023/24 Bristol LA Maintained Schools Financial Summary	2023/24 Closing Balance forecast as at Q2	2023/2024 In Year balance forecast as at Q2	Number of Schools with cumulative deficit as at 31/3/2024	Number of Schools with deficit variance to Q1
Nursery	7,215,354	165,269	11 of 12	no change
Primary	-1,907,703	998,676	5 of 28	no change
Primary with Nursery Class	-275,696	461,531	3 of 12	up one
SECONDARY	-21,118	370,547	1 of 2	up one
SPECIAL	-491,730	297,665	2 of 5	up one
PRU	-325,124	178,822	0 of 1	no change
<b>Sub Total</b>	<b>4,193,983</b>	<b>2,472,511</b>	<b>22 of 60</b>	
Bristol LA CC	640,499	99,167	1 of 1	no change
<b>Sub Total inc CC</b>	<b>4,834,482</b>	<b>2,571,678</b>	<b>23 of 61</b>	
<b>Total</b>	<b>4,834,482</b>	<b>2,571,678</b>		

Information provided by LA Maintained Schools at Quarter 2, projects an in-year deficit position of £2.572m (including Children’s Centres).

As reported to November School Forum the deterioration between Q1 and Q2 Maintained Nursery Schools in-year forecast positions was in part due to schools adopting a more prudent position following emerging pressures over the Summer, despite the uplift in the MNS supplement for 2023/24 and the enhanced rates from September 2023. Recovery plans are being prepared to address the accumulated deficits.

Maintained Primary and Secondary schools identified greater pressures in their positions. With Q2 forecasting a cumulative closing position of £2.205m surplus, down £1.831m.

Special schools and PRUs also reported deteriorating positions, with forecast cumulative closing positions of £0.817m, a decrease of £0.476m from 2022-2023.

All schools forecasting deficit position have been notified to produce robust recovery plans to secure their long-term financial sustainability. Meetings are being held with schools' leadership team and schools' governing bodies to explore solutions. Education and Financial Service colleagues are working closely with the schools on their recovery programmes.

The schools in difficulty funding reported in November provides the necessary sources to bridge temporarily the financial gap in the concerned LA maintained schools, including planning the use of the £0.675m additional grant being made available to support LA maintained schools.

To date three schools have approved licenced deficit plans, the rest are continuing to develop satisfactory recovery plans. The three approved plans, and repayment profiles, are summarised in Table 3 below:

Table 3

<b>Bristol Schools Licenced Deficit Plans (LD)</b>								
			<b>Repayment Profile</b>					
<b>Type of Setting</b>	<b>No of schools approved for Licenced Deficit</b>	<b>Licenced Deficit Approval</b>	<b>2023/24</b>	<b>2024/25</b>	<b>2025/26</b>	<b>2026/27</b>	<b>2027/28</b>	<b>Balance</b>
<b>Nursery</b>	<b>2</b>	£437,917	-£87,583	-£87,583	-£87,583	-£87,583	-£87,583	£0
<b>Primary</b>	<b>1</b>	£103,100	-£36,445	-£33,328	-£33,328	£0	£0	£0
<b>Total</b>	<b>3</b>	<b>£541,017</b>	<b>-£124,028</b>	<b>-£120,911</b>	<b>-£120,911</b>	<b>-£87,583</b>	<b>-£87,583</b>	<b>£0</b>

With regard to the Dedicated Schools Grant Block forecast position:

- 3.1 **De-delegated resources (Nil variance).** 2023/24 budget is forecast to be fully utilised.
- 3.2 **Central School Services Block (Nil Variance).** 2023/24 budget is anticipated to be underspent by £8k to offset carry forward overspend from previous years.
- 3.3 **Early Years Block (£0.307m overspend).**

As indicated earlier in the report, Early Years is experiencing pressure in emerging SEN which is anticipated to overspend by £0.645m during the financial year, plus the planned use of the allocated EY / MNS improvement fund carried forward from previous year to support EY transformation work in 2023/24.

- 3.4 **High Needs Block (£17,604m overspend).** The High Needs block is forecast to overspend overall by £17.6m in 2023/24. This is mainly driven by the increasing numbers and complexity of cyp with EHCPs in the city, as evidenced by pressures on top-up and placement budgets. Additionally there is a planned overspending in the Education Transformation programme to utilise funding carried forward from 2022/23.
- 3.5 **Funding (Nil Variance).** £452.302m as at July 2023 announcement, which will be subject to Early Year's adjustment where funding is calculated in arrears based on actual participation.

### Appendix 1 - 2023/24 DSG P07 forecast position as at October 2023

Bristol DSG Outturn position as at Period 7 (P07) 2023/24	Brought forward 1.4.23	Funding 2023/24	P07 Forecast position	In-year movement	Carry forward 31.3.24	2022/23 Outturn position
	£'000	£'000	£'000	£'000	£'000	£'000
Maintained Schools		80,857	80,857	(0)		77,821
Academy Recoupment		240,206	240,206	0		223,990
Growth Fund		2,788	2,788	0		2,063
<b>Schools Block</b>	<b>(787)</b>	<b>323,851</b>	<b>323,851</b>	<b>(0)</b>	<b>(787)</b>	<b>303,874</b>
<b>De-delegation Services</b>	<b>(527)</b>	<b>0</b>	<b>(1)</b>	<b>(1)</b>	<b>(528)</b>	<b>(23)</b>
Admissions	6	575	575	0	6	529
Centrally Retained	1	2,142	2,134	(8)	(7)	2,213
<b>Schools Central Services</b>	<b>8</b>	<b>2,717</b>	<b>2,709</b>	<b>(8)</b>	<b>(0)</b>	<b>2,742</b>
National Formula		29,523	29,503	(19)		27,105
2-Year-Old Funding		2,914	2,912	(2)		3,172
Pupil Premium (EYPP)		386	386	0		317
Additional Support Services		500	500	0		457
SEN Top up		1,686	2,326	640		2,074
Staffing		2,116	2,113	(3)		1,892
Disability Access Fund		152	181	29		105
SEND Support		156	155	(1)		
EY & Nursery improvement work		0	269	269		74
<b>Early Years Block</b>	<b>(605)</b>	<b>37,432</b>	<b>38,344</b>	<b>912</b>	<b>307</b>	<b>35,196</b>
Commissioned Services		2,653	4,673	2,019		3,422
Core Place Funding		9,289	9,235	(54)		9,102
Staffing		1,237	2,558	1,321		2,272
Top Up		46,390	51,665	5,275		48,610
Placements		10,349	17,609	7,260		14,485
Pupil Support		975	1,708	733		1,402
HOPE Virtual School		236	235	(0)		235
Academy Recoupment		15,547	15,547	0		15,099
Education Transformation		1,627	2,677	1,050		1,343
<b>High Needs Block</b>	<b>41,592</b>	<b>88,302</b>	<b>105,907</b>	<b>17,604</b>	<b>59,196</b>	<b>95,972</b>
<b>Funding</b>		<b>452,302</b>	<b>470,810</b>			<b>437,761</b>
<b>Total</b>	<b>39,681</b>	<b>0</b>	<b>18,508</b>	<b>18,508</b>	<b>58,189</b>	<b>15,031</b>

**Appendix 2 - High Needs Block top up funding breakdowns by settings as at P7: September 2023**

<b>Appendix 2 - High Needs Block top up funding breakdowns by settings as at P6:</b>	<b>Funding 2023/24</b>	<b>P07 Forecast Outturn</b>	<b>In-year movement</b>	<b>Carry forward 31.3.24</b>	<b>2022/23 Outturn position</b>
	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>		<b>£'000</b>
HNB: Top Up Special Schools	23,796	21,957	(1,839)		23,226
HNB: Top Up OLA	2,107	2,459	352		2,501
HNB: Top Up GFE	3,714	4,370	656		4,556
HNB: Top Up - Resource Bases	2,359	3,551	1,192		2,351
HNB: Top Up - Mainstream Schools	11,755	16,217	4,462		17,180
HNB: Top Up - PRUs	2,658	3,112	453		2,543
<b>HNB: Top Up</b>	<b>46,390</b>	<b>51,665</b>	<b>5,275</b>		<b>52,357</b>



**Bristol Schools Forum**  
**Dedicated Schools Grant (DSG) 2024/25**

<b>Date of meeting:</b>	16th January 2024
<b>Time of meeting:</b>	5.00 pm
<b>Venue:</b>	Virtual Meeting

## **1 Purpose of report**

- 1.1 To give an overview on the DSG for 2024/25 and seek ratification of the Schools Forum on the block allocations which were agreed in principle at the last meeting.
- 1.2 To seek agreement on the Early Years National Funding Formula (EYNFF) proposals, following consultation with settings.
- 1.3 The Local Authority (LA) must seek Schools Forum approval for Central Services spend, except for the item relating to school licences which must be repaid to the Department for Education (DfE) on behalf of all maintained schools and academies.

## **2 Recommendation**

- 2.1 **Schools Forum is invited to:**
  - a) **note 2024/25 funding levels.**
  - b) **approve final transfers between blocks.**
  - c) **approve the EYNFF.**
  - d) **agree Central School Services Block allocations**
    - LA Core Functions £1.223m (as per Appendix 1);
    - School Admissions £0.592m;
    - Schools Forum £0.023m;
    - Combined Services £0.382m (as per Appendix 2).
  - e) **provide feedback, as appropriate, to Cabinet and Council, for their consideration in making final decisions on the Schools Budget for 2024/25.**

## **3 Background**

- 3.1 Schools Forum considered the emerging position on the DSG for 2024/25 at its meetings in September and November 2023 and agreed 0.5% could be transferred to the High Needs Block from the Schools Block. This 0.5%

will be used to increase the funding available to support High Needs in 2024/2025, rather than be earmarked to support the Education Transformation. These recommendations were made following consultation with schools.

- 3.2 The final data and allocations from the Education and Skills Funding Agency (ESFA) were released on 19<sup>th</sup> December 2023 and the results of both events have informed this report.

## 4 DSG 2024/25

- 4.1 The funding in the DSG is primarily generated by pupil numbers from the October 2023 census, which for mainstream schools recorded 34,671 primary age pupils. Decrease of 330 from October 2022 (0.94%, 35,001), continuing the decline in primary age (which fell by 359 (-1.01%) between October 2022 and October 2021).
- 4.2 Secondary age pupil numbers in mainstream schools continue to increase, with October 2023 counting 21,789 – an increase of 413 (1.93%) in October 2022. This also continues the trend (Oct 2022 was an increase of 797 (3.87%) in Oct 2021).
- 4.3 Funding per pupil in mainstream schools has also increased (by 5.13% for primary and 5.53% for secondary) over the 2023-24 levels. The overall increase in the DSG, is £28.750m giving a total DSG of £491.736m.
- 4.4 Table 1 shows the funding allocations in each block for 2024/25 compared to the current allocations for 2023/24.

Table 1 - DSG Allocations

<b>DSG blocks</b>	<b>Current 2023/24 DSG allocation</b>	<b>DSG 2024/25 allocation</b>	<b>Increase</b>	<b>Change</b>
	<b>£m</b>	<b>£m</b>	<b>£m</b>	<b>%</b>
Schools Block*	336.192	344.325	8.133	+2.42%
Central School Services Block	2.717	2.696	(0.021)	-0.77%
High Needs Block	86.645	89.535	2.890	+3.34%
Early Years Block**	37.432	55.180	17.748	47.41%
<b>Total</b>	<b>462.986</b>	<b>491.736</b>	<b>28.750</b>	<b>6.21%</b>

\*£10.714m has been added to 23/24 allocation to include MSAG which is included in schools block for 2024/25

\*\*Early years funding for 2024/25 includes new funding totaling £14.996m. More information can be found in point 4.12

- 4.5 **Central School Services Block.** This block is funded in two parts, for ongoing and for historic responsibilities. The funding for historic commitments has been reduced again by 20% (£0.095m) from £0.477m to £0.382m. It remains the aim of ESFA to withdraw this funding over time. The historic responsibilities' part previously supported two areas: contributions to Combined Services and Prudential Borrowing. The prudential borrowing element had not been required for that purpose for some time, so the LA has elected to maintain the contribution to combined services as far as possible and then transferred any remainder of the historic responsibilities portion to support High Needs.
- 4.6 The 2024-25 allocation for historic responsibilities is £0.382m, so the LA needs to trim the contribution to combined services by £0.095m with no spare element to transfer to high needs or elsewhere.
- 4.7 **High Needs Block.** The High Needs Block has received an increase in funding (of 3.34%) but this block continues to be under pressure. Current spending levels in 2023/24 indicate that the increased allocation will not cover spending at the same level as this year and does not provide any additional funding for growth, additional need or historic shortfalls.
- 4.8 Forecast in-year spend in 2023/24 is £17.605m over budget. Table 2 shows the forecast position for 2023/24 and 2024/25 highlighting the ongoing deficit position. Whilst the projection is £108.582m, there is a risk that this could change depending on the upward pressures of rising demand and rising costs against planned mitigations in this block.

Table 2 – High Needs Analysis

	2023/24	2024/25
	£m	£m
Block Allocation	86.675	89.535
Transfer from CSSB	0	0
Transfer from Schools Block	1.627	1.721
<b>Total Block Funding</b>	<b>88.302</b>	<b>91.256</b>
Forecast Spend	103.230	108.582
Education Transformation spend	2.677	
<b>Total Spend</b>	<b>105.907</b>	<b>108.582</b>
<b>In year over/(under) spend</b>	<b>17.605</b>	<b>17.326</b>
Opening Balance b/f - HNB	42.520	59.197
Opening Balance b/f - Transformation	(0.928)	
<b>Closing Balance c/f</b>	<b>59.197</b>	<b>76.523</b>

- 4.9 For the 2023/24 budget £1.6m was transferred from the Schools Block to the High Needs Block with agreement from forum, and this funding is being used to support the Education Transformation Programme. At the November meeting Forum agreed to the transfer of 0.5% of the schools' block into the high needs block. This funding will be used to support High Needs activities and reducing the deficit.
- 4.10 **Schools Block** Details on this block are covered in a separate paper on this agenda.
- 4.11 **Early Years Block.** The allocation is still indicative at this stage as the majority of the funding in this block is based on census data collected throughout the year. The indicative allocation is based on January census only, so the actual amount will be updated by ESFA once the Spring 2024 census figures are known.
- 4.12 The 2024/25 allocation includes £14.996m of new funding being:
- New 2-year old and under entitlement to 15 hours of free childcare for eligible parents
  - Extension of pupil premium and DAF to eligible 2 year olds and under
- Overall the change in early years funding is £17.748m increase when compared to 2023/24.
- 4.13 The release of the block allocations also included the first indication of the hourly rates for 2024/25. For 3 & 4 year old the rate will increase by 17p to £5.97 from £5.80 in 2023/24. The 2 year old rate will increase by £2.36 to £8.25. The under 2 year old rate will be £11.24 which is new for 2024/25. These are the rates used to calculate funding to the LA, the rates paid to providers are outlined in section 5 of this report.
- 4.14 The Maintained Nursery School (MNS) supplementary funding will increase to £4.64 per hour; this is equivalent to an indicative increase of £0.613m in funding based on part-time participation number of 1,177 for 15 hours per week, 38 weeks per year.
- 4.15 The Teachers Pay and Pensions Grant (TPPG) continues to reside in the Early Years Block as per 2023/24. The Early Years team confirm that no funding will be retained and payments to schools and academies with nursery classes will continue through the payment workbook at a provisional rate of £0.27 for 3 & 4 year old universal and extended hours. TPPG is already included in the MNS supplement (for rates, see 4.14).

4.16 **Overall position.** Table 3 shows the effect on the block funding position and outlines the 2024/25 Budget, it also shows the forecast carry forward amounts against each block.

**Table 3: Forecast block budgets after movements between blocks and carry forward amounts.**

<b>DSG Blocks</b>	<b>Balance brought forward from 2023/24 (forecast) £m</b>	<b>2024/25 DSG allocation* £m</b>	<b>Movement between blocks £m</b>	<b>Final DSG budget 2024/25 £m</b>	<b>Estimated spend 2024/25 £m</b>	<b>Carry forward balance at end of 2024/25 £m</b>
Schools block	(0.787)	(344.325)	1.721	(342.604)	342.604	(0.787)
De-delegation	(0.528)			(0)	0	(0.528)
Central Services Block	0	(2.696)	0	(2.696)	2.696	0
High Needs Block	59.197	(89.535)	(1.721)	(91.256)	108.582	76.523
Early Years	0.307	(55.180)		(55.180)	55.180	0.307
<b>Total</b>	<b>58.189</b>	<b>(491.736)</b>	<b>0.000</b>	<b>(491.736)</b>	<b>509.062</b>	<b>75.515</b>

\*Figures are based on latest allocations published in December 23

## 5 Early Years National Funding Formula (EYNFF)

- 5.1 The rates outlined in section 4.10 are those which generate funding to the LA. There have been significant changes in the guidance regarding how local authorities must distribute funding, which culminated in the [publication of changes](#) here which outline the [expansion of free childcare to Under 2s and 2 year olds from working families](#), beginning in April 2024 (and fully rolling out by Sept 2025). There remains a requirement to consult with providers prior to setting rates, which ran for 6 weeks and concluded on 29<sup>th</sup> Dec 2023.
- 5.2 Providers were asked for their views on the base rate, payment frequencies, supplements and the rates for SEN. Here is the final outcome of the 24/25 EYNFF consultation. 122 providers (34% of market share) responded:

Table 4: EYNFF Consultation responses

Question	% Agree	% Disagree
Base rate – Under 2s from working families	88	12
Base rate – Eligible 2s and 2s from working families	79	21
Base rate – 3 and 4 year olds	34	66
6 additional places for Eligible 2s	84	16
Limiting eligible 2s to 1 provider at a time	89	11
1 calendar months' notice period for eligible 2s	94	6
Introduce monthly payments (CMs and PVIs only)	77	14 (9N/A)
Supplement – keep deprivation supplement as current	96	4
Supplement – use System Leadership for the quality supplement	98	2
EY SEN – maintain the current rate	83	17

- 5.3 The rates that the LA is proposing to pay to providers for 2024/25 are as follows:
- 3 and 4 year olds: £5.08
  - 2 year olds: £7.82
  - Under 2 year olds: £10.77
- 5.4 The small increase in the 3 & 4 year olds funding rate proved unappealing to the sector, however as much as was affordable was included and due to funding regulations and restrictions, no further increase is possible without reducing the supplements (which were overwhelmingly supported). The Early years team feel that the significantly higher rate for under 2s overshadowed the older age range rates.
- 5.5 Deprivation supplement will be applied to all ages (currently only 3 and 4 year olds) from April 2024.
- 5.6 For under 2s and 2 year olds, early years Pupil Premium (rising to £0.68 per universal hour) and Disability Access Fund (rising to £910 per year) will also be available from April 2024.
- 5.7 For 2024/25, the LA is allowed to retain central funding from the under 2 and 2 year olds funding. The maximum percentage allowed is 5% (which is the same as the current 3 and 4 year olds) but to keep the base rates high, the LA are only retaining 3% of each for both under 2 and 2 year olds. 3 and 4 year olds will remain at 5% for 2024/25.

## 6 Central School Services Block (CSSB)

6.1 The purpose of the CSSB is to provide funding for the statutory duties the LA hold for both maintained schools and academies. The CSSB brings together:

- funding previously allocated through the retained duties element of the Education Services Grant (ESG)
- funding for ongoing central functions, such as admissions, previously top-sliced from the schools block
- residual funding for historic commitments, previously top-sliced from the schools block

6.2 The LA must still seek Schools Forum approval for Central Services spend, apart from the item relating to school licences which must be repaid to the DfE on behalf of all maintained schools and academies.

6.3 **CSSB Budget proposals.** The CSSB allocation for 2024/25 is £2.696m. This total is composed of two distinct components: on-going functions (£2.314m) and historic commitments (£0.382m). The on-going functions element has increased by 3.3% from 2023/24, up from £2.240m. Of the historic commitments, this funding is insufficient to support the contribution to combined services at the previous level, and as such leaves no element to transfer to high needs or elsewhere. Table 5 shows the funding and proposed 2024/25 budgets.

**Table 5: Composition of Central School Service Block Allocations**

Type of funding	Component	DSG Allocation 2023/24 £'000	2023/24 budget £'000	DSG Allocation 2024/25 £'000	Proposed 2024/25 budget £'000
Formulaic	LA Core functions	1,175	1,179	1,223	1,223
Formulaic	School Admissions	575	575	592	592
Formulaic	School Licences	348	348	358	358
Formulaic	Schools Forum	23	23	23	23
Formulaic	Pay & Pension – Centrally employed teachers	119	115	118	118
Historic	Combined Services	477	477	382	382
Historic	Prudential Borrowing	0	0	0	0
<b>Total</b>		<b>2,717</b>	<b>2,717</b>	<b>2,696</b>	<b>2,696</b>

6.4 **LA Core Functions £1.223m.** Appendix 1 sets out the functions and services that may be included in the LA Core functions budget. The relevant

costs for Bristol have been included against these line items. For 2024/25 it is proposed to inflate each item by 4.4% to reflect inflationary pressure across all spending items.

- 6.5 **Admissions £0.592m.** The only change to this budget is that arising from the increase in CSSB generally, due to pupil number and rate increases. For 2024/25, it is proposed to inflate this budget by 3% to reflect the increase in funding for ongoing commitments.
- 6.6 **School Licences £0.358m.** The DfE requires the Authority to pay licences on behalf of all maintained schools, academies and free schools in Bristol, to avoid the administration of delegating funding to and recovering the money from each school. The amount for 2024/25 has been increased by 3% to reflect the increase in funding for ongoing commitments. However, this figure is provisional and could change once DfE provide 2024-25 costs. There is no requirement for Schools Forum to specifically approve this line of the budget.
- 6.7 **Schools Forum £23k.** This funding is used to support the administration, clerking and hosting the meetings. It is proposed that this allocation remain at the 2023/24 level.
- 6.8 **Pay and Pensions – Centrally Employed Teachers.** For 2024/25, it is proposed that the budget is increased by 3% to reflect the increase in the funding of ongoing commitments.
- 6.9 **Combined Budgets. Appendix 2** details the analysis of the £0.382m for Combined Services, which Schools Forum has agreed in the past and it is proposed for agreement again for 2024/25. However, many of these costs are increasing and 20% reduction in funding has been distributed equally across all functions.



## Appendix 1 – CSSB LA Core Functions

Category	Component permitted to be funded from central DSG, subject to Schools Forum agreement	BCC proposal	Amount 2024/25 £'000	Amount 2023/24 £'000
Statutory & Regulatory	<ul style="list-style-type: none"> <li>Director of children's services and personal staff for director (Sch 2, 15a)</li> <li>Planning for the education service as a whole (Sch 2, 15b)</li> </ul>	Central budgets for education planning that are not already charged to Combined Budgets or elsewhere in the DSG.	112	107
Statutory & Regulatory	<ul style="list-style-type: none"> <li>Revenue budget preparation, preparation of information on income and expenditure relating to education, and external audit relating to education (Sch 2, 22)</li> <li>Authorisation and monitoring of expenditure not met from schools' budget shares (Sch 2, 15c)</li> <li>Formulation and review of local authority schools funding formula (Sch 2, 15d)</li> </ul>	Accounting and finance staff directly supporting education budget setting and funding for all schools.	281	269
Statutory & Regulatory	<ul style="list-style-type: none"> <li>Internal audit and other tasks related to the authority's chief finance officer's responsibilities under Section 151 of LGA 1972 except duties specifically related to maintained schools (Sch 2, 15e)</li> </ul>	Estimated cost of internal audit time.	29	28
Statutory & Regulatory	<ul style="list-style-type: none"> <li>Consultation costs relating to non-staffing issues (Sch 2, 19)</li> <li>Plans involving collaboration with other LA services or public or voluntary bodies (Sch 2, 15f)</li> </ul>	Estimated cost of public consultation on service development (eg High Needs) and collaborative working.	92	88
Statutory & Regulatory	<ul style="list-style-type: none"> <li>Standing Advisory Committees for Religious Education (SACREs) (Sch 2, 17)</li> </ul>	Current budget for SACRE.	14	13
Statutory & Regulatory	<ul style="list-style-type: none"> <li>Provision of information to or at the request of the Crown other than relating specifically to maintained schools (Sch 2, 21)</li> </ul>	Legal Services staff support.	68	65
Education Welfare	<ul style="list-style-type: none"> <li>Functions in relation to the exclusion of pupils from schools, excluding any provision of education to excluded pupils (Sch 2, 20)</li> <li>School attendance (Sch 2, 16)</li> <li>Responsibilities regarding the employment of children (Sch 2, 18)</li> </ul>	Current budget for Education Welfare.	438	420
Asset Management	<ul style="list-style-type: none"> <li>Management of the LA's capital programme including preparation and review of an asset management plan, and negotiation and management of private finance transactions (Sch 2, 14a)</li> <li>General landlord duties for all buildings owned by the local authority, including those leased to academies (Sch 2, 14b)</li> </ul>	Current budget for education property management and capital programme monitoring.	189	181
<b>TOTAL STATUTORY / REGULATORY FUNCTIONS OF LA</b>			<b>1,223</b>	<b>1,171</b>

## Appendix 2 – CSSB Combined Services Budget

Service	Total 2024/25 £'000	Total 2023/24 £'000
Director of Education and Skills	77	96
Equalities	29	36
Governor Support	14	17
HR	16	20
Primary Services	114	142
Pupil Census	22	28
School Place Planning	57	72
Secondary Services	53	66
<b>Grand Total</b>	<b>382</b>	<b>477</b>

**Bristol Schools Forum**  
**Schools Block 2024/25**

<b>Date of meeting:</b>	16 <sup>th</sup> January 2024
<b>Time of meeting:</b>	5:00 pm
<b>Venue:</b>	Zoom

## 1. Purpose of report

- 1.1 To inform and seek agreement of the Schools Forum on the final application of the funding formula for mainstream schools and academies for 2024/25, prior to final decision by Cabinet and submission of the Authority Proforma Tool (APT) to the Education and Skills Funding Agency (ESFA).

## 2. Recommendations

### Schools Forum is invited to:

- 2.1 Indicate which of the two proposed formula models for 2024/25 mainstream funding formula is preferred. The LA recommends the option to maximise the lump sum first, for the reasons set out in the report.
- 2.2 Approve the proposed arrangements for the 2024/25 mainstream funding formula, including the amount set aside for the Growth Fund
- 2.3 Provide feedback, as appropriate, to Cabinet and Council, for their consideration in making final decisions on the Schools Budget for 2024/25.

### Maintained primary school representatives of Schools Forum are invited to:

- 2.4 Agree to de-delegation of the following services at the amounts per pupil indicated in table 2 for 2024/25:
- a) Employee and Premises Insurance
  - b) Assessment of eligibility for free school meals
  - c) Maternity supply cover
  - d) Schools in financial difficulty
  - e) Trade Union facility time
  - f) Education Psychology
  - g) School Improvement Services

### Maintained secondary school representatives of Schools Forum are invited to:

- 2.5 Agree to de-delegation of the following services at the amounts per pupil indicated in table 2 for 2024/25:
- a) Employee and Premises Insurance
  - b) Assessment of eligibility for free school meals

- c) Maternity supply cover
- d) Trade Union facility time
- e) Health and safety roving reps
- f) Education Psychology
- g) School Improvement Services

### 3. Funding available

3.1 The DSG overview paper elsewhere on this agenda explains the overall strategy for schools finance for 2024/25. This indicates that the allocated funding for Schools Block in 2024/25 is £344.3m.

3.2 At the meeting held November 2023, Schools Forum agreed the following:

- The transfer of 0.5% of the Schools Block to the High Needs Block;
- The Minimum Funding Guarantee (MFG) to be set at +0.0%;
- The lump sum was to be set at maximum allowed £139,849.82;
- Any remaining funding directed to the Additional Education Needs (AEN) factors, then Age Weighted Pupil Unit (AWPU); and
- £2.0m top-slice of Schools Block to create the Growth Fund for 2024/25.

3.3 **Table 1** sets out how it is proposed that this funding be calculated and applied.

**Table 1: Proposed Schools Block Budget 2024/25**

<b>Funding</b>	<b>£'000</b>	<b>Cost</b>	<b>£'000</b>
Pupil led DSG funding	£330.1m	Transfer of 0.5% to HNB	£1.7m
Premises led DSG funding	£12.2m	Growth Fund	£2.0m
Growth funding	£2.0m	Balance remaining for Mainstream Schools formula	£340.6m
<b>DSG Schools Block Total Allocation</b>	<b>£344.3m</b>	<b>Schools Block Total</b>	<b>£344.3m</b>

\*The 2023/24 mainstream schools additional grant has been rolled into the National Funding Formula (NFF) for 2024/25 and is therefore, included in the schools block allocation.

3.4 The component elements of the calculation have been refreshed, upon release of the October 2023 census data. Each of the components is explained below.

3.5 **Pupil led DSG funding £330.1m.** This is the sum allocated to the LA based on the number of pupils recorded in the October 2023 census. Primary age pupils attract unit funding of £5,200.70, which is an increase on 2023-24's £4,946.84.

Secondary age pupils attract unit funding of £6,873.45, up from £6,513.22. The allocation to Bristol is based on a recorded 34,671 primary age pupils, down from last year's 35,001. Secondary is based upon 21,789 pupils, up from last year's 21,376.

- 3.6 **Premises led funding £12.2m.** This is the element of the Schools Block DSG that recognises costs not defined by NFF values, and is derived from the 2023/24 NFF baseline.
- 3.7 **Growth Funding £2.0m.** This element of the DSG Schools Block settlement is calculated by the ESFA based on the observed differences between the October 2022 and October 2023 school censuses. Growth is measured at the level of middle layer super output areas (MSOAs). This allocation is intended to meet the cost of both the growth fund and the additional cost of those pupils in growing schools not yet present in the school census, but can be insufficient as it is based on the historic change and not the anticipated change it is required to fund.
- 3.8 **Schools Block Total £344.3m.** This is the sum of the proposed allocations above.
- 3.9 **Transfer 0.5% of Schools Block to High Needs Block £1.7m** Schools Forum agreed to the transfer of 0.5% of the Schools Block to the High Needs Block at its meeting in November 2023. 0.5% is the maximum the Department for Education (DfE) allows to be agreed locally.
- 3.10 **Growth Fund allocation £2.0m** This funding as agreed at November's schools forum, is the top-slice of the Schools Block taken in order to fund growth expansions in existing schools for the following academic year, separate to the growth commitment in "new and growing" schools" which is funded within the formula mechanism.
- 3.11 **Balance remaining for Mainstream Schools formula £340.6m.** This is the remainder of the Schools Block allocation available for the mainstream funding formula, including the mandated elements of the formula.
- 3.12 **Schools Block Total £344.3m.** This is the total of the elements above.

#### 4. Growth Fund

- 4.1 The growth funding into the Schools Block is £2.0m, and this intended to support both the "new and growing" schools funded via the APT and create a growth fund to support existing schools that have been expanded.
- 4.2 Officers have estimated the requirement in "new and growing schools" to be for 210 FTE pupils, and this cost is built into the school funding formula.

- 4.3 Officers have also considered the existing commitments on the Growth Fund and projected these forward for a potential cost in 2024/25. This commitment is estimated to be approximately £1.2m, and includes the effect of existing growth moving from KS3 into KS4.
- 4.4 In addition to the existing known commitments it is possible further expansion may be needed, as the primary age bulge continues to move into secondary schooling. The Growth Fund of £2.0m leaves approximately £0.8m over the estimated known commitment to support any additional growth commitments and exceptional funding requests that may arise.

## 5. Funding formula

- 5.1 Schools Forum agreed the principles for the operation of the mainstream formula at its meeting in November 2023, including:
- Appropriate allocations are made for NNDR/rates
  - A Minimum Funding Guarantee of +0.0%
  - The Additional Educational Needs (AEN) factor values to be a function of the available funding
  - The lump sum is set to maximum allowed at £139,849.82 for both Primary and Secondary
  - An allocation of £2.0m is set for the Growth Fund
  - No decisions were made for de-delegation and representatives asked that this was deferred to January's schools forum. As de-delegation is applied after formula shares are determined, these outstanding items have no direct impact on the information presented in this report.
- 5.2 Following December's announcement from Education and Skills Funding Agency, when distributing the allocated schools block funding, it was not possible to maximise AEN and the lump sum in the same funding calculations. This is because of the Autumn census data adding proportionally more secondary pupils than the previous census. As Secondary pupils are funded at a higher level, once we met the statutory minimum requirements, the remaining unallocated funding was not sufficient to maximise the AEN and lump sum. Therefore, we have modelled two options and schools forum is being asked which one to apply.
- 5.3 Two options for the Schools Block formula have been modelled within the above constraints:
- Scenario 1: AEN factors have been prioritised with remaining funding being distributed through lump sum.
  - Scenario 2: Lump sum has been set to maximum allowed with remaining funding being distributed through AEN factors.

- 5.4 In both scenarios, the basic entitlement uses the AWPU rates at the minimum allowed for 2024/25. The total funding distributed by this factor is £235.4m (69% of the pre-MFG total). The per-pupil rates for 2024/25 are as follows:
- Primary £3,501.80
  - KS3 (years 7-9) £4,937.55
  - KS4 (years 10-11) £5,565.65
- 5.5 Scenario 1 favours the majority of secondary schools (18 out of 22), 2 all-through schools and 15 Primary schools. Whilst scenario 2 favours the most primary schools (70 out of 103) and 3 Secondary schools. The remaining 19 schools will receive the same level of funding from both of the proposals.
- 5.6 Scenario 2 does result in a slight decrease in some of the AEN factor values (FSM, IDACI, EAL3 and Low attainment) compared to 2023/24. However, the minimum funding guarantee along with increases in statutory minimum per pupil funding protects these schools from any potential loss resulting in a reduction of these factor values. This scenario also brings the factor values closer to the NFF values which supports the transition to hard NFF. Overall, this scenario is still more beneficial to majority of primary schools due to increase in lump sum and MFG protections.
- 5.7 Scenario 1 results in the lump sum being £133,649.08 for each setting, which distributes a total of £16.9m for all settings (4.98% of the pre-MFG total). In scenario 2, the lump sum is set to maximum allowed £139,849.82 which distributes a total of £17.7m for all settings (5.22% of the pre-MFG total).
- 5.8 The Minimum per Pupil funding levels were made a mandatory item in 2020/21 and remain mandatory in the formula, the rates have been dictated by the NFF. For 2024-25 the Primary rate is £4,610, whilst is £5,995 for secondary school pupils.
- 5.9 Overall in scenario 1, 109 of the 127 schools are set to receive an increase in cash funding in 2024/25, whilst 18 schools will receive less funding than in 2023/24. In scenario 2, 110 of the 127 schools are set to receive an increase in cash funding in 2024/25, whilst 17 will receive less funding than in 2023/24. Where schools receive a reduction in funding, this is being caused by a reduction in pupil numbers on roll that does not offset per-pupil funding gains in the formula.
- 5.10 The LA recommends option two over option one as this favours more schools, and as these schools are mainly primary, have smaller overall budgets than secondary schools. Option two also has the advantage of the formula factors becoming closer to the NFF values, which is required in the transition to a hard formula.
- 5.11 In total, 60 schools have a reduced NOR in 2024/25, whilst 8 are static and 59 have increased NOR.

5.12 Forum should note that the formula is subject to final approval from ESFA so figures in the report and appendices are therefore still indicative at this stage.

5.13 The detail of the unit values, the allocations against factors and individual school budget shares are shown in the appendices.

- Appendix A shows the formula unit values
- Appendix B shows the distribution of the funding across the relevant factors
- Appendix C shows the school budget shares and indicates which model benefits each school.

## 6. De-delegation

6.1 In November's schools forum, maintained primary and secondary school representatives were asked to agree to de-delegation for services listed in table 2. However, representatives asked to defer this decision to January's schools forum pending further information.

6.2 On 3<sup>rd</sup> October 2023, a consultation paper on 2024-25 School's Funding which included de-delegation was sent to head teachers for all settings via email and was also included in the Head Teacher's bulletin.

**Table 2: De-delegation rates per pupil for primary and secondary schools**

	Primary rate £	Secondary rate £
Employee and Premises Insurance	29.92	29.92
FSM Eligibility	1.23	1.23
Maternity Supply Insurance	33.55	48.72
Schools in Financial Difficulty	0	N/A
Trade Union Facility Time	4.15	4.15
Health and Safety Roving Reps	N/A	0.98
Educational Psychology	6.27	6.27
School Improvement Services	5.31	5.31

6.3 De-delegated items 2024/25:

### **Employee and Premises Insurance**

This funds insurance cover as arranged by the local authority. If delegated, schools would need to assure the LA that cover arranged by the school (if not bought back) is fit for purpose. Pooling the funding ensures proper cover and



allows schools' to avoid bureaucracy.

More information on the RPA for schools can be found here: [The risk protection arrangement \(RPA\) for schools - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/consultations/the-risk-protection-arrangement-rpa-for-schools)

**Rate:** Per-pupil charge has increased by 8% from 2023/24. This includes £2 increase in RPA rate which DfE have announced.

### **Assessment of eligibility for free school meals**

This funding enables the service to schools for the checking of free school meal eligibility.

**Rate:** Per-pupil charge has increased by 5% from 2023/24

### **Maternity Supply Cover**

Supports schools by funding the costs incurred covering staff taking maternity / paternity leave or staff on adoption leave.

**Rate:** Per-pupil charge has increased by 5% from 2023/24.

### **Schools in Financial Difficulty for primary schools**

Provides support to schools in or forecasting a deficit. Access to the support is generally dependent on a school producing an agreed Recovery Plan. The use of funds is directed by the head of school partnerships.

For information: there is currently available balance of £335k on this fund.

**Rate:** No contribution proposed for 2024/25.

### **Trade Union Facility Time Fund**

Employers have a statutory obligation to release trade union representatives for representation in cases. The facilities fund held by Bristol City Council is used to remunerate schools that release their teachers who are TU representatives to carry out casework for their members. In the absence of any facility fund, maintained school bear the cost of releasing staff.

For information: there is currently available a balance of £192k available to be used for this purpose.

**Rate:** Per-pupil charge has increased by 5% from 2023/24.

### **Health and Safety Roving Reps in Secondary Schools**

"Roving" reps are safety representatives who are appointed by TUs to cover multiple school sites. Their work includes effective consultation with employees in relation to employee health and safety issues. Compared to previous years, there are fewer safety representatives, and the cost of training is reduced. School head teachers retain overall responsibility, with the TU rep acting on the Head's behalf.

**Rate:** Per-pupil charge has increased by 5% from 2023/24.

### **Education Psychology (EP)**

The Education Psychology Service provides professional advice to young people, families and educational settings. The de-delegated funding supports the delivery of EP visits to schools to discuss and identify vulnerable children and young people, and support a robust graduated response to needs including cost effectiveness. This is in addition to the Educational Psychology work in to the SEN assessment process, paid for by the LA as a statutory responsibility.

**Rate:** Per-pupil charge has increased by 5% from 2023/24.

### **School Improvement Service**

The ending of the DfE School Improvement monitoring and brokering grant for 2022-23 impacted on the current model of school improvement service. We are now working to create a model to support quality provision for children and young people. This model is to meet both statutory improvement needs and provide a holistic approach to school improvement across the city. The request of £86,000 is to commit to investing into the service to future proof and become a self-sustainable model and not simply to meet the statutory requirements. The model places children and young people at the heart of the work and we want to ensure an equitable service is funded realistically and fairly.

**Rate:** Per-pupil charge has increased by 46% from 2023/24. However, de-delegation for 2023/24 was based on 9 months funding, whereas 2024/25 is being requested for the full year.

Key Mitigations/Savings	Mitigations/ Savings forecast						
	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30
<b>SCHEME A1</b> Specialist Provision Create 380 specialist places in special and mainstream schools to meet current and future	£2,017,725	£7,265,348	£11,272,987	£14,963,043	£16,819,893	£17,324,489	£17,844,224
<b>SCHEME A2</b> New Capital Request to increase specialist provision	£0	£883,709	£2,677,639	£5,521,598	£9,447,089	£14,486,557	£19,935,809
<b>SCHEME A3</b> Expansion of Supported Living (Project Rainbow) To build an education residential centre to support preparation for adulthood.	£94,275	£233,048	£240,039	£247,240	£254,658	£262,297	£270,166
<b>SCHEME A4</b> Bristol Special Free School The new Bristol Special Free School will create an additional 129 spaces between September 2025 to September 2031.	£0	£0	£0	£775,832	£2,019,625	£3,007,886	£3,555,894
<b>SCHEME B1</b> Review of HNB Element 3 Non-Statutory 'top-up' Funding	£0	£202,731	£1,716,971	£3,688,690	£5,660,410	£7,632,129	£9,603,848
<b>SCHEME C4</b> Aligning with SEND Programme	£0	£209,520	£697,131	£1,482,240	£2,585,123	£4,326,961	£6,479,871
<b>SCHEME G1</b> Review and reform of the Alternative Learning Provision model and funding to improve outcomes and ensure best value provision	£0	£684,049	£1,193,176	£1,228,972	£1,265,841	£1,303,816	£1,342,931
DBV Stretched Confidence Benefits INCLUDING Inflation	£0	£68,891	£1,747,814	£4,099,838	£6,655,997	£9,387,019	£11,917,630
For schemes A1, G1, C4a & C4b Impact of Inflation on Scheme B1 & C4	£0	£12,368	£84,791	£239,918	£487,284	£846,057	£1,328,569
<b>Total savings</b>	<b>£2,112,000</b>	<b>£9,559,663</b>	<b>£19,630,548</b>	<b>£32,247,372</b>	<b>£45,195,920</b>	<b>£58,577,212</b>	<b>£72,278,944</b>

## High Needs Block Recovery Plan Mitigations

As previously presented to Cabinet on 3<sup>rd</sup> October 2023

Ref:	Name of Scheme	Status	Narrative	Links to Published Documents (Cabinet Papers, consultation etc.)
A1	Specialist Provision	Delivery	So far capital projects have delivered 233 additional specialist education places in Bristol. Work continues with a further 104 places forecast by September 2024 and a further 56 by September 2025. In addition to this, conversations are ongoing about additional projects being added into the programme.	<a href="#">(Public Pack) Agenda Document for Cabinet, 06/09/2022 16:00 (bristol.gov.uk)</a>

Ref:	Name of Scheme	Status	Narrative	Links to Published Documents (Cabinet Papers, consultation etc.)
A2	Capital Investment in Existing Specialist Settings	Delivery	<p>The Council has received £14.874m High Needs Grant Funding from the Department for Education for 2022/23 and 2023/24. Cabinet has taken the decision to use this funding to deliver the additional specialist places noted in A1 and A3 with some capital held for future specialist provision opportunities. It is hoped the DfE will announce new High Needs Grant Funding for 2024/25 &amp; 2025/26 to enable the delivery of the next wave of strategic priorities to continue to reduce the reliance on INM provision and support the recovery plan.</p> <p>In addition, the Council has targeted appropriate Free School windows to encourage investment in new Specialist schools in the city. This has resulted in the approval of a DfE investment in a new Specialist Free School located in the North of the City. Future bid opportunities will be reviewed on their ability to deliver key strategic priorities for the city including supporting the HNB recovery plan.</p>	<a href="#">(Public Pack) Agenda Document for Cabinet, 06/09/2022 16:00 (bristol.gov.uk)</a>

Ref:	Name of Scheme	Status	Narrative	Links to Published Documents (Cabinet Papers, consultation etc.)
A3	Expansion of Support Living (Project Rainbow)	Delivery	<p>The 12-bedroom property is currently under construction at the City of Bristol College Ashley Down site with expected completion for the start of term 1, September 2023. The college anticipate that all 12 rooms will be fully occupied within the autumn term.</p> <p>The property is for young people aged 18-24 with an Education, Health and Care Plan (EHCP) who are enrolled on a full-time course with City of Bristol College. Students living at the centre will develop independent living skills, employability skills, gain work experience and have opportunities to socialise with others.</p> <p>Bristol City Council have been working together with students currently living at the City of Bristol College Brislington Centre site and young people from the Listening Partnership (our SEND participation group) to co-produce plans for the site, including interior design and artwork, signage, and accessibility.</p>	<p><a href="#">(Public Pack) Agenda Document for Cabinet, 18/01/2022 16:00 (bristol.gov.uk)</a> page 675</p> <p><a href="#">(Public Pack) Agenda Document for Cabinet, 06/09/2022 16:00 (bristol.gov.uk)</a> page 11</p>

Ref:	Name of Scheme	Status	Narrative	Links to Published Documents (Cabinet Papers, consultation etc.)
B1	Review of HNB Element 3 Non-Statutory 'top-up' Funding	Planning	This mitigation is being pursued as part of the DfE's Delivering Better Value in SEND Programme which Bristol has secured funding for. A procurement process has been undertaken to identify a delivery partner to work with the council to develop a suite of options for public consultation. This work collectively comprises 4 schemes within the HNB Recovery Plan (and is also known as Workstream 2). The delivery partner is currently developing proposals for consultation in November 2023 before a Cabinet decision planned for January 2024.	<a href="#">Delivering Better Value in SEND Programme Grant Allocation (Cabinet Report) 07/02/2023</a> (pages 294 to 298)
B2	Needs Matrix for Non-Statutory Top-Up Funding Applications	On Hold	Pending outcome of DBV Workstream 2	<a href="#">DCLU Local Digital Fund Round 5 Award</a>
C4	Belonging with SEND Programme	Delivery	The Belonging with SEND programme was delivered as a grant funding programme to support schools turn creative ideas into innovative school inclusion practice. To date 29 schools have received funding totalling £485k. Round 1 funded projects were completed in July – September 2023. Round 2 projects will complete in January 2024 and Round 3 projects will complete in July/September 2024. Further funding rounds will be developed in the new academic year 2023/24.	<a href="#">Bristol Schools Forum Report January 2023</a>

Ref:	Name of Scheme	Status	Narrative	Links to Published Documents (Cabinet Papers, consultation etc.)
C5	Workforce Development Plan and Delivery	Delivery	This work is currently focusing on maintenance and continued development of the online SEND workforce development offer, planning delivery of in-school training following a reduction in attendance due to workload challenges and completion of guidance on working with families of CYP with SEND from Black and Minoritised Communities following engagement with parent carers and educational settings.	<a href="#">Bristol SEND Workforce Development Offer</a>
C6	School Improvement Offer for SEND	Delivery	Supporting schools with developing their SEND provision by providing school-based reviews; mapping Ordinarily Available Provision (OAP) through using a whole school OAP template; managing School SEND Coordinator clusters; member/vice-Chair of Inclusion in Education Group; workforce development through SEND Peer reviews; Belonging with SEND reviewing and monitoring projects.	<a href="#">Ordinarily Available Provision; Support for SENDCos;</a>
D2	Therapists, Mentors and Tutors Framework	Delivery	The framework contract is live with three tender rounds having been run. There are 17 providers on the framework, and a block contract has been called off under the framework for SALT and OT with health provider Sirona.	<a href="#">Additional Provision Framework Contract - Therapists Mentors Tutors Approved Providers List Fina.pdf (bristol.gov.uk)</a>
D3	ALP Framework	Delivery	The framework contract is live, tender round 5 closed Friday 16th June. 16 providers are on the framework, with a further 29 bids submitted and ready for evaluation.	<a href="#">Alternative Learning Provision (bristol.gov.uk)</a> <a href="#">Alternative Learning Provision Framework - Decision Pathway Report.pdf (bristol.gov.uk)</a>



Ref:	Name of Scheme	Status	Narrative	Links to Published Documents (Cabinet Papers, consultation etc.)
E1	Specialist Place Funding	Planning	This mitigation is being pursued as part of the DfE's Delivering Better Value in SEND Programme which Bristol has secured funding for. A procurement process has been undertaken to identify a delivery partner to work with the council to develop a suite of options for public consultation. This work collectively comprises 4 schemes within the HNB Recovery Plan (and is also known as Workstream 2). The delivery partner is currently developing proposals for consultation in November 2023 before a Cabinet decision planned for January 2024.	<a href="#">Delivering Better Value in SEND Programme Grant Allocation (Cabinet Report) 07/02/2023</a> (pages 294 to 298)
F1	Review of 18 to 25 EHCP top up Funding	Planning	This mitigation is being pursued as part of the DfE's Delivering Better Value in SEND Programme which Bristol has secured funding for. A procurement process has been undertaken to identify a delivery partner to work with the council to develop a suite of options for public consultation. This work collectively comprises 4 schemes within the HNB Recovery Plan (and is also known as Workstream 2). The delivery partner is currently developing proposals for consultation in November 2023 before a Cabinet decision planned for January 2024.	<a href="#">Delivering Better Value in SEND Programme Grant Allocation (Cabinet Report) 07/02/2023</a> (pages 294 to 298)

Ref:	Name of Scheme	Status	Narrative	Links to Published Documents (Cabinet Papers, consultation etc.)
F2	Review of Post-16 Out of Authority	Planning	This mitigation is being pursued as part of the DfE's Delivering Better Value in SEND Programme which Bristol has secured funding for. A procurement process has been undertaken to identify a delivery partner to work with the council to develop a suite of options for public consultation. This work collectively comprises 4 schemes within the HNB Recovery Plan (and is also known as Workstream 2)	<a href="#">Delivering Better Value in SEND Programme Grant Allocation (Cabinet Report) 07/02/2023</a> (pages 294 to 298)
G2	Alternative Learning Provision	Planning	High quality properly commissioned and monitored ALP will form an essential part of meeting Bristol's sufficiency requirements going forward. There is currently a local deficit in local SEMH provision. Effective ALP can offer an excellent local alternative to high cost out-of-authority ISP's meeting lower levels of SEMH Primary need and will form part of the sufficiency strategy. A plan will be developed to support the development and improvement of existing ALP provision and the development of needs led new provision.	

# Equality Impact Assessment [version 2.10]



Title: Dedicated Schools Grant Budget 24/25	
<input checked="" type="checkbox"/> Budget Proposal	<input type="checkbox"/> New <input checked="" type="checkbox"/> Already exists / review <input type="checkbox"/> Changing
Directorate: Children and Education	Lead Officer name: Reena Bhogal-Welsh
Service Area: Education	Lead Officer role: Director of Education, Skills & Learning

## Step 1: What do we want to do?

The purpose of an Equality Impact Assessment is to assist decision makers in understanding the impact of proposals as part of their duties under the Equality Act 2010. Detailed guidance to support completion can be found here [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#).

This assessment should be started at the beginning of the process by someone with a good knowledge of the proposal and service area, and sufficient influence over the proposal. It is good practice to take a team approach to completing the equality impact assessment. Please contact the [Equality and Inclusion Team](#) early for advice and feedback.

### 1.1 What are the aims and objectives/purpose of this proposal?

Briefly explain the purpose of the proposal and why it is needed. Describe who it is aimed at and the intended aims / outcomes. Where known also summarise the key actions you plan to undertake. Please use [plain English](#), avoiding jargon and acronyms. Equality Impact Assessments are viewed by a wide range of people including decision-makers and the wider public.

#### Budget context

Each year, Bristol City Council receives a Dedicated Schools Grant (DSG) allocation which is a ring-fenced grant. The grant is paid to the LA to support schools budgets. It is the main source of income for schools. Bristol is, like all Local authorities with Education responsibilities – required to determine the split of the grant between central expenditure and the individual schools budget (ISB) in conjunction with schools forum, and within the terms of the grant. Once agreed Bristol City Council is responsible for allocating the ISB to individual schools in accordance with the local schools' funding formula.

The majority of the grant is used to fund individual school budgets for maintained schools, academies and free schools. The grant also funds early years nursery free entitlement places as well as provision for pupils with high needs including those with Special Educational Needs and or Disabilities (SEND), Education Health and Care Plans (EHCPs) in special schools and specialist provision in and out of Bristol. The Council is required to set a budget for the use of the DSG based on statutory guidance, national funding formulae and needs.

At present the DSG is carrying an overall deficit for which a statutory instrument is in place until 2026, and the LA is required to produce plans to bring the DSG back into overall balance.

#### Purpose

To note that in year 2024/2025 position for the overall Dedicated Schools Grant (DSG) is a fair and consistent distribution of funding that is closely aligned to need and is essential to supporting opportunity for all children, irrespective of their background, ability and need. The DSG is distributed centrally from central government. This proposal covers an additional uplift to the Early Years bloc. The Delivering Better Value in SEND (DBV) workstream focused on 'Top-Up' funding, which forms part of the

DSG deficit management plan, is subject to its own EqIA. This will be published and presented to Cabinet for a key decision on 6 February 2024.

The DSG is the main source of revenue funding for state-funded 5 to 16 schools in England. DSG is paid to local authorities, minus deductions ('recoupment') for academies and subject to certain other adjustments. The Grant comprises of four blocks:

- The Schools Block
- Schools Central Services Block
- The High Needs Block
- The Early Years Block

The DSG is a ring-fenced grant of which the majority is used to fund individual school budgets in maintained schools, academies and free schools. It also funds early years nursery free entitlement places for two, three and four year-olds as well as provision for pupils with high needs including those with Special Educational Needs and or Disabilities (SEND), Education Health and Care Plans (EHCPs) in special schools and specialist provision in and out of Bristol.

Our Goals:

- Enable all children and young people to achieve their potential through having access to the right resources and provision needed to meet their needs and the right support for their education settings.
- Improve outcomes for Bristol's Disabled children and young people with SEND as well as those identified with high needs including educational aspirations, engagement and progress in learning, in line with those who do not have SEND or high needs.
- Make sure all children and young people attend the right education setting that can meet their needs, where they receive a full time/ appropriate education offer that ensures they are safeguarded and their welfare is promoted.
- Reduce persistent absence and increase attendance for Disabled children and young people in receipt of SEND support and those with EHCPs.
- Reduce / eliminate the need for permanent exclusions and reduce multiple suspensions for children and young people in receipt of SEND Support and those with EHCPs.
- Ensure each young person progresses post-16 to suitable education, training or employment and is fully prepared for adulthood.

### **Early Years Block**

Early Years Block is based on census data collected throughout the year. The indicative allocation is based on January census only, so the actual amount will be updated by the Education Skills Funding Agency (ESFA) once the Spring 2024 census figures are known.

The 2024/25 allocation includes £14.996m of new funding being:

- New 2 year-old and under entitlement to 15 hours of free childcare for eligible parents
- Extension of pupil premium and Disability Access Fund (DAF) to eligible 2 year olds and under

Overall, the change in early years funding is £17.748m increase when compared to 2023/24.

The release of the block allocations also included the first indication of the hourly rates for 2024/25.

- For 3 & 4 year-old the rate will increase by 17p to £5.97 from £5.80 in 2023/24.
- The 2 year-old rate will increase by £2.36 to £8.25, from £5.89 in 23/24
- The under 2 year-old rate will be £11.24 which is new for 2024/25.

These are the rates used to calculate funding to the LA, the rates paid to providers are outlined in section 5 of this report. Overall the indicative Early Years block has increased by £17.7m, to £55.180m in 24/25 from £37.432m in 23/24.

The Maintained Nursery School (MNS) supplementary funding will increase to £4.64 per hour; this is equivalent to an indicative increase of £0.613m in funding based on part-time participation number of 1,177 for 15 hours per week, 38 weeks per year.

As a result of any cabinet decisions, there may be a policy change for the Non statutory top up funding process. The policy may identify a new way of working for the non statutory top up funding process that all partners of SEND will need to be aware of. Workstream 2 of Delivering Better Value required the procurement of an independent delivery partner, as part of the tendering process. Their equality and diversity moral purpose was measured to ensure that the chosen partner was aligned to the inclusion agenda. The EQIA will be updated and reviewed and any further specific proposals will be subject to their own specific EQIAs

*NB: There have been significant changes in the guidance regarding how local authorities must distribute funding, which culminated in the publication of changes here which outline the expansion of free childcare to Under 2s and 2 year-olds from working families, beginning in April 2024 (and fully rolling out by Sept 2025). [Date set for new childcare offer applications - GOV.UK \(www.gov.uk\)](https://www.gov.uk). There remains a requirement to consult with providers prior to setting rates, which ran for 6 weeks and concluded on 29th Dec 2023.*

## 1.2 Who will the proposal have the potential to affect?

<input type="checkbox"/> Bristol City Council workforce	<input checked="" type="checkbox"/> Service users	<input checked="" type="checkbox"/> The wider community
<input checked="" type="checkbox"/> Commissioned services	<input checked="" type="checkbox"/> City partners / Stakeholder organisations	
Additional comments:		

## 1.3 Will the proposal have an equality impact?

<input checked="" type="checkbox"/> <b>Yes</b>	<input type="checkbox"/> <b>No</b>	[please select]
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Could the proposal affect access levels of representation or participation in a service, or does it have the potential to change e.g. quality of life: health, education, or standard of living etc.?

If 'No' explain why you are sure there will be no equality impact, then skip steps 2-4 and request review by Equality and Inclusion Team

If 'Yes' complete the rest of this assessment, or if you plan to complete the assessment at a later stage please state this clearly here and request review by the Equality and Inclusion Team.

### 2.1 What data or evidence is there which tells us who is, or could be affected?

Please use this section to demonstrate an understanding of who could be affected by the proposal. Include general population data where appropriate, and information about people who will be affected with particular reference to protected and other relevant characteristics: [How we measure equality and diversity \(bristol.gov.uk\)](https://www.bristol.gov.uk)

Use one row for each evidence source and say which characteristic(s) it relates to. You can include a mix of qualitative and quantitative data e.g. from national or local research, available data or previous consultations and engagement activities.

Outline whether there is any over or under representation of equality groups within relevant services - don't forget to benchmark to the local population where appropriate. Links to available data and reports are here [Data, statistics and intelligence \(sharepoint.com\)](https://www.sharepoint.com). See also: [Bristol Open Data \(Quality of Life, Census etc.\)](https://www.bristol.gov.uk); [Joint Strategic Needs Assessment \(JSNA\)](https://www.jsna.org.uk); [Ward Statistical Profiles](https://www.bristol.gov.uk).

For workforce / management of change proposals you will need to look at the diversity of the affected teams using available evidence such as [HR Analytics: Power BI Reports \(sharepoint.com\)](https://www.sharepoint.com) which shows the diversity profile of council teams and service areas. Identify any over or under-representation compared with Bristol economically

active citizens for different characteristics. Additional sources of useful workforce evidence include the [Employee Staff Survey Report](#) and [Stress Risk Assessment Form](#)

<b>Data / Evidence Source</b> [Include a reference where known]	<b>Summary of what this tells us</b>
<u>Census 2021</u>	The Census details the demographic profile of Bristol.
<p><b>School census:</b> Data is from the Jan 2023 school census and provides information on the number of pupils in Bristol schools with SEND.</p>	<p><b>The School Block</b></p> <p>The 24/25 School Block allocation is based upon:</p> <ul style="list-style-type: none"> <li>• Primary (Reception-Year 6) 34,670 pupils</li> <li>• Secondary age pupils (Y7-Y11): 21,788 pupils</li> </ul> <p>The 23/24 School Block allocation is based upon:</p> <ul style="list-style-type: none"> <li>• Primary (Reception-Year 6) 35,005 pupils</li> <li>• Secondary age pupils (Y7-Y11): 21,607 pupils</li> </ul> <p>Overall the balance has shifted with 335 fewer primary age pupils, and 181 more secondary age pupils.</p> <p>Note: This does not include pupils who live in Bristol but attend a school out of area or young people not of school age.</p> <p><b>Pupils with SEND in schools</b></p> <p>We know from Bristol’s school census data that for school age children – boys are more likely to receive support for non-physical SEND needs than girls, whilst Black African children are more likely to be in receipt of non-statutory top-up funding at mainstream schools; and more likely to be at a special school. Mixed White and Black African/Caribbean children are also overrepresented, whilst White British children are underrepresented compared to the Bristol population average. We also know that Disabled children with SEND are more likely to live in a deprived area and be eligible for free school meals. Over 13,500 pupils in Bristol been diagnosed with special educational needs (SEN). This is an increase of 9% in the last year and 43% since 2016.</p> <ul style="list-style-type: none"> <li>• 2,877 pupils have an Education, Health and Care plan (EHC plan)</li> <li>• 10,944 pupils have SEND but no EHC plan – SEND support (SEND support means support that is additional to, or</li> </ul>

different from, the support generally made for other children of the same age in a school.)

In Bristol, 4.1% of pupils have an EHC plan. The percentage of pupils with an EHC plan has been increasing since 2018 but is still below the national average (4.3%).

The proportion of pupils in Bristol schools with SEND support continues to increase with 15.6% of pupils recorded with SEND support in 2023, higher than the national average of 13%.

### **SEND provision by school type**

Rates of EHC plans and SEND support are higher in secondary schools than primary schools.

- In primary schools, 2.1% of pupils have an EHC plan and 14.9% have SEND support
- In secondary schools, 2.7% of pupils have an EHC plan and 16.7% have SEND support

### **Pupil characteristics** (does not include independent schools)

SEND Diagnosis is more prevalent in boys than girls, both locally and nationally.

- 71% of pupils with an EHC plan are boys
- 62% of pupils with SEND Support are boys

In Bristol, EHC plans are most prevalent at age 12 and SEND support rates are highest for 9 and 10 year olds. The proportion of pupils with SEND support increase with age up until age 10. The proportion of pupils with an EHCP also increases with age from 3.5% at age 4 to 11.5% at age 12.

White British children make up a smaller proportion of the population in receipt of top-up funding than they do of the general British population of the same age (2021 Census data) by around 16%. Black African children are 27% more likely to be in receipt of non-statutory top-up at mainstream schools, and 60% more likely to be at a special school than the average child in Bristol. Mixed White and Black African/Caribbean children are also overrepresented. A full analysis of impact by ethnicity has not been possible due to data limitations.

Ethnic group	EHCP		SEN Support	
	Bristol	England	Bristol	England
White British	4.5%	4.5%	16.7%	14.3%
Irish	4.2%	4.4%	12.1%	13.6%
Traveller Of Irish Heritage	2.0%	6.1%	25.5%	25.5%
Any Other White Background	2.7%	2.9%	10.8%	9.5%
Gypsy Roma	3.3%	4.8%	27.5%	22.2%
White And Black Caribbean	6.8%	5.4%	20.8%	17.0%
White And Black African	4.6%	4.5%	15.9%	12.6%
White And Asian	2.6%	3.4%	11.0%	10.1%
Any Other Mixed Background	4.6%	4.3%	15.5%	11.5%
Indian	2.0%	2.4%	7.3%	6.3%
Pakistani	3.8%	3.9%	14.1%	11.2%
Bangladeshi	5.2%	4.5%	12.4%	10.2%
Any Other Asian Background	3.5%	3.7%	8.4%	8.0%
Black Caribbean	7.0%	5.8%	26.0%	16.5%
Black African	4.7%	4.5%	14.1%	10.4%
Any Other Black Background	5.7%	5.6%	15.0%	12.7%
Chinese	2.6%	2.1%	5.3%	4.9%
Any Other Ethnic Group	4.1%	3.4%	11.4%	10.1%
Unclassified	4.8%	4.7%	13.8%	11.6%

cc	Mainstream (EHCP)	Mainstream (Non-Stat)	Special Schools
White British	0.85x	0.75x	0.82x
Black African	1.06x	1.24x	1.65x
Any Other White Background	0.83x	0.99x	0.89x
White and Black Caribbean	1.36x	1.43x	1.63x
Any Other Mixed Background	1.69x	1.60x	1.32x
Pakistani	0.67x	0.76x	0.97x
Black Caribbean	1.87x	2.81x	1.82x
Any Other Black Background	1.39x	1.03x	1.62x
White and Black African	1.22x	1.28x	1.19x
Any Other Asian Background	0.91x	1.51x	2.00x
Any Other Ethnic Group	0.92x	0.81x	0.64x
White and Asian	0.46x	0.34x	0.50x
Bangladeshi	1.21x	0.64x	1.69x
Indian	0.58x	0.41x	0.40x
Chinese	0.55x	0.44x	0.97x
White Irish	0.77x	0.40x	1.08x
Traveller of Irish Heritage	1.02x	2.15x	nanx

**Primary type of need (does not include independent schools)**

Speech, language and communication needs is the most common primary need type for SEND pupils in Bristol. For pupils with SEND support the most common primary need type is also speech, language and communication needs, but for pupils with an EHC plan it is Autistic Spectrum Disorder.



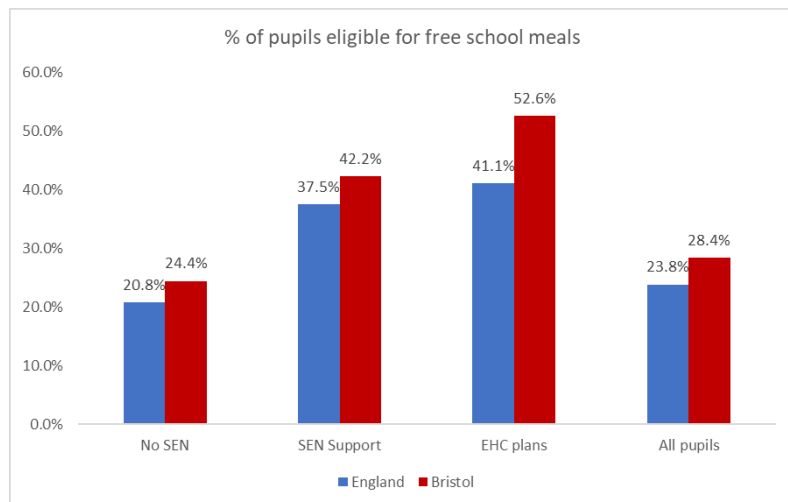
Primary Need	EHCP	SEN Support	Total
Speech, Language and Communications needs	413	2943	3356
Social, Emotional and Mental Health	640	2467	3107
Autistic Spectrum Disorder	922	653	1575
Specific Learning Difficulty	113	1439	1552
Moderate Learning Difficulty	178	1020	1198
Other Difficulty/Disability	61	472	533
SEN support but no specialist assessment of need	0	364	364
Physical Disability	107	207	314
Hearing Impairment	82	131	213
Severe Learning Difficulty	129	34	163
Visual Impairment	33	67	100
Profound & Multiple Learning Difficulty	90	4	94
Multi- Sensory Impairment	5	23	28

The most common primary need in primary schools is speech, language and communication needs (2,236 pupils), with a much higher number of pupils with this need type compared to secondary schools (822 pupils).

In secondary schools the most common primary need type is social, emotional and mental health (1,320 pupils).

**Free school meal (FSM) eligibility** (does not include independent schools)

Pupils with SEND are more likely to be eligible for free school meals.



**SEN2:** data is from the SEND statutory return, SEN2, and includes information on Disabled children and young people with SEND from 0-25 years who live in a Bristol postcode.

<https://www.explore-education-statistics.service.gov.uk/find-statistics/education-health-and-care-plans>

**Summary of what the below data tells us:** The children and young people for whom Bristol maintains an EHC Plan are distributed across the age ranges, with the vast majority (91%) aged between 5 and 19 years.

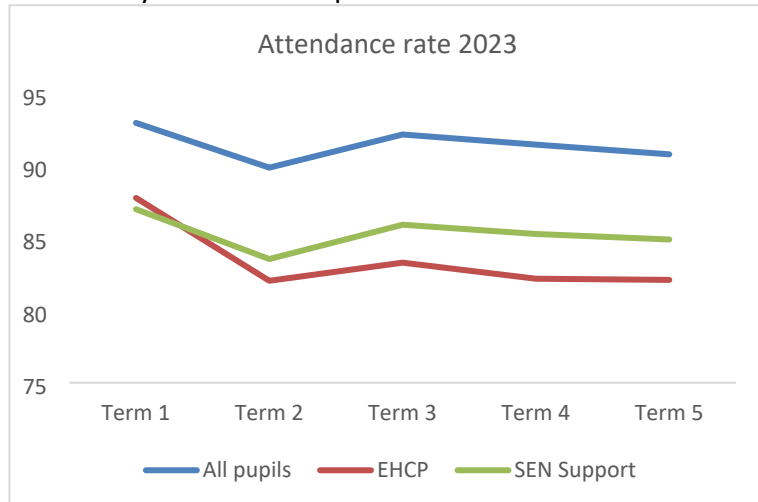
Of those 3,709 children and young people for whom Bristol maintains an EHC Plan in January 2023:

- 141 (3.8%) are aged under 5 years
- 1139 (30.7%) are aged 5 to 10 years
- 1413 (38.1%) are aged 11 to 15 years
- 839 (22.6%) are aged 16 to 19 years
- 177 (4.8%) are aged 20 to 25 years

**Attendance & Deprivation**  
(Source: Xvault)

**Summary of what the below data tells us:**

The attendance rate for pupils with an EHCP or SEND support is consistently below the overall attendance rate for Bristol schools. We also know that Disabled children with SEND are more likely to live in a deprived area.



**Deprivation**

41.6% of pupils with SEND support live in a deprived area and 58.5% of pupils with an EHCP. This compares to 34.9% of all pupils in Bristol.

NB: in this analysis a deprived area is an LSOA in the bottom 20% in the IDACI deprivation index. Totals do not include pupils who live outside of Bristol but attend a Bristol school. Excludes pupils who attend an independent school.

**Suspension rates** (source: Department for Education)

<https://explore-education-statistics.service.gov.uk/find-statistics/permanent-and-fixed-period-exclusions-in-england>

**Summary of what the below data tells us:**

Suspension rates were higher within SEN provision (both with and without EHC) in 2020/21; compared to “no SEN provision” category.

Suspension Rate by SEN Provision (All Phases, 2020/21)



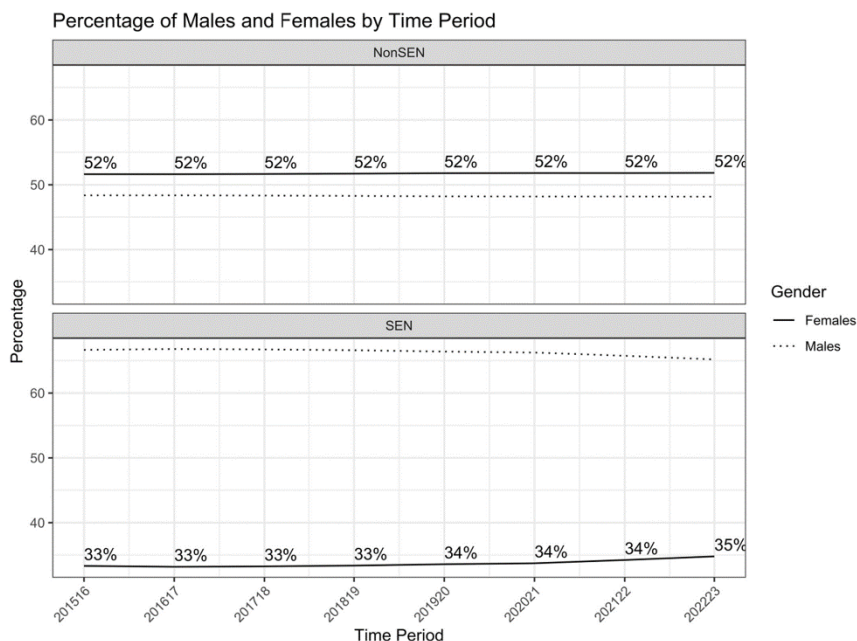
**Gender differences in special educational needs identification, Daniel, J. & Wang, H.**

Source:

<https://doi.org/10.1002/rev3.3437>

**Summary of what the below data tells us:**

Of the roughly 1.5 million children in English schools identified for SEN services in 2022-23, only 0.5 million were girls. The same pattern is seen across the country, with girls making up between 34% to 36% of all students accessing SEN support in most regions. In some cases, this may be because certain disabilities are more common in boys. But it is likely to be also down to gender bias in assessment and from those referring children for assessment, as well as girls being better at hiding the challenges they face from some conditions.



Local Area education performance (Early Years, School Age mainstream and specialist provision)

[Key stage 2 attainment: 2023 - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/statistics/key-stage-2-attainment-2023)

[Statistics: GCSEs \(key stage 4\) - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/statistics/gcse-key-stage-4-attainment-2023)

[Early years foundation stage profile results: 2022 to 2023 - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/statistics/early-years-foundation-stage-profile-2022-2023)

**Summary of what this tells us:**

National statistics published by the DfE on attainment outcomes for local authorities for early years foundation stage and at the end of Key stage 2 and Key stage 4. Includes a breakdown by characteristics including SEN provision.

The population of Bristol

Updated annually. The report brings together statistics on the current estimated population of Bristol, recent trends in population, future projections and looks at the key characteristics of the people living in Bristol.

Bristol Key Facts 2022

Population Profiles for Equalities Groups bring together detailed analysis looking at equalities groups and how they differ in

	relation to age, health, employment, education and housing, and maps the distribution of equalities groups across the city.
<u>Ward profile data (bristol.gov.uk)</u>	The Ward Profiles provide a range of data-sets, including population, life expectancy, health and education disparities etc. for each of Bristol's electoral wards.
<u>Joint Strategic Needs Assessment (JSNA)</u>	The Joint Strategic Needs Assessment reports on the health and wellbeing needs of the people of Bristol. It brings together detailed information on local health and wellbeing needs and looks ahead at emerging challenges and projected future needs. The JSNA is used to provide a comprehensive picture of the health and wellbeing needs of Bristol (now and in the future); to inform decisions about how we design, commission and deliver services, and also about how the urban environment is planned and managed; to improve and protect health and wellbeing outcomes across the city while reducing health inequalities; and to provide partner organisations with information on the changing health and wellbeing needs of Bristol, at a local level, to support better service delivery.
Children in Care Data	<p>There are currently 727 children in care, 57% are male and 43% female (compared to 51% and 49% of the overall child population). 9% have a disability (compared to 6.1% of the total Bristol child population) and the majority (73%) are aged 10-17.</p> <p>Ethnicity:</p> <ul style="list-style-type: none"> <li>• 60% White (compared to 72% across the total Bristol child population)</li> <li>• 16% Mixed Race</li> <li>• 12% Other Ethnicity</li> <li>• 9% Black British</li> <li>• 3% Asian/Asian British</li> </ul> <p>It is not possible to add other comparative data for the Bristol average child population due to the size and format of data sets.</p>
Census 2021	35.2% of Bristol population were economically inactive, of this, 14.5% are retired. New 2 year-old and under entitlement to 15 hours of free childcare for eligible parents can support parents to get into work. Therefore the new entitlement will support the structures needed to support parents' back into the world of work.
Census 2021	<ul style="list-style-type: none"> <li>• Of the 67.5% of the population who were economically active, 10.4% work less than 16 hours a week. Eligibility for Tax Free Childcare is a minimum of 16 hours income at minimum wage, meaning that those who are employed and not on Universal Credit, nor eligible for Tax Free Childcare, will get no government support with the costs of wrap around childcare. New 2 year-old and under entitlement to</li> </ul>

	15 hours of free childcare for eligible parents can support parents to get into work
Bristol Key Facts 2021	<ul style="list-style-type: none"> <li>There is a 2.3% rise in employment levels in Bristol (Sept 21 compared to Dec 21) which shows that more citizens are gaining employment and will have a need for childcare. New 2 year-old and under entitlement to 15 hours of free childcare for eligible parents can support parents to get into work</li> </ul>
Women’s Budget Group - 2023 <a href="https://wbg.org.uk/analysis/uk-policy-briefings/spring-budget-2023-gender-and-early-education-and-childcare/">https://wbg.org.uk/analysis/uk-policy-briefings/spring-budget-2023-gender-and-early-education-and-childcare/</a>	<ul style="list-style-type: none"> <li>An estimated 1.7M women are prevented from taking on more hours of paid work due to childcare issues. New 2 year-old and under entitlement to 15 hours of free childcare for eligible parents can support parents to get into work</li> </ul>
Universal Credit / Gov’s Back to Work schemes <a href="https://www.gov.uk/government/publications/jobseekers-allowance-back-to-work-schemes/universal-credit">https://www.gov.uk/government/publications/jobseekers-allowance-back-to-work-schemes/universal-credit</a>	The DWP is encouraging parents to return to work by removing barriers and providing financial support. In July 23 the DWP implemented a monthly advance for childcare costs for parents on UC to enable them to start nursery (where payment is often required up front).
<a href="#">Women 7 times more likely than men to be out of work due to caring commitments   TUC</a>	<ul style="list-style-type: none"> <li>One in 10 women in their 30s – more than 450,000 women – is out of the labour market because of caring responsibilities – compared to just one in 100 men in their 30s. Women in their 30s are 10 times more likely than men to be unable to work due to family commitments at home.</li> <li>More than 1.46 million women are unable to work alongside their family commitments, compared to around 230,000 men.</li> <li>Women are much more likely than men to be working in low-paid jobs – and are far less likely to be in high-paid work.</li> <li>Women make up two-thirds (65%) of the 10 lowest-paid occupations in the UK, like jobs in cleaning, catering and care.</li> <li>But less than two in five (39%) women are working in the 10 highest-paid occupations, in industries like finance, law and IT.</li> <li>The gender pay gap for all employees currently stands at 14.9%, and it widens with age.</li> </ul> <p>New 2 year-old and under entitlement to 15 hours of free childcare for eligible parents can support women to return to work.</p>
<b>Additional comments:</b>	

## 2.2 Do you currently monitor relevant activity by the following protected characteristics?

<input checked="" type="checkbox"/> Age	<input checked="" type="checkbox"/> Disability	<input type="checkbox"/> Gender Reassignment
<input type="checkbox"/> Marriage and Civil Partnership	<input type="checkbox"/> Pregnancy/Maternity	<input checked="" type="checkbox"/> Race
<input type="checkbox"/> Religion or Belief	<input checked="" type="checkbox"/> Sex	<input type="checkbox"/> Sexual Orientation

## 2.3 Are there any gaps in the evidence base?

Where there are gaps in the evidence, or you don't have enough information about some equality groups, include an equality action to find out in section 4.2 below. This doesn't mean that you can't complete the assessment without the information, but you need to follow up the action and if necessary, review the assessment later. If you are unable to fill in the gaps, then state this clearly with a justification.

For workforce related proposals all relevant characteristics may not be included in HR diversity reporting (e.g. pregnancy/maternity). For smaller teams diversity data may be redacted. A high proportion of not known/not disclosed may require an action to address under-reporting.

Although our corporate approach is to collect diversity monitoring for all relevant characteristics, there are gaps in the available local diversity data for some characteristics, especially where this has not historically always been included in census and statutory reporting e.g. for sexual orientation. Given the way in which data is provided it is not possible to provide demographic breakdowns of this specific cohort without significant delay. The data and insight team do not have the capacity to develop this report within available timeframe, but pupil data will be monitored throughout the process to address any impacts on protected characteristics.

## 2.4 How have you involved communities and groups that could be affected?

You will nearly always need to involve and consult with internal and external stakeholders during your assessment. The extent of the engagement will depend on the nature of the proposal or change. This should usually include individuals and groups representing different relevant protected characteristics. Please include details of any completed engagement and consultation and how representative this had been of Bristol's diverse communities.

Include the main findings of any engagement and consultation in Section 2.1 above.

If you are managing a workforce change process or restructure please refer to [Managing change or restructure \(sharepoint.com\)](#) for advice on consulting with employees etc. Relevant stakeholders for engagement about workforce changes may include e.g. staff-led groups and trades unions as well as affected staff.

We launched a public consultation on our budget proposals between 9th November and 21 December. This consultation set out all the savings proposals we had identified to produce a balanced budget in the context of reduced available funding and increasing financial pressures.

We have completed consultation with all Early Years settings in relation to the funding in this area. Where it is in the local authority remit, we will explore opportunities to target funding to those groups which the evidence demonstrates face barriers to their educational achievement. However, the move to a national funding formula is reducing the scope we have locally to influence the funding formula. We believe that all pupils will benefit from a fairer distribution of funding. Where decisions may have a disproportionate impact on some children and young people because of protected characteristics, appropriate engagement and consultation will ensure the views of service users, and groups that represent them are taken into account and help build a consensus around the case for change and that our statutory duties are complied with.

We consulted all schools via the Bristol Schools Forum on the proposals to transfer funding between the schools block and the High Needs Block, on the principles of the funding formula for mainstream schools and the arrangements for some central budgets for maintained mainstream schools.

All responses to the DSG Budget Consultation have been analysed and summarised in relevant Schools Forum reports that are published [Schools Forum \(bristol.gov.uk\)](#)

All responses to the Budget Consultation will be analysed and included in the Council’s Budget report that will be published on the Bristol City Council website in early 2023. We will take Budget consultation responses into account when developing this and other final proposals to put to the Cabinet and a meeting of the Full Council for approval. The final decision will be taken by Full Council at its budget setting meeting in February / March 2023.

Following the setting of the overall budget envelope there will be extensive engagement, consultation and co-design with affected communities on particular proposals which will inform future decision making prior to implementation. Our approach to public engagement and consultation will proactively target under-represented respondents to increase the participation of people from equality groups and their local representative organisations. This will help to ensure that our services and actions are informed by the views and needs of all our citizens, including the voice of young people.

## 2.5 How will engagement with stakeholders continue?

Explain how you will continue to engage with stakeholders throughout the course of planning and delivery. Please describe where more engagement and consultation is required and set out how you intend to undertake it. Include any targeted work to seek the views of under-represented groups. If you do not intend to undertake it, please set out your justification. You can ask the Equality and Inclusion Team for help in targeting particular groups.

Schools Forum will continue to engage in the budget developments through the main meetings and finance sub-group.

Steering Groups have been established to support the development and implementation of the DSG Management Plan. The Groups are focused on the Early Years Block and the High Needs Block. We have completed an engagement process regarding the proposed mitigations, as part of the developing DSG Management Plan and the implementation of the Delivering Better Value programme.

## Step 3: Who might the proposal impact?

Analysis of impacts must be rigorous. Please demonstrate your analysis of any impacts of the proposal in this section, referring to evidence you have gathered above, and the characteristics protected by the Equality Act 2010. Also include details of existing issues for particular groups that you are aware of and are seeking to address or mitigate through this proposal. See detailed guidance documents for advice on identifying potential impacts etc. [Equality Impact Assessments \(EqIA\) \(sharepoint.com\)](#)

### 3.1 Does the proposal have any potentially adverse impacts on people based on their protected or other relevant characteristics?

Consider sub-categories (different kinds of disability, ethnic background etc.) and how people with combined characteristics (e.g. young women) might have particular needs or experience particular kinds of disadvantage.

Where mitigations indicate a follow-on action, include this in the ‘Action Plan’ Section 4.2 below.

**GENERAL COMMENTS** (highlight any potential issues that might impact all or many groups)

Even when we plan to consult in more detail on specific service delivery proposals at a later time, we must ensure that any budget setting decisions that are likely to affect future services are informed by sufficient consultation and proper analysis. This is so that our members can have due regard to any likely

disproportionate or negative impact on the basis of their protected and other relevant characteristics at the time the budget is approved – not afterwards.

Decision makers will have the ability to make changes to the individual spending plans following further consultation as appropriate and detailed evaluation of the impact of specific proposals. Within the proposed budget envelope there will be financial mitigation put aside for any non-delivery or amendments to proposals which may occur due to future consideration of equalities issues or other factors.

As well as identifying whether budget changes will have a disproportionate impact on particular groups (e.g., because they are over-represented in a particular cohort), we need to pay particular attention to the risk of indirect discrimination: when an apparently neutral decision puts members of a given group at a particular disadvantage compared with other people because of their different needs and circumstances.

We are also aware of existing structural inequalities and particular considerations, issues, and disparities for people in Bristol based on their characteristics, which we will take into account.

Through the Local Authority's statutory role and duties, consideration is given to any adverse impact on children and young people, based on their protected characteristics. These duties include:

- Determination of the budgets for distribution to schools and early years settings, and allocation of the High Needs Block – all in the context of the National Funding Formula for each block.
- Commissioning of school places, personal education packages, alternative learning provision and post 16 education for children and young people we are responsible for.
- Responsibility for ensuring there are sufficient education places and the right types of education settings in our area.
- Arranging education for permanently excluded pupils, children and young people with EHCPs and Children in Care and others who, because of illness or other reasons, are unable to attend mainstream settings.
- Ensuring the Local Authority, schools and other partners are focused on safeguarding and promoting the welfare of children and young people with SEND up to age 25.
- Promoting and driving high standards in education across all types of educational provision.
- Establishing financial provision for children and young people with EHCPs
- Ensuring compliance with statutory duties associated with SEND legislation, safeguarding and Looked After Children/ Care Leavers.

There continues to be a risk that some groups or individuals from specific backgrounds are over-represented in Bristol's Disabled Children and Young People with SEND population. We know from Bristol's school census data that for school age children – boys are more likely to receive support for non-physical SEND needs than girls, whilst Black African children are more likely to be in receipt of non-statutory top-up funding at mainstream schools; and more likely to be at a special school. Mixed White and Black African/Caribbean children are also overrepresented, whilst White British children are underrepresented compared to the Bristol average. We also know that Disabled children with SEND are more likely to live in a deprived area and be eligible for free school meals.

The current high needs budget is finite, and if overspends continue, it risks destabilising the whole school system in Bristol. The council, schools, and their local partners therefore need to make vital changes to the way it uses its High Needs Block funds to meet pupils' needs earlier and more effectively and enable greater inclusion in mainstream schools.

Bristol continues to have a legal duty to provide funding for Children and Young People (CYP) with a statutory EHC plan. Local Authorities are required by law (Section 42 of the Children's and Families Act 2014) to secure special educational provision and health care provision in accordance with an EHC plan.



<p>Where an EHC plan is maintained for the child or young person, the local authority must make sure that the special educational provision set out in it is delivered.</p> <p>We will continue to monitor outcomes via demographic breakdowns and protected characteristics to see if the way we deliver SEND provision changes significantly. As well as identifying whether funding changes will have a disproportionate impact on particular groups, we need to pay particular attention to the risk of indirect discrimination: when an apparently neutral decision puts members of a given group at a particular disadvantage compared with other people because of their different needs and circumstances.</p>	
<b>PROTECTED CHARACTERISTICS</b>	
<b>Age: Young People</b>	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	Whilst rates for 2 year-olds and 3 & 4 years olds will be somewhat increased, this will not compensate for the inflationary pressures providers are experiencing and any historic deficits that they are carrying because of Covid-19, the increase of living costs and increases in teachers' pay awards. It is likely that more providers will find operating sustainably to be challenging and recruitment and retention of staff weakening. This will potentially lead to a reduction in sufficiency of places and reduce the quality of education.
Mitigations:	Work is ongoing to ensure that Maintained Nursery Schools operate on a financially sustainable model. The increase in funding will support these measures and secure high-quality education in the most deprived areas of the city. In addition, we will continue to work with leaders across the city to design a financially sustainable model that will future-proof provisions as integral infrastructures of the city. A recruitment and retention task group is looking at a range of options to promote working in the early years sector. BCC is also using research and evidence from the university sector as well as any emerging practice nationally identified.
<b>Age: Older People</b>	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	NA
Mitigations:	NA
<b>Disability</b>	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	The High Needs budget is being set on the basis of existing policies and existing rates to settings, with forecast levels of demand. The budget proposals, as they stand, represent no change on existing practice or funding rates, but the programme will seek to understand and address areas where outcomes for Disabled children and young people are not good.
Mitigations:	See general comments above
<b>Sex</b>	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	Boys are more likely to be receiving support for SEND needs than girls for all non-physical needs.  Women are likely to be impacted by the additional funding in Early Years. This is supported by the below evidence: <ul style="list-style-type: none"> <li>• One in 10 women in their 30s – more than 450,000 women – is out of the labour market because of caring responsibilities – compared to just one in 100 men in their 30s. Women in their 30s are 10 times more likely than men to be unable to work due to family commitments at home.</li> <li>• more than 1.46 million women are unable to work alongside their family commitments, compared to around 230,000 men.</li> </ul>

	<ul style="list-style-type: none"> <li>• women are much more likely than men to be working in low-paid jobs – and are far less likely to be in high-paid work.</li> <li>• Women make up two-thirds (65%) of the 10 lowest-paid occupations in the UK, like jobs in cleaning, catering and care.</li> <li>• But less than two in five (39%) women are working in the 10 highest-paid occupations, in industries like finance, law and IT.</li> <li>• The gender pay gap for all employees currently stands at 14.9%, and it widens with age.</li> <li>• An estimated 1.7M women are prevented from taking on more hours of paid work due to childcare issues.</li> </ul>
Mitigations:	<p>Any decisions around meeting needs of CYP with SEND will need to ensure we consider their wellbeing and clearly evidence how any provision of additional support promotes their wellbeing and doesn't impact on their Human Rights. Any decisions need to be on an individual case by case basis. Detailed evidence will be gathered as part of the updated process, with increased resourcing to manage and ensure this. We will also be improving the monitoring and oversight of how the targeted support fund is used and its impact – this will include monitoring of protected characteristics which will enable us to reflect and adjust practice accordingly to tackle these disparities; aided by the targeted approach possible with the new fund</p> <p>New 2 year-old and under entitlement to 15 hours of free childcare for eligible parents can support parents to get into work</p>
<b>Sexual orientation</b>	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	
Mitigations:	NA
<b>Pregnancy / Maternity</b>	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	NA
Mitigations:	NA
<b>Gender reassignment</b>	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	NA
Mitigations:	NA
<b>Race</b>	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<p>The population of Bristol has become increasingly diverse, and some local communities have changed significantly. There are now at least 45 religions, at least 180 countries of birth and at least 91 main languages spoken. The proportion of the overall Black, Asian and minoritised ethnic population has increased from 16% (2011) to 18.9% (2021) •</p> <p>Whilst we do not think that the overall budget setting should have a disproportionate impact on Race we are aware of existing disparities for Black, Asian and minority ethnic pupils. The 2017 Runnymede Report “Bristol - a city divided?” found ethnic minorities in Bristol experience greater disadvantage than in England and Wales as a whole in education and this is particularly so for Black African people. Black African young people are persistently disadvantaged in education compared to their White peers and addressing educational inequalities requires attention to the unrepresentativeness of the curriculum, lack of diversity in teaching staff and school leadership and poor engagement with parents.</p>

	<p>Although Bristol has low rates of permanent exclusion it has one of the highest rates for fixed term exclusions of any local authority in England, and a disproportionately high percentage of school pupils from Black, Asian and minority ethnic backgrounds have had one or more fixed term exclusion, compared to other English core cities and nationally. Nationally Gypsy and Roma, and Traveller of Irish Heritage pupils have the highest school exclusion rates (both permanent and temporary) however Mixed White and Black Caribbean, and Black Caribbean pupils also have high exclusion rates, and both are nearly three times as likely to be permanently excluded as White British pupils.</p> <p>There is an urgent need to recruit more Black Asian and ethnic minority teachers and teaching staff in Bristol. A 2018 BBC report<sup>4</sup> found that of the 1,300 teachers in Bristol, only 26 were Black, equating to less than two per cent.</p> <p>Local stakeholder engagement suggests schools may indirectly discriminate against Black, Asian and minority ethnic pupils due to lack of cultural competence. Rules about appearance may penalise pupils who dress differently or have different hairstyles. Conduct rules may not take into account the diversity of culture around language and ways of demonstrating inter-generational respect.</p> <p>Other research indicates Black and Mixed ethnicity pupils in England (especially boys) are frequently associated by school staff with criminality, violence and hypersexuality e.g. groups of friends and siblings labelled as a 'gang'<sup>5</sup>. Youth workers and education professionals in Bristol have told us that Black pupils may struggle to understand their own cultural identity. Just as there is a disproportionately high 'stop and search' rate of ethnic minority young people by police, Black, Asian and minority ethnic school children may face additional discrimination because of their visibility.</p>
Mitigations:	Any decisions around meeting needs of CYP with SEND will need to ensure we consider their wellbeing and clearly evidence how any provision of additional support promotes their wellbeing and doesn't impact on their Human Rights. Any decisions need to be on individual case by case basis. Detailed evidence will be gathered as part of the updated process, with increased resourcing to manage and ensure this. We will also be improving the monitoring and oversight of how the targeted support fund is used and its impact – this will include monitoring of protected characteristics which will enable us to reflect and adjust practice accordingly to tackle these disparities; aided by the targeted approach possible with the new fund.
<b>Religion or Belief</b>	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	
Mitigations:	Na
<b>Marriage &amp; civil partnership</b>	Does your analysis indicate a disproportionate impact? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Potential impacts:	
Mitigations:	NA
<b>OTHER RELEVANT CHARACTERISTICS</b>	
<b>Socio-Economic (deprivation)</b>	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	Disabled children with SEND are more likely to live in a deprived area and be eligible for free school meals. Significant majorities of children classed as SEMH are on free school meals across genders, in both mainstream and special schools, and regardless of ECHP

	status. In mainstream schools there are more children on free school meals classed as ASD, although this effect disappears in special schools.
Mitigations:	<p>In setting this Budget we are acutely aware of existing disparities for pupils living in areas of deprivation and low income households. Whilst there is limited scope to address systemic issues in this budget setting we have considered socio-economic inequality as far as possible and will continue to do so as part of ongoing service design and commissioning. There is a deprivation measure (based on IDACI) applied to the supplements provided to Early Years settings.</p> <p>Any decisions around meeting needs of CYP with SEND will need to ensure we consider their wellbeing and clearly evidence how any provision of additional support promotes their wellbeing and doesn't impact on their Human Rights. Any decisions need to be on individual case by case basis. Detailed evidence will be gathered as part of the updated process, with increased resourcing to manage and ensure this. We will also be improving the monitoring and oversight of how the targeted support fund is used and its impact – this will include monitoring of socio-economic status which will enable us to reflect and adjust practice accordingly to tackle these disparities; aided by the targeted approach possible with the new fund.</p>
<b>Carers</b>	Does your analysis indicate a disproportionate impact? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Potential impacts:	<p>As above any negative impact on Early Years settings may restrict the range of provision available which would have a disproportionate impact on carers.</p> <ul style="list-style-type: none"> <li>• An estimated 1.7M women are prevented from taking on more hours of paid work due to childcare issues.</li> <li>• 59% of unpaid carers are women (Census 2021). Women are more likely to become carers and to provide more hours of unpaid care than men. More women than men provide high intensity care at ages when they would expect to be in paid work (Petrillo and Bennett, 2022)</li> </ul>
Mitigations:	<ul style="list-style-type: none"> <li>• New 2 year-old and under entitlement to 15 hours of free childcare for eligible parents can support parents to get into work</li> </ul>
<b>Other groups</b> [Please add additional rows below to detail the impact for other relevant groups as appropriate e.g. Asylums and Refugees; Looked after Children / Care Leavers; Homelessness]	
<b>Children in Care</b>	
Potential impacts:	<p>Children in care experience worse academic outcomes compared to the general population. Bristol is currently the corporate parent of nearly 800 children and young people. Circa 45% of these individuals have an identified Special Educational Need (far higher than the general population), with around half of these receiving support via a statutory Education, Health and Care Plan (EHCP); the other half receiving non-statutory top-up funding.</p> <p>Through our engagement we heard that any changes to top-up needs to be considerate of those who may be involved in the children's social care system. Tightening of the top-up application needs to be considerate of those in receipt of the higher end of the top-up which includes those involved in youth justice support, whilst funding decision makers also need to be mindful of where there is family neglect and parents/carers not identifying needs earlier resulting in higher cost late applications for funding.</p> <p>SEMH is considered common for Children in Care (CIC) due to the trauma they have experienced. There are two contrary outcomes here. On one hand reducing non-statutory funding may result in CIC being less able to access support and funding. On the other hand, some conversations have suggested that EHCPs are leveraged for this cohort as a way to move these young people onto other settings, excluding them from</p>

	mainstream education. By providing more targeted funding for these needs and this cohort; it may increase schools' ability to provide inclusive support.
Mitigations:	As above

**3.2 Does the proposal create any benefits for people based on their protected or other relevant characteristics?**

Outline any potential benefits of the proposal and how they can be maximised. Identify how the proposal will support our [Public Sector Equality Duty](#) to:

- ✓ Eliminate unlawful discrimination for a protected group
- ✓ Advance equality of opportunity between people who share a protected characteristic and those who don't
- ✓ Foster good relations between people who share a protected characteristic and those who don't

The scale of the potential gap in our core funding means that there is very limited opportunity to bring genuine additional benefit to equalities groups in the circumstances. However, we have considered as far as possible the need to: eliminate discrimination, harassment, victimisation and any other conduct prohibited under the Equality Act 2010; advance equality of opportunity between people from different groups; and foster good relations between people from different groups.

Our Dedicated Schools Grant management plan proposals are aligned to our Corporate Strategy and although we have limited resources our future focus will be on achieving those priorities, we have identified including tackling poverty and intergenerational inequality.

As a result of the increased funding for entitlement for 2 year olds and 3 and 4 year olds, there will be small benefits gained for early years children like eliminating discrimination. Some children may now have access to provision that may not have been accessible prior to the entitlement allowance to early year settings.

Women would be at an advantage due to the increase in Early Years entitlement as this would enable mothers to seek, gain or return back into employment for some hours, this would positively impact the economy and significantly improve well-being and for some, their mental health.

**Step 4: Impact**

**4.1 How has the equality impact assessment informed or changed the proposal?**

What are the main conclusions of this assessment? Use this section to provide an overview of your findings. This summary can be included in decision pathway reports etc.

If you have identified any significant negative impacts which cannot be mitigated, provide a justification showing how the proposal is proportionate, necessary, and appropriate despite this.

<b>Summary of significant negative impacts and how they can be mitigated or justified:</b>
None
<b>Summary of positive impacts / opportunities to promote the Public Sector Equality Duty:</b>
The early years nursery free entitlement places for two, three and four year-olds of 15 hours of free childcare for eligible parents can support parents to get into work. Women can benefit from this as they are disproportionately impacted by caring responsibilities and thus can be prevented from working.

**4.2 Action Plan**

Use this section to set out any actions you have identified to improve data, mitigate issues, or maximise opportunities etc. If an action is to meet the needs of a particular protected group please specify this.

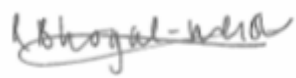
Improvement / action required	Responsible Officer	Timescale
All relevant EqIAs will be published on the Council's website <a href="https://www.bristol.gov.uk/council-spending-performance/council-budgets">https://www.bristol.gov.uk/council-spending-performance/council-budgets</a> and continue to be updated as appropriate.		Ongoing
Ongoing monitoring of the service with inclusion of voice of young people	Head of Service	Ongoing
Ongoing review of EQIA as the Dedicated Schools Grant (DSG) mitigations are implemented	Head of Service	Ongoing
Completion of any EQIAs specific to any policy changes	Commissioning	Ongoing
Inclusion of equalities question in the tender process to ensure the provider will be inclusive and work from an equality's perspective.	Procurement	July 2023
Recruitment to Head of Service: inclusion to ensure rigour of implementation of the DSG mitigations	Director of Education	February 2024

### 4.3 How will the impact of your proposal and actions be measured?

How will you know if you have been successful? Once the activity has been implemented this equality impact assessment should be periodically reviewed to make sure your changes have been effective your approach is still appropriate.

Children and Young People with special educational needs and disability will have better outcomes and experiences, both educationally and in their life chances. Their voices and feedback will be captured via work within the service area of Inclusion and / or through surveys and the work that we complete with the Bristol Parent Carer Forum, Health Partners, Schools and wider partnerships. The recruitment of a Head of Service for inclusion will ensure that all contributory services for Inclusion are working cohesively, effectively and towards the same goals and ambitions outlined in the DSG deficit mitigations plan. The procurement of any commissioned delivery partners must be aligned to the Equalities Act 2010 to ensure an informed, diverse and equitable experience for everyone exposed to the work. As a result of the actions and implementing the EQIA, BCC should have a sustainable and financially healthy plan to reduce the deficit of the DSG.

The Equality and Inclusion Team need at least five working days to comment and feedback on your EqIA. EqIAs should only be marked as reviewed when they provide sufficient information for decision-makers on the equalities impact of the proposal. Please seek feedback and review from the [Equality and Inclusion Team](#) before requesting sign off from your Director<sup>1</sup>.

<b>Equality and Inclusion Team Review:</b> Reviewed by the Equality and Inclusion Team	<b>Director Sign-Off:</b> 
Date: 16/01/2024	16/01/2024

<sup>1</sup> Review by the Equality and Inclusion Team confirms there is sufficient analysis for decision makers to consider the likely equality impacts at this stage. This is not an endorsement or approval of the proposal.



# Environmental Impact Assessment [version 1.0]

<b>Proposal title:</b> Dedicated Schools Grant (DSG) 2024/25 Budget Proposals		
<b>Project stage and type:</b> <input type="checkbox"/> Initial Idea Mandate <input type="checkbox"/> Outline Business Case <input type="checkbox"/> Full Business Case		
<input type="checkbox"/> Policy <input type="checkbox"/> Strategy <input type="checkbox"/> Function <input type="checkbox"/> Service <input type="checkbox"/> Other [please state]	<input type="checkbox"/> New <input type="checkbox"/> Already exists / review	<input type="checkbox"/> Changing
<b>Directorate:</b> Finance		<b>Lead Officer name:</b> Travis Young
<b>Service Area:</b> Accountancy, Risk and Insurance		<b>Lead Officer role:</b> Finance Business Partner – Children and Education

## Step 1: What do we want to do?

The purpose of this Environmental Impact Assessment is to help you develop your proposal in a way that is compliant with the council’s policies and supports the council’s strategic objectives under the [One City Climate Strategy](#), the [One City Ecological Emergency Strategy](#) and the latest [Corporate Strategy](#).

This assessment should be started at the beginning of the project proposal process by someone with a good knowledge of the project, the service area that will deliver it, and sufficient influence over the proposal to make changes as needed.

It is good practice to take a team approach to completing the Environmental Impact Assessment. See further [guidance](#) on completing this document. Please email [environmental.performance@bristol.gov.uk](mailto:environmental.performance@bristol.gov.uk) early for advice and feedback.

### 1.1 What are the aims and objectives/purpose of this proposal?

Briefly explain the purpose of the proposal and why it is needed. Please use plain English, avoiding jargon and acronyms.

The Dedicated Schools Grant (DSG) is the ring-fenced grant from Government that provides each local authority with an allocation of funding for schools and services for pupils.

This proposal sets out the use of the DSG and how associated grants are to be applied during 2024/25. The Bristol Schools Forum must be consulted on all aspects of the use of the Dedicated Schools Grant (DSG) and the School Funding Regulations limit the scope for how funding may be used. Schools Forum has some responsibilities to determine a small number of specific budgets and the decisions on the amount of funding to distribute to schools and early years settings. The distribution mechanisms, the proposed spend on central services and the High Needs budget are matters to be determined by the Council.

### 1.2 Will the proposal have an environmental impact?

Could the proposal have either a positive or negative effects for the environment now or in the future? If ‘No’ explain why you are sure there will be no environmental impact, then skip steps 2-3 and request review by sending this form to [environmental.performance@bristol.gov.uk](mailto:environmental.performance@bristol.gov.uk)

If ‘Yes’ complete the rest of this assessment.

<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	[please select]
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The proposal relates to the allocation of central government funding for education, which BCC has a legal duty to carry out. The funding allocation is to cover core operations of schools and the precise spending choices reside with each institution.

### 1.3 If the proposal is part of an options appraisal, has the environmental impact of each option been assessed and included in the recommendation-making process?

If 'Yes' please ensure that the details of the environmental impacts of each option are made clear in the pros and cons section of the [project management options appraisal document](#).

<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Not applicable	[please select]
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If 'No' explain why environmental impacts have not been considered as part of the options appraisal process.

## Step 2: What kinds of environmental impacts might the project have?

Analysis of impacts must be rigorous. Please demonstrate your analysis of any impacts of the proposal in this section, referring to evidence you have gathered. See detailed [guidance documents](#) for advice on identifying potential impacts.

### Does the proposal create any benefits for the environment, or have any adverse impacts?

Outline any potential benefits of the proposal and how they can be maximised. Identify how the proposal will support our corporate environmental objectives and the wider [One City Climate and Ecological Emergency strategies](#).

Consider how the proposal creates environmental impacts in the following categories, both now and in the future.

**Reasonable efforts should be made to quantify stated benefit or adverse impacts wherever possible.**

Where the proposal is likely to have a beneficial impact, consider what actions would enhance those impacts. Where the proposal is likely to have a harmful impact, consider whether actions would mitigate these impacts.

Enhancements or mitigation actions are only required when there is a likely impact identified. Remember that where enhancements or mitigation actions are listed, they should be assigned to staff and appropriately resourced.

GENERAL COMMENTS (highlight any potential issues that might impact all or many categories)		
<b>ENV1 Carbon neutral: Emissions of climate changing gases</b>  BCC has committed to achieving net zero emissions for its direct activities by 2025, and to support the city in achieving net zero by 2030.  Will the proposal involve transport, or the use of energy in buildings? Will the proposal involve the purchase of goods or services? If the answer is yes	<b>Benefits</b>	
	<b>Enhancing actions</b>	
<b>Persistence of effects:</b> <input type="checkbox"/> 1 year or less <input type="checkbox"/> 1 – 5 years <input type="checkbox"/> 5+ years		



<p>to either of these questions, there will be a carbon impact.</p> <p>Consider the scale and timeframe of the impact, particularly if the proposal will lead to ongoing emissions beyond the 2025 and 2030 target dates.</p> <p><a href="#">Further guidance</a></p> <p><input type="checkbox"/> <b>No impact</b></p>	<p><b>Adverse impacts</b></p>	
	<p><b>Mitigating actions</b></p>	
<p>Persistence of effects: <input type="checkbox"/> 1 year or less <input type="checkbox"/> 1 – 5 years <input type="checkbox"/> 5+ years</p>		

<p><b>ENV2 Ecological recovery: Wildlife and habitats</b></p> <p>BCC has committed to 30% of its land being managed for nature and to halve its use of pesticides by 2030.</p> <p>Consider how your proposal can support increased space for nature, reduced use of pesticides, reduce pollution to waterways, and reduce consumption of products that undermine ecosystems around the world.</p> <p>If your proposal will directly lead to a reduction in habitat within Bristol, then consider how your proposed mitigation can lead to a biodiversity net gain. Be sure to refer to quantifiable changes wherever possible.</p> <p><a href="#">Further guidance</a></p> <p><input type="checkbox"/> <b>No impact</b></p>	<p><b>Benefits</b></p>	
	<p><b>Enhancing actions</b></p>	
	<p><b>Adverse impacts</b></p>	
	<p><b>Mitigating actions</b></p>	
<p>Persistence of effects: <input type="checkbox"/> 1 year or less <input type="checkbox"/> 1 – 5 years <input type="checkbox"/> 5+ years</p>		
<p>Persistence of effects: <input type="checkbox"/> 1 year or less <input type="checkbox"/> 1 – 5 years <input type="checkbox"/> 5+ years</p>		

<p><b>ENV3 A cleaner, low-waste city: Consumption of resources and generation of waste</b></p> <p>Consider what resources will be used as a result of the proposal, how they can be minimised or swapped for</p>	<p><b>Benefits</b></p>	
	<p><b>Enhancing actions</b></p>	
<p>Persistence of effects: <input type="checkbox"/> 1 year or less <input type="checkbox"/> 1 – 5 years <input type="checkbox"/> 5+ years</p>		

<p>less impactful ones, where they will be sourced from, and what will happen to any waste generated</p> <p><a href="#">Further guidance</a></p> <p><input type="checkbox"/> <b>No impact</b></p>	<p><b>Adverse impacts</b></p>	
	<p><b>Mitigating actions</b></p>	
<p>Persistence of effects: <input type="checkbox"/> 1 year or less <input type="checkbox"/> 1 – 5 years <input type="checkbox"/> 5+ years</p>		
<p><b>ENV4 Climate resilience: Bristol’s resilience to the effects of climate change</b></p> <p>Bristol’s climate is already changing, and increasingly frequent instances of extreme weather will become more likely over time.</p> <p>Consider how the proposal will perform during periods of extreme weather (particularly heat and flooding).</p> <p>Consider if the proposal will reduce or increase risk to people and assets during extreme weather events.</p> <p><a href="#">Further guidance</a></p> <p><input type="checkbox"/> <b>No impact</b></p>	<p><b>Benefits</b></p>	
	<p><b>Enhancing actions</b></p>	
	<p>Persistence of effects: <input type="checkbox"/> 1 year or less <input type="checkbox"/> 1 – 5 years <input type="checkbox"/> 5+ years</p>	
	<p><b>Adverse impacts</b></p>	
	<p><b>Mitigating actions</b></p>	
<p>Persistence of effects: <input type="checkbox"/> 1 year or less <input type="checkbox"/> 1 – 5 years <input type="checkbox"/> 5+ years</p>		
<p><b>Statutory duty: Prevention of Pollution to air, water, or land</b></p> <p>Consider how the proposal will change the likelihood of pollution occurring to air,</p>	<p><b>Benefits</b></p>	
	<p><b>Enhancing actions</b></p>	
<p>Persistence of effects: <input type="checkbox"/> 1 year or less <input type="checkbox"/> 1 – 5 years <input type="checkbox"/> 5+ years</p>		

water, or land and what steps will be taken to prevent pollution occurring.  <a href="#">Further guidance</a> <input type="checkbox"/> No impact	Adverse impacts	
	Mitigating actions	
	Persistence of effects: <input type="checkbox"/> 1 year or less <input type="checkbox"/> 1 – 5 years <input type="checkbox"/> 5+ years	

### Step 3: Action Plan

Use this section summarise and assign responsibility for any actions you have identified to improve data, enhance beneficial, or mitigate negative impacts. Actions identified in section two can be grouped together if named responsibility is under the same person.

This action plan should be updated at each stage of the project. Please be aware that the Sustainable City and Climate Change Service may use this action plan as an audit checklist during the project’s implementation or operation.

Enhancing / mitigating action required	Responsible Officer	Timescale

### Step 4: Review

The Sustainable City and Climate Change Service need at least five working days to comment and feedback on your impact assessment. Assessments should only be marked as reviewed when they provide sufficient information for decision-makers on the environmental impact of the proposal.

Please seek feedback and review by emailing [environmental.performance@bristol.gov.uk](mailto:environmental.performance@bristol.gov.uk) before final submission of your decision pathway documentation<sup>1</sup>.

Where impacts identified in this assessment are deemed significant, they will be summarised here by the Sustainable City and Climate Change Service and must be included in the ‘evidence base’ section of the decision pathway cover sheet.

<b>Summary of significant beneficial impacts and opportunities to support the Climate, Ecological and Corporate Strategies (ENV1,2,3,4):</b>
<b>Summary of significant adverse impacts and how they can be mitigated:</b>

<sup>1</sup> Review by the Sustainable City and Climate Change Service confirms there is sufficient analysis for decision makers to consider the likely environmental impacts at this stage. This does not an endorsement or approval of the proposal.

<b>Environmental Performance Team Reviewer:</b> Daniel Shelton	<b>Submitting author:</b> Travis Young
<b>Date:</b> 11.01.24	<b>Date:</b> 11.01.24