

Public Document Pack

Bristol Schools Forum

Agenda Thursday, 12th January, 2023 at 5.00 pm

Virtual Meeting via Zoom

	Start	Item	Action	Owner	Paper
1.	17:00	Welcome	A	Chair	
2.	17:05	Forum Standing Business (a) Apologies for Absence (b) Confirmation meeting is quorate (c) Appointment of new members/Resignations: (d) Notification of Vacancies: (e) Declarations of Interest	A	Clerk	
3.	17:10	Minutes of the Previous Meeting (a) To confirm as a correct record (b) Matters arising not covered on agenda	A	Chair	2 - 7
4.		Update from Director of Education and Skills	I	RH	verbal
5.		DSG Budget Monitor 2022/23 Period 8 (P8)	Di	AL	8 - 12
6.		Dedicated Schools Grant (DSG) 2023/24 & Schools Block 2023/24	De	AL	13 - 32
7.		Delivering Best Value in SEND	I	RH	33 - 39
8.		Belonging with SEND Programme	De	TJ	40 - 46
9.		Any other business (as agreed with the Chair)	I	Chair	verbal

(*) A = Admin, I = Information, De = Decision required, C = Consultation, Di = Discussion

Clerk: Sam Wilcock email: Sam.Wilcock@bristol.gov.uk Tel: City Hall

Chair: (contact via clerk)

FUTURE MEETINGS

Date (Tuesdays unless indicated)

28 March 2023

23 May 2023

12 July 2023 (Wednesday)

The public invited to watch the meeting via the Bristol City Council YouTube Channel.

Bristol Schools Forum

Minutes of the meeting held on Tuesday, 29th November, 2022
at 5.00 pm at A Committee Room - City Hall, College Green, Bristol, BS1 5TR

Present:

Mary Cox	Diocese of Clifton Dept for Schools & Colleges
Cllr Asher Craig	Cabinet Member for Children’s Services, Education and Equalities
Simon Eakins	Cathedral Primary
Simon Holmes	St Phillips Marsh Nursery
Sarah Lovell	Bristol Brunel Academy
Chris Pring	Whitehall Primary School
Emma Richards (Head)	Claremont School
Cedric Sanguignol	Bishop Road Primary
Cameron Shaw	Bristol Metropolitan Academy
Jo Willis	Bristol Diocese Board of Education
Aderyn Zajicova	The Limes Nursery School

In attendance from Bristol City Council:

Denise Murray	Director: Finance
Richard Hanks (RH)	Interim Director of Education and Skills
Ian Bell (IB)	Place Planning Manager
Angel Lai (AL)	Finance Manager (Children’s and Education)
Samantha Wilcock (SW)	Clerk to Schools Forum

	Action
1. Welcome	
SL welcomed everyone to the meeting.	
2. Forum Standing Business	
<p>a. Apologies for absence</p> <p>Apologies for absence were received from:</p> <ul style="list-style-type: none"> Melanie Bunce – Primary Head, St Barnabas Stephanie Williams – Bannerman Road Community Academy Mick O’Neill-Duff – Primary Governor, Wansdyke Primary Simon Shaw – St Mary Redcliffe & Temple Mandy Cheshire – St Bede’s Catholic College Tracy Jones – Merchant’s Academy Kate Matheson - St Barnabas Primary Trish Dodds – Fishponds Academy Richard Penska – NorthStar Academy Jeff Sutton - GMB Steve Mills - UNISON Marian Curran - - Post 16 Provider Rebecca Watkin - LearnMAT <p>b. Quorate</p> <p>The Clerk confirmed the meeting was quorate.</p>	

<p>c. Resignations Liz Townsend resigned as representative of Bristol Diocese Board of Education.</p> <p>d. Appointment of New Members Jo Willis has been appointed as representative of Bristol Diocese Board of Education. Mandy Cheshire has been appointed as representative Secondary Governor member (St Bede's Catholic College). Mary Cox has been appointed as representative of Diocese of Clifton Department for Schools and Colleges.</p> <p>e. Notification of Vacancies The following vacancies were noted: 1 Secondary Academy Governor Representatives.</p> <p>f. Declarations of Interest There were no declarations of interest.</p>	
<p>3. Minutes of the Previous Meeting</p>	
<p>RESOLVED – that the minutes be confirmed as a correct record.</p> <p>There were no matters arising that were not covered within the agenda.</p>	
<p>4. Update from Director of Education and Skills</p>	
<p>RH gave a verbal presentation which outlined the following:</p> <ol style="list-style-type: none"> 1. The report of the October SEND inspection had been published and was available online via the BCC and OFSTED websites. Of the five areas of weakness identified in 2019, sufficient progress had been made regarding four of them. There was still work to be done regarding relationships with parents and carers. Within the foundations of processes established since 2019 officers would now work with a DfE advisor to establish a 12 month rapid action plan. This work would link to the SEND partnership plan and be governed by the SEND Partnership Board. A draft was planned for the middle of January. <p>RH confirmed that officers would be working with schools, and early year settings across the sector as they were the points of contact and support for parents.</p> <p>With reference to long waits for appointments, it was suggested that the benefit of integrated working between paediatricians, speech and language therapists and other services be raised within the Integrated Care Board (ICB). The solution may be a different way of working together to ease obstacles and improve the speed of resolution.</p> <ol style="list-style-type: none"> 2. With reference to the DSG mitigation plan, officers had met with different groups to discuss the themes and gather feedback. An online survey had been established and publicised and the responses were being collated with, so far, general agreement that the identified themes were appropriate. Officers would return to report to the BSF with 	

more detail at a future meeting.

3. There would be a full update on the 'Delivering Better Value' process at the January meeting. The process was currently within the second module of three, considering equality and consistent practice within maintained schools. The team were looking at case studies, finance, SEND data and surveys. Module three would focus on shaping an application for a grant that would help develop the mitigation plan. The process was on track with plans to submit the application in January.

5. DSG Budget Monitor P7

AL presented to the Forum and outlined emerging DSG funding levels for 2023-2024 as provided within the report.

Following questions in response to the presentation, the forum was advised:

1. Work continued through the transformation process to establish improved procedures for top up funding which were currently within the 'testing' phase
2. The budget process for the Council as a whole was at out for consultation. Difficult conversations were taking place regarding non statutory services in order to balance the budget of the Council.
3. The transfer across the block supported the wider transformation programme. The resource was important as it added capacity for projects which evaluated the data to understand spend and outcomes. The project was an investment in improvements and would result in developed processes. The funds would not be used to offset the overarching deficit.
4. The transfer contribution demonstrated the Schools Forum involvement in improving performance and reducing the deficit and was an example of the Local Authority and Schools Forum working together to own the solution.
5. With regards to the statutory override which enables councils to carry forward the deficit (which is due to cease on 31 March 2023), officers were waiting to receive written confirmation from the Department of Levelling Up, Housing and Communities and Department of Education of an extension.

It was AGREED that the in-year 2022/23 position for the overall DSG was noted.

6. School Places Update

IB introduced the report and highlighted the following:

1. With reference to Secondary school places, initial indications were that the demand for places would be broadly in line with forecasts. Precise numbers would be known within the first few months of 2023. The planned two new free schools would operate outside of the school admissions coordination but would work with the admissions authority and DfE in terms of offers to the pupils that apply to attend. Any delay to the delivery of the schools would mean further temporary places may be required for September 2022.
2. In terms of admissions to Primary Schools, the local authority continued to look at the supply of places due to the trend of gradual decline. As most primary schools were academies there was less scope for the local authority to dictate what could happen however, officers continued to work with Academy trusts to plan staffing and class

numbers.

3. There was an future trend of rising numbers Post 16 over time (following the bulge through secondary schools). Current numbers on roll close to the city centre were high. The new school planned for Temple Quarter would have some places for post 16 but would not satisfy the full demand.

Following questions in response to the presentation, the forum was advised:

1. The Local Authority continued to work with secondary schools about places required in September 2023. There were some places at some sites but they were not necessarily in the areas of the city the demand was forecast.
2. Demand had increased for post 16 SEN places. Some had been provided via Project Rainbow pathways to independence and KnowleDGE Learning Centre. There was a proposal for a new school was at 'expressions of interest' stage. Further conversations were taking place with providers to identify places and offer specialist provision within placement plans.
3. For primary schools in 2025-2026 there were 1000 places more than those required. It was important to plan ahead and provide strategic oversight. Schools within the same area were having collective conversations specifically where the impact is shown as it was important that schools did not feel the need to compete. It was important to ensure that primary schools were supported and that they contact the local authority if they have any issues.

It was AGREED that the Schools Forum noted the contents of the report.

7. Schools Block School Funding Formula 2023/24

AL introduced the report which requested a decision in principle regarding the school funding formula in order to inform budget proposals. Schools had been consulted on various aspects of the funding formula for 2023/24 and the results were presented on p.47 the report. Following the consultation outcome and also discussions with the Finance Sub Group, the Local Authority proposed that the Forum:

- a. Note the changes made to the formula by the ESFA
- b. That the MFG be set at +0.0%
- c. The transfer of 0.5% of the Schools Block to High Needs, to continue support Education Transformation Programmes such as Delivering Better Value (DBV) for SEND.
- d. The lump sum be set at minimum allowed, £126,627 for both Primary and Secondary
- e. That fund remaining after meeting mandated requirements be distributed to the AEN factors in line with consultation outcome
- f. No bias of this distribution to either primary or secondary
- g. Premises factors (NNDR, PFI, Split Sites) are appropriately funded, consistent with previous years
- h. £2.0m be allocated to the Growth Fund
- i. No re-establishment of a Falling Rolls fund

DM confirmed that the autumn statement had referenced further funding with initial calculations based on the current funding formula suggesting a further £15m however, confirmation had not been received to date.

In response to the proposals SE reported that the Finance Sub Group had met to look at the issues and modelling in detail and the conclusions of the Sub Group were:

1. The Sub Group had discussed the levels of the MFG and supported a level of 0.0%.
2. The Sub Group highlighted that primary schools were struggling with budgets being faced with falling rolls and rising costs as well as national support staff pay increases. The Sub Group proposed and supported a weighting to primary schools..
3. SE suggested that context be provided within the consultation in future re the £1.5m transfer.
4. CP highlighted that within the information provided to the sub group meeting, 35 of 126 schools were shown as nil contribution.

DM confirmed in response that all schools contributed to the transfer and the figures indicated those schools compensated through the MFL.

SL reminded the Forum that the £1.5m schools block transfer was not offset against the deficit but helped provide funding and capacity within the transformation programme.

Schools Forum members supported the proposals and it was AGREED that the Schools Forum:

- a. The changes made to the formula by the ESFA be noted.
- b. That the MFG be set at +0.0%
- c. The transfer of 0.5% of the Schools Block to High Needs, to continue support Education Transformation Programmes such as Delivering Better Value (DBV) for SEND.
- d. The lump sum be set at minimum allowed, £126,627 for both Primary and Secondary
- e. That fund remaining after meeting mandated requirements be distributed to the AEN factors in line with consultation outcome
- f. No bias of this distribution to either primary or secondary
- g. Premises factors (NNDR, PFI, Split Sites) are appropriately funded, consistent with previous years
- h. £2.0m be allocated to the Growth Fund
- i. No re-establishment of a Falling Rolls fund

8. Bristol Schools Forum De-delegation 2023/24

AL introduced the report and confirmed that the Maintained Schools had been consulted with the outcome included within the report.

SL confirmed that the Schools Forum representative for maintained secondary schools had sent apologies but had indicated via email to the Chair his full support for de-delegation.

Representatives for maintained primary schools, supported the proposals on the proviso that further information was provided about the following elements:

1. Trade Union Facility Time – detail was requested regarding the period of time allowed for the submission of invoices and how much of the funds remained unclaimed. Officers were asked to provide further information about the £293k carry forward including an updated net position as of a specific timepoint.
2. Schools and Financial difficulties Fund – detail was requested regarding who owned, controlled and accessed the fund which stood at £335k. Information about the trends of applications were requested as contributions had not been required for 2-3 years.

3. Educational Psychology – Feedback was requested regarding the value of the service and how had the money been spent over the last few years.
4. School Improvement Service –Feedback was requested regarding the value of the service and the requirement of the contribution from the Schools Forum.

It was AGREED that Schools Forum Members:

1. **Noted the outcomes of the consultation on school funding arrangements.**
2. **Maintained primary school representatives of Schools Forum supported the de-delegation of the following services at the amounts per pupil indicated in Table 1 for 2023-24:**
 - a) **Employee and Premises Insurance**
 - b) **Assessment of eligibility for free school meals**
 - c) **Maternity supply cover**
 - d) **Schools in financial difficulty**
 - e) **Trades Union facility time**
 - f) **Education psychology**
 - g) **School Improvement Services**
3. **Maintained secondary school representatives of Schools Forum supported the de-delegation of the following services at the amounts per pupil indicated in Table 1 for 2023-24:**
 - a) **Employee and Premises Insurance**
 - b) **Assessment of eligibility for free school meals**
 - c) **Maternity supply cover**
 - d) **Trades Union facility time**
 - e) **Health and safety roving reps**
 - f) **Education psychology**
 - g) **School Improvement Services**

9. Any Other Business

The Chair indicated that the next meeting in January 2023 would be a remote meeting, webcast on YouTube.

The meeting closed at 6.50pm.

Bristol Schools Forum **DSG Budget Monitor 2022/23 Period 8 (P8)**

Date of meeting:	12 January 2023
Time of meeting:	5.00 pm
Venue:	Virtual meeting

1 Purpose of report

- 1.1 This report provides information of the forecast financial position for the DSG overall as at Period 8 (P8 to end of November 2022 extrapolated).

2 Recommendation

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

a) note the in-year 2022/23 position for the overall DSG.

3 Background

- 3.1 The report updates Schools Forum on the position at P8 (to end of November extrapolated) 2022/23.

4 Budget monitoring 2022/23

- 4.1 The DSG ended the 2021/22 financial year with a cumulative deficit of £24.650m including deficit brought forward from the previous years of £10.004m.

Period 8 forecast is showing the in-year forecast deficit of £18.825m (v.s. £20.182m in P7), which when added to the brought forward balance will give a total forecast deficit of £43.475m to carry forward at the end of the year. This represents a favourable movement of £1.357m from P7 forecast position; mainly driven by reprofiling in planned overspend associated with improvement programmes in Early Years Block £0.217m; £0.5m reduction in ALP and £0.557m reduction in Growth funding.

The P8 position is set out in **Table 1** with more detail set out in **Appendix 2**.

Table 1: Forecast position on overall DSG for 2022/23 at P8 (to end of November 2022) extrapolated)

<i>All figures £'000</i>	<i>End of year b/f Deficit</i>	<i>Transfers</i>	<i>b/f Deficit</i>	<i>DSG Funding 2022/23</i>	<i>Forecast Outturn P8 2022/23</i>	<i>In-year variance</i>	<i>Forecast Carry- forward P8 2022/23</i>
Schools Block	(1,517)	1,517	0	304,661	304,661	0	(557)
De-delegation Schools	(504)		(504)	0	(0)	0	(504)
Central Block	8		8	2,742	2,742	0	8
Early Years	(472)		(472)	35,987	36,455	468	(4)
High Needs Block	27,876	(1,517)	26,358	78,466	96,641	18,175	44,533
Education Transformation	(740)		(740)	1,531	2,271	740	0
Funding	-		-	(423,388)	(442,213)	0	0
Total	24,650	0	24,650	0	18,825	18,825	43,475

4.2 **Schools Block (nil balance).** All of the formula funding for maintained mainstream schools and academies has been allocated. Scope for variation is in the growth fund, which has been revised down to £2.332m; from £2.889m budgeted spend based on latest NOR (October 2022 Census return).

4.3 **De-delegated resources (Nil variance).** At this stage of the year it is anticipated that this will be in a balanced position. Any variance will be carried forwards to future years.

4.4 **School Central Services Block (Nil Variance).** It is expected that all of the services in this block will spend to budget.

4.5 **Early Years Block (£0.468m forecast overspend).** Early Years income and expenditure is based on participation throughout the academic year, so the reported position will change in subsequent reports.

Early Years is experiencing significant pressure in emerging SEN; the current overspend in this area is £0.579m; partially offset by savings in Central Team staffing (£0.03m) and adjustments in other factors (£0.2m) to align with latest allocation (November 2022). The Forum has approved to utilise £0.340m from carry forward fund for Early Years (£0.25m) and Nursery (£0.09m) improvement programmes; £0.123m is included within total overspend in Early Years.

4.6 **High Needs Block (£18.915m forecast overspend).** The High Needs block is forecasting an in-year overspend of £18.175m, extrapolated based on September 2022 panel outcome; or £18.915m including

£0.740m planned overspend on Transformation Programme to utilise previous years' carry forward funds. This means at the end of this financial year the cumulative overspend in High Needs Block will reach £44.533m when adding cumulative brought forward deficit balance of £25.618m; after partially offset by £1.517m underspend transferred from the Schools' Block which was agreed with the Schools' Forum in May 2022 meeting.

- 4.7 Top-up funding remains the single greatest pressure, with a significant in year forecast overspend of £15.751m in 2022/23. Current forecast is based on September 2022 panel outcome which may result further deviation from this present outturn.
- 4.8 High Needs recovery plan proposals has been developed alongside the DSG Management Plan and Department of Education Delivering Better Value for SEND Programme (DfE DBV programme) as part of the LA's priority to bring DSG spend to sustainable footing, further updates is available in a separate paper and is covered in Education Director's updates.

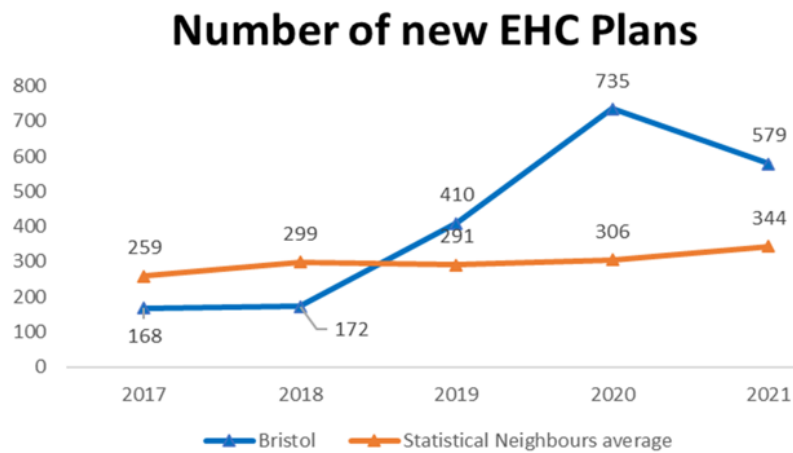
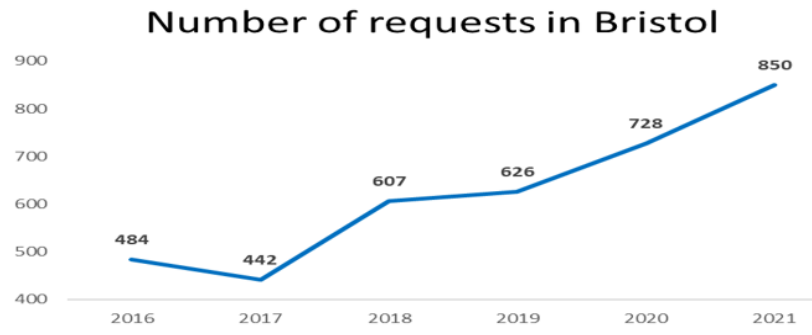
Graphs outline current trend of Children and Young People requiring EHC plans is available in **Appendix 1**.

- 4.9 **The Education Transformation Programme** commenced in 2020-21, now known as Belonging with SEND Programme, primarily concerned with SEN and consequently the High Needs Block, a separate report is provided to cover this (Agenda Item 7). Nationally High Needs continues to be challenging and in Bristol this has been exacerbated by work to clear the backlog of EHCP.
- 4.10 **Funding (Nil Variance).** £423.388m is the latest DSG amount notified by the ESFA in November 2022.

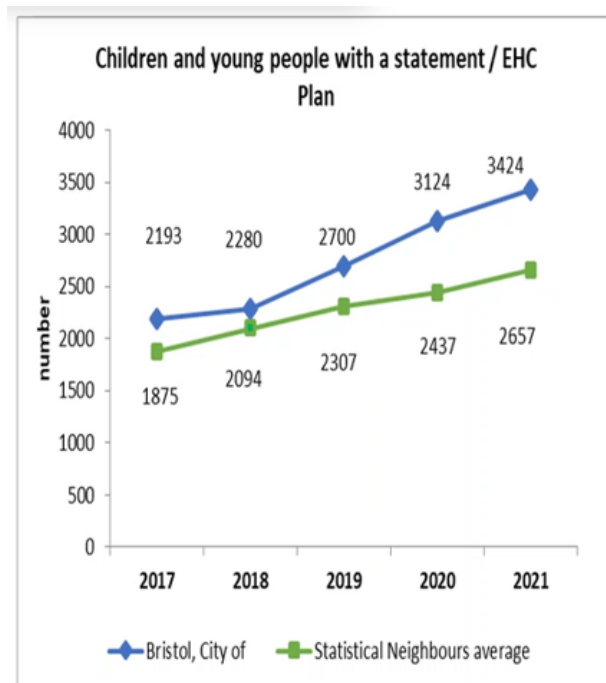
In summary the DSG is forecasting an in year overspend of £18.825m in P8 against annual funding of £423.388m (per ESFA announcement in November 2022). This is equivalent to a cumulative forecast overspend of £43.475m when including £24.650m deficit balance brought forward from previous years.

As statutory overwrite has been extended by DHCLG (Department of Housing, Communities and Local Government) for another three years, this gives the LA more time to deliver DGS management plan and mitigations with the aim to bring DSG annual spend back to a sustainable footing. Bristol has been actively engaging with DfE DBV programme (Delivering Better Value in SEND). Further details on DBV programme updates and High Needs Recovery plan with potential mitigation options is included within Education Director's update.

Appendix 1a: Increase in initial EHCNA requests in Bristol and Number of new EHC plans benchmarking with neighbouring cities:



Appendix 1b:



Appendix 2 - Forecast position for Overall DSG 2022/23 as at P8 (to end of November 2022 extrapolated)

Bristol DSG Forecast Outturn position as at Period 8 (P8) 2022/23	Brought forward 1.4.22	Funding 2022/23	P8 Forecast Outturn	In-year movement	Carry forward 31.3.23
	£'000	£'000	£'000	£'000	£'000
Maintained Schools		80,377	80,377	0	
Academy Recoupment		221,394	221,394	0	
Growth Fund		2,889	2,332	(557)	
Schools Block	0	304,661	304,104	(557)	(557)
De-delegation Services	(504)	0	0	(0)	(504)
Admissions	6	557,581	558	0	6
Centrally Retained	1	2,185	2,185	0	1
Schools Central Services	8	2,742	2,742	0	8
National Formula		27,811	27,716	(95)	
2 Year Old Funding		3,541	3,541	0	
Pupil Premium (EYPP)		370	328	(42)	
Additional Support Services		500	500	0	
SEN Top up		1,600	2,179	579	
Staffing		2,025	1,991	(34)	
Disability Access Fund		140	78	(62)	
EY & Nursery improvement work		0	123	123	
Early Years Block	(472)	35,987	36,455	468	(5)
Commissioned Services		2,612	3,548	936	
Core Place Funding		9,307	9,308	1	
Staffing		1,202	1,265	63	
Top Up		38,679	54,429	15,751	
Placements		10,396	11,442	1,046	
Pupil Support		936	1,299	363	
HOPE Virtual School		236	250	14	
Academy Recoupment		15,099	15,100	1	
Education Transformation		1,531	2,271	740	
High Needs Block	25,619	79,997	98,912	18,915	44,533
Funding		423,388	442,213		
Total	24,650	0	18,825	18,825	43,475

Bristol Schools Forum **Dedicated Schools Grant (DSG) 2023/24**

Date of meeting:	12 January 2023
Time of meeting:	5.00 pm
Venue:	Virtual Meeting

1 Purpose of report

- 1.1 To give an overview on the DSG for 2023/24 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 EYNFF, following consultation with settings.
- 1.3 The LA must seek Schools Forum approval for Central Services spend, except for the item relating to school licences which must be repaid to the DfE on behalf of all maintained schools and academies.

2 Recommendation

- 2.1 **Schools Forum is invited to:**
 - a) **note 2023/24 funding levels.**
 - b) **approve final transfers between blocks.**
 - c) **approve the EYNFF.**
 - d) **provide feedback, as appropriate, to Cabinet and Council, for their consideration in making final decisions on the Schools Budget for 2023/24.**
 - e) **agree Central School Services Block allocations**
 - LA Core Functions £1.171m (as per Appendix 1);
 - School Admissions £0.575m;
 - Schools Forum £0.023m;
 - Combined Services £0.477m (as per Appendix 2).

3 Background

- 3.1 Schools Forum considered the emerging position on the DSG for 2023/24 at its meetings in September and November 2022 and agreed any spare funding could be transferred to the High Needs Block from the Schools Block. This 0.5% fund will be ringfenced to support the continuation of the Education transformation journey and emphasis of the sustainability of the

High Needs Block. 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 16 December 2022 and the results of both events have informed this report.

4 DSG 2023/24

- 4.1 The funding in the DSG is primarily generated by pupil numbers from the October census. The 2022 censuses recorded 35,001 primary pupils, so the primary age population decreased by a further 359 (or 1.0%) from 35,360.0 in October 2021; showing a continuing decline in primary age population since 2019. (*which fell by 283 (or 0.78%) between October 2020 and October 2019*). Secondary age pupil numbers continue to increase, with October 2022 counting 21,376.17; an increase of 797.17 (3.9%) from October 2021. This also continues the trend from October 2020 (recorded an increase of 757 (3.95%) from Oct 2019). Funding per pupil has also increased (by 4.5% for primary and 5.6% for secondary) over the 2022-23 levels. The overall increase in the DSG is £29.838m or 7.0% giving a total DSG of £453.226m.
- 4.2 Table 1 shows the funding allocations in each block for 2023/24 compared to the final allocations for 2022/23.

Table 1 - DSG blocks	2022/23 DSG allocation as at Nov22	DSG 2023/24 allocation**	Increase	Change
	£m	£m	£m	%
Schools Block**	306.192	325.478	19.287	+6.3%
Central School Services Block	2.742	2.717	(0.025)	-0.9%
High Needs Block	78.466	86.504	8.038	+10.2%
Early Years Block	35.987	38.526	2.539	+7.1%
Total	423.388	453.226	29.838	+7.0%

**This does not include Mainstream Schools Additional Grant (MSAG) 2023-24 government announced on 16th December 2022 where indicative allocation to Bristol is £10.749m. The LA will update the Forum once School Level allocations is confirmed by ESFA in Spring 2023. Further details is available in Appendix 3 which will be incorporated into 2024/25 funding formulae.

- 4.3 **Central Services Block.** This block is funded in two parts, for ongoing and historic responsibilities. The funding for historic commitments has been reduced again by 20% (£0.119m) from £0.596m to £0.477m. It remains an aim of ESFA to withdraw this funding over time. The historic responsibilities' part supported two areas: contribution to Combined Services and Prudential Borrowing. The prudential borrowing element has not been required for some time, so the LA has maintained the contribution to combined services at £0.477m.
- 4.4 The 2023-24 allocation for historic responsibilities is £0.477m, so the LA needs to trim the contribution to combined services by £0.119m with no spare element to transfer to high needs or elsewhere.
- 4.5 **High Needs Block.** The High Needs Block has received another substantial increase in funding of £8.038m or 10.2% but this block continues to be under pressure. Current spending levels in 2022/23 indicating the increased allocation in 2023/24 will not cover current year forecast shortfalls and will not provide any additional funding for historic deficits.
- 4.6 High Needs Block (HNB) forecast in-year spend in 2022/23 is £18.175m over budget based on forecasted need.

Table 2 shows the HNB forecast position for 2022/23 and 2023/24 highlighting the ongoing deficit position. In this table the spend for 2023/24 has been projected as per the latest mitigated DSG Management Plan but there is a risk that this will change depending on the upward pressures of rising need and rising costs against planned mitigations in this block.

	2022/23	2023/24
Table 2 - High Needs Block Forecast as at Period 8 (November 2022)	£m	£m
Latest Block Allocation	78.466	86.504
Transfer from CSSB	0	0
Transfer from Schools Block	1.531	1.627
Total Block Funding	79.997	88.131
Forecast Spend	96.641	105.121
Education Transformation spend	2.271	1.627
Total Spend	98.912	106.752
In year over/(under) spend	18.175	18.621
Opening Balance b/f	25.618	44.533
Closing Balance c/f	44.533	63.154

In spite of allocation of £8.0m additional funding in 2023/24, whilst welcomed this is still outstripped by increase in EHC plan currently at 17.3%. As a result, a forecasted deficit of £63m in 2023/24 DSG.

It should be noted that 2023/24 mitigations have not been included in the above Table. It has been further developed in conjunction with DBV Programme. (See Appendix A for further information) It is estimated that improved outcome could reduce £12.6m from our costs over 5 year period, and this will be further explored in 2023/24 and fully consulted before implementation.

- 4.7 For the 2023/24 budget £1.6m (0.5%) was transferred from the Schools Block to the High Needs Block with agreement from the Forum, and this funding will be ringfenced for supporting the Education transformation activities with the aim to address the findings of the OFSTED inspection and deliver the commitments in the Written Statement of Action in a sustainable manner.
- 4.8 Department of Housing, Communities and Local Government (DHCLG) has agreed an extension of Statutory override for further three years (now ends in March 2026) to allow HN mitigations / transformations to be implemented.
- 4.9 **Schools Block** Details on this block are covered in a separate paper on this agenda.
- 4.10 **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 throughout the year, so the actual amount will be updated by ESFA once these later participation census figures are known.
- 4.11 The release of the block allocations also included the first indication of the hourly rates for 2023/24. For 3 & 4 year old the hourly rate will increase by 6p or 1% to £5.75 from £5.69 in 2022/23. The 2 year old rate will increase by 9p or 1.6% to £5.89. This will mean a likely real-term reduction in funding for both year groups as cost of living pressure outstrips increase in funding levels per pupil. These are the rates used to calculate funding to the LA, the rates paid to providers are outlined in section 5 of this report.
- 4.12 The Maintained Nursery School supplementary funding will increase to £3.80 per hour; this is equivalent to an indicative increase of £1.855m in funding based on part-time participation number of 1,154 for 15 hours per week 38 weeks per year.
- 4.13 The Teachers Pay and Pensions Grants (TPPG) will be moved from the Schools Block to the Early Years Block from 23/24 in line with the results from the DfE EYNFF Consultation outcomes. The EY Team confirm that no funding will be retained and the same payments to schools and academies will continue through the payment workbook.

4.14 **Overall position.** Table 3 shows the effect on the block funding position and outlines the 2022/23 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.

Table 3 - DSG Blocks	Balance brought forward from 2022/23 (forecast) £m	2023/24 DSG allocation £m	Movement between blocks £m	Final DSG budget 2022/23 £m	Estimated spend 2023/24 £m	Carry forward balance at end of 2023/24 £m
Schools block	(0.557)	(325.478)	1.627	(323.851)	323.851	(0.557)
De-delegation	(0.504)			(0)	0	(0.504)
Central Services Block	0.008	(2.717)	0	(2.717)	2.709	0
High Needs Block	44.533	(86.504)	(1.627)	(88.131)	106.752	63.154
Early Years	(0.004)	(38.526)		(38.526)	38.743	0.213
Total	43.475	(453.226)	0.000	(453.226)	472.056	62.306

Note: Estimated spend 2023/24 in CSSB is £0.008m less than DSG budget allocation to balance the legacy deficit in the Block back to zero; and Early Year's Estimated spend 2023/24 including £0.217m in EY & Nurseries Improvement Programmes.

5 EYNFF

The rates outlined in section 4.10 are those which generate funding to the LA. There have been no significant changes in the guidance regarding how local authorities must distribute funding to providers but there is still a requirement to consult with providers prior to setting rates. EY proactively began their provisional local consultation in mid November 2022 and final results are summarised in Table below:

Table 4: EYNFF Consultation (83 responses out of 347)

Question	% Agree	% Disagree
2YO Base Rate – pass full 9p onto providers	67	33
3 and 4YO Base rate – pass full 6p onto providers	47	53
3p Retention of 2YO Base for 6 x extra places	82	18
Estimated payments (70% up front)	88	12
Deprivation supplement methodology	93	7
Quality supplement methodology (Lead Teachers)	87	13
EY SEN - maintain the current rate	70	30

5.1 The 3 & 4 year olds funding rate will increase by 6p to £5.75 per hour (excluding 5p designated for Teachers Pay and Pension Grant), the base rate to providers will be increased by 6p to £4.94. We will also maintain the

same levels of supplements, SEN rates and the same proportion of central funding.

- 5.2 For 2 year olds the rate will increase by 9p to £5.89 per hour. It is intended that we will pass on this increase in full to providers meaning their rate increases from £5.77 to £5.86, with the same £0.03 retained for central administration.

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 2023/24 is £2.717m. This total is composed of two distinct components: on-going functions (£2.240m) and historic commitments (£0.477m). The on-going functions element has increased by 4.4% or £0.094m to £2.239m, from £2.146m in 2022/23. 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 2023/24 budgets.

Table 5: Composition of Central School Service Block Allocations:

Type of funding	Component	DSG Allocation 2022/23 £'000	2022/23 budget £'000	DSG Allocation 2023/24 £'000	Proposed 2023/24 budget £'000	% change from 2022/23 budget
Formulaic	LA Core functions	1,139	1,139	1,175	1,171	+2.8
Formulaic	School Admissions	557	557	575	575	+3.2
Formulaic	School Licences	312	312	348	348	+11.5
Formulaic	Schools Forum	23	23	23	23	-
Formulaic	Pay & Pension – Centrally employed teachers	115	115	119	115	-
Historic	Combined Services	596	596	477	477	-20.0

Historic	Prudential Borrowing	0	0	0	0	-
Total		2,742	2,742	2,717	2,709	-0.9
Note: proposed 2023/24 budget is £0.008m less than DSG allocation to balance the £0.008m legacy deficit back to zero in CSSB.						

- 6.4 **LA Core Functions £1.171m.** 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 2023/24 it is proposed to inflate each item by 2.8% to reflect inflationary pressure across all spending items.
- 6.5 **Admissions £0.575m.** The only change to this budget is that arising from the increase in CSSB generally, due to pupil number and rate increases.
- 6.6 **School Licences £0.348m.** 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 2023/24 has been advised as £0.348m. 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 writing of papers, clerking and hosting the meetings. It is proposed that this allocation remain at the 2021/22 level.
- 6.8 **Pay and Pensions – Centrally Employed Teachers.** The last budget increase was in 2021-22, where allocation has been uplifted by the 5.8% growth in the on-going services element of the CSSB which is financially unrealistic given the cost of living pressure.
- 6.9 **Combined Budgets. Appendix 2** details the analysis of the £0.477m for Combined Services, which Schools Forum has agreed in the past and it is proposed for agreement again for 2023/24. 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 2023/24 £'000	Amount 2022/23 £'000
Statutory & Regulatory	<ul style="list-style-type: none"> Director of children's services and personal staff for director (Sch 2, 15a) Planning for the education service as a whole (Sch 2, 15b) 	Central budgets for education planning that are not already charged to Combined Budgets or elsewhere in the DSG.	107	104
Statutory & Regulatory	<ul style="list-style-type: none"> Revenue budget preparation, preparation of information on income and expenditure relating to education, and external audit relating to education (Sch 2, 22) Authorisation and monitoring of expenditure not met from schools' budget shares (Sch 2, 15c) Formulation and review of local authority schools funding formula (Sch 2, 15d) 	Accounting and finance staff directly supporting education budget setting and funding for all schools.	269	262
Statutory & Regulatory	<ul style="list-style-type: none"> 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) 	Estimated cost of internal audit time.	28	27
Statutory & Regulatory	<ul style="list-style-type: none"> Consultation costs relating to non-staffing issues (Sch 2, 19) Plans involving collaboration with other LA services or public or voluntary bodies (Sch 2, 15f) 	Estimated cost of public consultation on service development (eg High Needs) and collaborative working.	88	84
Statutory & Regulatory	<ul style="list-style-type: none"> Standing Advisory Committees for Religious Education (SACREs) (Sch 2, 17) 	Current budget for SACRE.	13	10
Statutory & Regulatory	<ul style="list-style-type: none"> Provision of information to or at the request of the Crown other than relating specifically to maintained schools (Sch 2, 21) 	Legal Services staff support.	65	64
Education Welfare	<ul style="list-style-type: none"> Functions in relation to the exclusion of pupils from schools, excluding any provision of education to excluded pupils (Sch 2, 20) School attendance (Sch 2, 16) Responsibilities regarding the employment of children (Sch 2, 18) 	Current budget for Education Welfare.	420	410
Asset Management	<ul style="list-style-type: none"> 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) General landlord duties for all buildings owned by the local authority, including those leased to academies (Sch 2, 14b) 	Current budget for education property management and capital programme monitoring.	181	178
TOTAL STATUTORY / REGULATORY FUNCTIONS OF LA			1,171	1,139

Appendix 2 – CSSB Combined Services Budget:

Service	Total 2023/24 £'000	Total 2022/23 £'000
Director of Education and Skills	96	119
Equalities	36	45
Governor Support	17	21
HR	20	25
Primary Services	142	178
Pupil Census	28	35
School Place Planning	72	90
Secondary Services	66	83
Grand Total	477	596

Appendix 3 Mainstream Schools Additional Grant 2023-24:

The 2022 Autumn Statement announced that the core schools budget will increase by £2 billion in the 2023 to 2024 financial year, over and above totals announced at the Spending Review 2021.

In the 2023 to 2024 financial year, mainstream schools will be allocated additional funding through the mainstream schools additional grant (MSAG) 2023 to 2024.

The MSAG will allocate funding to state-funded mainstream schools only. The MSAG will fund the following providers, for the 5 to 16-year-old age range:

- primary and secondary maintained schools
- primary and secondary academies and free schools
- all-through maintained schools
- all-through academies
- city technology colleges

This is in addition to schools' allocations through the schools national funding formula. Indicative allocation for Bristol is £10.749m, final School Level allocation will be confirmed in Spring 2023. Funding for maintained mainstream schools will be paid to local authorities and passported to individual schools at the published rates. Funding due to mainstream academies will be paid directly to mainstream academies by ESFA.

Local authorities and academies will receive their payments for 2023 to 2024 in 2 tranches. Payments will be made in May 2023 for local authorities, and June 2023 for academies, to cover April 2023 to August 2023; and in October 2023 for local authorities, and November 2023 for academies, to cover September 2023 to March 2024.

In addition to the MSAG, local authorities have been allocated £400 million additional high needs funding for 2023 to 2024, on top of their high needs national funding formula allocations. This element (Bristol uplift of £3m) has been included within High Needs amount as part of 2023-24 DSG funding announcement published in December 2022.

Further information is available via link: [Mainstream schools additional grant 2023 to 2024: methodology - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/news/mainstream-schools-additional-grant-2023-to-2024-methodology)

APPENDIX A							
Draft indicative Mitigations Proposals (subject to change)							
Note : Figures are indicatives annual expenditure reduction could be subject to change following consultation and further due diligence							
CM ref	Schemes	Indicative Completion Dates	A	B	C	D	E
			23/24	24/25	25/26	26/27	27/28
			£0	£0	£0	£0	£0
A1	Specialist Provision Create 330 specialist places in special and mainstream schools to meet current and future projected demand	Sep-24	0	2,458,342	4,214,300	4,214,300	4,214,300
A2	Capital Investment in existing specialist settings To expand and modernise existing special school provision to create an additional 108 specialist places (contributes 450 places committed through Mayoral Pledge).	Sep-24	1,403,000	1,403,000	1,403,000	1,403,000	1,403,000
A3	Expansion of Supported Living (Project Rainbow) To build a 12-bed education residential centre to support preparation for adulthood	Sep-24	0	576,000	576,000	576,000	576,000
TOTAL			£1,403,000	£4,437,342	£6,193,300	£6,193,300	£6,193,300
B1	Review of HNB Element 3 Non-Statutory 'top-up' Funding To conduct a review of existing Non-Statutory Top-Up process where schools can apply for funding to support additional needs without having to request an Education, Health & Care Needs Assessment.	Dec-22	1,693,002	2,031,603	2,370,203	2,708,804	2,708,804
B2	Needs Matrix for Non-Statutory Top Up Funding Application The new process will use a web-portal and be more transparent and equitable about how non-statutory top-up funding is calculated and allocated. There is potential to extend the Matrix to statutory funding.		0	0	0	0	0
TOTAL			£1,693,002	£2,031,603	£2,370,203	£2,708,804	£2,708,804
C4	Belonging with SEND Programme. Using the funding allocated by Bristol Schools Forum, the programme aims to reduce the number of exclusions in Bristol and improve attendance and attainment of children with SEN. The programme will do this by supporting schools/settings to deliver sustainable evidence-based interventions, improve skills and knowledge, and pilot the use of specialist equipment.	Sep-23	0	0	0	0	0
C5	Workforce Development Plan and Delivery. The Bristol Local Area to have a well-trained workforce, able to identify and respond to need at the earliest point.		232,178	234,802	237,330	237,330	237,330
C6	School Improvement offer for SEND. To develop the School Improvement offer for schools (utilising recent redeployed staff) to focus on improving provision at the school-based stages of the Code of Practice.		0	378,000	378,000	378,000	378,000
TOTAL			£232,178	£612,802	£615,330	£615,330	£615,330
D2	Therapies Framework. The aim is to ensure therapies mainly associated with Education, Health & Care Plans are appropriate and reach quality assurance standards. Implementation of a Preferred Provider List model is estimated to deliver a 10% reduction in spend per year over 5 years when compared to the previous procurement approach	Sep-22	300,000	300,000	300,000	300,000	300,000
D3	ALP Commissioning Framework. ALP Commissioning Framework To ensure that children and young people's needs are met by receiving Alternative Learning Provision which has been quality assured and is commissioned through a framework. The new contract is able to limit price increases from providers		0	0	0	0	0
TOTAL			£300,000	£300,000	£300,000	£300,000	£300,000
E1	Statutory Top-Up Standardisation. To review the statutory funding system in line with other local authorities and implement a standardised banding and process which ensures statutory funding aligns with need.		0	2,113,947	2,852,598	3,591,249	3,591,249
TOTAL			£0	£2,113,947	£2,852,598	£3,591,249	£3,591,249
F1	Review of 18 to 25 Education, Health & Care Plan Top Up Funding. To review funding to ensure it is in line with statutory requirements.	Sep-24	0	1,495,558	1,794,669	2,093,781	2,093,781
F2	Review Post-16 Out of Authority. To review out of authority post-16 provision to inform and develop more cost-effective local options.		0	0	0	0	0
TOTAL			£0	£1,495,558	£1,794,669	£2,093,781	£2,093,781
G2	Reduction in use of ALP. As a result of the ALP Improvement Plan and service improvement activity, the aim is to see a reduction in the use of ALP over time.		215,000	215,000	215,000	215,000	215,000
TOTAL			£215,000	£215,000	£215,000	£215,000	£215,000
TOTAL MITIGATIONS			£3,843,180	£11,206,252	£14,341,100	£15,717,463	£15,717,463
Less Programme Optimuim Bias (20%)			-£768,636	-£2,241,250	-£2,868,220	-£3,143,493	-£3,143,493
RISK ADJUSTED DRAFT MITIGATIONS			£3,074,544	£8,965,001	£11,472,880	£12,573,970	£12,573,970

Bristol Schools Forum
Schools Block 2023/24

Date of meeting:	12 January 2023
Time of meeting:	5:00 pm
Venue:	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 2023/24, prior to final decision by Cabinet and submission of the Authority Proforma Tool (APT) to the Education and Skills Funding Agency.

2. Recommendations

Schools Forum is invited to:

- 2.1 Approve the proposed arrangements for the 2023/24 mainstream funding formula, including the amount set aside for the Growth Fund
- 2.2 Provide feedback, as appropriate, to Cabinet and Council, for their consideration in making final decisions on the Schools Budget for 2023/24.

3. Funding available

- 3.1 The DSG overview paper elsewhere on this agenda explains the overall strategy for schools finance for 2023/24. This indicates that the allocated funding for Schools Block in 2023/24 is £325.5m.
- 3.2 At the meeting held November 2022, Schools Forum agreed to the transfer of 0.5% of the Schools Block to the High Needs Block, and expressed approval for the Minimum Funding Guarantee (MFG) to be set at +0.0%. The lump sum was to be preserved at £126,627 and any remaining funding directed to the Additional Education Needs (AEN) factors.
- 3.3 In addition Schools Forum approved a £2.0m top-slice of Schools Block to create the Growth Fund for 2023/24.
- 3.4 **Table 1** sets out how it is proposed that this funding be calculated and applied.

Table 1: Proposed Schools Block Budget 2023/24

Funding	£'000 (allocations)	Cost – spending plan	£'000
Pupil led DSG funding	£312.4m	Transfer of 0.5% to HNB	£1.627m
Premises led DSG funding	£10.9m	Growth Fund	£2.0m
Growth funding	£2.2m	Balance remaining for Mainstream Schools formula	£321.8m
DSG Schools Block Total Allocation**	£325.5m	Schools Block Total	£325.5m

**This does not include Mainstream Schools Additional Grant (MSAG) 2023-24 government announced on 16th December 2022 where indicative allocation to Bristol is £10.749m. The LA will update the Forum once School Level allocations is confirmed by ESFA in Spring 2023.

- 3.5 The component elements of the calculation have been refreshed, upon release of the October 2022 census data. Each of the components is explained below.
- 3.6 **Pupil led DSG funding £312.4m.** This is the sum allocated to the LA based on the number of pupils recorded in the October 2022 census. Primary age pupils attract unit funding of £4,946.84, which is an increase on 2022-23's £4,733.44. Secondary age pupils attract unit funding of £6,513.22, up from £6,168.48. The allocation to Bristol is based on a recorded 35,001 primary age pupils, down from last year's 35,360. Secondary is based upon 21,376.17 pupils, up from last year's 20,579.0
- 3.7 **Premises led funding £10.9m.** This is the element of the Schools Block DSG that recognises costs not defined by NFF values such as PFI spend, split sites and NNDR.
- 3.8 **Growth Funding £2.2m.** This element of the DSG Schools Block settlement is calculated by the ESFA based on the observed differences between the October 2021 and October 2022 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.
- 3.9 **Schools Block Total £325.5m.** This is the sum of the proposed allocations above. This does NOT include the Mainstream Schools Additional Grant (MSAG) circa £10.749m where School Level allocations will be confirmed by ESFA in Spring 2023.
- 3.10 **Transfer 0.5% of Schools Block to High Needs Block £1.627m** Schools Forum agreed to the transfer of 0.5% of the Schools Block to the High Needs Block at its

meeting in November 2022. 0.5% is the maximum the DfE allows to be agreed locally.

- 3.11 **Growth Fund allocation £2.0m** This funding 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. The commitment for 2023/24 is estimated at £1.2m, leaving £0.8m for new commitments that may arise during the admissions round.
- 3.12 **Balance remaining for Mainstream Schools formula £321.8m** This is the remainder of the Schools Block allocation available for the mainstream funding formula, including the mandated elements of the formula.
- 3.13 **Teacher Pay and Teacher Pensions Employer Contributions Grant funding**
The funding formerly provided to mainstream schools via the Teachers Pay Grant (TPG) and Teacher Pensions Employer Contributions Grants (TPECG) was incorporated into the Schools Block of the DSG from 2021/22.
- 3.14 For 2021/22, the ESFA inflated the 2020/21 Post MFG Budget of all mainstream schools subject to the funding formula by an amount representing the funding schools receive through the TPG, the TPECG and supplementary fund in respect of their reception to year 11 pupils. This had the effect of raising each school’s baseline funding levels, which the 21/22 formula had to provide against. The ESFA ensured funding these increased baselines by imposing higher Minimum Per Pupil Funding levels and a positive MFG with no capping.
- 3.15 For 2023/24 this methodology continues, with the funding previously paid separately for TPG and TPECG incorporated into each school’s baseline position. These baselines and the mandated increases in funding for schools are provided for again via the increased minimum per pupil funding levels and positive MFG.
- 3.16 **Schools Block Total £325.5m.** This is the total of the elements above. It worthnoting that this does not include the Mainstream Schools Additional Grant (MSAG) circa £10.749m where School Level allocations will be confirmed by ESFA in Spring 2023.

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 140 FTE pupils (pro rata 7/12 of academic year), 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 2023/24. The known 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 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 2022, 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 preserved at £126,627 for both Primary and Secondary
- An allocation of £2.0m is set for the Growth Fund

- 5.2 The Schools Block formula presented has been modelled within the above constraints, using the 2022/23 formula unit values as the starting point.

- 5.3 The basic entitlement uses the AWPU rates from the 2023/24 formula. The total funding distributed by these factors is £222.083m (69% of the pre-MFG total). The per-pupil rates for 2023/24 are as follows:

- Primary £3,317
- KS3 (years 7-9) £4,677
- KS4 (years 10-11) £5,271

- 5.4 The £126,627 lump sum for all settings distributes £16.1m (5% of the pre-MFG total).

- 5.5 After applying the above, remaining unallocated funding allowed the increase of the AEN factors unit funding by 2% above 2022-23 levels. This means that £69.099m (22% of pre-MFG total) is distributed through these factors.

- 5.6 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 2023/24 the Primary rate is £4,405, whilst is £5,715 for secondary school pupils.

- 5.7 25 primary schools and 1 secondary school will receive an uplift to meet this minimum per-pupil funding costing £3.2m (1% of pre-MFG funding). For comparison, in 2022/23 30 primary schools and 3 secondary schools required uplifting to the minimum per pupil funding levels, at a cost of £4.6m (1.5% of preMFG funding).

- 5.8 After all the above factors MFG (Minimum Funding Guarantee) is then applied. The MFG increases the funding to 7 schools to uplift them to this guarantee, costing £0.09m.
- 5.9 Overall, 105 of the 126 schools are set to receive an increase in cash funding in 2023/24, whilst 21 out of the 126 schools will receive less funding than in 2022/23. Of the 105 receiving increases, 72 also have increased numbers on roll, 4 have static NOR, whilst 29 have reduced NOR. In all 21 schools receiving a reduction in funding this is being driven by a reduction in pupil numbers on roll that more than offsets per-pupil funding gains in the formula.
- 5.10 In total, 50 schools have a reduced NOR in 2023-24, whilst four are static and 72 have increased NOR.
- 5.11 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.
- 5.12 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 changes from 2022/23.

6. Future funding arrangements

- 6.1 2023/24 is the first firm year of transition to a hard funding formula, and it's clear that the intention of the ESFA is to continue on this transition in 2024/25 and following years, although no end or target date has yet been set.
- 6.2 Elements of funding in scope yet to transition include split site policy, falling rolls support and growth funding methodology, and it can be expected that local formula factor unit values will further converge towards NFF absolute values in coming years. Guidance issued on 3rd November indicates that Split Site eligibility criteria will be mandated for 2024/25 and suggests that some BCC schools currently receipt of split site funding will no longer be eligible under the proposed NFF criteria.
- 6.3 Bristol's Schools Block is funded at a level above that needed to implement a hard NFF in full. Whilst it is not clear whether that once any hard NFF is in operation if Bristol schools will be protected at this higher funding level by any future MFG or other floor mechanism, it seems likely that NFF minimum per pupil funding levels will grow to a point to provide floor protections to Bristol schools.

Appendix A unit values

FOR REFERENCE
VALUES PAID IN 2022-23 FORMULA

FOR REFERENCE
2023-24 NFF VALUES

Proposed formula
AWPU and lump sum set to
minimum allowed, with AEN
uplifted

MFG=0.00%

FOR REFERENCE
2022-23 formula values

MFG=0.50%

FOR REFERENCE
2023-24 NFF VALUES

Proportion of NFF value

Factor		Increase on 22-23			
Basic Entitlement (Primary)	£3,316.76	6.2%	£3,123.00	£3,443.69	96.31%
Basic Entitlement (KS3)	£4,676.57	6.2%	£4,404.00	£4,855.05	96.32%
Basic Entitlement (KS4)	£5,270.59	6.2%	£4,963.00	£5,471.95	96.32%
Free School Meals (Primary)	£556.23	0.4%	£553.77	£487.03	114.21%
Free School Meals(Secondary)	£556.23	0.4%	£553.77	£487.03	114.21%
Free School Meals Ever 6 (Primary)	£724.79	4.7%	£692.22	£715.32	101.32%
Free School Meals Ever 6(Secondary)	£1,058.83	4.7%	£1,011.23	£1,045.08	101.32%
IDACI (P F)	£265.42	2.5%	£258.83	£233.37	113.73%
IDACI (P E)	£319.25	2.0%	£313.00	£284.10	112.37%
IDACI (P D)	£507.14	2.7%	£493.58	£446.44	113.60%
IDACI (P C)	£549.11	2.5%	£535.71	£487.03	112.75%
IDACI (P B)	£584.66	2.2%	£571.82	£517.47	112.99%
IDACI (P A)	£767.13	2.8%	£746.39	£679.81	112.84%
IDACI (S F)	£383.57	2.8%	£373.20	£339.90	112.85%
IDACI (S E)	£513.06	2.7%	£499.60	£451.51	113.63%
IDACI (S D)	£714.16	2.3%	£698.23	£629.08	113.53%
IDACI (S C)	£778.99	2.7%	£758.43	£689.96	112.90%
IDACI (S B)	£838.23	2.4%	£818.61	£740.69	113.17%
IDACI (S A)	£1,068.10	2.6%	£1,041.33	£943.62	113.19%
EAL3 (P)	£668.46	1.0%	£662.12	£588.49	113.59%
EAL3 (S)	£1,799.72	0.7%	£1,787.72	£1,587.91	113.34%
Low Attainment (P)	£1,326.44	0.6%	£1,318.22	£1,171.91	113.19%
Low Attainment (S)	£2,012.67	0.7%	£1,998.39	£1,775.62	113.35%
Mobility (P)	£119.53		£0.00	£958.83	12.47%
Mobility (S)	£173.20		£0.00	£1,379.91	12.55%
Lump Sum P	£126,627.02	1.3%	£125,000.00	£129,873.92	97.50%
Lump Sum S	£126,627.07	1.3%	£125,000.00	£129,873.92	97.50%
Sparsity (P)	£6,900.54		£0.00	£57,124.23	12.08%
Sparsity (S)	£10,046.38		£0.00	£83,099.02	12.09%

Appendix B formula distribution

Proposed formula
 AWPUs and lump sum set to minimum allowed, with AEN uplifted
 MFG=0.00%

FOR REFERENCE
 VALUES PAID IN 2022-23 FORMULA

FOR REFERENCE
 2022-23 formula values
 MFG=0.50%

		Increase on 22-23	
TOTAL COST OF FORMULA	321,851,050	6.3%	302,656,562
Basic Entitlement	222,082,574	7.9%	205,760,033
Basic Entitlement (Primary)	116,103,184	5.1%	110,432,403
Basic Entitlement (KS3)	62,212,411	9.3%	56,904,084
Basic Entitlement (KS4)	43,766,979	13.9%	38,423,546
Deprivation	40,588,036	5.3%	38,533,038
Free School Meals	8,865,353	5.4%	8,414,060
Free School Meals (Ever 6)	14,605,348	6.9%	13,661,389
IDACI (F)	2,063,182	5.2%	1,960,967
IDACI (E)	2,158,650	4.3%	2,069,042
IDACI (D)	2,117,963	5.0%	2,017,926
IDACI (C)	2,644,943	4.1%	2,541,830
IDACI (B)	4,249,728	1.9%	4,171,676
IDACI (A)	3,882,870	5.1%	3,696,149
EAL	4,424,304	14.2%	3,875,035
EAL3 (P)	3,058,597	8.6%	2,815,720
EAL3 (S)	1,365,707	28.9%	1,059,315
Prior Attainment	24,047,128	2.4%	23,476,405
Low Attainment (P)	14,172,084	1.0%	14,035,762
Low Attainment (S)	9,875,044	4.6%	9,440,643
Mobility	39,800		
Lump Sum	16,102,742	2.2%	15,750,000
Split Sites	628,651	0.4%	626,436
Rates (NNDR)	2,410,628	-5.4%	2,548,937
PFI Funding	8,194,852	15.2%	7,113,586
Sparsity	0		
Minimum Funding	3,332,335	-33.0%	4,973,092
Additional to meet minimum per pupil	3,240,411	-29.0%	4,566,227
MFG	91,924	-77.4%	406,865

Appendix C School budget shares

FOR REFERENCE
VALUES PAID IN 2022-23 FORMULA

Proposed formula	FOR REFERENCE
AWPU and lump sum set to minimum allowed, with AEN uplifted	2022-23 formula values
MFG=0.00%	MFG=0.50%

2023/24 NOR	School Name	2022-23 funding	22/23 NOR	Potential cash change	Change in NOR
56,612	Total	321,851,051	302,656,562	56,024	
408	Brunel Field Primary School	1,888,004	1,814,136	407	73,868
399	Ashley Down Primary School	1,784,731	1,718,090	396	66,641
777	Ashton Gate Primary School	3,532,423	3,509,143	797	23,280
279	Nova Primary School	1,431,794	1,427,043	290	4,751
199	Broomhill Junior School	1,054,154	1,033,701	207	20,453
261	Chester Park Junior School	1,356,102	1,380,424	283	-24,322
225	Chester Park Infant School	1,159,143	1,096,050	220	63,093
407	Hillcrest Primary School	1,818,035	1,726,935	399	91,100
440	Shirehampton Primary School	2,189,243	2,013,417	431	175,826
564	Two Mile Hill Primary School	2,616,236	2,492,006	552	124,230
415	Glenfron Primary School	1,917,214	1,858,791	412	58,424
226	Henleaze Infant School	1,017,346	1,042,936	240	-25,590
185	St Anne's Infant School	917,918	900,907	190	17,011
179	Sefton Park Infant School	855,168	806,399	175	48,769
221	Sefton Park Junior School	973,505	951,095	223	22,410
577	Southville Primary School	2,623,697	2,478,792	562	144,905
165	Summerhill Infant School	893,979	804,717	156	89,262
183	Upper Horfield Primary School	1,040,951	976,151	179	64,800
599	Holymead Primary School	2,717,899	2,655,414	604	62,485
204	Brentry Primary School	1,080,802	1,037,017	209	43,785
156	Broomhill Infant & Nursery School	877,160	752,582	140	124,578
149	Willow Park CofE Primary School	919,134	748,891	130	170,243
231	Hannah More Primary School	1,368,306	1,511,183	266	-142,878
833	Bishop Road Primary School	3,775,962	3,655,067	832	120,895
411	Blaise Primary and Nursery School	2,101,288	1,965,553	405	135,734
408	Fair Furlong Primary School	2,322,111	2,226,932	406	95,179
621	Whitehall Primary School	2,816,922	2,661,549	613	155,373
176	Avonmouth Church of England Primary School	926,385	971,402	193	-45,016
410	Horfield Church of England Primary School	1,840,314	1,774,384	408	65,930
71	St Barnabas Church of England VC Primary School	514,654	464,735	64	49,919
494	St Johns Church of England Primary School	2,246,590	2,198,805	499	47,785
199	School of Christ The King Catholic Primary School	1,168,123	1,100,532	197	67,592
181	Holy Cross RC Primary School	989,215	1,013,249	197	-24,034
171	Ss Peter and Paul RC Primary School	829,029	748,181	164	80,848
195	St Joseph's Catholic Primary School	934,940	922,263	203	12,678
208	Our Lady of the Rosary Catholic Primary School	1,067,792	998,729	204	69,063
211	St Bernadette Catholic Voluntary Aided Primary School	987,992	915,133	205	72,859
393	St Bonaventure's Catholic Primary School	1,741,920	1,627,190	379	114,730
610	Knowle Park Primary School	2,758,710	2,680,652	620	78,058
203	Sea Mills Primary School	1,111,981	1,040,380	198	71,600
737	Air Balloon Hill Primary School	3,311,707	3,198,492	736	113,214
416	St Peter's Church of England Primary School	2,102,828	2,007,932	411	94,896
1101	St Mary Redcliffe and Temple School	6,685,229	6,162,951	1,084	522,278
742	St Bernadette Catholic Secondary School	4,821,760	4,506,583	734	315,177
412	Cheddar Grove Primary School	1,878,853	1,801,914	408	76,939
187	Ashton Vale Primary School	948,544	893,517	189	55,028
191	Fonthill Primary Academy	1,068,584	1,016,604	191	51,980
576	Begbrook Primary Academy	2,550,285	2,550,477	595	-192
407	Waycroft Academy	1,799,235	1,767,745	413	31,490
387	St Werburgh's Primary School	1,972,543	1,872,265	384	100,278
541	Cotham Gardens Primary School	2,430,240	2,367,158	544	63,082
311	Ilminster Avenue E-ACT Academy	1,799,285	1,739,263	317	60,021
563	St Ursula's E-ACT Academy	2,494,044	2,436,330	568	57,714
603	Filton Avenue Primary School	2,956,825	3,144,062	676	-187,237
335	Oasis Academy Connaught	1,926,753	2,052,568	376	-125,816
369	Henleaze Junior School	1,630,309	1,514,247	354	116,062
132	Hotwells Primary School	684,643	774,783	167	-90,140
226	The Dolphin School	1,242,186	1,384,542	275	-142,355
195	Oasis Academy Bank Leaze	1,099,371	1,051,262	192	48,109
309	Parson Street Primary School	1,600,597	1,786,809	362	-186,212
343	Minerva Primary Academy	1,774,152	1,585,021	327	189,131
184	Frome Vale Academy	982,056	926,419	178	55,637
367	Fishponds Church of England Academy	1,749,467	1,789,319	392	-39,852
339	Bannerman Road Community Academy	1,970,370	1,896,682	337	73,687
285	Henbury Court Primary Academy	1,552,213	1,632,312	320	-80,099
236	Summerhill Academy	1,173,591	1,215,281	260	-41,689
138	The Kingfisher School	845,003	775,379	132	69,625
424	Cathedral Primary School	1,947,249	1,903,291	426	43,958
383	Redfield Educate Together Primary Academy	1,867,497	1,793,001	392	74,496
413	Westbury Park School	1,819,265	1,756,594	411	62,671
392	Oasis Academy Marksbury Road	1,895,746	1,768,065	389	127,681
265	Fairlawn Primary School	1,238,766	1,146,957	256	91,809
395	Oasis Academy Long Cross	2,157,876	2,118,967	408	38,909
408	Headley Park Primary School	1,848,433	1,765,181	411	83,252
359	Easton Church of England Academy	2,100,341	2,183,455	390	-83,115
297	Barton Hill Academy	1,821,895	1,876,026	322	-54,131
241	Wicklea Academy	1,154,652	1,165,337	260	-10,686
151	Woodlands Academy	853,174	928,576	174	-75,402
351	Harecive E-ACT Academy	2,171,242	2,117,220	359	54,022
365	Elmlea Junior School	1,612,612	1,544,377	361	68,235
392	St Mary Redcliffe Church of England Primary School	1,909,162	1,829,045	389	80,117
212	Badocks Wood E-ACT Academy	1,260,574	1,182,451	206	78,124
404	Perry Court E-ACT Academy	2,100,403	1,901,837	380	198,565
108	Luckwell Primary School	571,860	589,852	119	-17,991
123	Evergreen Primary Academy	775,255	815,896	139	-40,641
470	May Park Primary School	2,336,036	2,232,547	461	103,488
207	Wansdyke Primary School	1,039,265	1,017,702	207	21,563
270	Elmlea Infant School	1,911,910	1,163,825	270	28,085
186	Cabot Primary School	1,145,140	1,044,234	176	100,905
170	Compass Point Primary School	993,484	826,478	146	167,006
350	Four Acres Academy	1,994,454	1,831,363	339	163,091
318	Christ Church Church of England Primary School	1,424,714	1,379,384	323	45,330
400	Stoke Bishop Church of England Primary School	1,769,066	1,704,425	398	64,640
409	Westbury-On-Trym Church of England Academy	1,807,431	1,779,544	416	27,887
202	St Bernard's Catholic Primary School	1,010,880	939,606	201	71,275
125	St Nicholas of Tolentine Catholic Primary School	790,151	771,895	129	18,257
205	St Patrick's Catholic Primary School	1,040,968	1,001,209	206	39,759

Appendix C School budget shares

FOR REFERENCE VALUES PAID IN 2022-23 FORMULA	
Proposed formula	FOR REFERENCE
AWPU and lump sum set to minimum allowed, with AEN uplifted	2022-23 formula values
MFG=0.00%	MFG=0.50%

2023/24 NOR	School Name		2022-23 funding	22/23 NOR	Potential cash change	Change in NOR
56,612	Total	321,851,051	302,656,562	56,024		
208	St Teresa's Catholic Primary School	1,059,385	1,011,129	208	48,256	0
349	Greenfield E-ACT Primary Academy	1,934,909	1,969,734	371	-34,825	-22
403	Little Mead Primary Academy	1,990,486	1,966,005	415	24,481	-12
206	Stoke Park Primary School	1,126,773	1,095,756	208	31,017	-2
199	Oasis Academy New Oak	1,071,016	981,498	195	89,519	4
603	West Town Lane Academy	2,666,967	2,556,558	597	110,409	6
629	Bridge Farm Primary School	2,803,769	2,707,179	627	96,590	2
413	Victoria Park Primary School	1,842,334	1,762,976	412	79,358	1
210	Avanti! Gardens School	984,190	756,804	159	227,386	51
1009	Bristol Free School	5,811,367	5,529,612	996	281,755	13
923	Orchard School Bristol	7,109,421	6,528,099	898	581,322	25
1334	Oasis Academy Brislington	10,074,958	8,461,710	1,173	1,613,247	161
1039	The City Academy Bristol	7,746,348	7,385,038	1,032	361,310	7
1072	Ashton Park School	6,578,613	6,222,474	1,070	356,138	2
709	Trinity Academy	4,620,575	3,030,587	488	1,589,988	221
910	Blaise High School	7,060,719	6,180,433	851	880,286	59
1063	Bedminster Down School	7,827,000	7,324,773	1,043	502,227	20
1210	Cotham School	8,164,333	7,517,742	1,184	646,590	26
1065	Fairfield High School	6,769,128	6,445,377	1,077	323,751	-12
1046	St Bede's Catholic College	6,143,994	5,660,234	1,018	483,760	28
1184	Redland Green School	6,830,892	6,516,564	1,168	314,328	16
1330	Bristol Brunel Academy	10,298,379	9,224,110	1,257	1,074,269	73
756	Bristol Cathedral Choir School	4,645,224	4,338,787	748	306,436	8
773	Montpelier High School	4,691,774	4,209,108	749	482,666	24
878	Oasis Academy John Williams	5,916,005	5,657,429	882	258,576	-4
762	Oasis Academy Brightstowe	5,795,280	5,636,865	789	158,415	-27
1085	Bristol Metropolitan Academy	8,255,749	7,816,435	1,053	439,314	32
1081	Bridge Learning Campus	8,044,937	6,917,175	978	1,127,762	103
1152	Merchants' Academy	8,141,823	7,617,561	1,137	524,263	15

Report of: Bristol Schools Forum

Title: Delivering Better Value in SEND

Date of meeting:	Thursday 12 th January 2023
Time of meeting:	5pm
Venue:	Virtual meeting
Officer Presenting Report	Richard Hanks

1. Purpose of report

The purpose of the report is to update Bristol Schools Forum on the development of the DfE's Delivering Better Value in SEND programme, key areas of focus for the forthcoming grant application and next steps.

2. Recommendation

The recommendation is that Schools Forum

- Note the content of this paper in order to understand the focus of the grant application and, if successful, how this aligns to the DSG Management Plan and High Needs Block Recovery Plan.

3. Background & Context:

The DBV Programme's main objective has been to identify local and national opportunities to improve the outcomes for children and young people with SEND.

The programme has designed its support through two key approaches:

1. Short term support:

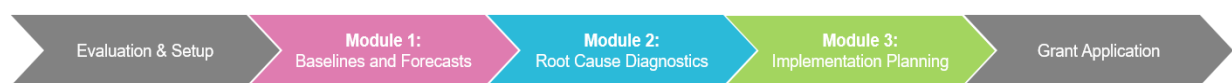
To identify sustainable changes in each Local Authority that can drive high-quality outcomes for children and young people with SEND, and to support Bristol in building an evidence-based grant application to assist the implementation of those changes.

2. Informing Long Term Reform:

Build an objective evidence base across a third of the sector, which can be used to:

- Inform future policy and drive legislative and funding changes
- Build a national playbook and share best practice
- Inform future national programmes of similar scale and intent

4. Programme Phases



The programme was developed through the three modules you see above, as these are considered critical to ensuring Bristol can identify sustainable changes that will drive high

quality outcomes for children and young people (CYP) and support in developing our grant application.

Module 1 - In order to understand the volume and type of support Bristol's CYP have been receiving historically, and what that might look like going forward the three modules focused on building a clear baseline and both unmitigated and mitigated forecasts. These are currently being finalised, prior to sign off.

Module 2 – In order to have a sustained impact on CYP's outcomes this module focused on deeper dives in order to understand the root cause of why it has been difficult to achieve the high-quality outcomes and ambitions we have for all of our children and young people with SEND. The diagnostics covered detailed analysis on data sets, review cases and detailed reviews of previous feedback from stakeholders.

Module 3 – To ensure Local Authorities can practically implement solutions to the root causes identified in module 2, this module sought to understand how 'ready' the people, processes and systems are for change.

During this process:

- Over one million data points have been analysed
- Nearly 30 detailed case reviews have taken place
- Over 100 external partners engaged through surveys
- Undertaken detailed analysis of previous feedback e.g. annual parent/carer surveys

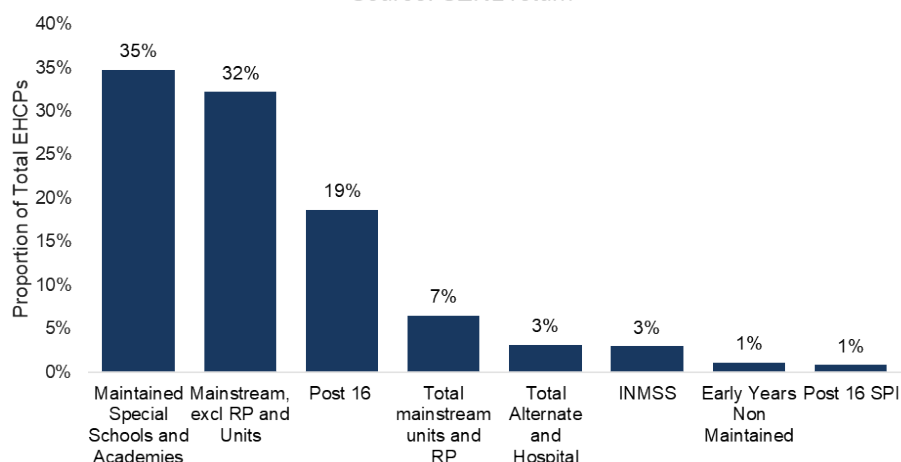
The current stage in the process is focused on the grant application.

5. Key Findings

Analysis of local Bristol datasets were used to identify high priority cohorts of children and young people with SEND to focus the deeper analysis. This also provided greater insight into Bristol's areas of spend and how it compares to other Local Authorities.

Bristol: 3416 EHCPs by Provision, Jan 2022

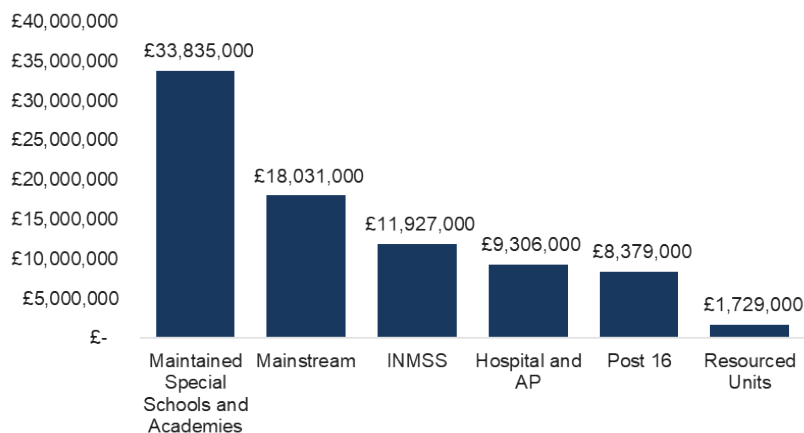
Source: SEN2 return



The largest share of EHCPs in Bristol in 2022 were Maintained Special Schools and Mainstream, with a total of 1086 EHCPs and 1007 EHCPs. This accounts for 67% of active EHCPs in 2022 in Bristol.

Bristol: High Needs Block Total Expenditure by Provision, 2021/22, (unmitigated)

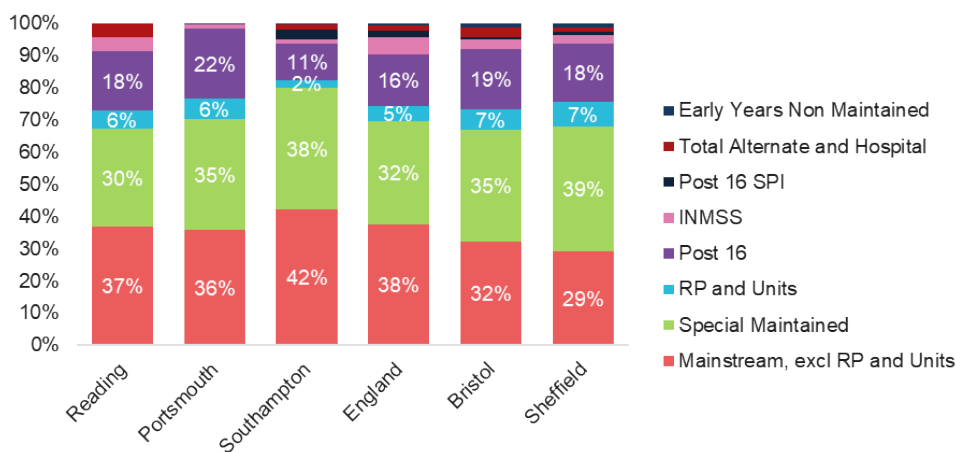
Source: DSG Plan and HN Recoupment



The largest spend area is in Maintained Special Schools, with a cost of £33.8 million for 1186 EHCPs in 2022, representing 41% of total HNB unmitigated expenditure. This figure includes children and young people on non-statutory support.

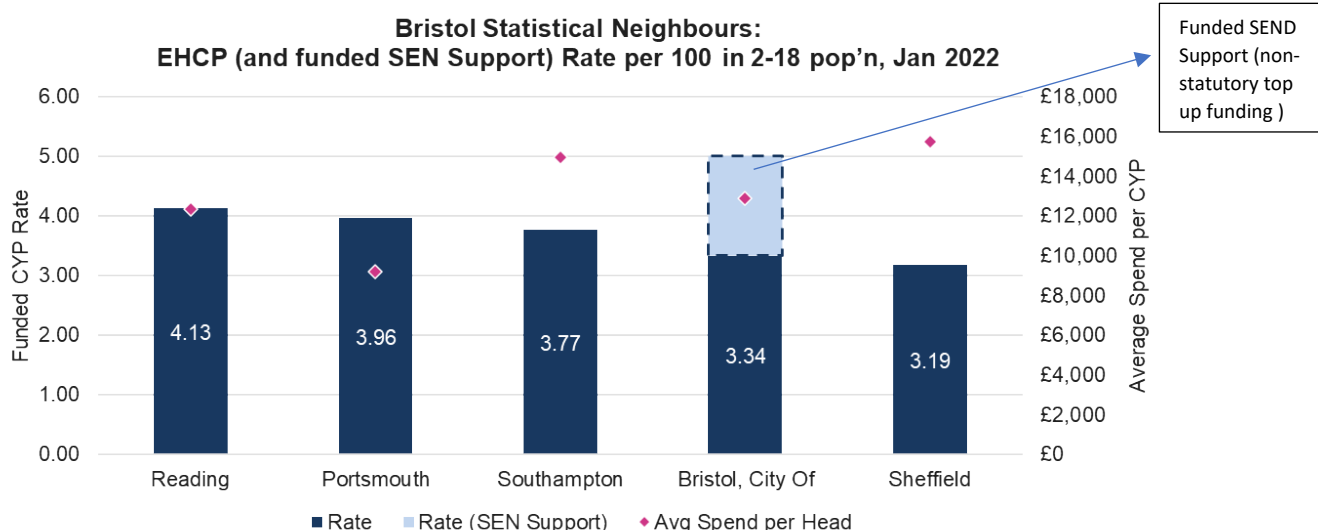
INMSS costs £11.9 million, however it accommodates 11.8 times fewer EHCPs than Maintained Special School, with 92 EHCPs. Therefore, the focus of the deeper analysis concentrated on Bristol’s mainstream and special schools.

Bristol: EHCP Proportions by Provision against statistical neighbours



Source – Rates of EHCP Use by Provision: Public Data based on SEN2 Return

Bristol has a low rate of children and young people in mainstream schools and settings, compared to it’s the majority of statistical neighbours and England’s average.



Source – Rates of EHCP Use by Provision: Public Data based on SEN2 Return, average spend based on S251 returns. Bristol funded SEN Support rate based on DSG Management Plan 2022-23

When including the rate of CYP on funded SEN Support (*assuming statistical neighbour LAs do not also provide non-statutory top-ups*), Bristol has the highest rate of support when adjusted for population, but at a similar cost per head compared to statistical neighbours. This suggests that overall, Bristol is spending more supporting its CYP with SEND.

In relation to the deep dives, it also brought together themes from existing Ofsted reports and stakeholder surveys, highlighting opportunities for improvement such as co-production and consistency of training. Areas identified build on the work already developed through the Education Transformation Programme, SEND Improvement activity and the ambition of Bristol’s Belonging Strategy.

The diagnostic deep dive evidence suggests being able to make a significant impact on any point relies on addressing an interconnected set of system issues:

1. Inclusive mainstream settings – quality, consistency and culture
2. Utilisation and awareness of support across Bristol – right support at the right time
3. Parental confidence in mainstream provision – communication and co-production

6. Grant Application

The focus of the grant application is currently under development, as module 3 of the programme closed at the end of December. However, given the above outputs, the design of the DfE funded programme is likely to focus on two key themes.

1. Strengthening the relationships between the school, family and child – improving the experiences of children with SEND in mainstream settings
2. Strengthening relationships between the school and the wider system – creating fair, transparent, consistent and financially sustainable processes underpinned by robust monitoring and accountability frameworks.

Both of the above areas, align and build on improvement work to date and the wider areas identified in the High Needs Block Recovery Plan (Appendix A), with the ambition that all activity is articulated within a single DSG Management Plan.

7. Next Steps

- January – focus on the detailed development of the grant application and completion of the grant requirements
- 4th February – Seek Cabinet approval to apply for the DfE funding
- Before 24th February – submit final application to the DfE's DBV Programme Board
- If successful, funding is released at the end of March with implementation starting in April.

Appendix A

High Needs Recovery Plan Themes

Theme A: Expanding Specialist Provision

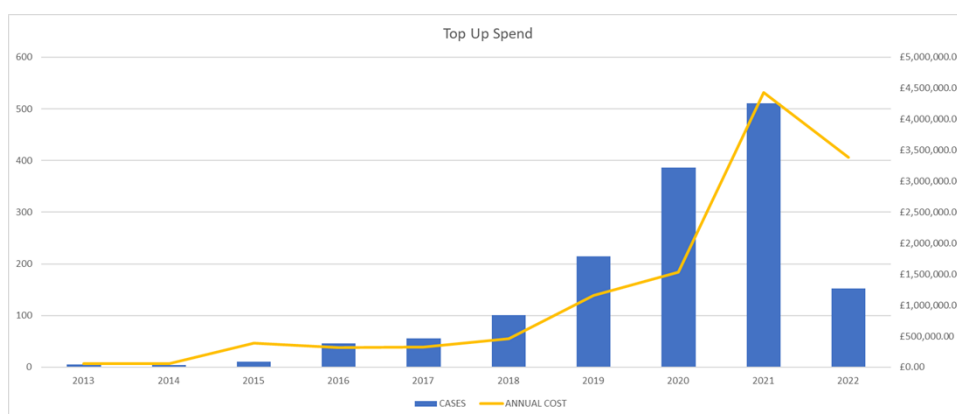
This is an existing programme of work. Increasing the number of specialist places in the city was a priority within the Written Statement of Action (WSOA) resulting from the previous Local Area Inspection. The places are being created to ensure there are sufficient places locally to meet the needs of children and young people with SEND and ensure they are educated as close to their home and community as possible. Work has progressed and is on track to deliver 450 additional places by 2024.

The specialist places programme was set up primarily to ensure sufficiency locally and create greater local options for families. In addition, increased local specialist places will also help make more effective and efficient use of funding by reducing reliance on the independent non-maintained sector and out of authority placements.

Theme B: Non-Statutory Top and Early Intervention

This is a new proposed programme of work. Bristol is one of small handful of local authorities continuing to offer non-statutory top up funding. The funding supports the school-based stages of the SEND Code of Practice and is to fund short term early intervention for one to three years. The funding is for those CYP who are accessing ordinarily available provision (OAP) but may need short term additional intervention as specific gaps in their progress have been identified through the assess, plan, do review process.

Over the last few years, top-up funding has moved away from this targeted, clear approach and the number of applications has significantly increased (see graph below). A review of the top-up process will help us to understand how funding is utilised and the impact on outcomes for CYP. With the introduction of OAP guidance and training, inclusive practice should be more effective at utilising Element 1 and 2 funding to support need.



Theme C: Inclusion Practice in Schools and Settings

This is an existing programme of work. The development of a training and development offer to all education settings was also a focus within the WSOA, including the development of what is ordinarily available within schools. There is now a training and development programme in place for the sector to improve the quality of inclusive practice in schools and settings. Funding for the Belonging in SEND programme has just begun, following approval of funding from Schools Forum, to develop evidenced-based interventions in schools and settings to reduce suspensions and exclusions of pupils with SEND.

There is an assumption that improvements in inclusive practice and more effective use of

Element 1 and Element 2 funding will ensure appropriate early intervention, reduce escalation of need and have a positive impact on outcomes for children and young people.

Theme D: Commissioning Frameworks

This is an existing programme of work. The Therapies Framework was published in July 2022. The aim of the new framework is to ensure therapies, mainly associated with Education, Health & Care Plans, are appropriate and reach quality assurance standards. Implementation of a Preferred Provider List model is estimated to deliver efficiencies compared to the previous procurement approach. A similar approach is also in progress for the commissioning of Alternative Learning Provision.

Theme E: Specialist Place Funding

This is a new proposed programme of work. The aim is to review the statutory funding system to ensure it is in line with other local authorities and implement a standardised banding and process which ensures statutory funding aligns with need. A clear and consistent approach will ensure the most efficient and effective use of funding.

Theme F: Post-16 Funding

This is a new proposed programme of work. Post-16 funding for SEND requires greater clarity and review, to ensure it is fully in line with the ESFA guidelines. There is a need to ensure the process is clear, transparent and equitable. As well as benchmarking against other local authorities, the Local Authority and post 16 settings need to understand and operate in line with statutory requirements.

Theme G: Alternative Learning Provision (ALP)

This is a new programme of work. The previous ALP review identified key recommendations, which continue to be addressed. The next stage of the process is to review ALP based on the proposals in the recent government Green Paper, reviewing the impact of the current model and the benefits of moving to a new model with a greater focus on outreach and early intervention that builds inclusive capacity in schools.

A model that ensures more CYP remain engaged in education within their own school or setting, limits the number of move between settings and builds capacity in schools to meet need has very clear benefits for CYP and families. The associated use of funding will also be more cost effective as it will both support CYP within their own settings but also build long term capacity in the system.

Bristol Schools Forum **Belonging with SEND Programme**

Date of meeting:	12 January 2023
Time of meeting:	5.00 pm
Venue:	Remote meeting

1. Purpose of report

- 1.1 To inform and update the School's Forum on the progress of the Belonging with SEND programme (the Programme).
- 1.2 To outline and seek approval on the next steps for the Programme and note potential areas of focus for the academic year 2023/24.

2. Recommendation

School's Forum is invited to:

- 2.1 Review the progress to date and next steps for implementation of the Programme.**
- 2.2 Approve the rollover of the Programme funding to cover the academic year 2023/24.**
- 2.3 Approve the extension of the Programme Management role up to the end of September 2024.**
- 2.4 Approve the widening of the criteria to include Voluntary and Community Sector (VCS) organisations as recipients of funding.**

3. Background – Belonging with SEND

- 3.1 The Programme is funded through the High Needs Block – the total amount of funding for school-based inclusion projects is £900,000
- 3.2 The Programme is overseen by a Programme Manager working for Bristol City Council – funding for this role is split between this programme and a

grant from the Department for Education to deliver the Holiday Activity and Food (HAF) Programme.

- 3.3 The objective of the Programme is to provide grant funding to schools to develop projects that have the potential to improve outcomes for children and young people with SEND
- 3.4 The original timeline for the completion of the Programme was at the end of the academic year 2022/23.
- 3.5 At a School's Forum meeting on 27/09/2022 the Forum accepted that some projects may not be able to close at the end of this academic year and may continue into the 2023/24 academic year.
- 3.6 At the School's Forum meeting on 27/09/2022 the Forum agreed that the Programme Manager, working in collaboration with both internal and external inclusion experts could centrally develop inclusion projects and invite schools to take part.

4. Progress of the Belonging with SEND programme to date

- 4.1 Grant funding is available in three components:
 - 4.1.1 Component 1 – Grants of up to £100,000 available to groups of schools looking to implement evidence-based interventions which have yet to be tested in Bristol.
 - 4.1.2 Component 2 – Grants of up to £50,000 available to groups of schools looking to scale up existing evidence-based interventions which have been successful in Bristol.
 - 4.1.3 Component 3 – Grants of up to £5,000 for individual, or groups of schools looking to implement evidence-informed interventions using a test and learn approach.
- 4.2 The Programme is overseen by a Programme Board consisting of partners from Bristol City Council's early intervention, and educational inclusion and psychology services. The University of Bristol, Education Endowment Foundation (EEF) and parents/carers with lived experience of the SEND system in Bristol are also represented on the Board.
- 4.3 The Programme has been designed to align with the Belonging in Education Strategy, and to build on the recently completed Developing

Effective Leadership of Teaching Assistants (DELTA) programme delivered to 76 Bristol schools in partnership with the EFF.

- 4.4 Round 1 grant funding went live on the 01/07/2022. Grant applications were submitted for components 1 and 2 only, with a deadline set for the 27/07/2022. In total 3 applications for component 1, and 1 application for component 2 were received.
- 4.5 Round 2 of the grant funding went live on the 01/08/2022. Grant applications could be submitted for all 3 components, with a deadline set for the 30/09/2022. In total 3 applications for component 1, 3 applications for component 2, and 15 applications for component 3 were received.
- 4.6 Grant applications were reviewed by the Programme Board and assessed against criteria set out in the application form. The following projects were agreed in funding rounds 1 & 2:

Component	School	Amount	Funding Round	Summary
1	Woodlands Academy	£54,537	1	Use funding to roll-out Hamish & Milo wellbeing intervention focusing on emotional literacy for primary-aged children in three primary schools (Waycroft, Woodlands, Wicklea)
2	North Star Academy	£50,000	1	Build on the strengths of the NSO primary offer extending into 5 secondary schools. Focus on KS3, building on successful transition work and

				extending into Years 8 and 9.
2	Educational Psychology – Bristol City Council	£48,200	2	MeLSA training 2 cohorts of 20 LSA/TAs – first cohort starts March 2023. Funding also agreed for one whole school MeLSA programme academic year 2023/24
2	Cathedral Primary School	£22,401	2	Build a trauma informed and ACE aware culture in Cathedral and Hotwells Primary Schools, following the implementation plan outlined in the grant agreement.
2	City Academy	£47,200	2	Work with external provider, Unique Voice, to provide the ‘Bossing It!’ programme to approximately 180 targeted young people with SEND across four CLF schools.
2	Cabot Learning Federation	£17,000	2	Deliver a transition project working with non-CLF primary schools to improve transition for children with SEND in Years 6 & 7. The project will build on and bring together

				two streams of work that are currently happening under the umbrella of support for the most vulnerable pupils at the Cabot Learning Federation.
2	Barton Hill Academy	£2,226	3	Funding to support a SEND resource library for SENCo use
2	Hareclive E-Act Academy	£4,820	3	10 I pads and Clicker subscriptions to support children with SEND who struggle to read written text
2	Knowle Park Primary School	£5,000	3	MeLSA training and supervision for 3 Learning Support Assistants (LSA)
2	North Star	£5,000	3	Funding to support a SEND resource library for SENCo use
2	Southville Primary	£5,000	3	20 sit/stand desks to support children with ADHD in KS2
2	St Annes Infants	£3,000	3	Music therapy interventions
2	St Bonaventures RC Primary School	£5,000	3	ELSA funding for 2 support staff
2	SS Peter and Paul RC Primary School	£4,576	3	Create sensory space for children with autism

2	St Werburgh's Primary School	£5,000	3	Music therapy intervention
2	Summerhill Infants	£3,415	3	Social and emotional aspects of learning (SEAL) family programme – support and training
Total		£282,375		

- 4.7 9 grant applications were rejected in rounds 1 and 2 as they did not demonstrate alignment with the grant criteria.
- 4.8 Funding for components 1 and 2 are paid in instalments. Successful applicants are subject to monitoring visits and evaluation points. The payment schedule is as follows:

% Grant	Payment following
30%	Acceptance of grant
20%	1 st evaluation
20%	2 nd evaluation
20%	Final evaluation
10%	Dissemination of learning

- 4.9 The payment schedule for component 3 is as follows:

% Grant	Payment following
40%	Acceptance of grant
40%	Monitoring
20%	Final report

5. Next Steps for Belonging with SEND Programme

- 5.1 Funding round 3 which was due to close on 16/12/2022 was postponed due pending a review of the process and due to capacity demands on the project team. Round 3 will now open in January 2023 with a submission deadline of 30/03/2023. Projects funded in round 3 will be expected to begin in the academic year 2023/24 (following approval from school forum).

- 5.2 Early Language Development (ELD) in Reception and Key Stage 1 has been identified as a consistent theme in South Bristol. The intention is to engage Early Years colleagues, the EEF and South Bristol schools to develop a central support offer to improve language development with an expected start date of September 2023 (following approval from school forum).
- 5.3 Several voluntary and community sector (VCS) organisations have expressed an interest in developing or widening an intervention to support children with SEND in mainstream schools. The current funding criteria requires schools to apply for funding, or for the programme manager to develop central projects and offer them to schools. It is proposed that the Belonging with SEND programme be widened to allow VCS organisations working with schools to bid for funding.