

Bristol Schools Forum

Agenda Wednesday, 12th July, 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 - 12
4.		Update from Director of Education and Skills - Verbal Update	I	RBW	
5.		DSG Budget Monitor Period 2	I	AL	13 - 18
6.		Delivering Better Value in SEND Resourcing To inform and Update	I	RBW	19 - 23
7.		Early Years SEND Report for Information	I	RBW	24 - 31
8.		Any other Business Through the Chair and if time allows			

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

Clerk: Claudette Campbell email: Sam.Wilcock@bristol.gov.uk Tel: City Hall**Chair:** (contact via clerk)**FUTURE MEETINGS****Next School Year**

- **26th September 2023**
- **28th November 2023**
- **January 2024 to be confirmed**
- **26th March 2024**
- **21st May 2024**
- **9th July 2024**

Bristol Schools Forum

Minutes of the meeting held on Tuesday, 23rd May, 2023
at 5.00 pm at Virtual Meeting via Zoom

Present:

Melanie Bunce	St Barnabas Primary
Mandy Cheshire	St Bede’s Catholic Colleges
Trish Dodds	Fishponds Academy
Simon Eakins	Cathedral Primary
Tonya Hill	New Fosseway School
Simon Holmes	St Philips March Nursery
Steve Hornsby	North Star Academy
Jo Kingston	Diocese of Clifton
Aileen Morrison	St Matthias Park
Chris Pring	Whitehall Primary School
Cameron Shaw	Bristol Metropolitan Academy
Jo Willis	Bristol Diocese Board of Education

In attendance from Bristol City Council:

Reena Bhogal-Welsh	Director of Education and Skills
Denise Murray	Director, Finance and Section 151 Officer
Angel Lai	Finance Manager (Children and Education)
Ian Bell	Place Programming Managers
Jessica Taylor	Specialist Place Managers
Claudette Campbell	Clerk to Schools Forum

	Action
1. Welcome	
Simon Eakins Chaired the meeting as the Chair had sent her apologies. SE welcomed those present	
2. Forum Standing Business	
a. Apologies for absence Apologies were received from: Aderyn Zajicova – Nursery Governor Cedric Sanguignol – Primary Governor Cllr Asher Craig Kate Matheson - Primary Governor: Further advised that she would be leaving the role due to school closure Marian Curran – Post 16 Provider Rebecca Watkin - LearnMAT: Advised that she would be leaving her role and would not be able to attend future meetings Steph Williams	

b. Quorate

The Clerk confirmed that the meeting was quorate

c. Resignations

- It was noted that Rebecca Watkin had resigned from the forum.
- That Kate Matheson Primary Governor for St Barnabas Primary would be leaving the role due to the school closure at the end of the school year, but still remains interested in the role and the work of the Forum.
- Action: Asked RBW for the vacancy positions to be promoted via the Head Teachers Updated.

d. Appointment of New Members

- It was noted that Jo Kingston joins the Forum as the representative for the Diocese of Clifton, Department for Schools & Colleges.

e. Notifications of Vacancies

The following were noted.

As reported the following two vacancies are yet to be filled that of

- 1 x Secondary Academy Governor Representative
- 1 x Primary Academy Governor Representative

Additional

- 1 x Special Academy Representative

Pending at the conclusion of the school year due to the closure of St Barnabas Primary

- Primary Governor Maintained representative
- Primary Head Maintained School

f. Declaration of Interest

- There were no declarations of interest

3. Minutes of the Previous Meeting

Resolved – that the minutes be confirmed as a correct record with the following amendments:

- That Jo Kingston was present and Jo Willis had given her apologies
- That Steve Hornsby was also present, he was mentioned in the minutes but not noted in the main list of attendees at the top of the document

I. The Chair noted that any actions would be covered within the items on the agenda.

II. The Chair noted that the announcement made by the DfE they had issued their response to the following the national consultation on funding. He noted that further reiterations were pending over the summer & Autumn that will provide a clearer picture on a number of issues. Noted that 24/25 may not be a hard national funding formula.

4. Update from Director of Education And Skills

Reena Bhogal-Welsh (RBW) spoke to her presentation providing an update Family Hubs(FH). The presentation is attached to these minutes.

The following was highlighted:

- The 3 family hubs will build on and extend the service provision previously provided by Children Centres.
- Funding of 4.8million secured for the next 3 years
- All were encouraged to take the opportunity to engage with the hubs and a special invitation was extended to the BSF Chair & Vice-Chair for an onsite visit.

The following was noted from the discussion:

- a) SH took the opportunity to visit a FH and reported back that this was a positive development allowing services to come together to support families. A discussion had been had about future strategy and how to sustain the FH at the end of the Funding period. He sought assurances that the planning for the future would start now. RBW confirmed that future plans for funding would be pursued.
- b) The Chair asked for an explanation as to how FH worked alongside nursery provision and to clarify whether FH was funded via a separate funding stream.
- c) RBW confirmed that the funding was separate. That all were aware of the additional support and service provision provided by nursery settings over and above the remit. FH formalise the process with the convergence of social care, health care and health visitors and related services in place to support families. Acknowledged that nursery settings had stepped up but were not provided with funding for wrap around care.
- d) SH referenced what was lost when children centres closed that there was no longer that earlier indication of need; that family services became remote and fragmented leaving families without support and that gap was filled by nursery services. With establishment of the FH this much need provision was restored.
- e) TH supported the FH provision and would take the opportunity to visit. Noting that there was a need for future proof planning in a form of a strategy to take the provision beyond 2025.

5. DSG Budget Monitor and Financial Outturn for Year 2022/23

Angel Lai (Finance Manager, Children and Education) spoke to the report. The report provided information on the 2022/23 DSG end of year outturn position as at Period 12 (P12) to end of March 2023.

The BSF were asked to note the 2022/23 position.

In response to the presentation the following was noted from the discussion that arose:

- a) Questions were put on the DSG overspend. The cumulative deficit sum of £39.681m includes sums carried forward from previous years. Further explanation was given on the legislation that determined how this was managed. The LA is legally obligated to deliver a balanced budget and to find a solution before March 2026.
- b) Local Authorities are unable to run a deficit budget they are obligated to spend within their means. To enable a DSG deficit that exceeds reserves the Secretary of State laid down in a Statutory Instrument a process for all local authorities; an accounting treatment for the deficit which is time limited; following conversations it was extended for a further 3 years.
- c) Officers outlined the work programmes and funding streams identified and the actions that will be taken to reach a 25/26 in year balance position.

- d) RBW outlined the two workstreams for Delivering Better Value:
- e) Workstream 1: The programme to develop relationship with schools and families, to include the voice of all young persons around provisions. A review of services available for families; to consider what services can be triangulated to enable partnership working. This will include absorbing the changes to the demographic in several communities.
- f) Workstream 2: The second programme is concerned with procuring a partner to work on the delivery of High Needs services that is independent of the LA. The report details the current deficit and going forward this area will continue to require non-statutory funding.
- g) The work programmes are being overseen by a programme board with a 6-weekly reporting process to drive the project forward.
- h) As part of Workstream 1 SENDCos will be contacted regarding piloting opportunities. Workstream 2 is currently procuring an independent partner to delivery the work.
- i) The Forum asked for a definition of the characteristics of the partner agency being sought; the partnership organisation should have the ability to be forensic, granular, and willing to hear the voices of the family.
- j) The Forum was invited to hold Officers to account should this work fail to progress. Officers would be assisted by the newly created family board and will receive input from colleagues from health and social care.
- k) The Finance Director further summarised: that these pressures were not just being faced by Bristol but is a national issue and one that must be resolved; the expectation is for Bristol and the BSF to take ownership of this issue; the two workstreams must result in a solution for annual financial sustainability to meet current service needs. The next step is to deliver the long-term plan to reduce the deficit. Conversations with the DfE and Auditors continue to ensure that the strategic plan is realistic and deliverable. The service is tasked to implement continual monitoring and to provide the right level of overview.
- l) The extension of the deadline on the carry-forward deficit was extended to all LAs but there is no data on the number of LAs with a deficit. The report summary details the funds secured to support our work programme.
- m) The DfE have provided £1 million to deliver on the work needed for Delivering Better Value in SEND. This sum although welcomed does not reflect the greater need that Bristol has over and above other LAs.
- n) An explanation was given on the term used in the finance report at section (3.7 last paragraph) 'stretched confidence benefit materialise'. This is to say not worst-case scenario but a term for the middle ground; based on a forecast and the application of a bias on whether there is 100% certainty of delivery.
- o) A further ask was put to Officers that the programmes incorporate 'Health and Social' care needs.
- p) Board members looked to officers to acknowledge the inconsistency in BCC Leadership team due to changes in senior officers and interims over the last 5 years. That the current strategic plan must be agreed and implemented so the direction of travel is consistent and not interrupted by the change of personnel. RBW reassured the Board that the intention is to bring stability and cement progress so that the direction of travel is clear and agreed upon.
- q) Clarity was given on the letters being issued to school settings on the action needed to bring budgets in line. That the detail in the letter would be based on those settings

reported quarterly returns. All settings will be offered an opportunity to meet and work through a budget recovery plan.

- r) The Fund for Schools in Financial difficulties; it was suggested that sums should be returned to Local Maintained schools on a pro-rata basis to assist with budget challenges; that the forum should consult on this to identify options and make a final decision.
- s) Action: The Chair asked Officers to consider and set out what actions were needed to enable this to happen with a report to the next meeting. RBS and AL

It was AGREED that the Schools Forum:

- i. Noted the update on the DSG

6. School Sufficiency

Reena Bhogal-Welsh (Director of Education & Skills) introduced the report that provided the forum with an update on the school place planning across Bristol. The actions taken to mitigate the rising demand in secondary school places. Ian Bell and Jessica Taylor were in attendance to address questions.

The following was highlighted from the report:

- That two free schools are to open in September 2023 on temporary sites to ease the rising demand in secondary school places.
- A number of secondary schools have agreed to breach over the Published Admission Number to assist the LA meet local demand for places at Bristol schools.
- That there are a number of surplus primary school places and this trend in lower pupil numbers seeking reception places continues on a downward trajectory.
- The increased in secondary school demand has now filtered through to the post 16 sector and will impact demand.
- A review of the need across the Bristol area will commence in May 2023. The outcome of the review will feed into a consultation before any changes to Admission Policy criteria.

The following was noted from the debate and discussion that followed.

- a) Bristol City is set to establish a Free School; the process includes an engagement event for all Trusts; Timeline: 16th June pre-application and final application 31st August; that final bids would be submit; the decision maker is the DfE with input from the LA.
- b) The review on needs should include early years sufficiency because of the variation of birth rates across Bristol. Where is the data on birth rate and who is feeding this into sufficiency for early years?
- c) IB outlined the issues within the Early Years team and childcare sufficiency survey work; that had become disjointed, but assurance was given that the factors that impact provision are monitored to support sufficiency.
- d) Head of St Barnabas School shared the work undertaken by the setting to work towards closure; that this was a steep learning curve the outcomes of which will be shared with the LA decision makers; the school was left unsupported in a number of areas; the decision to close was with the LA but the process on who was responsible for which action/steps was not clearly defined between the LA, the School and the Dioceses. Examples were given of the areas that the school had to navigate unaided; the school site is jointly owned; who was responsible for disposing of what, it was

complex issues. The school's surplus resources was offered to other settings; thanked the forum and all primary settings that had support the integration of current children into their settings.

- e) Concerns were shared about the speed at which Officers were dealing with the primary setting sufficiency issue; that those settings with single form entry will be disproportionately impacted than those settings that expanded to 3 or 4 form entry when demand was high. The ask was about the scaling down conversations; to know what was proposed with these settings; what is the strategic plan to mitigate the crisis.
- f) RBW advised that the review was proceeding at pace; that conversation will include Heads of primary settings. The review will consider a formula to address the issue with clear objectives. The intention is to avoid closing schools with single form entry to spread the burden; all school settings will be updated on progress of this review.
- g) Published Admission Numbers(PAN) must be adhered to and any adjustments must follow a formal process and consulted on before implementation. The ask was for those conducting the review to include in the final outturn a timeline for change that allows settings to adhere to the legal timeline; that requires consultation on any change in the PAN the year before implementation.
- h) Officers were asked to work into all reviews a succession plan that would future proof the sufficiency plan.
- i) A discussion followed in which forum members expressed their disappointment in the break in sufficiency planning because of the inconsistency in senior managers in the LA. The ask was for a sufficiency plan that stood regardless of the interim managers that were in role. The issues have been well rehearsed for 4-5 years and yet there is a lack of consistent direction. The ask was for a written plan that all would adhere to no matter who leads the service to avoid any future waste of time.

It was AGREED that Schools Forum

- I. Noted the planned next steps

7. Any Other Business (As agreed by the Chair)

AL advised that training was delivered in April 2023 to Forum Members and that she was happy to arrange future sessions.

The Chair thanked all for being in attendance and for their contribution. A special thank you to Sam Wilcock, former Clerk, for her support and contribution to the work of the Forum.

The meeting closed at 6.45pm



Schools Forum – Interim Director’s Update

23rd May 2023

Family Hubs



Funding

- 3 years of DfE/DHSC funding 2022/23 to 2024/25
- Total funding £4.8m
- Year 1: Transformation – Carry forward approved
- Year 2 & 3: Family Hubs Programme transformation 19.3%; capital 4.8%; plus 5 funded strands (as per graphic):

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Parent Carer Panel
established

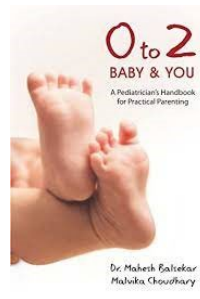
Start for Life
offer published

2.9%



Parenting Support
0 - 2

16.9%



Perinatal mental
health & parent-
infant relationships

31.2%



Early language and the
Home Learning
Environment

9.9%



Infant feeding support
15%



Key Transformation Milestones - 2023

January

- Delivery Plan approved
- First wave of funding released
- Bristol submission used as example of best practice

March

- Local Area Development Groups established
- Established city-wide Parent/Carer Panel

May

- Opening date confirmed as 28th June
- Appointment made to Family Hub Lead role
- Planning and preparation for opening

Beyond June...

Starting the process of co-locating a wider range of services, aligned to the expectations of the programme in each of the Family Hubs

February

- Options appraisal undertaken for physical hubs
- Development of Needs Analysis underway
- Confirmation on transformation funding carry forward

April

- City-wide Start for Life Offer published
- Programme reporting data established and first return to DfE
- Detailed milestone planning maturing
- Funded workstreams developing
- Estates audit completed

June

- Formal opening of the physical Family Hubs and Start for Life Offer
- Expanding delivery towards campus approach

Agreeing new partnerships with local voluntary, community and faith sectors with clear plans for expanded delivery to families

Physical Family Hub – Local Area Development Groups

Southmead Children’s Centre

Wellspring Settlement

Hartcliffe Children’s Centre and
Nursery

Local partnership groups have been established in each of the physical Family Hub areas.

The Family Hub Locality Development Groups are multi-agency groups, with the authority and agency for local decision making and accountable to the Family Hub and Early Help Executive Group and wider Steering Group to ensure synergy with the city-wide developments.

The groups have been established to drive the development of Bristol’s first physical Family Hubs and establish the range of services required to meet the national programme’s expectations.

Members include:

FIF Managers Children Centre Managers Parent/carer panel reps
BAND Family and Community Locality Managers Public Health Nursing
Midwifery Nursery Heads Local community partners



Next Steps

- Development of Start for Life offer at physical Family Hubs– launching on 28th June
- Development of physical packs and materials for families (city-wide)
- Expand Family Hub support offer from 0-19 (25) and include wider core services e.g. housing
- Appropriate ICT systems in place and adopted by staff groups, and development of public facing information platform and single phone line families can use for family hub queries
- Implementation of a shared outcomes framework
- Commence multiagency workforce development and training
- Development of sustainability planning to ensure continuation of services beyond 2025

Bristol Schools Forum
DSG 2023/24 Quarter 1 (Q1) forecast report as at May 2023 (Period 02 / P02)

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

1 Purpose of report

1.1 This report provides information of the 2023/24 DSG position as at Period 02 (P02) to end of May 2023.

2 Recommendation

2.1 Schools Forum is invited to:

a) note the Q1 / P2 forecast position as at end of May 2023 for DSG.

3 2023/24 DSG forecast position

The DSG ended the 2022/23 financial year with an in-year deficit of £15.031m or a cumulative deficit of £39.681m including £24.650m deficit brought forward from the previous years.

2023-24 gross allocation for DSG is £453.2m as approved at Full Council in February 2023 (or net amount £197.6m after deduction for academies recoupment, NNDR and direct funding of high needs places by ESFA) per ESFA announcement on 30th March 2023.

The DSG is forecasting to overspend by £18.7m in 2023/24, which is broadly in line with previous year in-year overspend position (£15m). This is mainly driven by increase in EHCP and complexity of Children with SEN, overspend was forecasted in top up funding of £5m, special placement (pre- and post-16) £7.4m, ISP £2m and Teachers pay & pension £1.2m.

Early Years is forecasting an in-year overspend of just over £1.0m, of which £0.2m was planned overspend on EY improvement programme and £0.8m was due to increase demand in EY top up funding on SEN.

High Needs Transformation programme is forecasting an in-year overspend of £0.980m which will be covered by carry-forward funding from previous years' underspend.

DSG P2 forecast position is set out in **Table 1** with more detail set out in **Appendix 1**.

Summary of 2023/24 DSG forecast position as at P2

Bristol Dedicated Schools Grant 2023/24	b/f balance	Gross DSG funding / Budget 2023/24*	P2 Gross DSG forecast outturn	In-year variance at P2	Cummulative c/f
	£'000				
Schools Block	(787)	323,851	323,851	(0)	(787)
De-delegation	(527)	0	0	1	(526)
Central School services Block	8	2,717	2,717	(0)	7
Early Years	(605)	38,526	39,583	1,057	451
High Needs Block	42,520	86,504	103,123	16,616	59,136
High Needs Transformation	(928)	1,627	2,607	980	52
Funding	0	(453,226)	(453,226)	0	0
Total	39,680	0	18,655	18,655	58,335

* Bristol gross DSG Allocations, before recoupment and deductions for NNDR, and for direct funding of high needs places by ESFA totalling £255.607m as at 30th March 2023.

- 3.1 **Schools Block (Nil variance).** All of the formula funding for maintained mainstream schools and academies has been allocated. Scope for variation is in the growth fund, which is currently expected to be fully spent.

3.1.1 LA Maintained Schools forecast position

2022/23 was proven to be challenging for the sector and the financial health of LA maintained schools deteriorated by £5.279m during the year and ended the financial year with £1.765m cumulative deficit. Although this position is £1.373m favourable compared to Schools' Q2 forecast position (reported to the Forum in March 2023), the scale of in-year deficit of (£1.858m in 2022/23) in Maintained Nursery schools (MNS) is envisaged having significant impact to overall financial health of LA Maintained Schools going forward and as such unspent EY / MNS improvement fund (£0.267m) will be ring-fenced to support EY transformation journey going forward; and when surplus is available and subject to formal consultation, the Forum is advised to support DSG funding to be optimised to support the ongoing sustainable delivery of MNS service in the City.

2023/24 LA maintained schools' financial position is summarised in Table 2 below which is NOT included within Schools' Block balance figure in Table 1.

Table 2 - 2023/24 LA Maintained Schools Forecast position as at May 2023	2022/23 closing balance	2023/24 in-year forecast	2023/24 forecast closing balance	Number of schools forecasting in-year deficit in May 2023
CC	541,336	207,782	749,118	1 out of 1
Hub (transferred to Children's Service)	-498,219	n/a	n/a	n/a
Nursery	7,050,084	119,334	7,169,418	6 out of 12
Primary	-2,906,380	593,050	-2,313,330	14 out of 28
PrimNur	-737,177	191,464	-545,713	7 out of 12
Secondary	-391,665	53,228	-338,437	1 out of 2
Special	-789,394	57,381	-732,013	3 out of 5
Pru	-503,946	302,873	-201,073	1 out of 1
Total sum (+ve: deficit)	1,764,639	1,525,112	3,289,751	61

Based on forecasts provided by LA Maintained Schools on 30th May 2023, an overall deficit position of £1.5m was projected by Bristol LA Maintained Schools, made up of 33 schools forecasted £2.6m overspend (or an average of £80k deficit per school), offset by 28 schools forecasted £1.1m surplus (or £40k per school).

Whilst additional £1.6m funding uplift in MNS supplement in 2023/24 was welcomed as this makes a good contribution towards 2023-24 financial sustainability but recovery plans will be required to address the accumulated historic deficits.

Primary and Secondary schools also experience financial challenges, May 2023 forecast indicating an overspend position of £1.4m despite additional £10.749m MSAG (Bristol indicative allocation of Mainstream Schools' Additional Grant) allocation in 2023/24.

Education Service is working closely with the Sector to explore options to bring Schools Finance back to sustainable footing. Where applicable, schools forecasting deficit position have been notified of next step, meetings have been set up with schools leadership team and schools' governing body to explore affordable solutions.

- 3.2 **De-delegated resources (Nil variance).** 2023/24 budget is anticipated to be fully spent.
- 3.3 **School Central Services Block (Nil Variance).** 2023/24 budget is anticipated to be fully spent.
- 3.4 **Early Years Block (£1.057m overspend).** Early Years income and expenditure is based on actual participation throughout the academic year. The end of year financial position is calculated based on January 2023 census data where £0.658m funding clawback is anticipated due to participation rate and could vary when actual income is confirmed in July 2023.

Early Years is experiencing significant pressure in emerging SEN which is anticipated to overspend by £0.8m during the financial year, plus planned overspend of £0.267m EY / MNS improvement fund carried forward from previous year which will continue to be ringfenced to support EY transformation work in 2023/24

- 3.5 **High Needs Block (£16.616m overspend).** The High Needs block is anticipated to overspend by £16.6m in 2023/24. This is mainly driven by increase in EHCP and complexity of Children with SEN, overspend was forecasted in top up funding of £5m, special placement (pre- and post-16) £7.4m, ISP £2m and Teachers pay & pension £1.2m.
- 3.6 **High Needs Transformation (£0.980m overspend).** £1.627m (or 0.5%) was transferred from the Schools Block to The High Needs Block to fund High needs recovery work following budget approval by the Schools' Forum in January 2023.

The £0.980m planned overspend will be covered by underspend from 2022/23 High Needs Transformation fund.

- 3.7 High Needs recovery plan proposals has been developed alongside the DSG Management Plan and Department for Education Delivering Better Value for SEND Programme (DfE DBV programme), latest forecast including potential benefits (subject to formal consultation) was reported to the Forum in March 2023 and is summarised in Table 4 below:

Table 4 DSG MP: DSG forecast position	2022-23		2023-24	2024-25	2025-26	2026-27	2027-28
	outurn	Forecast					
Income / Surplus should be shown as negative	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast
	£'000	£'000	£'000	£'000	£'000	£'000	£'000
Brought forward unmitigated deficit	£24,650	£39,681	£60,735	£80,871	£98,579	£114,732	£114,732
Total expenditure	£437,761	£464,920	£476,529	£491,701	£506,736	£521,263	£521,263
Total Income ¹	£-422,730	£-443,867	£-448,277	£-463,967	£-480,206	£-497,013	£-497,013
Funding gap carry forward to future years	£39,681	£60,735	£80,871	£98,579	£114,732	£128,242	
Mitigation Proposals:							
Carried forward indicative proposals			-3,075	-12,040	-23,512	-36,086	
Annual Indicative Proposed Mitigations	0	-3,075	-8,965	-11,472	-12,574	-12,574	
Funding gap after proposed mitigations	£39,681	£57,660	£68,831	£75,067	£78,646	£79,582	
DBV stretched confidence benefits - cumulative	£0	£-3,180	£-13,180	£-29,880	£-52,980	£-80,380	
DBV stretched confidence benefits - annaul	£0	£-3,180	£-10,000	£-16,700	£-23,100	£-27,400	
Funding gap after DBV stretched benefits	£39,681	£57,555	£67,691	£68,699	£61,752	£47,862	

Note ¹: income uplift of 3.5% I assumed post 2023-24 per ESFA guideline.

Based on latest forecast (as at January 2023) which was broadly in line with Newton's (DfE DBV delivering partner) forecast, it is estimated that High Needs Block could achieve a balanced budget position in 2025-26 if DBV

stretched confidence benefits materialise, which is subject to formal consultation. Further updates on DBV programme is covered in Education Director's updates.

The Belonging with SEND Programme (was known as Education Transformation Programme), primarily concerned with SEN and consequently the High Needs Block, a separate report was available in January 2023 Schools Forum paper (Agenda Item 8, link: [Jan23 SF DBV update](#)). Nationally High Needs continues to be challenging and in Bristol this has been exacerbated by work to clear the backlog of EHCP.

3.8 Funding (Nil Variance). £453.226m as at March 2023 announcement, which will be subject to Early Year's adjustment where funding is calculated in arrears based on actual participation.

In summary DSG is forecasted to overspend by £18.655m in 2023/24 Q1 P2 forecast. This is equivalent to a cumulative forecast carry forward deficit reserve balance of £58.335m including £39.680m deficit balance brought forward from previous years.

SEN topup continue to be the main financial pressure, whilst £8m (or 10.2%) funding uplift was welcomed in 2023/24 High Needs Block funding allocation, this is way below 2022/23 in-year deficit in High Needs block (£15.974m), neither would this contribute to DSG cumulative deficit position recovery. While transformation work is underway and as financial benefits still needs be to validated, this forecast is reflecting an unmitigated deficit position.

As statutory overwrite has been extended by DLUHC (Department for Levelling Up, Housing and Communities) for another three years to March 2026, this gives the LA time to deliver DGS management plan and mitigations with the aim to bring DSG annual spend back to a sustainable footing.

Bristol has secured £1.0m from DfE DBV programme (Delivering Better Value in SEND). Along with £1.6m transformation fund from 2023/24 Schools Block to High Needs approved by the Schools' Forum in January 2023, this gives a total of £2.6m to deliver DBV programmes and High Needs recovery plan, which is in addition to the £0.980m carry forward fund from Belong with SEND programme.

Two workstreams funded through a Department for Education Delivering Better Value (DBV) Grant are starting to move from the development to the delivery phase. A tender process for workstream 2 will be completed by the 30 June to identify a delivery partner to review High Needs Block funding which is subject to public consultation. In workstream 1 a steering group has been established to develop the scope of the project and identify schools to take part in a test and learn pilot for the new academic year. Further details on DBV programme updates and High Needs Recovery plan is included within Education Director's update.

Appendix 1 - DSG 2023/24 Q1 P2 forecast position as at May 2023

Bristol DSG Outturn position as at Q1 Period 2 (P)2 2023/24	Brought forward 1.4.22	Funding 2023/24	P02 Forecast position	In-year movement	Carry forward 31.3.24	2022/23 Outturn position
	£'000	£'000	£'000	£'000	£'000	£'000
Maintained Schools		80,857	80,857	(0)		77,821
Academy Recoupment		240,206	240,206	0		223,990
Growth Fund		2,788	2,788	0		2,063
Schools Block	(787)	323,851	323,851	(0)	(787)	303,874
De-delegation Services	(527)	0	1	1	(526)	(23)
Admissions	6	529	529	0	6	529
Centrally Retained	1	2,188	2,188	(0)	1	2,213
Schools Central Services	8	2,717	2,717	(0)	7	2,742
National Formula		29,939	29,919	(20)		27,105
2 Year Old Funding		3,596	3,596	0		3,172
Pupil Premium (EYPP)		383	382	(0)		317
Additional Support Services		500	500	0		457
SEN Top up		1,686	2,495	810		2,074
Staffing		2,272	2,273	1		1,892
Disability Access Fund		152	152	0		105
EY & Nursery improvement work		0	266	266		74
Early Years Block	(605)	38,526	39,583	1,057	451	35,196
Commissioned Services		2,653	4,673	2,019		3,422
Core Place Funding		9,289	9,235	(54)		9,102
Staffing		1,027	2,322	1,295		2,272
Top Up		46,363	51,606	5,243		48,610
Placements		10,349	17,730	7,381		14,485
Pupil Support		975	1,708	733		1,402
HOPE Virtual School		236	236	0		235
Academy Recoupment		15,402	15,402	0		15,099
Education Transformation		1,627	2,608	980		1,343
High Needs Block	41,592	87,921	105,519	17,597	59,189	95,972
Funding		453,016	471,671			437,761
Total	39,681	0	18,655	18,655	58,336	15,031

Bristol Schools Forum **Delivering Better Value (DBV) in SEND Programme**

Date of meeting:	12 July 2023
Time of meeting:	5.00 pm
Venue:	Virtual/City Hall
Officer Presenting Report	Reena Bhogal-Welsh

1. Purpose of report

- 1.1 To inform and update the School's Forum on the progress of the Delivering Better Value in SEND Programme (the Programme).

2. Recommendation

School's Forum is invited to:

- 2.1 Review the progress to date and next steps for implementation of the Programme.**

3. Background – Delivering Better Value in SEND (As outlined in the School Forum Report 28 March 2023)

- 3.1 Alongside existing plans, the DfE recognises the challenge faced by LAs and is running intervention programmes, Safety Valve Agreements and Delivering Better Value in SEND (DBV in SEND). Bristol was invited to participate in DBV in SEND. A paper outlining the preliminary findings of the DBV programme was presented to Schools Forum on 12 January 2023.
- 3.2 Upon completion of a 6-month diagnostic period, a grant application based on diagnostic findings was submitted to the DfE. The original estimate for the grant allocation was £1.07m as detailed in the report on the 28 March 2023. In total Bristol secured a £1m grant to pump-prime deficit mitigation interventions identified through the programme.

3.3 The diagnostic identified that the unmitigated deficit position of the High Needs Block will increase to £116m (lower bound) over the next 5 years. This is primarily due to an increase in spend in the following provision areas:

- Increase in number of EHCPs issued
- Non-statutory top up funding (mainstream provision)
- Bristol-based specialist provision (cost of placement and increased numbers of pupils entering special schools)
- Post-16 provision

3.4 The focus of Bristol's grant application to the DfE focused on the delivery of 2 key workstreams:

Workstream 1:

**Strengthening relationships between the school, families and children
(improving the experiences of children with SEND in mainstream settings)**

We will work in partnership with a cross phase group of education partners, families and children to develop and implement a pilot programme to improve the experience of children with SEND in mainstream education. The pilot will focus on enhancing school-based inclusion practice and improving school-to-family communication with the aim of rebuilding parental confidence in current SEND arrangements and reducing the demand for specialist placements, in situations when a child's needs can be effectively met within mainstream. The aim of the trial is to create an eco-system of inclusive Bristol schools to act as inclusion champions, provide peer-to-peer support, disseminate learning and model best practice to support further roll out across the Bristol education system.

Workstream 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)**

We will undertake a further analysis and review of Bristol's existing SEND funding model to identify, define and measure problems relating to efficiency, effectiveness and value for money. A detailed options appraisal will be developed for full public consultation in the areas of:

- a) Effective and sustainable use of non-statutory top up funding
- b) Standardisation of statutory top-up funding and the model for funding Bristol's special schools (maintained and academies)
- c) Realignment of Post-16 funding to ensure adherence to current DfE/ESFA guidelines – including review of use of non-statutory top up funding.

Our intention is to create a fair, transparent, consistent and financially sustainable model, that achieves good outcomes for CYP with SEND through

robust monitoring and accountability frameworks. We will use co-production with parents/carers, children and education partners to ensure the change process is collaborative, clearly communicated, understood and fit for purpose. Robust analysis of the key impact measures, relating to ensuring more CYP's needs are effectively met earlier and within mainstream education will be key, along with the changes as a mechanism to increase parental confidence in Bristol's mainstream provision. The use of external benchmarking and adherence to current and future legislation will underpin all transformation.

4. Progress of the Delivering Better Value (DBV) Programme to date

- 4.1 The DBV Programme is part of a wider programme to address the deficit in the Dedicated School's Grant (DSG). This wider programme also includes the Maintained Nursery Transformation project, as well as workstreams and projects outlined in the High Needs Recovery Plan which was approved by School's Forum in September 2022.
- 4.2 The DSG programme is part of a wider *Our Families* programme focusing on the transformation of children and young people services in Bristol. The *Our Families* programme brings together all change activity across Children, Families, Safer Communities, Education, Skills and Learning. It is focused on whole system change in the re-design of effective services with, and for, children and families. The *Our Families* Board is Chaired by the Executive Director for Children and Education. The delivery of the change programme is overseen by a Director of Transformation.
- 4.3 An external consultant with significant experience working with Local Authorities to improve SEND services, has been recruited as a Strategic Programme Manager to oversee the DSG Programme. Funding for this role will be met via the £1.6m allocated from the High Needs Block in April 2023 to support the wider transformation agenda.
- 4.4 Internal capacity has been identified from core Bristol City Council Services to manage and oversee the delivery of projects and workstreams. An example of the roles that have been joint funded to drive this transformation work include programme and project management, finance, and data capacity. Officers from within the Education and Skills directorate have been identified to lead the delivery and oversight of DBV

Workstreams 1 & 2. £300,000 worth of DBV funding has been allocated to the resourcing of this programme.

- 4.5 A planning workshop to develop Workstream 1 will take place on the 6 July. Internal and external partners from schools, the local authority, parent/carer support services and health partners will help shape the project. The project is scheduled to begin delivery in September 2023. The project will use a test and learn methodology to understand the impact changes in practice have on the relationships between schools and families with children with SEND in Bristol. School inclusion data sets will be used to identify priority schools to take part in the project which is due to commence on the 4 September 2023. Workstream 1 pilots are planned to be completed by 30 March 2023. £100,000 worth of DBV funding has been allocated to the delivery of this workstream.
- 4.6 Bristol City Council is undertaking a procurement process to secure a delivery partner to lead Workstream 2 of the DBV programme. It is expected that the delivery partner will begin working on Workstream 2 in early July. It is expected that the delivery partner will begin the analysis phase of Workstream 2 in early July and complete this phase of the project by the end of August 2023. The delivery partner will develop an options paper outlining potential changes to the way Bristol City Council use the High Needs Block funding. Following completion of this phase the delivery partner will oversee a city wide, multi-stakeholder 6-week consultation on the options paper. This will begin in early September. Once completed findings from the consultation will be used to inform a final recommendation which will be presented to Bristol City Council's Cabinet for a key decision. Estimated date of completion December 2023. £600,000 worth of DBV funding has been allocated to the recruitment of a delivery partner for this workstream.
- 4.7 Due to the recruitment of project resources and the development of compliant procurement options, the indicative timescales outlined in the original grant application to the Department of Education have slipped. Current implementation plans seek to bring both workstreams back within delivery tolerance.
- 4.8 A further update on progress against the delivery of both workstreams will be provided in the first School's Forum of the new academic year.

Bristol Schools Forum **Early Years SEND Panel**

Date of meeting:	12 July 2023
Time of meeting:	5.00 pm
Venue:	Virtual/City Hall
Officer Presenting Report	Reena Bhogal-Welsh

1. Purpose of report

- 1.1 To inform and update the School's Forum on the progress of the Early Years SEND Panel

2. Recommendation

School's Forum is invited to:

- 2.1 Review the progress to date of the Panel.**

3. Background – Early Years

In 2017 with the introduction of the Early Years National Funding Formula all Local Authorities were required to have a Special Education Needs Inclusion Fund (SENIF) to support children with emerging special educational needs in their early years settings within their Local Authority

- 3.1 The statutory guidance: Early years entitlements: local authority funding operational guide 2023 to 2024 states that: 'Local authorities should target SENIFs at children with lower level or emerging SEN. Children with more complex needs and those in receipt of an education, health and care plan (EHC plan) continue to be eligible to receive funding via the high needs block of the DSG'. It also states in sources of funding that: 'Local authorities should establish their SENIFs using funding from the early years block and/or the high needs block of their DSG allocation'.
- 3.2 In Bristol the Early Years Service has identified a budget to support children with SEND in their early years settings, this is a long standing budget and has been in place since the early 2000's and is known as the

Early Years SEN Panel. This budget is allocated only from the DSG Early Years Block and forms part of the 95% 'pass through' that LA's must give out to providers. There is currently no contribution from the High Needs Block. The amount of budget allocated since 2017 is: £1,274,720

- 3.3 The Early Years SEN Panel currently allocates funding to all of those children with an Education, Health and Care Plan (EHCP) who attend an early years setting. This is to avoid early years providers having to claim funding from different systems, as the funding for EHCP's is the responsibility of the High Needs Block. The SEN Team will issue an EHCP and rather than pay the setting direct the Early Years SEN Panel will provide the funding. This ensures all funding that is paid to early years settings for SEND support is paid at a consistent rate. This does provide a cost saving to the SEN Team, who allocate funding for children in schools with an EHCP at a higher rate than the Early Years SEN Panel funds. The Early Years Service then re-claims the funding from the High Needs Block usually twice a year, in September and March.
- 3.4 The system used to allocate funding to support children with SEND is the Early Years SEN Panel. This is a multi-agency meeting that takes place monthly and uses the Early Years Bristol Universal Descriptors (BUD's) to make decisions on the levels of funding to be allocated. The early years BUD's were originally designed to align with those in the school age Top Up process to support transition from early years to school. In May/June each year the Early Years Service provides a list of all children who will be starting at Reception to the SEN Team who then arrange for the band level to transfer to the receiving primary school.
- 3.5 The aim of this funding is to enhance the staffing ratios within the environment to increase the capacity of the child's Key Person. The hours that will be funded in any week will be in line with the child's free early education entitlement plus any additional hours of paid childcare recorded on the application.
- 3.6 Funding is allocated for a specific length of time usually around 6 months, at which time the early years setting is asked to provide a review so the panel can monitor the use of the funding.
- 3.7 The budget also funds other services to support children with SEND in early years settings:

Service	Description	Funding
Early Years Specialist Equipment	This funding is a contribution to a pooled budget with Health and Social care to provide specialist equipment for children in their early years setting.	£25,000
Bristol Autism Team	The Bristol Autism Team allocate specific staff to support children with a formal diagnosis of autism and those on the pathway to a diagnosis in early years settings.	£60,490
Specialist Children's Centre Inclusion Practitioner (SCCIP)	Experienced early years practitioners who work with the Early Years Portage and Inclusion Team and provide the following three areas of support: <ul style="list-style-type: none"> ➤ Intervention Package - a block of up to 6 visits to model and support the implementation of strategies in an <u>early years</u> setting ➤ Rainbow Stay and Play groups - a weekly drop-in group specifically for parent/carers with a child who has special educational needs or disabilities ➤ Dedicated SEND support for Childminders 	£72,000
Early Support Practitioners	These posts are jointly funded by Health and Early Years which support pre-school children with disabilities and their families. The primary role is to empower parents and carers by providing them with support, resources, and information to meet their individual needs.	£41,250
Educational Psychology Support	The Bristol Educational Psychology Service provide support to children in early years settings.	£35,086

4. Pressures

4.1 The Increasing numbers of children: the table below shows the actual amount of funding provided to early years settings via the Early Years SEN Panel and the increasing number of children it has supported year on year.

Year 2018 - 2019	Year 2019 - 2020	Year 2020 – 2021 (COVID impact)	Year 2021 - 2022	Year 2022 -2023
£919,205	£1,482,006	£1,200,093	£1,741,303	£2,145,882
312 children	498 children	425 children	575 children	637 children

4.2 Children deferring and delaying entry to school: the table below shows the impact on the funding from those children that delay their entry to school and remain in their early years setting.

Year 2019 - 2020	Year 2020 – 2021 (COVID impact)	Year 2021 - 2022	Year 2022 -2023
£144,000	£124,000	£124,000	£190,800
36 children	31 children	31 children	47 children

4.3 Funding Stream: The Early Years SEN Panel budget does not currently receive any contribution from the High Needs Block. This differs from other LA's who do contribute HNB funding to the early years budget.

- 4.4 Children supported: The requirement within the Statutory Guidance is for funding to be available to support identified 3&4 years olds who are accessing their Free Early Education Entitlement hours.
- 4.5 In Bristol we provide funding to support all children under statutory school age and in an early years setting for all of the hours they attend both with emerging and complex needs. This is to ensure early intervention; support is provided to all children identified with SEND without the need for an Education Health and Care Needs Assessment.

5. Early Years SEND Project Plan

The Schools Forum agreed to provide £250,000 with an aim to reduce the annual overspend on the Early Years SEN Panel. The table below shows the projects this funding will provide:

Project	Description	Cost
Early Years SEND Audit	To audit 50 early years settings (30% of all settings and includes a range of each type, Nursery Class, Nursery School, Private, Voluntary an Independent) to establish how Early Years SEN Panel funding that they have been allocated is meeting the needs of children with SEND. Design appropriate paperwork to be used. The audits will be carried out by Early Years SENCO's currently working in settings who have expressed an interest in completing them in the model of peer review. A briefing was provided to ensure a consistent model was implemented.	Design: £1,000 Cost: £600 per audit = £30,000
SEND Continuing Professional Development Programme (CPD) for Early Years Settings	To design and deliver a 12 hour CPD Programme to be offered to whole settings to meet the areas of need: <ul style="list-style-type: none"> ➢ Social Communication ➢ Social, Emotional and Mental Health / Personal, Social, Emotional. Training to be delivered as a twilight set of sessions or over In-set Days. Funding to be provided to those settings participating to enable all practitioners to be paid for their attendance.	Design of course £4,000 Cost per course: £5,000 to be delivered to 32 early years settings. Cost: £160,000
SEND Self Help Sheets	To develop self-help sheets outlining strategies for supporting specific areas of needs.	Cost: £10,000
Training Course	Developing a Neuro diverse early years environment and curriculum. Plan to deliver 3 courses for 40 practitioners at each event.	Cost: £30,000
Early Years SEN Panel	To review and re-design the Early Years SEN Panel process.	Cost: £15,000

6. Spend to date

Project	Spend
Early Years SEND Audits	£24,600
SEND CPD Programme for Early Years	£20,534
SEND Self Help Sheets	£600
Training Course	£0
Early Years SEN Panel	£511
Total:	£46,245

- 6.1 The nominated Early Years SENCO's have to date audited 37 early years settings:
- Maintained Nursery Schools - 9
 - Nursery Classes - 11
 - LA Managed Children's Centres - 2
 - Private, Voluntary and Independent – 15
- 6.2 There were 7 settings that were allocated to SENCO's who were then unable to carry them out due to their capacity.
- 6.3 The audit comprised of an observation within the childcare environments, a discussion with members of the senior leadership team and SENCO, with the visits being documented on standardised paperwork.

7. Impact from the SEND Audits

- 7.1 We now have a more accurate understanding of how the funding allocated from the Early Years SEN Panel is being used in settings. This evidence base is helpful in generating clear lines of enquiry for future school/setting visits, and for training purposes. Key areas of focus to include embedding Ordinarily Available Provision and structured approaches to play for neurodiverse learners.
- 7.2 Further insight gained into the role of SENCO – most SENCOs are knowledgeable, but further dissemination of knowledge base is often needed across other staff. Further exploration and promotion of the role of 'expert' teacher/practitioner leading on SEND now required, including impact analysis of reducing SENCO capacity/costs and sharing roles across schools and settings.
- 7.3 Some nursery chains have SENCOs with multiple roles, limited time and little SEND knowledge. If a senior member of the team in the school/setting is the SENCO, high expectations are embedded in practice. The valuing of SEND at the 'top' creates a positive culture throughout the school/setting and this needs promotion.

- 7.4 Scrutiny, processes and accountability - we identified that early years settings would welcome a reduction in the initial process of referral with pre-populated drop down lists to choose from, and with more added scrutiny around the review phase. There is a general feeling of a lack of accountability of how funding is being used – very heavy loaded to get the funding and then no follow up. Schools and settings welcome more robust systems of monitoring of expenditure – through self-evaluation/externally.
- 7.5 There is a trend that nursery classes in primary schools tend to not apply for funding in early years. There are instances of the SENCO being a Key Stage 2 teacher and unfamiliar with early years practice. Ongoing review of central team deployment and monitoring of school SENCO attendance at Early Years SENCO network meetings needed to provide support and challenge.
- 7.6 Sufficiency – settings are managing their intake, so are not always offering places to children with SEND. Maintained settings always offer places to children with SEND, but this is impacting on deficit budgets. Settings get a reputation re: SEND and professionals direct parents to them and this can result in numbers of children with SEND becoming too high – tipping the balance. Staff recruitment and retention is a significant challenge, particularly in relation to part-time, temporary staff which schools/settings need to operate within funding envelopes. Difficult to build expertise needed. These sufficiency concerns remain key considerations, included as part of the Maintained Nursery School transformation programme, and subject to further monitoring across the wider sector.
- 7.7 Reduced Family Support - children’s behaviour is being seen as SEND but is possibly due to trauma (heightened by the pandemic) and lack of parenting skills. Further exploration of therapeutic approaches and ‘nurture spaces’ required to prevent misdiagnosis. More robust family support needed. Greater promotion of Disability Access Fund (DAF which is £828 a year) is needed– some settings unaware, parents not applying for Disability Living Allowance (DLA) as no family support for them to make the application.
- 7.8 Practice exemplars - we have identified that the different types of settings within the early years sector manage the needs of children with SEND in different ways. A continued focus on best practice, exemplifying how high quality SEND provision can be managed within the allocated funding envelope remains a priority. There has been sharing of good practice through the audit process itself, where the SENCO completing the audit has implemented some practices they have observed into their own setting. The settings that have been audited have implemented some of the recommendations from the SENCO doing the audit.

8. Reflection / Summary – Where we are now...

- 8.1 There is an established Early Years SEND Forum that meets on a regular basis and has representatives from across the early years sector, schools, LA Education services, Health and Social Care. Members of this forum have joined a Task and Finish Group which will be responsible for reviewing the audits which will then inform the re-design of the Early Years SEN Panel process.
- 8.2 The SEND CPD Programme has been piloted and a criteria has been developed to enable us to target 30 early years settings and offer them the training from August 2023.
- 8.3 All elements of the Early Years SEND Project Plan are incorporated and will be monitored through the SEND Strategic Partnership Plan.
- 8.4 Bristol is working with Dingley's Promise to support the delivery of their Early Years Inclusion Programme in Bristol. 'This programme is a series of ten courses over five years aimed at empowering early years practitioners to deliver inclusive practices by upskilling them through training and shared information/learning resources. It is expected that the training will increase learners' awareness of the needs of all children, especially those with Special Educational Needs and Disabilities (SEND), and their confidence in supporting the learning and well-being of all children.' This programme has been advertised to all early years practitioners, Social Care and Health colleagues. To date 161 practitioners have registered to complete this training.
- 8.5 The Ordinarily Available Provision (OAP) document was released in 2021. It has been shared with early years settings but the general feeling is that it does not fully reflect an early years environment so needs to be reviewed.
- 8.6 The Early Years SEN Panel allocates funding to early years settings to enable them to support children, currently the descriptors used to make decisions are based on the percentage of time the child requires 1:1 support. This directly conflicts with our aim for settings to enhance their ratios to meet the needs of children with SEND, so in any re-design of the panel this will be addressed.

9. Next Steps

- 9.1 A Task and Finish Group has been set up and the first meeting is July 7th.
- 9.2 To undertake a review of all current contracts that are in place to provide support for children with SEND to assess value for money and effectiveness.

- 9.3 To review the Ordinarily Available Provision (OAP) to ensure appropriate for early years.
- 9.4 To roll out the SEND CPD Programme to 30 targeted early years settings, with the aim to embed Ordinarily Available Provision.
- 9.5 To promote the training offer that will be available from Dingley's Promise to support early years providers in business planning, ensuring they are managing their budgets to be able to meet the needs of children with SEND.