

***Bristol Schools Forum***

Agenda Tuesday, 28th November, 2023 at 5.15 pm

**The Bordeaux Room - City Hall, College Green, Bristol, BS1 5TR**

	<b>Start</b>	<b>Item</b>	<b>Action</b>	<b>Owner</b>	<b>Paper</b>
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	3 - 9
4.	17:20	Director of Education & Skills Update	Info	RBW	
5.	17:30	Delivering Better Value in SEND Presented by Director of Education & Skills  Report on the Dedicated Schools Grant Programme Delivering Better Value in SEND and Belonging with SEND update  This Report is for consideration and Decision as indicated on the recommendations set out in sections: - 4.2.12  - 4.2.13  - 4.6.3	De	RBW	10 - 24
6.	17:50	Dedicated Schools Grant Budget Monitor Period 6 Presented by the Finance Officer for information and to note the DSG position as at Period 06.  To note the quarter 2 forecast position for maintained schools  To note the increase funding available for schools in financial difficulties	Info	Finance Officer	25 - 32

7.	18:10	Schools Block School Funding Formula 2024 to 2025 To inform and seek agreement of the Schools Forum on the principals of the funding formula for mainstream schools and academies for 2024/25, prior to final allocations being made available by the ESFA in December, for final formula agreement in January 2024.  For Decision as set out in the Recommendations	De	Finance Officer	33 - 46
8.	18:40	De-delegation for 2024 to 2025 To inform and seek agreement as set out in the recommendation of the report.	Dec	Finance Officer	47 - 53
9.	18:55	Early Years Supplementary Grant 2023 to 2024 Schools Forum to note the provision of the grant for 2023/24	Info	Finance Officer	54 - 56

(\* ) A = Admin, I = Information, De = Decision required, C = Consultation, Di = Discussion  
**Clerk:** Claudette Campbell email: [claudette.campbell@bristol.gov.uk](mailto:claudette.campbell@bristol.gov.uk) Tel: City Hall  
**Chair:** (contact via clerk)

#### **FUTURE MEETINGS**

<b>Date</b>
16 January 2024
26 March 2024
21 May 2024
16 May 2024

## *Bristol Schools Forum*

**Minutes of the meeting held on Tuesday, 26th September, 2023**  
**at 5.00 pm at Virtual Meeting via Zoom**

	<b>Action</b>
<b>1. Welcome</b>	
The Chair welcomed all those present to the meeting and led introductions.	
<b>2. Forum Standing Business</b>	
<b>Present:</b>	
Mandy Cheshire	St Bedes Catholic Colleges
Simon Easkins	Cathedral Primary
Lorraine Gaskell	GMB Union Rep
Jo Grayson	North Star Academy
Tonya Hill	New Fosseway School
Simon Holmes	St Philips Marsh Nursery
Steve Hornsby	North Star Academy
Jo Kingston	Diocese of Clifton
Ian Morris	St Mary Redcliffe & Temple Secondary
Aileen Morrision	St Matthias Park
Sarah Lovell (Chair)	Bristol Brunel Academy
Samantha Packer	PVI Early Years
Chris Pring	Whitehall Primary School
Cedric Sanguignol	Bishop Road Primary
Helen Thornton	Unison Education Co-ordinator
Jo Willis	Bristol Diocese Board of Education
Aderyn Zajicova	The Limes Nursery School
<b><u>In attendance from Bristol City Council</u></b>	
Reena Bhogal-Welsh	Director of Education and Skills
Denise Murray	Director of Finance and S.151 Officer
Angel Lai	Finance Manager
Funmi Olagbalye	Finance Officer
Claudette Campbell	Clerk to the School Forum
<p>Apologies for Absence were received from:</p> <ul style="list-style-type: none"> <li>- Cameron Shaw</li> <li>- Cllr Asher Craig</li> </ul> <p>Quorate</p> <ul style="list-style-type: none"> <li>- The Clerk confirmed that the meeting was quorate.</li> </ul> <p>Resignation</p> <ul style="list-style-type: none"> <li>- Further to the email circulated to Forum members by the Director of Education and the</li> </ul>	

Chair an opportunity was provided for the Chair to address the forum.

- The Director of Education and Vice Chairs gave a vote of thanks for the Chairs leadership and participation.
- The Chair invited those interested in taking the role to make contact to enable a discussion and information sharing to support the transition into the role.

#### Appointments

- Simon Shaw has retired from St Mary Redcliffe and has been replaced by Ian Morris as the Head's rep.
- Specialist representative there are two seats and the vacant seat will be filled by Jo Grayson.

#### Vacancies

The remaining positions are vacant and have been advertised via the Heads newsletter and various contacts. The challenge is filling the Academy seats on the forum. The following are vacant.

- 1) Academy settings reps required for the following categories of membership
  - a) Secondary Head x 1
  - b) Secondary Governor x 1
  - c) Primary Head x 2
  - d) Primary Governor x 1
- 2) Maintained Settings
  - i) We have applicants for the following vacancies elections are pending:
  - ii) Primary Maintained head x 1 seat
    - (1) Two applicants
  - iii) Primary Maintained governor x 1 seat
    - (1) Three applicants
  - iv) Secondary Maintained Governor - 1 from 1
    - (1) Ian Morris is to address the current board of Governors at St Mary Redcliffe to see if there is interest in replacing the retired governor
    - (2) Contact has been made with the one other maintained secondary St Bernadette Secondary Catholic School

Elections will be arranged to fill the vacant positions in time of the November meeting.

#### Declaration of Interest

There were none and the register will be reviewed this year to ensure up it is up to date.

### 3. Minutes of the Previous Meeting

The minutes of the meeting held on the 12<sup>th</sup> July was resolved as a correct record.

#### Matters Arising/Actions

1. Action points
  - a. RBW to look at the Sponsor Licence and whether this can be applied to education settings
  - b. RBW to share details of the school selection process to participate in Workstream 1
  - c. RBW to share with colleagues the pressure to complete consultations that school settings have in the Autumn Term and to find a way to avoid consultation fatigue

RBW reported on point

1(a) that the programme spearheading the work on sustainability & transformation of maintained nursery schools have been made aware of this ask and it will be considered in the work programme; the next event, a workshop, involving Heads will be held on the 11<sup>th</sup> & 12<sup>th</sup> October 2023

1(b) addressed in agenda item 7

1(c) Conversations have taken place with work groups and at the Headteachers breakfast

#### 4. DSG Budget Monitor - Angel Lai

Angel Lai, Finance Manager, reported on the Dedicated School Grant position as of Period 05(P05) to end of July 2023 and to seek approval of redesignation of funding to facilitate temporary support for LA Maintained schools in financial difficulty.

Highlighted the following from the report:

- a. DSG forecast overspend remains at £18.7m; driven by high needs block top up and placements costs resulting from increasing EHCP costs and the complexity of children with SEN; advised that is a continuing trend.
- b. Reassurance was given that the team supports and encourages each block to meet their needs within allocated budget.
- c. The decision item for LA maintained schools, set out in 3.1.1 of the report; the redelegation is to enable those schools who can demonstrate they have drawn up a financial plan that is sustainable and enables them to reach in-year balance over a fixed period. Sums will be provided to support them on a temporary basis until their ambitions are realised.
- d. Table 3 in the report identifies where the surplus funds will be drawn; 3 pots of money; total approx. £1m pounds.
- e. The allocated sums will be repaid to the fund by the school after the agreed period to enable sums to be recycled to others in need.
- f. Officers recommendation is for the Forum to approve the redelegation of the funds identified, to support LA Maintained Schools in financial difficulty.

Points of Clarification:

- g. Table 1, the bottom line the mitigation figure; explanation provided that the full mitigation sum is not projected to be realised; the sum noted is the current projected saving.
- h. Discussion as to why the DSG assumption includes an overspend and what the historic narrative is to explain the position that accepts that the High Needs Block brings with it a deficit. The ongoing challenge was acknowledged, and all reminded that 'The Programme' (agenda item 7) is in place to find a resolution.
- i. A robust question and answer session followed on the redelegation of funds to meet the need of LA Maintained schools.
- j. In summary:
  - a. The funds would only be provided to those schools that have set out a plan that results in the loan being paid back; the schools would have a licenced deficit; identified a repayment period; schools are restricted in that they are unable to trade in an overdraft the funds provided would provide that buffer and provide necessary cashflow; the monies paid back will be recycled to assist other schools in the same position; the loan period would be anything from 3 – 5 years;
- k. The Director of Finance, assured the Forum the fund is only available to those who are

able to provide a viable plan that demonstrate repayment; that due diligence would be applied before the loan is agreed; the aim is to put schools on a sustainable setting; challenge is the number of schools that require assistance; the funds will come back in and it will be recycled for future use.

- l. **Action:** that a report can be provided to the Forum on the terms of loan and use of funds; at the same time being mindful & sensitive in the way data is shared on those involved.
- m. The wider transformation exists to address the deficit position that exist amongst LA maintained schools and nurseries; assurance given that officers will continue to report on the solution to the funding deficit challenges.
- n. An ask, that it is noted that some school settings, non-LA settings, have taken drastic steps to ensure they remain within budget, that has resulted in the reduction in provision and staffing; and that they have not had the advantage of this support.
- o. It was shared that maintained nursery schools continued to face challenges, at a time that they are required to absorb budget challenges and shrink provision but scale up to meet government future commitment to families.
- p. The Chair clarified for all following the discussion; that the £1.1 identified would be treated as a loan to maintained schools and nurseries; those to benefit would have produced plans that would be subject to due diligence; the funds would be loaned for a fixed period of 3 to 5 years;
- q. The Forum was asked if the establishment of this fund was supported.
- r. One objection was noted that of Simon Eakins

Resolved:

1. That the Forum would support the creation of the loan fund from the sums identified in Table 3 of the report.
2. That the Forum receive regularly updates on the operation of the loan fund

##### 5. National Funding Formula and DSG Funding Update - Angel Lai

Angel Lai (Finance Manager, Children and Education) presented the report on the emerging DSG funding levels for 2024/25; updates on changes to the School Block with the implementation of the hard NFF. Asked to note that allocations have yet to be confirmed and the figures shared in the report are indicative and should be treated only as such.

The following was highlighted from the report:

- a. Attention was drawn to the information shared in table 1 that provided the 'Indicative 2024/25 DSG Funding; that a comparative allocations summary was provided in the table; noted that the link provided to enable all to further interrogate the data.
- b. Bristol is working closer to the NFF; drew attention to the comparative allocations for 24/25 and the link in the report that provided a helpful summary.
- c. **Action:** The de-delegation service areas; that a balance position is reported on for each service area showing spending and balances; this should be available in time for the next meeting in November.
- d. The Grant allocation to cover teaching staff is made separately.
- e. Bristol historical has had a better fund allocation to support disadvantaged children.
- f. High Needs Block; an ask that the when funds are identified to be moved and transferred to support the block, that (1) those sums are put in proper context. (2) Noting the actual deficit amount and (3) the impact the sum identified will make; (4) to

avoid the impression that the movement of 'the sum' will resolve the issue.

The Chair invited the representatives from maintained mainstream schools to agree the de-delegated services in scope for the consultation as listed at 8.4 in the report.

When put to the vote:

**Resolved** (2 for; 0 against; 0 abstain) by the maintained school representatives that the de-delegation list as listed to be shared in the consultation.

**The Forum resolved to:**

- i. Note the indicative 2024/25 funding levels.
- ii. Note the transition to a hard NFF will continue in 2024-25 and the proposed restrictions relating to the DSG School Block.
- iii. Note that the LA will consult with schools on items in the local formula, particularly MFG, transfers between blocks, and formula factors.
- iv. Note that the LA will consult with schools on their views on de-delegation, and then report the results of the consultation to Forum for their decision at the meeting in November.
- v. Agreed to re-establishment a Finance Sub-group to consider funding formula proposals for 2024-25
  - a. Working Group Members Ian Morris and Chris Pring and Simon Eakins to meet on the 31<sup>st</sup> October with the LA Finance representative

## 6. DSG Management Plan - Angel Lai

Angel Lai (Finance Manager, Children and Education) presented the report. The purpose of the report is to update the forum on the refreshed DSG Deficit Management Plan.

AL outlined the position so far.

- a. The report summarises the position with regards to the 127 million deficit; sets out the plan to restore the financial health; sets out the operation and interventions.
- b. Reminded that 0.5 % percent was transferred to support the working group to find a resolution. The plan projects half percentage will be applied yearly.
- c. The latest forecast mitigation proposals could improve the forecasted financial position by £2.1 million in 2023/24 and up to a cumulative £12.6 million by 2027/28
- d. The position remains the same as reported last September 2022.
- e. Mitigation will be covered by agenda item 7

The following comments were noted, with the understand that the report on the Transformation programme, the next agenda item, provides details on the mitigation steps underway.

- i. Noted that the figures had not varied since last reported. The sum remains large, and it is for the Forum to bring challenge and provide support to the delivery of the transformation plan.
- ii. What assumptions made about staff salary increases; the assumption applied included 5% uplift based on information provided by DfE; the national figures were considered and the revised assumptions applied.
- iii. Section 4.1 page 24 estimates a reduction in SEN; that is because the school years population is projected to fall; the OSN projected school age population applied to forecasts.

- iv. The plan includes a calculation to account for movement of children in and out of the Bristol region. The Forum resolved to note the report.

## **7. High Needs Recovery Plan Update - Delivering Better Value - Reena Bhogal-Welsh**

The report provides the background information and the update is set out from section 5.

Reena Bhogal Welsh (Director of Education) presented the report that provided the forum with an update on the progress on the DBV in SEND Programme. The report sets out the historical narrative. A grant of £1m was awarded to support the programme from the DfE.

The DBV programme is part of a wider programme of work to address the DSG deficit. This Programme includes work set out in the High Needs Block Recovery Plan, which was approved by the School's Forum in September 2022.

Section 5 of the report provides the update; details of the team(5.1); sets out the Governance structure(5.2). Section 5.3 Workstream 1 Test and Learn methodology working with small groups of schools to improve relationships between schools and families. The pilots are to take place between September 2023 and March 2024; the focus to review and codesign the SEND Guidance Reports with staff and parents/carers in 4 participating schools.

Forum asked for information on the selection process, this is detailed in (5.4) of the report; it is expected that up to 20 schools to be involved (15 primary and 5 secondary) based on combined inclusion data.

Workstream 2 progress is reported in (5.5 – 5.7) of the report.

The Forum will be provided with a report on the outcome of the consultation in November 2023; details of the delivery partners will be provided on request, via Claudette Campbell, Schools Forum Clerk. All were encouraged to feed into the consultation process.

The following was noted from the decision that arose:

Chair thanked RBW for the report; for providing the update on The Programme and details of the progress made to date; and invited Forum members to comment.

- a. How should we measure value for money? How to ascertain whether the outturn meets this threshold? How do you account for the competing voices in Bristol and how is the line drawn? What does success look like?
- b. RBW: Success is the production of an option appraisal; that those options can be shared with all Bristol stakeholders; that the option shows how to utilise funding at the right time and right place; a sustainable model that addresses needs and that is financially viable.
- c. Unable to forecast the outcome and state how many options will be presented but support the concerns that the outturn must not be onerous and must be a finite workable number.
- d. The Director of Finance confirmed her involvement and supported the provision of a strong governance framework; to provide rigor to deliver on the ambition; consultants are a useful tool, but they must be targeted in their approach and pressed to produce define outcomes.



- e. Forum members were concerned that ‘success’ may involve pain to several settings and the option adopted would be detrimental to some.
- f. Unfortunately, no guarantees could be given but officers provided assurance that children with high needs will continue to be supported to have better life experiences.
- g. Chair commented that there will always be challenges and it was hard to ask for guarantees from the LA and Officers.
- h. Forum members were invited all to work together and to collaborate on the proposal. The Programme is not intended to put schools in a difficult position but to support the aspiration to put funding where it is needed. Forum members were invited to provide early indication, to flag immediately if they are aware of unintended consequence, so that it can be included in the conversation.
- i. Forum members were Invite to feed back any comments to the Clerk Claudette Campbell.
- j. Clarification was given on the schemes noted in the report that were established before the programme, to work on alternative mitigations. These schemes run in parallel with Workstreams 1 and 2.
- k. **Action:** A report to explain the original schemes; these schemes form part of the review process in the main programme.

Resolved to note the report.

#### 8. AOB

- A. The Chair confirmed that the Directors briefing will be carried over to the next meeting.
- B. The Director of Finance led the thanks to Angel Lai for her contribution to the financial business of the forum, as she moves to a new role.
- C. The Chair asked for clarification on the special schools funding and whether a further discussion was required on the decision to be made; AL confirmed that 1.78m had already been allocated to special schools; no further action was needed.

The meeting closed at 6.45 pm.

## Bristol Schools Forum

### Dedicated Schools Grant Programme – Including Delivering Better Value in SEND and Belonging with SEND updates.

<b>Date of meeting:</b>	28 November 2023
<b>Time of meeting:</b>	5.00 pm
<b>Venue:</b>	City Hall
<b>Officer Presenting Report</b>	Reena Bhogal-Welsh

#### 1. Purpose of report

- 1.1 To inform and update the Schools Forum on the progress of the Dedicated Schools Grant (DSG) Programme (DSG Programme) – specifically Delivering Better Value (DBV) in SEND, Belonging with SEND (BwS) and EHCP Process Redesign
- 1.2 To gain a decision on the use of underspend in the Programme relating to the Schools Block transfers 2022/23 & 2023/24.

#### 2. Recommendation

##### **School's Forum is invited to:**

- 2.1 Provide decisions on recommendations set out in points -
  - [4.2.12](#)
  - [4.2.13](#)
  - [4.6.3](#)

### 3. Background – DSG Programme

3.1 The DSG Programme was launched in June 2023. The DSG Programme includes the oversight and delivery of projects and workstream outlined in the Deficit Management Plan, approved by the Schools Forum in September 2022. An overview of the projects which form the Deficit Management Plan is attached as Appendix a.

3.2 The DSG Programme is part of the wider *Our Families* transformation programme focused on improving the delivery of services across BCC's Children's and Education Directorate.

3.3 The DSG Programme is governed internally by the Our Families Programme Board, with further reporting via Schools Forum, SEND Improvement Board and directly to the Department for Education. A draft governance framework is attached as Appendix b.

3.4 Funding to deliver the DSG Programme is broken down into three elements.

- £1m Department for Education Grant - to deliver DBV in SEND projects and workstreams.
- £928k remaining funding from the School's Block transfer 2022/23 – to deliver Belonging with SEND programme (£793k) and commitments outstanding from the Education Transformation Programme (£135k)
- £1.6m 2023/24 School's Block transfer – to cover programme delivery costs and review of the Education, Health, and Care Plan (EHCP) process.

3.5 This report will provide an overview of the progress against each of these three elements in the order outlined above.

#### 4. Progress - DSG Programme

##### 4.1 Delivering Better Value (DBV) in SEND – Progress since September 2023

4.1.1 **Workstream 1** – BCC has taken a test and learn approach to deliver this workstream focused on strengthening relationships between the school, families, and children.

4.1.1.1 Planning for the delivery phase of Workstream 1 was completed in August 2023 with four schools recruited to take part in the first Test and Learn pilot. The first Pilot focuses on reviewing and co-designing School SEND Information Reports in partnership with parents and carers of children with SEND. Schools were selected using comparison data linked to EHCP applications and the percentage of children in receipt of free school meals (FSM).

4.1.1.2 The Pilot is currently in the delivery phase – which began on the 19 September 2023. BCC is working with the Bristol Parent Carer Forum to develop and support the evaluation of the Pilot. Planning to develop a second and third Test and Learn Pilot is underway. The focus of which will be confirmed in late November, with an expected start date in early January 2024

4.1.2 **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).

4.1.2.1 BCC's Delivery Partners Private Public Ltd., working in collaboration with Social Finance, have now completed the initial analysis phase focusing on how BCC allocates funding known as 'Top up'. This has included interviews with internal and external stakeholders, analysis of SEND funding data, national benchmarking, and best practice.

4.1.2.2 PPL/Social Finance have developed a set of recommendations on how BCC could achieve its objectives of a sustainable use of High Needs Block (HNB) Funding, whilst remaining inclusive and championing early intervention. These recommendations have been designed drawing on research into best practice.

4.1.2.3 PPL/Social Finance are seeking feedback on a set of recommendations during the consultation period which went live on the 1 November 2023 and will close on the 13 December 2023. The consultation includes an online survey, which can be found on BCC's [Ask People](#) page, and a series of virtual and in-person focus groups with council staff, school staff, parents and carers, and young people.

4.1.2.4 For pupils (school age and Post 16) with no EHC plan / in receipt of non-statutory top-up funding, BCC is presenting three options for consultation -

- Retain current statutory funding pre controls/oversight
- Use a proportion of current non-statutory funding for a targeted early intervention and inclusion fund
- Remove non-statutory funding.

4.1.2.5 Following the closure of the consultation, PPL/Social Finance will synthesise findings to inform the final recommendation for a key decision at BCC's Cabinet in the early new year. A report on the findings will also be presented to the Schools Forum in January/February 2024.

## **4.2 Belonging with SEND (BwS) Programme – Progress since January 2023**

4.2.1 The Programme is funded via a school block transfer of £900,000 in the financial year 2022/23.

4.2.2 The BwS Programme aims to support schools financially to turn creative ideas into innovative inclusion practice.

4.2.3 In January 2023, Schools Forum agreed to extend the end date of the programme up to the end of the academic year 2023/24.

4.2.4 Three rounds of grant funding have taken place. Grants were made available in the following three components:

- 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.
- Component 2 – Grants of up to £50,000 available to groups of schools looking to scale up existing evidence informed interventions which have been successful in Bristol.
- Component 3 – Grants of up to £5,000 for individual, or groups of schools looking to develop evidence using a test and learn approach.

4.2.5 29 grants have been approved by a Board consisting of partners internal and external professionals – this includes expertise in early intervention,

educational inclusion, SEND school improvement and educational psychology. 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.

4.2.6 In total £457,666 worth of grant funding has been allocated via the BwS programme, this can be broken down per component as follows -

- Component 1 – Two grants totalling £89,222
- Component 2 - Seven grants totalling £292,251
- Component 3 – 20 grants totalling £76,193.

4.2.7 In total, 13 grant applications were rejected as they did not meet the funding criteria.

4.2.8 A summary of each funded project in components 1 and 2 is as follows:

Component	School	Amount	End Date	Summary
1	Woodlands Academy	£55,537	Completed July 2023	Roll out Hamish and Milo wellbeing intervention focusing on emotional literacy for primary aged children in three primary schools (Waycroft, Woodlands, Wicklea) costs include – staffing, equipment, training etc.

1	May Park	£33,685	July 2024	Collaboration with Bristol Family School CiC to implement a psychologically informed intervention to support vulnerable children and their families.
2	North Star Academy	£50,000	December 2023	Coaching, support and mentoring for 6 secondary schools mirroring NS' outreach primary offer
2	Education Psychology – Bristol City Council	£68,200	July 2024	MeLSA training and supervision for 60 LSA/TAs. One whole school MeLSA programme in the academic year 2023/24
2	Cathedral Primary School	£22,401	March 2024	Build a trauma informed and ACE aware culture across primary schools in the CPS Trust
2	City Academy	£47,200	Completed July 2023	Collaboration with Unique Voice to deliver the 'Bossing It' programme to support young people



				with SEND in four CLF schools
2	Cabot Learning Federation	£15,950 (Previous agreement £17k)	March 2024	Transition project focusing on supporting non-CLF primary students transitioning to CLF secondary schools
2	Briarwood Special School	£50,000	July 2024	Specialist support to review and write SEND school improvement plans with 6 Bristol primary schools
2	Cathedral Choir School	£38,500	July 2024	Project to implement the Education Endowment Foundation's (EEF) <a href="#">'5 a Day for SEND'</a> guidance across CST schools in Bristol.

4.2.9 The following table outlines the name of the school and the size of the grant for component 3.

Recipient	Grant Funding	End Date
Elmfield School for the Deaf	£1,330	31/03/2024
Whitehall Primary	£1,895	31/03/2024
Trust in Learning (TiLA) 1	£2,067	31/03/2024
Barton Hill Academy	£2,226	31/03/2024
Merchants Secondary School	£2,862	31/03/2024

St Anne's Infants	£3,000	Completed
E-ACT	£3,000	30/11/2023
Trust in Learning (TiLA) 2	£3,060	31/03/2024
Summerhill Infants	£3,415	Completed
Willow Park Church of England	£4,182	31/07/2024
St Peter and Paul Primary School	£4,576	Completed
Hareclive E-ACT Academy	£4,820	31/03/2024
Knowle Park Primary School	£5,000	Completed
North Star Academy Trust	£5,000	31/03/2024
Southville Primary	£5,000	Completed
St Bonaventures Primary School	£5,000	30/11/2023
St Werburgh's Primary School	£5,000	31/03/2024
Murmuration Community Therapy	£5,000	31/07/2024
DBAT 1	£4,880	31/07/2024
DBAT 2	£4,880	31/07/2024

4.2.10 Grant recipients are paid in instalments following the successful completion of a monitoring schedule set out in individual grant agreements.

4.2.11 £106,921 was paid out in grant funding in 2022/23. To date £225,203 has been paid in 2023/24, with a further £77,681 planned for the remainder of the financial year.

4.2.12 It is estimated that £51k worth of funding will be required to meet the remaining payment schedules for the period April – July 2024. Therefore, it is asked that the Schools Forum approve a carry forward of £51k to meet these commitments in the new financial year. This amount may increase if there are delays in projects between now and March 2024.

4.2.13 £440k is currently unallocated. It is proposed that this funding is used to cover the start-up costs of an Inclusion Hub, focused on early intervention, for the period of December 2023 and March 2024.

4.2.14 Other options have been explored. Further funding rounds are resource heavy in terms of administration. This is not currently an option. 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. The Mediated Learning Support Assistant (MeLSA) offer is a direct result of this approach. Other centrally developed opportunities have been explored, including an Early Language programme in Key Stage 1, but due to resourcing limitations this has not been possible.

4.2.15 The proposed Inclusion Hub would be delivered by BCC's Alternative Learning Provision (ALP) team and initially offered to schools in Bristol for free in 2023/24 using this funding source. The intention is to move towards a more sustainable, contribution-based model from 2024/25 onwards. The intervention, which was co-designed with schools, broken down into 4 tiers:

- Tier 1 – School Based – support to ensure that the school is demonstrating a fully graduated response.
- Tier 2 – Triage and Treat – provision and support to ensure that any extra support is targeted and effective.
- Tier 3 – Turnaround Provision – Short term placements off-site to address specific identified needs.
- Tier 4 – Long term Provision – A more thorough investigation into the needs of a child in an AP setting.

### **4.3 Remaining DSG Projects**

4.4 This section outlines the progress and funding of elements of the DSG programme directly funded by the Schools Block transfer of £1.6m for 2023/24

### **4.5 EHCP Process Improvement**

4.5.1 Reviewing BCC's EHCP process comes under the wider operating model review element of BCC's Our Families Transformation programme. It is not therefore directly part of DSG Programme. Proposed changes will enable BCC to process EHC requests more efficiently and reduce the deficit in the High Needs Block. £600k of funding from the 2023/24 schools block transfer is allocated to the delivery of this project.

4.5.2 Within BCC the demand for EHCPs has been increasing year-on-year. This is putting large amounts of pressure on the SEND service to assess and issue all EHCPs plans within the statutory timeframes.

4.5.3 The service has already made significant improvements to its overall processes through its 'Time for Change' programme. However, the service is still unable to meet the statutory timeframes for assessment and issuing and therefore needs to consider further potential improvements to help manage the high numbers of EHCPs and work towards achieving improved performance within the statutory timeframe.

4.5.4 The service has therefore acquired support from PriceWaterhouseCoopers (PWC) to provide extra capacity to map the end-to-end process and identify potential improvement opportunities.

These opportunities will look to supplement existing improvement and will look to utilise automation to aid officers in their day-to-day tasks.

## 4.6 Programme Costs

4.6.1 The remaining Schools Block transfer is used to cover the Programme management and costs as follows:

- £496k - Total contributions 2023/24 to the following posts
  - 0.5 FTE Head of Transformation – Our Families
  - SEND Strategic Programme Manager
  - Programme Accountant
  - SEND Inclusion Consultant
  - 0.5 FTE SEND Data Analyst
  - ICT Project Management
- £42k to develop and deliver the Workforce Development programme.
- £50k allocated to fund implementation of SEND funding matrix following the completion of the DBV Top Up Funding Key Decision.

4.6.2 £1.19m - Current commitment of funding from £1.6m in financial year 2023/24

4.6.3 Request that Schools Forum approve the carry forward of any remaining funding into 2024/25 to cover the continued costs associated with programme delivery and management – estimated to be £400k.

## 5. DSG Management Plan mitigation proposals

1.1. As part of the Education Transformation program and delivering better value (DBV) program a range of mitigation proposals are being developed and could potentially bring the HNB to a sustainable footing pending on further due diligence & formal consultation. A list of latest mitigations is available in Table below.

Please note the mitigation proposals are iterative and ongoing work is being carried out to review all the schemes shown below in to ensure savings targets are deliverable & on target.

We are awaiting feedback from schools regarding the consultation around 'Non-Statutory Top Up' and we are currently engaging with the DFE and seeking guidance around the details of our savings proposals.

We aim to provide you with a final list of our savings proposals in January 2024 once we have concluded our ongoing due diligence and the points mentioned above.

Key Mitigations/Savings	Mitigations/ Savings forecast 2023-24	Mitigations/ Savings forecast 2024-25	Mitigations/ Savings forecast 2025-26	Mitigations/ Savings forecast 2026-27	Mitigations/ Savings forecast 2027-28	Mitigations/ Savings forecast 2028-29	Mitigations/ Savings forecast 2029-30
<b>SCHEME A1, A2 &amp; A3</b> Reduce the reliance and placements in independent non maintained schools, including out of authority, by increasing the availability and suitability of local provision.	£0	£3,549,873	£4,954,840	£4,954,840	£4,954,840	£4,954,840	£4,954,840
<b>SCHEME B1</b> Review the effectiveness of rational SEND Budget in schools and settings and ensure non statutory top up funding to mainstream schools is robust, appropriate, time limited and impactful	£1,700,000	£1,025,282	£1,886,163	£2,167,043	£2,167,043	£2,167,043	£2,167,043
<b>SCHEME C5 &amp; C6</b> Support and drive mainstream schools to meet a higher level of need, in a more cost effective way whilst maintaining the quality of provision.	£0	£490,242	£492,294	£492,294	£492,294	£492,294	£492,294
<b>SCHEME D2</b> Therapies Framework. Ensure that therapies that are mainly associated with EHCP are appropriate	£240,000	£240,000	£240,000	£240,000	£240,000	£240,000	£240,000
<b>SCHEME E1</b> Review the methodology of top up and funding uplifts to ensure best value is delivered	£0	£1,991,150	£2,282,078	£2,872,999	£2,872,999	£2,872,999	£2,872,999
<b>SCHEME F1</b> Review post 16 offer to ensure full alignment to DFE/ESFA guidance	£0	£1,198,440	£1,435,735	£1,875,025	£1,875,025	£1,875,025	£1,875,025
<b>SCHEME G2</b> Review and reform of the Alternative Learning Provision model and funding to improve outcomes and ensure best value provision	£172,000	£172,000	£172,000	£172,000	£172,000	£172,000	£172,000
<b>DEV</b> DEV stretched confidence benefits - annual (Please see DBV Proposals Table 1 for further information)	£0	£1,034,669	£5,227,120	£10,528,030	£14,828,030	£14,828,030	£14,828,030
<b>PLEASE NOTE:</b> The mitigated savings for financial years 2026-29 & 2029-30 are left as 2027-28 and require further due diligence							
<b>Total savings</b>	<b>£2,112,000</b>	<b>£10,000,000</b>	<b>£16,700,000</b>	<b>£23,100,000</b>	<b>£27,400,000</b>	<b>£27,400,000</b>	<b>£27,400,000</b>

Subject to validation and final consultation, the latest forecast mitigation proposals could improve the forecasted financial position by £2.1million in 2023/24 and up to a cumulative of £12.6million by 2027/28 if fully supported by the public.

*Please note there is a reduction of £1m mitigation in 2023/24 due to further due diligence work and delay in the appointment of a delivery partner to deliver workstream two proposals.*

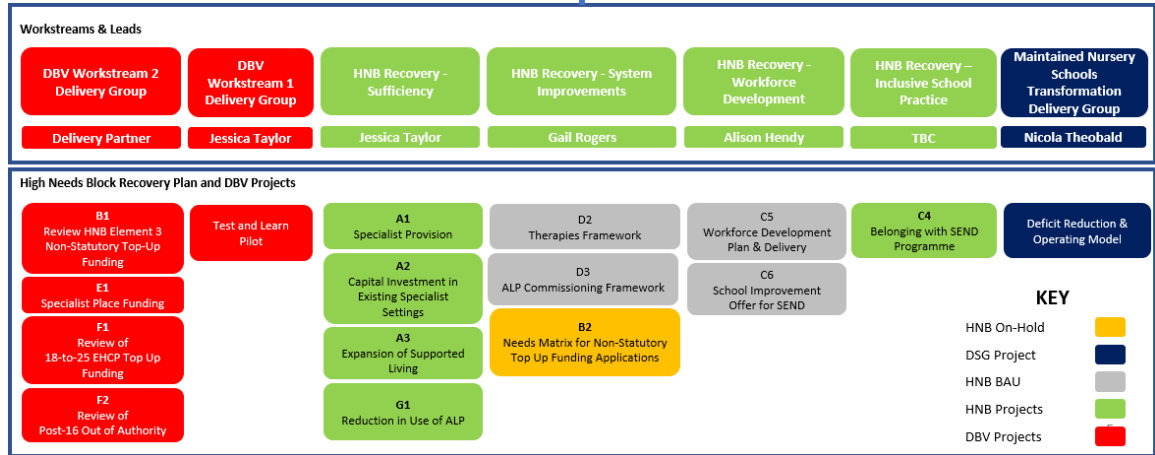
Whilst we continue to work with the DfE to drive the improvements required in outcomes for children with additional and special educational needs and achieve a balance in year position, that can be sustained and demonstrable reduces the deficit, we will need to consider all potential funding sources.

The Council has made significant investment in the General fund budget of circa £4m per year since 2022-23 to improve SEN service and fund Home to School Transport (HTST) and similarly have significant pressures in year of the same magnitude which will be recurrent in 2024/25 and beyond.

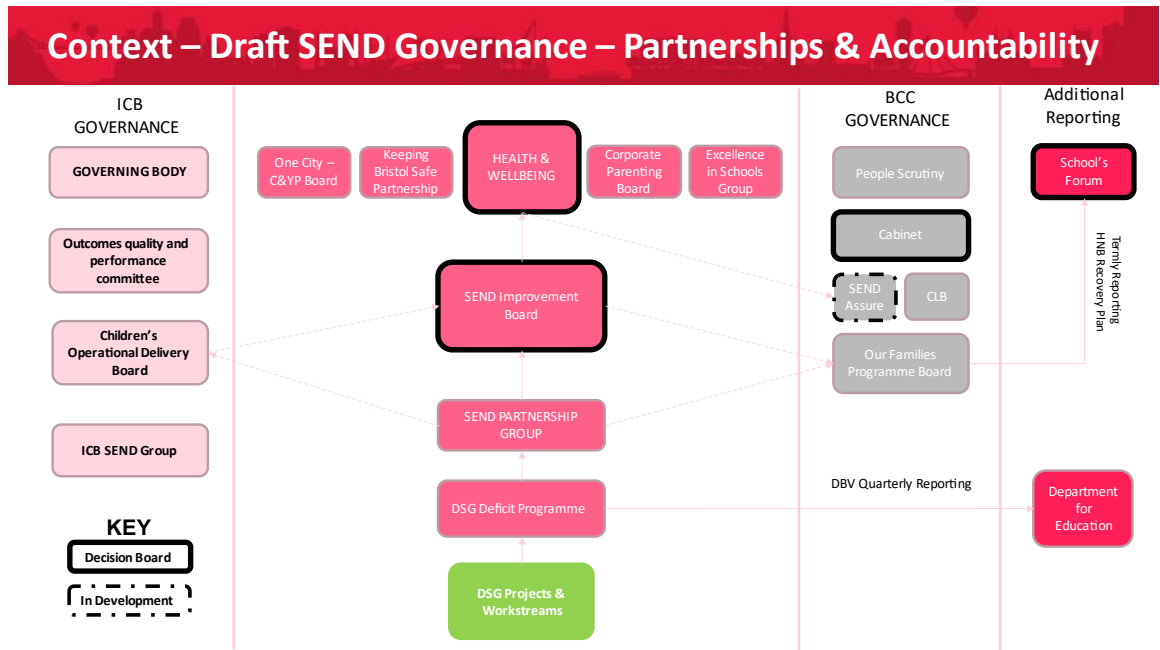
We recognise the collaborative approach adopted to date and the significant contribution that schools have and continue to make in investing in the Education Transformation programme.

## 6. Appendices

### 6.1 Appendix a



### 6.2 Appendix b





**Bristol Schools Forum**  
**2023/24 DSG forecast report as at September 2023 (Period 06)**

<b>Date of meeting:</b>	28 <sup>th</sup> November 2023
<b>Time of meeting:</b>	5.00 pm
<b>Venue:</b>	City Hall

## **1 Purpose of report**

1.1 This report provides information of the 2023/24 DSG position as at Period 06 (P06) to end of September 2023.

## **2 Recommendation**

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

- a) note the P06 forecast position as at end of September 2023 for DSG
- b) note the Q2 forecast position for maintained schools.
- c) Note the increase funding available for schools in financial difficulties.

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

The DSG ended the 2022/23 financial year with an in-year deficit of £15.030m or a cumulative deficit of £39.680m including £24.650m deficit brought forward from the previous years.

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

The DSG is forecasting to overspend by £16.396m in 2023/24, the key change being delivery of £2.112m savings from the DfE DBV programme. The main driver of forecast overspend remains to be in High Needs top-up and placements costs resulted from increasing EHCP and complexity of Children with SEN. The mitigated cumulative deficit forecast position at the end of 2023/24 could reach £56.076m.

Early Years is forecasting an in-year overspend of £0.912m, this is driven primarily from increased demand in EY's SEN £0.640m and EY & Nursery Improvements overspending of £0.269m. This item will be mitigated with use of EY transformation funding carried forward from 2022-23.

High Needs Transformation programme is forecasting an overspend of £0.980m which will be largely met from the carry-forward of £0.928m funding agreed from previous years.

**Summary DSG position as at 2023/24 Period 6 (P6)**

Table 1 - Bristol Dedicated Schools Grant 2023/24	2022/23 B/f balance	Gross DSG funding / Budget 2023/24*	P06 Gross DSG forecast outturn	In-year variance as at P06	Cumulative C/f forecast position as at P06
	£'000				
Schools Block	(787)	323,851*	323,851**	(0)	(787)
De-delegation	(527)		(1)	(1)	(528)
Central School services Block	8	2,717	2,709	(8)	
Early Years	(605)	37,432	38,344	912	307
High Needs Block	42,520	86,675	103,230	16,625	59,145
High Needs Transformation	(928)	1,627	2,677	980	52
Funding	0	(452,302)	(452,302)	0	0
<b>Total (Unmitigated position)</b>	<b>39,680</b>		<b>18,508</b>	<b>18,508</b>	<b>58,188</b>
Mitigations (budget vs. forecast in 2023-24)		(3,180)	(2,112)		(2,112)
<b>Total - Mitigated position</b>	<b>39,680</b>		<b>16,396</b>	<b>18,508</b>	<b>56,076</b>

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

**LA Maintained Schools forecast position.**

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

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

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

Table 2

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

Based on information provided by LA Maintained Schools at Quarter 2, an in-year deficit position of £2.572m (including Children's Centre) was projected by Bristol LA Maintained

Between Q1 and Q2 Maintained Nursery Schools in-year forecast position deteriorated by £0.397m due because Schools have adopted a more prudent position following the emerging pressure over the Summer despite the previously reported uplift in the MNS supplement for 2023/24 and the enhanced rates from September 2023. Recovery plans are required to address the accumulated deficits.

Maintained Primary and Secondary schools also identified deepening pressures in their positions. The closing forecasts for this sector worsened with movement if forecast closing position of £0.819m.

Special schools and PRUs also reported deteriorating positions, with movement of £0.055m in the period.

Type of Setting	Opening Bal 23/24	Q1 23/24 Forecast C/BAL	Q1 proposed Annual Recovery	Q2 23/24 Forecast C/BAL	Q2 23/24 C/Bal Adjusted for RCC Reversal	Minded To	No of school approved for Licenced Deficit	Licenced Deficit Approval
	£'000	£'000	£'000	£'000	£'000	£'000		£'000
Nursery	£7,118	£7,005	£76	£7,355	£438	£438	2	£438
Primary	£441	£827	£8	£1,001	£955	£103	1	£103
Primary with Nursery Class	£416	£684	£0	£739	£99	£0		£0
PRU	£0	£0	£0	£0	£0	£0		£0
Secondary	-£40	-£71	£0	£293	£0	£0		£0
Special	£234	£484	£0	£727	£0	£0		£0
<b>Total</b>	<b>8,169</b>	<b>8,930</b>	<b>84</b>	<b>10,115</b>	<b>1,492</b>	<b>541</b>	<b>3</b>	<b>541</b>

Education and Financial Service are working closely with the schools on recovery programmes with 3 schools already have their licenced deficit plans approved.

All schools forecasting deficit position have been notified to produce robust recovery plans to secure their long-term financial sustainability. Meetings are being held with schools' leadership team and schools' governing bodies to explore solutions.

Where plans demonstrate sustainability and the ability to recover the historic financial deficit, a funding source is needed to bridge temporarily the financial gap in the concerned LA maintained schools.

In September's meeting, School Forum endorsed the proposal to provide that bridge from £1.102m of earmarked reserves. This £1.102m is composed of funding from the closed school surplus (£0.517m), the schools in financial difficulty reserve (£0.335m) and from TWS reserves (£0.250m).

Following School Forum, BCC Cabinet approved the plan to use the £1.102m earmarked reserves to provide this temporary support to the schools in financial difficulty.

September's meeting officers informed School Forum of the proposed grant from the ESFA for maintained schools in financial difficulty. The allocation being made available to Bristol has since been announced at £0.675m. This is ringfenced for the support of maintained schools (including Nursery Schools) in financial difficulty; the ESFA provides alternative dedicated support for academies that are in financial difficulty. The additional funding

stream increases the financial support available to schools in financial difficulties to £2,047m. The link to the ESFA grant for the Schools in Financial Difficulties support grant can be found [here](#).

Table 3 shows this additional grant, and so the total available to support maintained schools in financial difficulty.

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

Planning for the usage of the £0.675m grant is now taking place in line with the guidance and wider work around supporting schools and nursery schools in financial difficulty and the utilisation of these funds will be reported to Schools Forum.

With regard to the Dedicated Schools Grant Block forecast position:

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

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

- 3.4 **High Needs Block (£17,604m overspend).** The High Needs block is forecast to overspend overall by £17.6m in 2023/24. This is mainly driven by the increasing numbers and complexity of cyp with EHCPs in the city, as evidenced by pressures on top-up and placement budgets. Additionally

there is a planned overspending in the Education Transformation programme to utilise funding carried forward from 2022/23.

- 3.5 High Needs recovery plan proposals are being developed alongside the DSG Management Plan and Department for Education Delivering Better Value for SEND Programme (DfE DBV programme),

**The Belonging with SEND Programme** (previously known as Education Transformation Programme), is primarily concerned with SEN and consequently the High Needs Block, and a separate report is being presented to School Forum in November 2023

- 3.6 **Funding (Nil Variance).** £452.302m as at July 2023 announcement, which will be subject to Early Year's adjustment where funding is calculated in arrears based on actual participation.

### Appendix 1 - 2023/24 DSG P06 forecast position as at September 2023

Bristol DSG Outturn position as at Period 6 (P06) 2023/24	Brought forward 1.4.22	Funding 2023/24	P06 Forecast position	In-year movement	Carry forward 31.3.24	2022/23 Outturn position
	£'000	£'000	£'000	£'000	£'000	£'000
Maintained Schools		80,857	80,857	(0)		77,821
Academy Recoupment		240,206	240,206	0		223,990
Growth Fund		2,788	2,788	0		2,063
<b>Schools Block</b>	<b>(787)</b>	<b>323,851</b>	<b>323,851</b>	<b>(0)</b>	<b>(787)</b>	<b>303,874</b>
<b>De-delegation Services</b>	<b>(527)</b>	<b>0</b>	<b>(1)</b>	<b>(1)</b>	<b>(528)</b>	<b>(23)</b>
Admissions	6	575	575	0	6	529
Centrally Retained	1	2,142	2,134	(8)	(7)	2,213
<b>Schools Central Services</b>	<b>8</b>	<b>2,717</b>	<b>2,709</b>	<b>(8)</b>	<b>(0)</b>	<b>2,742</b>
National Formula		29,523	29,503	(19)		27,105
2-Year-Old Funding		2,914	2,912	(2)		3,172
Pupil Premium (EYPP)		386	386	0		317
Additional Support Services		500	500	0		457
SEN Top up		1,686	2,326	640		2,074
Staffing		2,116	2,113	(3)		1,892
Disability Access Fund		152	181	29		105
SEND Support		156	155	(1)		
EY & Nursery improvement work		0	269	269		74
<b>Early Years Block</b>	<b>(605)</b>	<b>37,432</b>	<b>38,344</b>	<b>912</b>	<b>307</b>	<b>35,196</b>
Commissioned Services		2,653	4,673	2,019		3,422
Core Place Funding		9,289	9,235	(54)		9,102
Staffing		1,237	2,558	1,321		2,272
Top Up		46,390	51,665	5,275		48,610
Placements		10,349	17,609	7,260		14,485
Pupil Support		975	1,708	733		1,402
HOPE Virtual School		236	235	(0)		235
Academy Recoupment		15,547	15,547	0		15,099
Education Transformation		1,627	2,677	1,050		1,343
<b>High Needs Block</b>	<b>41,592</b>	<b>88,302</b>	<b>105,907</b>	<b>17,604</b>	<b>59,196</b>	<b>95,972</b>
<b>Funding</b>		<b>452,302</b>	<b>470,810</b>			<b>437,761</b>
<b>Total</b>	<b>39,681</b>	<b>0</b>	<b>18,508</b>	<b>18,508</b>	<b>58,189</b>	<b>15,031</b>

**Appendix 2 - High Needs Block top up funding breakdowns by settings as at P6: September 2023**

<b>Appendix 2 - High Needs Block top up funding breakdowns by settings as at P6:</b>	<b>Funding 2023/24</b>	<b>P06 Forecast Outturn</b>	<b>In-year movement</b>	<b>Carry forward 31.3.24</b>	<b>2022/23 Outturn position</b>	<b>2021/22 Outturn</b>
	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>		<b>£'000</b>	<b>£'000</b>
HNB: Top Up Special Schools	23,796	21,957	(1,839)		23,226	22,649
HNB: Top Up OLA	2,107	2,459	352		2,501	2,317
HNB: Top Up GFE	3,714	4,370	656		4,556	4,002
HNB: Top Up - Resource Bases	2,359	3,551	1,192		2,351	2,175
HNB: Top Up - Mainstream Schools	11,755	16,217	4,462		17,180	10,177
HNB: Top Up - PRUs	2,658	3,112	453		2,543	1,526
<b>HNB: Top Up</b>	<b>46,390</b>	<b>51,665</b>	<b>5,275</b>		<b>52,357</b>	<b>42,845</b>



## **Bristol Schools Forum** **Schools Block School Funding Formula 2024/25**

<b>Date of meeting:</b>	28 <sup>th</sup> November 2023
<b>Time of meeting:</b>	5:00 pm
<b>Venue:</b>	City Hall

### **1. Purpose of report**

- 1.1 To inform and seek agreement of the Schools Forum on the principals of the funding formula for mainstream schools and academies for 2024/25, prior to final allocations being made available by the ESFA in December, for final formula agreement in January 2024.

### **2. Recommendations**

Schools Forum is invited to:

- 2.1 Note the changes in the formula methodology for 2024/25
- 2.2 Provide feedback, as appropriate on the proposed arrangements for the 2024/25 mainstream funding formula, including the amount set aside for the Growth Fund to allow final proposals to be made and agreed on the Schools' Budget for 2024/25 in January 2024; specifically:
- On the transfer 0.5% to High Needs Block. In line with consultation response the LA is seeking this transfer.
  - set MFG at 0.0%. In line with the consultation response the LA is proposing to set the MFG at 0.0%
  - set the value of the lump sum. The LA is seeking to set the lump sum to the maximum allowed
  - how to allocate remaining funding (after mandated items). The LA is seeking to maximise the AEN factors, and then direct the remainder to the AWPU with no bias towards any phase.
  - the value to allocate for the Growth Fund. The LA is seeking to set at £2.0m for 2024/25.

### **3. Changes between the 2023/24 formula methodology and the 2024/25 methodology**

- 3.1 The main formula in 2024/25 is similar in operation to the formula in 2023/24. However, the ESFA have announced some changes for 2024/25 which were presented to schools forum at the meeting held on 26<sup>th</sup> September 2023. In summary these included:
- Local factor values must move a further 10% closer to NFF factor values
  - New formulaic approach to allocating split sites funding
  - Rolling the MSAG into the NFF

- Introducing a methodology for calculating and allocating funding for falling rolls.
  - New local formulaic requirements for growth funding.
- 3.2 Additional to the changes in methodology, the minimum per pupil funding amounts have been increased from the 2023-24 levels. KS1 & KS2 are now £4,610 from £4,405. KS3 is now £5,771 from £5,503 and KS4 is now £6,331 from £6,033.
- 3.3 All other NFF factor unit values have been increased. The increases in NFF unit values are as set out in **Appendix A**.

#### 4. Funding available

- 4.1 Provisional school block allocations were announced by ESFA in July 2023. However, in October the ESFA announced that an error was made during the initial calculations of the 2024-25 schools NFF which resulted in the overall cost of the schools NFF being underestimated. Therefore, the original NFF figures published in July 2023 were incorrect. This error has now been corrected and revised allocations were published by ESFA on 6<sup>th</sup> October 2023.
- 4.2 The provisional allocations are set out in the table below and are based upon the October 2022 school census data. Schools Forum is cautioned to note that final allocations will be different, being based upon the October 2023 school census data.

This indicates that the provisional funding for Schools Block in 2024/25 is £341.187m. The equivalent figure for 2023-24 was £330.574m\* (increase of £10.6m). In addition, there will be an as yet unannounced allowance for Growth. For 2023-24 this was £2.2m. **Table 1** sets out how the indicative 2024-25 funding is composed.

\*This figure includes MSAG totalling £10.714m

**Table 1: Revised indicative Schools Block Budget 2024/25**

	Unit of funding	2023/24 pupil numbers	£ total
Primary	£5,200.70	35,001	£182,029,793
Secondary	£6,873.45	21,376	£146,927,963
Funding through the premises factors			£12,229,486
Growth funding element			Not yet announced

<b>Provisional NFF 2024-25 schools block funding (excluding funding through the growth factor)</b>			<b>£341,187,242</b>

## 5. Funding formula

- 5.1 The DfE is moving to a hard funding formula, and 2023-24 was the first year of formal transition. As in previous years, the school block funding received into the LA is calculated on National Funding Formula, and there are increasing restrictions and requirements on how the Local Authority may distribute this funding to schools via the local formula. For 2024/25, Local Authorities must move their local formula factor values at least 10% closer to the NFF.
- 5.2 **Minimum per pupil funding levels.** Minimum funding levels per pupil are set as part of the NFF, for 2024/25 these will be £4,610 for primary schools and £5,771 for KS3 and £6,331 for KS4 in secondary schools (the calculation includes the lump sum but excludes other premises factors).
- 5.3 **Positive Minimum Funding Guarantees (MFG).** For 2024/25 funding formula the MFG can be set within the range +0.0% and +0.5%. This is the same as 2023/24.
- 5.4 For the 2023/24 funding formula, an MFG of +0.0% was agreed and applied, as both the LA and Schools Forum recognises the effect the MFG has in protecting funding that is no longer due to schools, for reasons of changing pupil characteristics.
- 5.5 **For 2024/25 the LA is proposing setting at the minimum allowable again, at +0.0% for the same reasons as last year.** This is in line with discussions at the sub-group and in line with the consultation results (the consultation is discussed at 6.33 – 6.36 and summary consultation results are shown at 6.37).
- 5.6 **Growth Funding.** Developing a fair and sustainable way of including sufficient resource in the formula to take account of growing pupil numbers continues to be a challenge for the DfE. Previously the DfE have used historic spend as the basis, but this did not help authorities with new, rapid growth. For 2023/24, the DfE is continuing with the formulaic basis for distributing growth funding, based on population changes in medium super-output areas, that was introduced for 2019/20. The allocation for 2024/25 will not be known until it is announced, which is expected during December 2024.
- 5.7 Growth funding is discussed in greater depth later in the paper, however as in previous years it is expected that the final allocation into Schools Block to be similar to the anticipated commitment.

- 5.8 **Movements between blocks.** The government's announcement of more funding into the schools will raise expectations that the additional funding will be passed on to them, and indeed a number of the changes to the formula for 2024/25 enforce this. However, as LAs retains some discretion over the application of the formula, some discretion over how these increases are passed on remains.
- 5.9 As in previous years, the position of the High Needs budget remains of concern. Whilst additional funding again has been made available for the High Needs block directly, in 2023/24 we transferred 0.5% of the Schools Block (£1.6m) to develop the Education Transformation programme. For 2024/25 the LA has scope to again seek agreement to transfer up to 0.5% of the Schools Block (up to an estimated £1.7m) into the High Needs Block.
- 5.10 The Authority continues to explore all options in closing the High Needs funding gap and create a stable platform for the future, and this includes considering the transfer of funding from Schools Block. In the past, transfers between blocks have supported the Education Transformation Programme and Delivering Best Value (DBV) in SEND Programme. However, for 2024/25 the transfer would be to increase the overall funding available to high needs block, rather than being earmarked for specific areas. For the purposes of this paper the maximum transfer that can be locally agreed has been modelled, based on current funding announcements and in line with the feedback from the consultation, alongside the results with no transfer.

## 6. Funding formula proposals

- 6.1 **Block transfer of up to 0.5% to High Needs:** The LA seeks School Forum views on whether a transfer of up to 0.5% of the available Schools Block to High Needs would be supported.
- 6.2 A block transfer was one of the areas consulted upon, with 13 of the 19 responses supporting a transfer of up to 0.5%. **The LA is therefore proposing the 0.5% transfer from Schools' Block to the High Needs Block.**
- 6.3 **Minimum Funding Guarantee:** The allowed MFG value must again be set between +0.0% and +0.5%.
- 6.4 The LA has discussed this in previous years with Schools Forum and this term worked with the finance sub-group, where the prevailing view has been that the MFG should be set at the lowest allowed value in order to avoid overly protecting schools with reducing AEN characteristics, and also to maximise all available funds remaining after applying the dominant formula commitments, to target areas of local priority.
- 6.5 The consultation with schools also sought their views on the level of MFG for 2024/25 and out of the 19 schools who answered this question, 14 were in favour of setting the MFG at +0.0%.

- 6.6 Given the strong preference expressed, and previous practice, **the LA once again proposes to set the MFG at the lowest allowable value, this time at +0.0% for 2024/25.**
- 6.7 Application of the formula funding for 2024/25: Once mandated formula commitments such as the minimum per pupil funding, minimum funding guarantee, premises factors, growth fund and any falling rolls fund allocations have been met, the LA seeks the views of School Forum as to **how to apply any remaining available funding remaining within the Schools Block.**
- 6.8 In previous years formula funding has been targeted at preserving the value of the lump sum and prioritised the Additional Educational Needs (AEN) factors: Deprivation, EAL and Prior Attainment.
- 6.9 Due to the tighter restrictions around factor values, once all mandated requirements have been met, it is no longer possible to distribute all remaining funding through the Additional Education Needs factors alone. Therefore, following discussions with schools' forum sub-group on 31<sup>st</sup> October 2023, the LA has completed modelling for schools' block funding based on increasing the lump sum and the AEN factors to maximum allowed (apart from mobility), with remaining funding being distributed through AWPU. These factor values can be found in Appendix A.
- 6.10 Forum is being asked whether it supports the above method or if the AWPU should be prioritised, or any other component of the funding formula such as supporting unit values for a specific sector.
- 6.11 The question as to the method of distributing funding was put to schools in the consultation. Schools were free to choose from nine options, in various combinations of the AWPU, the AEN and the lump sum. Out of 19 responding schools, 17 answered this question, with 10 opting to keep the lump sum at minimum allowed and support the AEN over the AWPU, 2 schools voted to increase the lump sum and prioritise the AEN factors to maximum allowed, 2 schools voted to keep the lump sum at minimum allowed and support both AWPU and AEN, 2 schools voted to increase the lump sum and support AWPU and AEN, 1 school voted to support AWPU and AEN and not preserving the lump sum.
- 6.12 **Preference to target any particular sector in the unit funding:** Forum will have noticed that the school funding formula uses differing unit values for factors for primary and secondary schools. This has been a feature of the funding formula since its inception and remains a feature of both the LA local formula and the NFF.
- 6.13 In previous discussions Forum has noted that locally the shift towards the NFF has benefitted larger schools to a greater degree than smaller schools. Forum has also noted that primary schools are no longer seeing substantive growth in pupil numbers, and indeed any primary schools are experiencing a decline in roll.
- 6.14 The LA seeks Forum's views on whether the LA should target or prefer the primary unit values over the secondary unit values to any degree when allocating any remaining available formula funding.

6.15 This question was asked of schools responding to the consultation. Of the 19 schools in the voting pool, 17 schools responded to this question, 7 schools wanted to see Primary targeted exclusively, with the remaining 10 responding schools wanting no distinction between sectors made.

Given the consultation outcome **the LA is proposing no bias of this distribution to Primary and Secondary and maximising the lump sum and AEN factors (apart from mobility) and distributing remaining funding through AWPU.**

6.16 **Other formula factors – premises factors:** In addition to other considerations, and in keeping with established practice, **the LA is proposing to continue with:**

- **Appropriate allocations for NNDR**
- **Appropriate allocations for PFI**

6.17 **GROWTH FUND:** The forecast costs of growth, funded from both the Growth Fund and via the APT for “new and growing schools” are set out in **Appendix C**. This projection is based on the current policy, the growth anticipated in September 2023 and the current rates at which the LA supports growth.

6.18 This table also includes a forward projection of growth in these schools through to September 2027.

6.19 New school openings are treated as “New and Growing Schools” and funded as such via the Schools Block formula rather than as bids to the Growth Fund.

6.20 It should be noted that the growth in secondary schools will be moving through year groups, and some will move from KS3 to KS4, becoming proportionately more expensive to support due to the higher KS4 AWPU, over the KS3 AWPU. This will increase the cost to the Growth Fund.

6.21 The actual level of cost will depend on actual pupil numbers recorded in the census and on the final formula considerations in those financial years. The projections shown are at an average of the current 2023/24 funding values.

6.22 Existing growth pressures continue to shift away from Primary Schools and into Secondary Schools. The degree at which there will need to be expansion of existing secondary schools in September 2024 and beyond is not yet certain, but the projection allows for some expansion of existing schools.

6.23 The commitment on the Growth Fund for 2024/25 – projected in the appendix at 2023 funding levels – is projected at £0.719m. The actual cost will depend on actual pupil numbers recorded in the Autumn 2024 census, the prevailing 2024/25 funding formula values, and the possible need to identify further expansions resulting from the Spring 2024 admissions round. Therefore, the actual cost is likely to be higher than £0.719m, but this increase cannot be quantified at this time.

6.24 The LA proposed and School Forum supported establishing a Growth Fund of £2.0m for 2023/24. Whilst commitments in Primary schools is expected to reduce in 2024/25, commitments to secondary school growth will increase, so again **the LA is proposing to allocate £2.0m to the Growth Fund.**

- 6.25 Funding for the Growth Fund is primarily supported from the as yet unannounced Growth element of the Schools Block. The actual allocation is expected to be announced in December 2023 alongside the release of the final DSG allocations and the final school census data.
- 6.26 Allocations will be available once the ESFA releases the data on their website and will be shared with School Forum at the January 2024 meeting, alongside presentation of the proposed final formula.
- 6.27 **FALLING ROLL FUND:** The LA may set aside some of the school block funding in order to create a small fund to support Good or Outstanding schools with falling rolls, where planning data shows the surplus places will be needed within the next three financial years.
- 6.28 BCC last operated the Falling Rolls fund in the 2016/17 financial year. At the meetings of November 2016 and January 2017, Forum received reports on the Falling Rolls fund and subsequently decided against continuation of the fund.
- 6.29 The School Forum finance sub-group revisited consideration of a Falling Rolls fund for 2020/21 at their meeting of 16<sup>th</sup> July 2019. The decision was not to re-establish a Falling Rolls fund for 2020/21.
- 6.30 The wording of the current (though dormant) locally agreed criteria restricts eligibility to secondary schools. Given the current and expected pupil population in secondary schools, it is questionable whether any school would qualify for support under the current criteria. Any re-establishment of a falling rolls fund would be at the expense of funding applied through the mainstream formula, reducing the available funds to all schools. The wording of the currently dormant Falling Rolls fund is reproduced in **Appendix B**
- 6.31 **At this time the LA is not proposing to reinstate the Falling Rolls fund for 2024/25.**
- 6.32 **Summary of LA's proposals:**
- 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
  - d. The lump sum be set at maximum allowed, £139,850 for both Primary and Secondary
  - e. That fund remaining after meeting mandated requirements be distributed to the AEN factors to maximum allowed with remaining funding through AWPU
  - f. No bias of this distribution to either primary or secondary
  - g. Premises factors (NNDR and PFI) 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

6.33 **Consultation with schools:** the LA consulted with schools on various aspects of the funding formula for 2024/25. The consultation was communicated to schools through the Service Director Education, Skills regular newsletter, via email and through school forum members. The consultation ran from 3<sup>rd</sup> October to 14<sup>th</sup> November 2023.

6.34 The consultation consisted of two main sections. The first was open to all schools and sought opinion on:

- a. any block transfer to High Needs
- b. on the MFG
- c. on the prioritisation of any available funding after mandated commitments
- d. on whether primary should be prioritised in the distribution of any remaining available funding
- e. any other comments

6.35 The second section was open to the maintained mainstream schools only and asked their views on the areas open to de-delegation. The results of the de-delegation section are discussed in a separate paper elsewhere on the agenda.

6.36 Nineteen schools responded to the consultation:

	Maintained	Academy
Primary	6	6
Secondary	0	4
All-through		0
Special	2	0
PRU		1
Nursery		0
<b>Grand Total</b>	<b>8</b>	<b>11</b>

6.37 The summarised responses to the questions were:

	<b>Yes</b>	<b>No</b>
Q1 Agree to Block transfer	13	6
Q2 Comments received	2 from "Yes"	6 from "No"
Q3 Agree to MFG 0.0%	14	5
Q4 Comments received	13 from "Yes" A=10, B=2, C=0, D=0, E=0, F=0, G=2, H=2,	5 from "No" response I=1
Q5 Preferred formula option		
Q6 Prefer any sector? All / Primary	All = 10, Primary = 7	
Q7 Comments received		Twelve comments

Note: Comments received in response to Question 1 are available in Appendix D.



## 7. Future funding arrangements

7.1 2023/24 was the first firm year of transition to a hard funding formula, and although no end of target date has yet been set, the transition will continue in 2024/25. In particular:

- Local Authorities must move their local formula factor values at least a further 10% closer to the NFF
- Local Authorities must use the new national formulaic approach to split sites. This could lead to some BCC schools no longer being eligible under the new NFF criteria
- Local Authorities must follow the new local formula requirements for growth funding
- Local Authorities with a falling rolls find, must follow the new requirements

7.2 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 - comparison of 2024/25 NFF unit values to Bristol's 2023/24 formula unit values

Factor	2024/25 National Funding Formula values (with ACA applied)	Range in which 2024/25 Local Formula value must be applied	Local 2023/24 Formula Values	Factors used for 2024/25 modelling (Mandatory minimum factors highlighted in Green)	
				0% block transfer	0.5% block transfer
Basic Entitlement (Primary)	£3,616	£3,502 - £3,706	£3,317	£3,558	£3,527
Basic Entitlement (KS3)	£5,098	£4,938 - £5,226	£4,677	£5,017	£4,973
Basic Entitlement (KS4)	£5,746	£5,566 - £5,891	£5,271	£5,655	£5,605

Free School Meals (Primary)	£498	£485 - £560	£556	£560	£560
Free School Meals (Secondary)	£498	£485 - £560	£556	£560	£560
Free School Meals Ever 6 (Primary)	£832	£812 - £853	£725	£853	£853
Free School Meals Ever 6 (Secondary)	£1,218	£1,188 - £1,249	£1,059	£1,249	£1,249
IDACI (P F)	£239	£233 - £267	£265	£267	£267
IDACI (P E)	£289	£282 - £321	£319	£321	£321
IDACI (P D)	£452	£440 - £506	£507	£506	£506
IDACI (P C)	£492	£480 - £548	£549	£548	£548
IDACI (P B)	£523	£510 - £583	£585	£583	£583
IDACI (P A)	£690	£673 - £769	£767	£769	£769
IDACI (S F)	£345	£337 - £384	£384	£384	£384
IDACI (S E)	£457	£445 - £512	£513	£512	£512
IDACI (S D)	£640	£624 - £716	£714	£716	£716
IDACI (S C)	£700	£683 - £781	£779	£781	£781
IDACI (S B)	£751	£732 - £839	£838	£839	£839
IDACI (S A)	£959	£935 - £1,071	£1,068	£1,071	£1,071
EAL3 (P)	£599	£584 - £671	£668	£671	£671
EAL3 (S)	£1,609	£1,569 - £1,800	£1,800	£1,800	£1,800
Low Attainment (P)	£1,188	£1,158 - £1,327	£1,326	£1,327	£1,327
Low Attainment (S)	£1,802	£1,757 - £2,015	£2,013	£2,015	£2,015
Primary mobility	£975	£219 - £999	£120	£219	£219
Secondary mobility	£1,401	£315 - £1,436	£173	£315	£315
Primary sparsity	£57,966	£12,765 - £59,415	£6,901	£12,765	£12,765
Secondary sparsity	£84,259	£18,512 - £86,366	£10,046	£18,512	£18,512
Lump Sum P	£136,439	£133,028 - £139,850	£126,627	£139,850	£139,850
Lump Sum S	£136,439	£133,028 - £139,850	£126,627	£139,850	£139,850
Split Sites - Basic	£54,515	£53,152 - £55,877	Not used	£53,152	£53,152
Split Sites - Distance	£27,308	£26,625 - £27,991	Not used	£26,625	£26,625

## **Appendix B – Falling Rolls bid criteria (dormant document, from September 2016)**

### **Falling Rolls Fund Bid Criteria**

As outlined in the EFA document “2014-15 Revenue Funding Arrangements”, Local Authorities may topslice the DSG in order to create a small fund to support good schools with falling rolls where local planning data show that the surplus places will be needed in the near future.

In Bristol, a small fund is available for those secondary schools & secondary academies to **bid for funding** if they meet **all** of the following criteria:

- 1) The school was deemed good or outstanding at their last Ofsted inspection (an EFA stipulation).
- 2) The School has a falling roll in this financial year or the school had a falling number on roll in the last financial year.
- 3) School is deemed to be significantly below PAN, (15%), when looking at total pupil numbers.
- 4) Where local planning data suggests vacant spaces will be needed within the next 3 years.
- 5) The School needs to show how it cannot support its number of pupils with the funding allocation. The School will be expected to cover the temporary funding shortfall from existing carry forward balances prior to application to the falling rolls fund.

If after review the bid meets these criteria, the allocation would be based on the following formula.

### **Formula Calculation**

The formula would look at the actual census and compare it to the PAN of the school, funding an average of the difference between 85% of the PAN and the actual census across all the year groups.

Example:

<b>Year Group</b>	<b>Year 7</b>	<b>Year 8</b>	<b>Year 9</b>	<b>Year 10</b>	<b>Year 11</b>	<b>Total</b>
Actual Census: October 2014	122	134	147	133	151	687
School PAN	216	216	216	216	216	1080

85% of the PAN	184	184	184	184	184	920
Difference between 85% of PAN and actual census	65	50	37	51	33	233

The total difference between 85% of PAN and actual census of 233 pupils is divided by 5 year groups to get an average of 46.6 pupils under PAN (233/5).

The 46.6 pupils are multiplied by the KS3 basic entitlement rate £4,103 (currently for 15/16) = **£191,200.**

### Notes

- 1) Falling rolls bids are capped at a maximum of £200,000 per establishment per annum.
- 2) The deadline for applications to the falling rolls fund is **1<sup>st</sup> December** each year.
- 3) Unspent falling rolls funding will be used to support the overall DSG fund as directed by the Service Director of Education and Skills in consultation with the Head of Finance (People).

## **Appendix C – Current and projected Growth commitments**

Type of Growth	Sector	School	Additional Forms of Entry				
			Sep-23	Sep-24	Sep-25	Sep-26	Sep-27
Growth Fund	Primary	Perry Court	1	1	1	1	1
Growth Fund	Secondary	Orchard	1	1	1	1	0
Growth Fund	Secondary	City Academy	2	1	1	0	0
Growth Fund	Secondary	Bristol Brunel	2	1	1	0	0
Growth Fund	Secondary	Bristol Met	1	0	0	0	0
Growth Fund	Secondary	Colston Girls	2	1	1	1	0
Growth fund	Secondary	Trinity	1	1	1	1	0
Growing school APT	Secondary	Trinity	6	6	0	0	0
Growing school APT	Secondary	Oasis Temple Q	6	6	8	8	8
Growing school APT	Secondary	Oasis S Bristol	4	6	6	6	6
<b>TOTAL number of forms of entry (ie classes of 30)</b>			<b>26</b>	<b>24</b>	<b>20</b>	<b>18</b>	<b>15</b>
Type of Growth	Sector	Average amount for 7/12ths of year	Sep-23	Sep-24	Sep-25	Sep-26	Sep-27

Growth Fund	Primary	£3,033	1	1	1	1	1
Growing school APT	Primary	£3,033	0	0	0	0	0
Growth Fund	Secondary	£4,190	9	5	5	3	0
Growing school APT	Secondary	£4,190	16	18	14	14	14
<b>TOTAL number of forms of entry (ie classes of 30)</b>			<b>26</b>	<b>24</b>	<b>20</b>	<b>18</b>	<b>15</b>
<b>Forecast cost (£'000)</b>			<b>£3,233</b>	<b>£2,982</b>	<b>£2,479</b>	<b>£2,228</b>	<b>£1,851</b>

Growth fund cost (£'000)	1,222	719	719	468	91
Growing schools cost (£'000)	2,011	2,263	1,760	1,760	1,760
Total (£'000)	3,233	2,982	2,479	2,228	1,851

## Appendix D – Comments for Q1: 0.5% transfer to High Needs Block

Comments from establishments who voted 'Yes':

- It is reassuring to know the LA is cognisant of the continuing pressures on schools' budgets, however reducing the amount available to schools through the HNB will only serve to add to these pressures as it will equate to less monies being available for TUF applications. Additionally, the increased mandatory minimum per pupil funding levels and the requirement to set MFG in the range 0% to +0.5% ensuring schools receive at least the same or higher level of protected per-pupil funding than in 2023/24 negates the need to not give support to this transfer.
- Funds transferred should be used directly for the benefit of SEN provision in mainstream schools where increasing needs are having a significant financial impact.

Comments received from establishments who voted 'No':

- I feel that a complete overhaul of the SEND funding is needed and that this money can be better spent in the schools block
- What would be the direct benefit to schools?
- Factors which have informed me of this is that an overhaul of the High Needs funding needs to be done and this money can be better spent in the schools block.
- High needs should be fully funded in its own right – do not support a transfer.
- This brings many challenges. Schools do not receive enough funding to support the day to day running without then having to support a 0.5% transfer to the high needs block. We have had to strip back to the bare essentials this year just to balance the budget removing extra-curricular activities, reducing forest schools, reducing the number of trips that we offer. The school is in an area of high deprivation and so school is often the only place where a lot of our pupils

experience wonderful things which we are now having to reduce due to budget constraints.

## **Bristol Schools Forum** **De-delegation 2024/25**

<b>Date of meeting:</b>	28 <sup>th</sup> November 2023
<b>Time of meeting:</b>	5.00 pm
<b>Venue:</b>	City Hall

### **1. Purpose of report**

- 1.1 To inform the Schools Forum of the outcome of the de-delegation consultation, which ran from 3<sup>rd</sup> October 2023 to 14<sup>th</sup> November 2023.
- 1.2 To seek agreement from the maintained primary school members of the Forum to the primary school de-delegated services for 2024/25.
- 1.3 To seek agreement from the maintained secondary school members of the Forum to the secondary school de-delegated services for 2024/25.

### **2. Recommendation**

**Schools Forum is invited to:**

- 2.1 **Note the outcomes of the consultation on school funding arrangements.**

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

- 2.2 **Agree to de-delegation of the following services at the amounts per pupil indicated in Table 1 for 2024-25:**
  - a) **Employee and Premises Insurance**
  - b) **Assessment of eligibility for free school meals**
  - c) **Maternity supply cover**
  - d) **Schools in financial difficulty**
  - e) **Trades Union facility time**
  - f) **Education psychology**
  - g) **School Improvement Services**

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

**2.3 Agree to de-delegation of the following services at the amounts per pupil indicated in Table 1 for 2024-25:**

- 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**

Table 1: de-delegation rates per pupil for primary and secondary schools

	Primary rate £	Secondary rate £
Employee and Premises Insurance*	27.72	27.72
FSM Eligibility	1.23	1.23
Maternity Supply Insurance	33.55	48.72
Schools in Financial Difficulty	0	n/a
Trade Union Facility time	4.15	4.15
Health and Safety Roving Reps	n/a	0.98
Educational Psychology	6.27	6.27
School Improvement Services	5.31	5.31

\*The rate for Employee and Premises Insurance is currently showing as 2023/24 rate as the DfE have not yet published the 2024/25 RPA rates. Therefore, this rate could change once updated information becomes available.

### **3. Background**

3.1 Maintained mainstream schools, by majority vote of the Schools Forum in each sector, can opt to de-delegate the funding for their sector. The agreed retention will not be given to maintained schools in the formula and instead the LA will hold the funds centrally for the agreed services and spend the funds on those de-delegating sectors only.



- 3.2 Decisions on de-delegation are for representatives of each sector's maintained schools to make.
- 3.3 To assist the LA and Schools Forum with determining courses of action for the 2024-25 de-delegation the LA consulted with schools to seek the views of stakeholders.

#### 4. De-delegation in 2023/24

- 4.1 The table below shows the services that Schools Forum voted to de-delegate for 2023/24, and the funding generated for each of those services.

Table 2: De-delegated services and funding in 2023/24

2023-2024 De-delegation	Primary		Secondary	
	Total £'000	Per Pupil	Total £'000	Per Pupil
<b>'Insurance' type Services</b>				
Employee & Premises Insurance	399	27.72	51	27.72
Assessment of Eligibility for free school meals	17	1.17	2	1.17
Maternity Supply Cover	460	31.95	86	46.40
Schools In Financial Difficulty	0	0	n/a	n/a
TU Facility Time	57	3.95	7	3.95
Health & Safety Roving Reps	n/a	n/a	2	0.93
<b>Services to Schools</b>				
Educational Psychology	86	5.97	11	5.97
School Improvement Services	52	3.64	7	3.64
<b>Total de-delegated</b>	<b>1,071</b>	<b>74.40</b>	<b>166</b>	<b>89.78</b>

- 4.2 Schools Forum will remember decisions were taken not to de-delegate additional funding for Schools in Financial Difficulty in Primary Schools due to the accumulated balances being felt sufficient for 2023/24.

#### 5. De-delegated items 2024/25.

- 5.1 The services in scope for 2024/25 include those that were in scope for 2023/24.

5.2 There have been a number of changes to the per-pupil de-delegation rates for 2024/25. The rates for Free School Meal assessment, Supply Cover, TU Facility Time, H&S Reps and Education Psychology have increased by 5%. Schools in Financial Difficulty has been listed for de-delegation again, but at nil contribution for 2024/25 due to accumulated funds still available. The proposed rate for School Improvement Service has increased by 46%.

5.3 Table 3 provides detail on each of the areas of de-delegation.

Table 3: Areas of de-delegation

<p><b>Employee &amp; Premises Insurance</b> This funds insurance cover as arranged by the local authority. If delegated, schools would need to assure the LA that cover arranged by the school (if not bought back) is fit for purpose. Pooling the funding ensures proper cover and allows schools' to avoid bureaucracy.</p>	<p>Currently same rate as last year until further information is published.</p>
<p><b>Assessment of eligibility for free school meals</b> This funding enables the service to schools for the checking of free school meal eligibility.</p>	<p>Per-pupil charge increased 5% from 2023/24</p>
<p><b>Maternity Supply Cover</b> Supports schools by funding the costs incurred covering staff taking maternity / paternity leave or staff on adoption leave.</p>	<p>Per-pupil charge increased 5% from 2023/24</p>
<p><b>Schools In Financial Difficulty for Primary schools</b> Provides support to schools in or forecasting a deficit. Access to the support is generally dependent on a school producing an agreed Recovery Plan. The use of funds is directed by the head of school partnerships.  For information: there is currently available balance of £335k on this fund.</p>	<p>No contribution proposed for 2024/25</p>
<p><b>Trade Union Facility Time Fund</b> Employers have a statutory obligation to release trade union representatives for representation in cases. The facilities fund held by Bristol City Council is used to remunerate schools that release their teachers who are TU representatives to carry out casework for their members. In the absence of any facility fund, maintained school bear the cost of releasing staff.  For information: there is currently available a balance of £192k available to be used for this purpose.</p>	<p>Per-pupil charge increased 5% from 2023/24</p>
<p><b>Health &amp; Safety Roving Reps in Secondary schools</b> "Roving" reps are safety representatives who are appointed by TUs to cover multiple school sites. Their work includes effective consultation with employees in relation to employee health and safety issues. Compared to previous years, there are fewer safety representatives, and the cost of training is reduced.</p>	<p>Per-pupil charge increased 5% from 2023/24</p>

<p>School head teachers retain overall responsibility, with the TU rep acting on the Head's behalf.</p>	
<p><b>Educational Psychology (EP)</b>  The Education Psychology Service provides professional advice to young people, families and educational settings.  The de-delegated funding supports the delivery of EP visits to schools to discuss and identify vulnerable children and young people, and support a robust graduated response to needs including cost effectiveness.  This is in addition to the Educational Psychology work in to the SEN assessment process, paid for by the LA as a statutory responsibility.</p>	<p>Per-pupil charge increased 5% from 2023/24</p>
<p><b>School Improvement Service (NEW)</b>  The ending of the DfE School Improvement monitoring and brokering grant for 2022-23 impacted on the current model of school improvement service. We are now working to create a model to support quality provision for children and young people.  This model is to meet both statutory improvement needs and provide a holistic approach to school improvement across the city. The request of £86,000 is to commit to investing into the service to future proof and become a self-sustainable model and not simply to meet the statutory requirements. The model places children and young people at the heart of the work and we want to ensure an equitable service is funded realistically and fairly.</p>	<p>Per-pupil charge increased 46% from 2023/24</p>

- 5.4 The de-delegation consultation was launched 3<sup>rd</sup> October 2023 and ran for six weeks to 14<sup>th</sup> November 2023. The de-delegation consultation was communicated to schools through the Service Director for Education, Skills regular newsletter, email and through school forum members.
- 5.5 This consultation sought school stakeholder views on the de-delegation of funding from mainstream schools for specific services, it was open to maintained mainstream schools only to respond.
- 5.6 6 of a possible 41 primary schools responded, whilst none of the possible two secondary schools responded. The response to de-delegation is shown in the tables below.

Table 4: Primary de-delegation (6 responses)

<b>Service</b>	<b>Votes Pool</b>	<b>Votes Delegate</b>	<b>Votes: No indication</b>	<b>% Pool</b>	<b>% Delegate</b>	<b>% No indication</b>
Employee and Premises Insurance	6	0	0	100	0	0
FSM Eligibility	6	0	0	100	0	0
Maternity Supply Insurance	5	1	0	83	17	0
Schools in Financial Difficulty	4	2	0	67	33	0
Trade Union Facility time	4	2	0	67	33	0
Education Psychology	5	1	0	83	17	0
School Improvement Service	3	3	0	50	50	0

Table 5: Secondary de-delegation (0 responses)

<b>Service</b>	<b>Votes Pool</b>	<b>Votes Delegate</b>	<b>Votes: No preference</b>	<b>% Pool</b>	<b>% Delegate</b>	<b>% No preference</b>
Employee and Premises Insurance	0	0	0	0	0	0
FSM Eligibility	0	0	0	0	0	0
Maternity Supply Insurance	0	0	0	0	0	0
Trade Union Facility time	0	0	0	0	0	0
H&S Roving Reps	0	0	0	0	0	0
Education Psychology	0	0	0	0	0	0
School Improvement service	0	0	0	0	0	0

### 5.7 Breakdown of Schools in Financial Difficulty and Trade Union De-delegations:

	SiFD £'000	Trade Unions £'000	Total £'000
Balance b/f	335	192	527
Estimated 23/24 Income*	0	222	222
2023/24 Spend to date	0	159	159
Estimated Balance c/f	<b>335</b>	<b>255</b>	<b>590</b>

\*Please note that estimated 2023/24 income includes £158k which relates to academies and it is likely that the full amount will not be paid.

**5.8** There were approximately 14,400 primary age pupils in maintained schools in 2023/24, whilst there were approximately 1,800 secondary age pupils. Assuming these pupil numbers continue into 2024-25, if School Forum supports further contributions via de-delegation, for TU Facility Time this would contribute £67k to the fund for 2024-25. No contribution is being sought for the SIFD fund for 2024-25. These funds are ringfenced and reserved for activity in maintained schools; activity in academy schools is charged separately.

**5.9 The Local Authority recommendation to Schools Forum is that all available services are de-delegated to maintained schools in 2024/25. De-delegation supports the provision of a coherent core offer by the LA to all maintained schools.** This is particularly important when unplanned issues arise in a school and enables support to be provided rapidly and without the need to agree terms of engagement. Whilst the LA recognises that in any particular given year not all schools will access all services to the same degree, funding these services enables all maintained schools to benefit at a time of need.

**Bristol Schools Forum**  
**Early Years Supplementary Grant 2023/2024**

<b>Date of meeting:</b>	28 <sup>th</sup> November 2023
<b>Time of meeting:</b>	5.00 pm
<b>Venue:</b>	City Hall

## **1 Purpose of report**

- 1.1 This report provides information of the recently announced Early Years Supplementary Grant (EYSG).

## **2 Recommendation**

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

**a) note the provision of the grant for 2023/2024.**

## **3 Background**

- 3.1 The Early Years Supplementary Grant (EYSG) is a funding initiative to provide additional financial support for existing early years entitlements during the current financial year (23/24) starting from September 2023..
- 3.2 This grant is specifically intended for local authorities to increase the hourly rates paid to childcare providers who offer the government's existing entitlement programs, with LAs passing all of the available funding through to providers; to there is no centrally retained funding as is permitted from the usual EY DSG Block, which is passed at 95%, with 5% retention.
- 3.3 The announced sum for Bristol's allocation of the supplementary grant is £843,216 and covers the funding period September 2023 to March 2024.

## **4 Use of the Early Years Supplementary Grant**

- 4.1 The grant provides supplementary funding for all existing early years funding streams including:
- 2Year Olds, (government funded hours for parents on low or no income)
  - 3-4Year Olds, (government funded hours for universal and extended hours for working parents)
  - Disability Access Fund (DAF for children who claim disability living allowance);

- Early Years Pupil Premium (EYPP children who meet the eligibility criteria, which is the same as free school meals).
- Maintained Nursery schools supplementary funding (MNSS)

4.2 The funding provided via the Early Years Supplementary Grant (EYSG) is in addition to and separate from funding provided via the Early Years Block of the Dedicated Schools Grant (DSG) for the existing entitlements in 2023-24 and is subject to its own terms and conditions of grant.

4.3 This additional funding is for local authorities to increase hourly rates paid to childcare providers for the government’s existing entitlement offers.

4.4 The allocation is based on the published rates in September 2023 and the rate will remain same for 7 months from September 2023 to March 2024. The reasoning for this separate funding stream is due to LA’s being unable to change the published funding rate in that same financial year. 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.

4.5 LAs must pass on the EYSG in full to early years providers for each of the funding streams. LAs have the flexibility to determine how best to pass on this funding to their providers..

4.6 It should be noted that the DfE does not require local authorities to consult their Schools Forum but encourages local authorities to engage appropriately with their early years providers about the funding amounts from September, with the uplift reflected in the actual headcount October payment for providers.

4.7 The additional funding from September 2023 for the funding streams are as set out in the table below:

	Current rates	Increase to rate through EYSG	New rates from Sept 23
Three- and four-years olds	£4.71	0.06p	£4.77
Two-year-olds	£5.86	£1.91	£7.77
DAF	£828.00	£53.00	£881.00
Pupil Premium (EYPP)	£0.62p	£0.04	£0.66
MNSS	£3.08	£0.21	£4.01

- 4.8 Based on the provided context for the grant, for 2024-25, the additional grant will be integrated into the Dedicated Schools Grant (DSG). Any surplus on the supplementary grant can be utilized to offset overspending on the main Early years grant.
- 4.9 The funding rates to Local Authorities for 2024-25 will be announced later in the autumn in line with the Department for Education's regular timetable. The funding rates paid to Providers will be revised with effect from April 2024.

### **Expansion of Early Years Entitlement for children aged 2 & Under 2s**

- 4.10 The Department for Education (DfE) have extended the early education offer to working parents of children aged:
- Under 2 years (term after 9<sup>th</sup> month birthday to end of term they turn 2) – Sept 24
  - 2 year olds (term after 2<sup>nd</sup> birthday to end of term they turn 3) – April 24
  - Further information is expected to be presented to the Schools Forum in January 2024

### **Wrap Around Childcare for Schools and Academies**

- 4.11 The Department for Education (DfE) have commenced a project to deliver 'wrap around childcare' for all children in primary schools/academies between 0800 and 1800 to support working parents, beginning in September 2024.

Further information is expected to be presented to the Schools Forum in January 2024