

Bristol Schools Forum

Agenda Tuesday, 22nd September, 2020 at 5.00 pm

Virtual Meeting - Zoom Committee Meeting with Public Access via YouTube

	Start	Item	Action	Owner	Paper
1.	17:00	Welcome	A	Clerk	
2.	17:05	Election of Chair To elect a Chair for the academic years 2020/21 and 2021/22.	De	Clerk	
3.	17:15	Election of Vice-Chair To elect a Vice-Chair for the academic years 2020/21 and 2021/22.	De	Clerk	
4.	17:20	Forum Standing Business (a) Apologies for Absence (b) Confirmation meeting is quorate (c) Appointment of new members/Resignations: (d) Notification of Vacancies: <ul style="list-style-type: none"> • Two Primary Academy Head; • Two Primary Maintained Heads; • Two Primary Academy Governors; • Two Secondary Academy Heads; (e) Declarations of Interest	A	Clerk	
5.	17:25	Minutes of the Previous Meeting (a) To confirm as a correct record (b) Matters arising not covered on agenda	A	Chair	3 - 13
6.	17:30	Update from Finance Sub-Group	I	Chair	14 - 15
7.	17:35	Verbal update from Director of Education and Skills	I	AH	
8.	17:50	DSG Budget Monitor 2020/21 P4	Di	GB/TY	16 - 19
9.	18:05	Education Transformation Programme - update on progress and spend	Di	AH	20 - 36
10.	18:30	Update on DSG 2021-22 with potential funding levels	Di	GB/TY	37 - 42
11.	18:45	Any Other Business			

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

Clerk: Corrina Haskins email: corrina.haskins@bristol.gov.uk Tel: City Hall**Chair:** tbc (contact via clerk)

Bristol Schools Forum

Minutes of the meeting held on Wednesday, 20th May, 2020

at 3.30 pm at Virtual Meeting - Zoom Committee Meeting with Public Access via YouTube

Present:

Karen Brown	Maintained Secondary Governor Rep, St Mary Redcliffe & Temple
William Brown	Non School Member, NASUWT and NEU
Rob Davies	Nursery Governor Rep, Speedwell and Little Hayes Nursery Federation
Trish Dodds	Academy Primary Governor Rep, Fishponds Academy
Simon Eakins	Academy Primary Head Rep, Cathedral Primary
Simon Holmes	Nursery Head Rep, St Phillips Marsh Nursery
Sarah Lovell	Academy Secondary Headteacher Rep, Bristol Metropolitan Academy
Kate Matheson	Maintained Primary Governor Rep, St Barnabas Primary
Garry Maher	Non School Member, Diocese of Clifton Rep
Aileen Morrison	Pupil Referral Unit Rep, St Matthias Park
Ruth Pickersgill	Academy Secondary Governor Rep, City Academy
Chris Pring	Maintained Primary Headteacher Rep, Cabot Primary
Carew Reynell	Academy Secondary Governor Rep, Blaise High School
Emma Richards	Special School Head Rep, Claremont School
Cedric Sanguignol	Maintained Primary Governor Rep, Bishop Road Primary
Simon Shaw	Maintained Secondary Head Rep, St Mary Redcliffe & Temple
Christine Townsend	Maintained Primary Governor Rep, Whitehall Primary
Wendy Weston	Non School Member, GMB
Stephanie Williams	Academy Primary Head Rep, Bannerman Road Community Academy
David Yorath	Academy Secondary Governor Rep, Cotham School

In attendance from Bristol City Council:

Graham Booth	Finance Manager
Cllr Anna Keen	Cabinet Member for Education and Skills
Corrina Haskins	Clerk to Schools Forum
Alison Hurley	Director of Education & Skills
Denise Murray	Director of Finance
Travis Young	Corporate Finance

	Action
10. Welcome	
The Chair welcomed everyone to the meeting.	
11. Forum Standing Business	
a. Apologies for absence Apologies for absence were received from: Kris Hristakev (Special Schools Governor);	
b. Quorate The Chair confirmed the meeting was quorate.	

c. Resignations

There were no resignations to report.

d. Appointment of New Members

The Clerk reported that Simon Holmes had been reappointed as the Nursery Heads representative.

e. Notification of Vacancies

The Clerk advised of the following Schools Forum Vacancies which would be advertised through the Heads/Governors Bulletins:

- Two Primary Academy Heads
- Two Primary Maintained Heads
- Two Primary Academy Governors
- Two Secondary Academy Heads

f. Declarations of Interest

There were no declarations of interest.

12. Minutes of the Previous Meeting

RESOLVED - that the minutes be confirmed as a correct record.

Matters Arising**Minimum Funding Guarantee**

The Chair confirmed that this would be discussed at the next meeting of the Finance Sub Group which was due to take place later in the year.

HR Systems ITrent

CP confirmed that he had received the guidance and that his school had now moved to the new system.

Composition of the Schools Forum

The Chair confirmed that this would be on the agenda for the September meeting.

Trading with Schools TwS

CP asked that, in future, the TwS expenditure breakdown be presented with the annual report as the information raised questions about why certain areas made a profit and others were in deficit. He undertook to raise this with outside of the meeting with the Chair and Vice Chairs.

13. Special Educational Needs and Disabilities (SEND) and the High Needs Block Written Statement of Action

In introducing the report, AH reported that she had hoped to produce a written report with an update from Ofsted/Care Quality Commission (CQC), but this information was not yet available and therefore she gave a verbal update as follows:

- Confirmation had been received that the Written Statement of Action (WSOA) was fit for purpose as an action plan;
- Despite the Covid 19 crisis, the WSoA remained a key priority for the Council and resources had not been redeployed elsewhere, however, some of the actions timed for July would be a challenge to deliver in the context of the pandemic;
- In terms of analysis, 50% had been achieved and those actions RAG rated “red”

or “amber” could not be delivered in the current climate;

- The closure of schools had meant that the attendance milestone was not deliverable;
- The Local Offer had been refreshed and there had been a lot of collaborative work with Special Educational Needs Co-ordinators (SENCOs) to ensure that schools had a voice in the process.

14. Special Educational Needs and Disabilities (SEND) and the High Needs Block - Milestones and Impact of Covid 19

AH introduced the report which gave details of the milestones and a breakdown of finances requested by Schools Forum to enable members to understand the impact of transferring money to the High Needs block and the difference it would make to the service.

Improvement Priority 2: Children and young people with SEND receive the best possible, appropriate and effective support and provision at the right time

She confirmed that the additional funding would enable:

- The local offer to be brought to life by having a team in place to support parents and carers. This would shape the longer term offer for Bristol;
- Training and skills to be provided for all schools and settings across Bristol so that every provider understood the fundamentals and the competency level was raised. This was not just about investing in the SENCO but ensuring there were equitable skills across schools and that the core offer was of a higher standard across the city;

Forum Members raised the following questions:

Welcome the range of developments, especially in relation to communication with parents to help change the perceptions of the services, but how was the Council ensuring that the specialist sector was involved and also ensuring quality of provision and value for money in terms of commissioning training services?

AH responded that, in terms of quality, Bristol City Council (BCC) was looking at training that had the right impact and there had been a lot of discussions with specialist teams to identify these areas as well as feedback from the survey of young people and parents/carers. BCC was looking to move to a model where it was the facilitator using the skills that were already in available in the city.

How will Schools Forum measure how successful this particular area has been, e.g. will we consider key performance indicators KPIs at future meetings? It would be useful to monitor how the additional money transferred to the High Needs Block has been attributed to this project so that Schools Forum can see that the funding is making a difference to the service.

AH confirmed that BCC had to provide detailed monitoring information for Department for Education (DfE) and CQC but this could be summarised into a manageable reporting format for future meetings of Schools Forum.

Was there a risk of sustainable funding not being secured and what would happen to the project if it was not?

AH confirmed that there was a risk as a lot of the project was based on one off funding, however the money was being used to frontload investment in the service and there would be a reassessment of the impact of this funding and how the project could be sustained in the future.

Of the total investment of £3m, £1.3m is from the transfer to the High Needs block agreed by Schools Forum, however, even though a major commissioner of the work, Schools Forum is not mentioned in the Governance Structure? Are Health and Social Care contributing to the work as they are included on the Governance Structure?

AH undertook to look into the governance arrangements and report back to a future meeting, but confirmed that Health and Social Care were involved, but for the purposes of the report to Schools Forum, only the information relating to education had been included. In terms of the funding, GB/DM confirmed that there was £1.3 from the Schools Block; £1.5m from additional funding that the Council had and has set aside to support the initiative and the balance was from unused reserves.

Priority 2 How does the SEND "first call" differ from the service provided by Supportive Parents and, in view of the Ofsted report, can the Local Authority be confident that families will use this service rather than Supportive Parents? Would it have been better to enhance the funding to Supportive Parents instead?

AH undertook to look into the comment about enhancing Supportive Parents, but confirmed that the SEND first call was offering something different in that it was a first point of contact for parents/carers to access services.

Will the funding from mainstream schools be used to train SENCOs and enable schools to understand the basic information around SEND support?

AH confirmed the £3m funding would be used to support the wider education transformation programme and not just the WSoA, but that that there would be a focus on basic SEND training for education providers to ensure a consistent level of knowledge and expertise across all education settings in the city.

Concern that training programmes can sometimes be a "one size fits all" toolkit and a better approach would be a co-constructed programme using the expertise of people on the ground, e.g. early years providers.

AH confirmed that, in terms of training, the provision would be a mix of different provision but the first priority was to ensure that the offer had a certain standard across the city, and building on from that would be the sharing of good practice and targeting particular training and coaching to create a sustainable system in schools.

Concern that, due to the nature of funding, the staff working with SEND children were often the lowest paid on fixed term contracts, it would be better to have proper contracts that allow staff and expertise to be retained.

There needs to be flexibility and creativity in terms of both training and provision?

AH concurred that there would need to be a flexible approach to increasing specialist provision.

Improvement Priority 4:

- **Leaders across the local area will work together to ensure that the children and young people with SEND will experience inclusive cultures, enabling them to achieve their full potential.**
- **Develop our systems and resources to enable young people with SEND/EHCP to be better supported to achieve a successful transition into education, training and employment between ages 14 -25 and beyond.**

AH gave further details on improvement 4 priority as follows:

- A focus on the inclusion of children and young people with SEND across all schools and settings with resources and structure in place and to improve attendance. There were a number of milestones and measures against the target, although it would be challenging to meet these in current circumstances;
- A focus on 14-25 year olds in terms of positive destinations and ensuring that destinations were recorded so that support could be targeted effectively;
- There was a current cohort of 633 and a target of March 21 for a supportive worker to look at career paths in partnership with schools and education settings;
- 14-16 year olds as it was important to start early to raise aspirations;
- There had been a challenge in delivering the milestones due to Covid, but a lot of the work had been done online;
- There was not enough specialist provision and there was a short term issue about children who need a place in September as well as the longer term issue of being enough provision to allow children to be educated in their local area;
- There would be a short term strategy co-produced with education providers to identify how special school places could be increased.

If there was only one person working with 633 young people, was this enough resource and would anyone else contribute to this such as post 16 providers?

AH confirmed that some of the work would be done through existing teams with engagement from providers but the long term aim would be to increase capacity.

There was an increase in anxiety felt by young people in relation to post 16 transition and this would be heightened this year as a result of the pandemic. Would welcome investment in schools, as many staff will continue to work with young people after 16 to ensure a successful transition and a small amount of funding would help support this to provide continuity for young people.

AH reported that the whole issue of transition was raised at Standards Board and did need further work, especially in light of the pandemic.

Would there be a target to measure Bristol's performance against its previous performance as well as comparing with statistical neighbours?

AH acknowledged that this was a good point and it was important to see if Bristol was on track as it could take longer to be comparable with neighbours.

Improvement Priority 5: Parents and carers have a positive experience of the SEND system in Bristol and their confidence in the system improves

AH reported that this priority was focused on the Local Offer and the co-production of the Local Offer website to ensure information was timely and added value.

As this is one off funding, how can we be confident that once this work on the Local Offer has started it will be embedded in the work of the Council?

AH confirmed that this was a frontloaded project piece which would allow those in post to manage the system after the initial project had been completed.

Concern that the priorities for improvement will take longer than the one off funding?

DM confirmed that this was the case and there would need to be a full scale review driven by the evidence base to identify funding going forward.

Does the authority currently measure findings from quality assurance activity?

AH confirmed that this was a new measure and there were some areas where BCC would not have previous data to measure against.

Support the package, but recognise that there is an element of risk involved due to the lack of sustainable funding.

AH confirmed that the risk had been mitigated by the rigorous governance from DfE QCC and BCC.

In summing up, the Chair referred to the recurring themes raised by Forum Members of co-production and who was involved, effectiveness and sustainability and asked AH to address these in the update reports to future Forum meetings.

In considering the recommendations as set out in the report it was:

RESOLVED that Bristol Schools Forum fulfil the transfer of funds based on the additional detail provided within the report.

15. Dedicated Schools Grant (DSG) Outturn for 19/20

The Chair asked that any questions on the report be forwarded to the Clerk and a written response would be provided.

16. Place Planning and the Growth Fund

The Chair asked that any questions on the report be forwarded to the Clerk and a written response would be provided.

The meeting closed at 4.50pm.

Schools Forum 20th May: Items 6 DSG & 7 Place Planning - Questions and Answers

Question 1: Chris Pring – Item 6 DSG Paper

- a) 4.6 Underspend (should this figure be -£0.463)?
- b) Table 2 – Items missing (Insurance/Maternity/FSM/Ed Psyc) from de-delegated tables
- c) Table 3 De-Del – figure has changed to 464 (463 on table 2)
- d) 8.1being pupils of key workers. This should bekey workers and vulnerable pupils.

Reply

- a) Yes, in paragraph 4.6 the underspend should read -£0.463m
- b) Table 2 just shows items with movements and balances at year end, in line with data provided in previous years. The other de-delegated items spent to budget so no movement or carry forward.
- c) In table 3 there is a rounding issue – updated table below;

Table 3: DSG year-end balances 2019/20

£'000	b/f	2019/20 movement	c/f
Schools Block	0	(174)	(174)
De-Del	(414)	(49)	(463)
CSSB	0	0	0
EYB	(1,115)	1,135	20
HNB	(432)	1,534	1,102
Sub-total	(1,962)	2,446	485
Advanced funding	0	2,407	2,407
TOTAL	(1,962)	4,853	2,892

d) Yes, in paragraph 8.1, the text should read 'key workers and vulnerable pupils.'

Question 2: Wendy Weston – Item 6 DSG Paper

- a) As a union with members in centrally managed Children's Centres when can we expect information on how the deficit budgets are to be managed?
- b) When is the all party parliamentary group to report back on the future of maintained nursery schools?

Reply

- a) Details on plans to manage deficits in Children's Centres will be shared with Forum later in the year once they are agreed. Obviously the current situation with Covid-19 has had an impact and the effect of this needs to be considered across the sector.
- b) We haven't received any update from the group or indication of when they will report their findings, we are very interested in the outcome of this too.

Question 3: Aileen Morrison – Item 6 DSG Paper

- a) There are references to a number of groups and task and finish groups including the 'Belonging' Task group? Could the LA provide a crib sheet on the different working groups and their purposes? How does the LA ensure membership to groups is open and transparent?
- b) Appendix 3 Shows AP spending and includes Block contracts. How are the large discrepancies in ALP funding justified?
- c) ALP spot purchasing- Can you comment on the fact that Secondary schools pay the LA for places at St Matthias and Lansdown Park so the £561,000 cost of ST Matthias is not complete picture. Where is the income generated through schools' contributions accounted for?
- d) Is the LA working with the sector to ensure value for money and to approach the DfE for an increase in places funded by the ESFA- Current provision (eg St Matthias) could expand and these places could attract ESFA funding that would reduce the burden on high needs budgets.

Reply

- a) The various working groups are in the stages of being developed and once they are finalised and their remit agreed we will share

details with Forum.

- b) The council is about to undertake an in depth review of alternative learning provision as part of a formal recommissioning process. The review is part of a wider SEND sufficiency exercise and does include an examination of funding for AP, the rising running costs of placements and value for money, as well as appropriateness of provision and quality outcomes. There are elements of AP school funding that we can't alter. The £10k place funding from ESFA does not go as far as it did in 2012. The discretionary element(s) of high needs funding (Top Up and contracted places) need to ensure good outcomes and effective use of money. The review of AP is being managed by Oliver Buell. We will be bringing in external expertise to give an independent view of the sector. The current plan envisages completion of this work by 2nd October 2020.
- c) Charges are levied to schools to reflect the fact that they have already received funding in their block allocation for the pupils that are then placed in AP. This has the effect of transferring funding into the high needs block, the income is not allocated to the specific AP provision, but is included as income within the AP budgets overall.
- d) All work by the LA with the sector tries to ensure value for money. This has to be balanced against the needs of vulnerable school age children and the LA's statutory duties to make educational provision for them, as well as those external factors that are outside the council's control. Unforeseen delays with planned increases to AP school places funded by the ESFA are one example of this, as are high levels of school exclusion in Bristol and high demand for (SEND/SEMH) specialist school places exceeding existing places capacity. Education settings have submitted ideas to expand existing provision. We are currently reviewing these ideas with a view to move forward with those that will release the right provision in the areas of the city that we are experiencing most demand

Question 4: Carew Reynell – Items 6 DSG & 7 Place Planning

a) Item 6:

When will projections for 20/21 be available? I'm particularly interested in High Needs, where 19/20 projections increased substantially towards the end of the year.

b) Item 7:

- i) The figures in Appendix 2 appear to show a potential commitment of £2.75m in 21/22, compared with a budget of £2m in 20/21. Is that right?
- ii) Does the authority have specific plans in place to provide the 240 places that would have been provided by the Oasis Temple Quarter School? If so, have they been costed?
- iii) How does the cost to the Growth Fund compare with the notional figures in Appendix 2?
- iv) There has, in the past, been talk of the possibility of amending the Growth Fund policy to reduce the amounts payable for new places (as is done by some other authorities) if the cost of the policy was likely to exceed the funding provided by DfE. Could this be considered for 21/22?

Reply

a) The first projections will be available as part of the 1st Quarter Monitoring Report – following cancellation of the July Forum meeting, it was agreed that this report be circulated to Forum Members.

b) Item 7:

i. There are three elements to Growth, each funded differently.

1. Routine growth from Growth Fund £2.0m
2. Growth due to academy schools for the 5 month overlap, funded from refunded recoupment
3. New and growing schools, funded directly in the formula and not charged to Growth fund.

The question is comparing the budget assigned to 1. against the overall Growth cost, which is all three considerations. The table in Appendix 2 states the anticipated cost to Schools Block, which is correct as all growth is funded from schools block, but not all growth is funded from Growth Fund.

ii. The Place Planning and Education Capital Teams have looked at possible options to increase places at a number of schools that could potentially provide additional provision. The indicative capital costs of these options have been calculated but the total cost would be well in excess of currently available capital. If existing schools were expanded this would increase pressure on the Growth Fund. By how much would depend on how many pupils and which schools they go to. Temple Quarter would be treated as a new and growing school, so the ESFA requires growth in that school is funded via the APT (via the schools formula directly, with an estimate for pupil numbers) rather than through the growth fund.

iii. The table in the report is looking forwards and identifies which schools are funded from Growth Fund, and which are APT. The actual cost will depend on the prevailing school formula value, the numbers of pupils, and whether the policy is amended in the timeframe.

iv. This has been discussed before at Schools forum, the last time was in March 2018 and there wasn't a change to amounts payable, with the policy staying broadly similar. This issue will be put on the agenda of the Finance sub-group to discuss the options and implications of any changes.

Question 5: Christine Townsend – Item 7 Place Planning

- a) 4.4 Of the 213 places offered to applicants living outside of the Bristol boundary and therefore falling outside the legal requirement held by Bristol to provide a school place, how many of these places will receive funds from Bristol's Growth Fund under the council's current policy?
- b) 4.7 Why is the School Capacity Survey not taking place in 2020?
- c) 4.11 What was the outcome of the planning application for the Oasis Temple Quarter secondary that went to the committee on May 28th? What is the deadline for the Environment Agency to 'call-in'?
- d) What is plan B if Oasis Temple does not open for Sept 2021?
- e) Table 1 includes Trinity at full PAN for 21/22 but omits Oasis Temple entirely despite both being in doubt. What is the reason for Trinity inclusion

and Oasis exclusion?

- f) 4.19 What progress has been made on the use of increasing primary estate capacity (created by falling mainstream demand) repurposing for educating children with SEND with or without an EHCP?

Reply

- a) 6 schools are scheduled to receive money from the Growth fund (Trinity is a new schools so is funded in APT as a new and growing school), as agreed in previous years. The 6 are Bristol Brunel Academy, Bristol Metropolitan Academy, City Academy, Colston Girls School, Cotham School, St Bede's College. Growth Fund is allocated to compensate a school for increases in NOR, caused by growing at the request of the authority. Admission of pupils from outside the LA boundary is not linked to Growth Funding, but these pupils will increase the census figures and therefore funding into the DSG.
- b) The 2020 School Capacity and Forecasts collection (SCAP) was due to commence in June The decision to cancel was made by the DfE to reduce burdens on local authorities during the current pandemic.
- c) The developer withdrew the application from the committee to undertake further work to mitigate against an objection and possible call-in by the Environment Agency.
- d) See answer above
- e) Trinity was included in the projection when progress was on schedule. The scheme is much more advanced and BCC is the contractor. We are therefore in more control and have more information than OATQ which is being managed by the DfE directly.

Following information sessions with schools and invitations to submit Expressions of Interest, a number of projects are being assessed. The process will ensure the schemes are technically possible, meet need and can be developed within the available budgets. Initial estimates of the work needed to deliver the projects show completion dates (i.e. when young people will be able to use the new provision) ranging from 11th September 2020 for more straight forward schemes and 2021 for more complex schemes.

Schools Forum Finance Sub-Group – 25th August 2020

Present:

Carew Reynell
Sarah Lovell
Christine Townsend
Cedric Sanguinol

Officers:

Graham Booth
Corrina Haskins
Alison Hurley
Travis Young
Levi Mapstone

Apologies: Garry Maher and Chris Pring

1. DSG Monitor

The Sub-Group noted the latest position; there was not much change overall and the High Needs Block was carrying forward a deficit from last year which was reflected in the HN brought forward value.

The following comments were raised:

- Early years funding overspend needs explaining in the report to Schools Forum;
- There would be a significant increase in the cost of teachers due to the 2.75% pay rise and this was a funding issue for schools.

2. Funding Formula

The Sub-Group noted that, until the Government guidance was available, it was not known whether there would be restrictions in the movements between blocks.

It was also noted that Bristol's formula was now very close to the NFF, and that the amount of money redistributed by the MFG was much lower than used to be the case.

AH confirmed that she was looking how to widen engagement with schools, which could be done using a virtual platform. It was suggested that it would also be useful to engage with Chairs of Governors in addition to Heads, and this would also raise the profile of the Schools Forum.

In response to questions about whether falling rolls in primary schools was an ongoing issue that needed to be reflected in the funding formula, TY confirmed that figures were stabilising and Early Years numbers were slowly starting to increase.

3. Growth Fund

The Sub-Group noted that there was a delay in the opening Oasis Temple Quarter and there were implications for school places and associated funding. This could be an issue for Schools Forum in terms of the Growth Fund.

4. De-delegation

The Sub-Group noted that some areas of the de-delegation budget would not be sustainable going forward – e.g. only 2 secondary schools would be paying into the maternity scheme. As a result some of the rates may rise and a consultation would take place with schools in the autumn.

In response to a question, it was noted that any balances accrued as a result of schools in financial difficulty and underspend in areas such as union fees and health and safety representatives could not be utilised in the Schools Block.

High needs/Education Transformation Programme

The Sub-Group received a draft paper from AH which would be finalised for the September meeting of Schools Forum. Members asked for further details to be included on the impact of the £1.3m which was transferred to the High Needs Block.

It was reported that other authorities had large and growing deficits on the HN block.

GB highlighted the difficulties of forecasting future costs, especially in relation to EHCPs as the cost of a plan varied between the different bands, however, costs would increase as the number of requests for ECHP was rising year on year and there were additional costs associated with the impact of Covid-19.

It was agreed that the report for Schools Forum would include further detail on the number of EHCPs, out of authority places along with an update on the progress made in carrying out the programme measured against the milestones.

Agenda for September Meeting

- DSG Monitoring report;
- Update on 2021/22 funding (to include the blocks and funding levels and an outline of the consultations which will be undertaken);
- Progress on the Education Transformation with contextual information.

Other Issues

- In response to a question about the Apprenticeship Levy and whether schools knew about using the money to invest in training and development, AH undertook to raise this with the Employment and Skills Officer.
- Forum Composition: This was due to be considered in September, but had been delayed due to the current pandemic. AH undertook to look into this with a view to encouraging a diversity of membership and would report back to a future meeting.

Bristol Schools Forum **DSG Budget Monitor 2020/21 P4**

Date of meeting:	22 September 2020
Time of meeting:	5.00 pm
Venue:	Virtual meeting

1 Purpose of report

- 1.1 This report provides information of the forecast financial position for the DSG overall as at Period 4 (to end July 2020).

2 Recommendation

2.1 **Schools Forum is invited to:**

- a) **note the in-year 2020/21 position for the overall DSG.**

3 Background

- 3.1 This is the first budget monitor paper for 2020/21 to be presented to Schools Forum, as result of the cancellation of the July Forum meeting.
- 3.2 The report updates Schools Forum on the position at Period 4 (end of July) 2020/21.

4 Budget monitoring 2020/21

- 4.1 The DSG ended the 2019/20 financial year with an overall deficit of £2.892m, this included £2.407m of funding accelerated from 2020/21.
- 4.2 This first monitor is showing that the in-year forecast deficit is £3.186m, which when added to the brought forward balance will give a total deficit to carry forward at the end of the year of £6.078m. The main area for concern is the High Needs block which is forecasting an overspend in-year of £3.094m, this is despite an increase in funding in this block. The Period 4 position is set out in **Table 1** with more detail set out in **Appendix 1**.

Table 1: Forecast position on overall DSG for 2020/21 at Period 4 (July 2020)

<i>All figures £'000</i>	<i>b/f</i>	<i>DSG Funding 2020/21</i>	<i>Forecast Outturn Period 04 2020/21</i>	<i>In-year variance</i>	<i>Forecast Carry- forward Period 04 2020/21</i>
Schools Block	(174)	272,492	272,492	0	(174)
De-delegation	(464)	0	0	0	(464)
Schools Central Block		2,386	2,386	0	0
Early Years	20	37,119	37,212	92	113
High Needs Block	3,509	62,511	65,606	3,094	6,603
Funding		(374,508)	(374,508)	0	0
Total	2,892	0	3,186	3,186	6,078

- 4.3 **Schools Block (Nil variance).** All of the formula funding for maintained schools and academies has been allocated. The only scope for variation is in the growth fund. Spend on the growth fund will depend on the pupil number information included on the October 2020 pupil census, any variation will be calculated and reported following receipt of this data.
- 4.4 **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 **School Central Services Block (Nil Variance).** It is expected that all of the services in this block will spend to budget.
- 4.6 **Early Years Block (£0.092m forecast overspend).** The Early Years DSG income is based on 5/12ths of the January 2020 census and 7/12ths of the January 2021 census. In 2019/20 the participation levels generated a balanced budget (with the overspend last year in the block being the agreed expenditure to utilise the carried forward surplus). Similar participation levels in 2020/21 should once again lead to a balanced position.
- 4.7 The area in the block experiencing the most pressure at the moment is emerging High Needs, the current overspend in this area is £0.2m.
- 4.8 **High Needs Block (£3.094m forecast overspend).** The High Needs block is forecasting an in-year overspend of £3.094m at this stage of the year. The increased funding has been allocated across the block reflecting 2019/20 outturn levels.
- 4.9 Top-up funding is experiencing the biggest pressure, with a significant (£2.1m) increase from 2019/20. Placement costs are also expected to increase from last year with the current forecast being £1.3m higher than 2019/20.

- 4.10 Detailed reports relating to SEND demand, forecasting and short to longer term changes in spend are being developed, these will be presented at future meetings.
- 4.11 Following agreement of Forum, the amount transferred from the Schools Block in 2020/21 is being used to contribute towards the Education Transformation Programme. We are currently forecasting that this funding of £1.3m will be spent in 2020/21.
- 4.12 The Education Transformation Programme commenced this year and is primarily concerned with SEN and consequently the High Needs Block, this will need to reduce future cost pressures in the block and make it more sustainable. Nationally High Needs continues to be challenging and in Bristol this has been exacerbated by work to clear the backlog of EHCP. Further detailed activity review & analysis will need to be undertaken to ensure planning is robust and sufficient resources are available to meet needs, and we will continue to lobby government for a more sustainable funding settlement.
- 4.13 **Funding (Nil Variance).** £374.508m is the latest DSG amount notified by the ESFA, this includes the first adjustments for the High Needs Import/Export adjustment and a slight adjustments in Early Years reflecting the final year-end actual position.

**Appendix 1 - Forecast position for Overall DSG 2020/21 as at Period 4
(Block financing position)**

	Brought forward 1.4.20 £'000	Funding 2020/21 £'000	Forecast Outturn Period 04 2020/21 £'000	In-year movement £'000	Carry forward 31.3.21 £'000
Maintained Schools		78,707	78,707		
Academy Recoupment		191,439	191,439		
Growth Fund		2,346	2,346		
Schools Block	(174)	272,492	272,492		(174)
De-delegation Services	(464)				(464)
Admissions		494	494		
Centrally Retained		1,891	1,891		
Schools Central Services		2,385	2,385		
National Formula		28,973	28,988	15	
2 Year Old Funding		3,982	3,799		
Pupil Premium (EYPP)		299	299		
Additional Support Services		805	805		
SEN Top up		1,275	1,475	200	
Staffing		1,680	1,644	(37)	
Disability Access Fund		105	105		
Early Years Block	20	37,119	37,212	92	113
Commissioned Services		2,301	2,353	52	
Core Place Funding		10,302	10,216	(87)	
Staffing		1,160	1,342	182	
Top Up		27,950	30,668	2,718	
Placements		9,044	9,345	301	
Pupil Support		814	758	(56)	
HOPE Virtual School		236	219	(16)	
Academy Recoupment		9,335	9,335		
Education Transformation		1,369	1,369		
High Needs Block	3,509	62,511	65,606	3,094	6,603
Funding		(374,508)	(374,508)		
Total	2,892	0	3,187	3,187	6,078

Bristol Schools Forum
Education Transformation Programme: update on progress and spend

Date of meeting:	Tuesday 22 September 2020
Time of meeting:	5:00pm
Venue:	Zoom

1. Purpose of report (for information)

The purpose of the report is to provide Bristol Schools Forum with an update on the progress and spend against the £1.369m funding transfer from the Schools Block to the High Needs Block in 2020/21. The funding was to support a range of interventions and transformation activity within the scope of the Education Transformation Programme.

2. Recommendation

- a) The report is provided for information.

3. Background:

- a) A report introducing a proposal to deliver a system-wide SEND and Inclusion improvement programme was introduced at Schools Forum on 25 September 2019. A subsequent report was presented to Schools Forum at the November meeting, which outlined the broad scope, and funding requirement for the whole programme, specifically seeking a £1.3m allocation from the Schools Block to the High Needs Block as part of an overall programme investment sum of £3m.
- b) The transfer of £1.369m funding from the Schools Block to the High Needs Block in 2020/21 was agreed on a conditional basis, subject to further information on how the money will be spent.
- c) In responding to that requirement, this report provides the activities and milestones for delivering the HNB funded improvements set out in the Bristol Local Area [Written Statement of Action](#) (WSoA) for Special Educational Needs and Disabilities (SEND). Bristol's Local Area WSoA was approved and deemed fit-for-purpose by [Ofsted in a letter](#) dated 19 March 2020. See Appendix 1.
- d) There are additional HNB funded activities presented in the same format which support the actions contained with the WSoA.
- e) An experienced programme manager, with a proven track record for delivery, has been assigned to the programme, working to public sector standard project and programme methodologies. As part of the council's portfolio of

change, the programme is subject to mandatory reporting to divisional, directorate and Corporate Leadership Boards.

4. Funding for the Education Transformation Programme/Written Statement of Action improvement priorities

Funding to deliver the priorities laid out in the Written Statement of Action, and the wider ambitions captured within the Education Transformation Programme total £4.747m and are drawn from a number of sources:

1. £1.575m one-off funding from reserves was approved by Cabinet in June 2019. The majority of this funding was used to increase capacity within the SEND team for EHCP processing and also the Educational Psychology Service.
2. £0.5m council one off earmarked fund for 3 years (£1.5m in total) starting 2020/21
3. £303k one-off funding from reserves for 2020/21 financial year.
4. £1.369 DSG HNB approved by Schools Forum

Items 1 and 2 (£3.075m) has been passed directly to the operational services responsible for delivery in these areas.

Items 3 and 4 (£1.672m) comprise the available spend for the Education Transformation Programme and are tracked and monitored by the Programme Manager. Approval to release funding for specific proposals or interventions, are made by the Education Transformation Programme Board.

This paper specifically relates to progress of spend against Item 4, £1.369 DSG HNB.

Total DSG HNB funding allocation	£1.369m
Total estimate of spend items from this source	£1.238m
variance/contingency	£131k
Total spend on track 2020/21	£714k
Total spend profiled for 2021/22	£474k

- As a result of delays to recruitment and other planned activities and interventions, largely due to Covid, £474k of spend is profiled for 2021/22.
- The difference in original spend estimates versus current forecast is explained by increased certainty in some costs.

The Programme Manager’s budget monitor tool is overseen by the Finance Manager in the Finance Division.

5. Governance

An Education Transformation Programme Board, chaired by the Director for Education & Skills, meets once per month to monitor progress, assess proposals for spend, review risks and resolve issues.

A newly formed Communities & Recovery Board, chaired by the Executive Director for People, expects to receive a monthly update report from the Education Transformation Programme (on a 'by exception' basis).

The Education Transformation Programme sits alongside and works in partnership with the Written Statement of Action process, making a direct contribution to many of the milestones contained within. Monitoring and tracking of delivering the milestones within the WSoA is robust and overseen by the DfE via quarterly monitoring visits. In between the DfE visits, the SEND Partnership Group (SPG) meets four weekly and is co-chaired by the Director Education and Skills and Director of Transformation, Bristol, North Somerset and South Gloucestershire CCG. The SPG is responsible for driving the actions set out in the written statement of action (WSoA) and establishing task and finish groups as necessary to focus on specific areas of work.

Accountability for progress and impact is through reporting to the bi-monthly, multi-agency SEND Improvement Board and via BCC and CCG governance. This board is independently chaired by a member of the Local Government Association.

Review of HNB Funded Activities with the Education Transformation Programme

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Project	Baseline Estimate	Current Estimate	Spend 2020/21	Forecast 2021/22	Commentary
Specialist Provision Project	£105k	£69k	£69k	£?	<p>Two stage strategy:</p> <ol style="list-style-type: none"> 1. Address shortfall for 20/21 2. Longer term Specialist Place Planning – 5+ year strategy <p>Stage 1</p> <ul style="list-style-type: none"> • Engaged schools – 78 expressions of interest from 30 schools. • Feasibility studies to consider these and list produced • Open additional places in phases (dependent upon completion of building works and education setting ‘readiness’) <p>Stage 2</p> <ul style="list-style-type: none"> • Vision Document including core principles to be co-produced • Mapping exercise underway and baseline control • Plan is to create flexing provision to meet demand – ongoing annual process
SEND ‘First Call’	£400k	£334k	£206k	£128k	<p>A team manager was appointed in June 2020, recruitment to the wider team has concluded and been successful. The team will be fully in post by the end of September. Service has been undertaking ‘Covid return to school’ calls to families with EHCPs throughout August and beyond.</p>
Top Up Funding	£35k	£66k	£66k	£?	<p>Matrix of needs for all 4 areas of need completed and shared with key professionals for their feedback. BGG (matrix of provision) shared with key professionals on 1 June 2020. Funding formulas will be calculated in July and August ready for testing in September. Programme Board agreed to extend</p>

Project	Baseline Estimate	Current Estimate	Spend 2020/21	Forecast 2021/22	Commentary
					the scope, timeline and budget to incorporate Early Years to deliver 0 to 25 system for top-up. NB – 2 elements will run consecutively i.e. scope change does not affect implementation plan for school's top-up. Timeline only extended for Early Years element, increased scope does not impact on Schools' Top Up timeline
Local Offer Development	£25k	£25k	£5k	£20k	The plan for Local Offer development was amended to undertake wider promotion of the website in first instance in order to increase coverage and use. Once more families know about and are using the Local Offer, changes and developments will be better informed and based on user feedback.
SEND School Improvement Offer	£230k	£230k	£66k	£164	Progress was initially impacted by Covid_19 as efforts were diverted to attend to pandemic crisis. However, this was progressed during August and a recruitment process was successful in appointing a SEND SIO who will start in Jan 2020 for a 12 month fixed-term contract. The remainder of the funding will be used to directly commission support and intervention from schools and settings demonstrating best practice and with the capacity to provide external support.
SEND NEET	£118k	£116k	£116k	£?	All SEND NEET roles were in post as at March 2020 and working towards to agreed milestones. There is some impact as a result of Covid.
Attendance Task Group	£105k	£172k	£121k	£51k	The Attendance Strategy Manager was appointed and in post in March 2020. However, the strategic work aligned to priorities laid out in the programme was set aside due to the need to respond to the Covid crisis which required significant effort in terms of tracking attendance of vulnerable pupils. As at September, a new Belonging and Attendance Task Group

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Project	Baseline Estimate	Current Estimate	Spend 2020/21	Forecast 2021/22	Commentary
					was formally launched by the Directors of Education and Children Social Care and the work is set to get back on track. Underspend in other programme areas has been redirected to support this critical work.
Coproduction Projects	£190k	£190k	£100k	£90k	This is the area most severely impacted by Covid in terms of progress as the very nature of the proposal was that intervention should be coproduced with schools. The ability of all professionals across the education sector was seriously compromised by the need to respond to the Covid crisis. It is anticipated that opportunities to get this back on track will forthcoming as schools return and seek to address the inequalities that have deepened as a result of the pandemic.

Appendix 1

Improvement Priority 2	Outcomes we are aiming to achieve Children and young people with SEND receive the best possible, appropriate and effective support and provision at the right time.
Impact Measures Increase in the percentage of parents reporting they know how to access early intervention and have used these services.	

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Action	Milestones			
	July 2020	July RAG	November 2020	March 2021
	Develop a SEND 'first call' single point of contact service for parents, carers and professionals – aligned to Family Support and Inclusion Team – to ensure an accessible pathway to advice and referrals to SEND Local Offer for families that need support before or after an EHC Plan is in place.	Role of team co-designed with parent carers.	Project Manager appointed and project board formed. In order to respond to urgent Covid-19 need to telephone all parents and carers of children with EHCP Team manager appointed and staffed by assistant EPs. Team focus will be reviewed in September.	Team recruited and launched.
A support system for education, training and skills settings (0-25) to understand their responsibilities in relation to the SEND Code of Practice	SENDCo briefing meetings established to enable the sharing of information and good practice. An agreed co-	Established and will continue to be held using virtual platform. SENDCo communication strategy out to consult and generally being well received including more	Forward programme of meeting agendas and content coproduced with SENDCos and informed by parents' feedback. Structures and channels	Briefing meetings evaluated. SENDCo's feedback evidences they are being kept informed and benefitting from direct

Action	Milestones			
	July 2020	July RAG	November 2020	March 2021
	constructed plan documenting purpose and format of other communication with SENDCos.	use of virtual platforms post Covid.	agreed for disseminating information and guidance.	lines of communication.
Early Years current training offer reviewed to identify gaps.	<ul style="list-style-type: none"> Evaluation of training delivered in the last academic year and up to January 2020. Training needs identified from the Inclusion Visits to early years settings in the Autumn Term and early Spring Term. CPD Evaluation Form revised CPD Feedback Sheet created Agreed a programme of Training Courses developed to be delivered by EY Inclusion Team at early years settings' Inset Days: 	Comprehensive SEND training programme developed for Early Years staff in settings.	Feedback from trainees used to evaluate and further develop programme.	
A comprehensive 3-year	Programme	SEND Workforce	An evaluation of	

Action	Milestones			
	July 2020	July RAG	November 2020	March 2021
	SEND Workforce Development Programme for education settings including leaders, teachers, staff, governors and councillors.	requirements mapped – ‘Back to Basics’ CoP/Behaviour policy. Extended offer for SENDCos to include training for ‘aspiring SENDCos’ Draft programme to be agreed and refined with school clusters before end of term.	Development Programme implemented.	feedback from workforce and parent carer experience used to further evaluate and develop programme.
A support system for education settings to understand their responsibilities of early identification and assessment using a ‘graduated response’.	Clear communications about the Bristol Support Plan encouraging its use in all educational settings.	Done – through briefings and bulletins. On the Local Offer. Next SENDCo briefing will include a section on how to complete a good EHC Needs assessment request and this will incorporate information about BSP. Evidence that starting to be used to support EHCNA requests.	Bristol Support Plan being used by increased numbers of educational settings.	Evidence that the consistent use of the Bristol Support Plan is leading to good quality, coproduced assessments and effective support.

Improvement Priority 4	<p>Outcomes we are aiming to achieve</p> <p>Leaders across the local area will work together to ensure that the children and young people with SEND will experience inclusive cultures, enabling them to achieve their full potential.</p> <p>Develop our systems and resources to enable young people with SEND/EHCP to be better supported to achieve a successful transition into education, training and employment between ages 14 -25 and beyond.</p>
<p>Impact Measures</p> <p>Reduce the overall rate of fixed-term exclusions to bring Bristol in line with statistical neighbours (all schools) <i>Agree a fixed-term exclusion reduction target for SEN support and EHCP (primary, secondary, special)</i></p> <p>Reduce the percentage of sessions missed through overall absence to bring Bristol in line with statistical neighbours (all schools) <i>Agree a percentage of sessions missed through overall absence for SEN support and EHCP (overall and persistent absence)</i></p> <p>PE302b Reduce the percentage of SEND Young People aged 16-25, who have an EHCP and are NEET or Not Known</p> <p>BCP270 Increase experience of work opportunities for priority groups, including SEND young people</p>	

Action	Milestones			
	July 2020	July RAG	November 2020	March 2021
	Establish the structures and systems to improve attendance and reduce fixed-term exclusions for pupils with SEND	<p>Multi-agency (education, health and social care) Exclusion and Attendance work stream agreed and Task & Finish Group established – including parent carers – to support the development of a system-wide approach to identify the range of complex factors that underpin pupil absence,</p>	<p>Belonging work started: Task group established and meeting.</p> <p>Work begun with Excellence in schools Group</p> <p>This work is a key strand of Covid 19 recovery plan.</p> <ul style="list-style-type: none"> • Returning to Education guidance 	<p>Operational activity mapped and coproduced, Bristol-wide approach to address issues of non-attendance and exclusion agreed and launched.</p> <p>Launch of coproduced assessment tool that will shape the approach of different agencies in keeping students in</p>

Action	Milestones			
	July 2020	July RAG	November 2020	March 2021
		adopting a contextual safeguarding approach.	written for when children returning to school following Covid 19 absence <ul style="list-style-type: none"> Using trauma informed approach Data – ‘Think Family data-base – multi-agency working Aim is to minimise double disadvantage - links to Leading Edge work. 	education.
Extend the SEND Data Tracker (BG6) temporary contract to ensure there is sufficient capacity to carry out critical research and contact functions to build an accurate picture of Bristol young people aged 19-25 with SEND (currently there are 633 young people in our cohort)	80% of young people aged 19-25 with SEND will be known and/or EHCP ceased	Aware now of where 620 YP are 13 are still not contactable. Work ongoing with SEND team in regards to ceasing the plans who need to be.	90% of young people aged 19-25 with SEND will be known and/or EHCP ceased	100% of young people aged 19-25 with SEND will be known and/or EHCP ceased

Action	Milestones			
	July 2020	July RAG	November 2020	March 2021
	Extend the Post-16 SEND Participation Worker (BG9) temporary contract to ensure there is sufficient capacity to carry out critical face to face support and IAG activities with young people with SEND aged 19-25 to secure positive progression from Education to Training and Employment	20 SEND young people aged 19-25 will have been supported to successfully progress into training or employment	As of August the SEND case worker was working with 14 young people to support them with EET progress.	35 SEND young people aged 19-25 will have been supported to successfully progress into training or employment
Extend the WORKS Project Manager temporary contract so that we can work in partnership with schools and education settings to embed careers development into the curriculum, expand the number of employer pledges, and co-design exploratory career insights and experiences of work for young people aged 14-16 with SEND	420 SEND young people aged 14-16 will have taken part in employer workshops and experience of work activities to increase aspirations and awareness of future career options	0 from April - July for YP due to Covid however there has been a CPD event for staff and Parents 24 people attended. Most of the SEND provisions had limited communication during lockdown. However with schools now returning there are already plans to return to delivery within the school from next week this is through a blended offer of Virtual and face to face in school.	500 SEND young people aged 14-16 will have taken part in employer workshops and experience of work activities to increase aspirations and awareness of future career options	840 SEND young people aged 14-16 will have taken part in employer workshops and experience of work activities to increase aspirations and awareness of future career options
Develop a strategy with health	Current education	Two stage strategy:	Significant increase in	Increased capacity across

Action	Milestones			
	July 2020	July RAG	November 2020	March 2021
and schools to ensure specialist provision is used effectively and there are sufficient appropriate places to meet need.	<p>providers are engaged to work with Bristol City Council to ensure sufficient school places for all children and young people carefully matched to meet their particular needs in line with SEN Code of Practice.</p> <p>Mapping exercise completed and gaps and issues understood to inform Specialist Provision Sufficiency Strategy.</p> <p>Principles for specialist provision planning are agreed.</p> <p>Forecast demand to ensure there are sufficient places in specialist provision (schools and resource bases) to meet need.</p>	<ol style="list-style-type: none"> 1. Address shortfall for 20/21 2. Longer term Specialist Place Planning – 5+ year strategy <p>Stage 1</p> <ul style="list-style-type: none"> • Engaged schools – 78 expressions of interest from 30 schools. • Feasibility studies to consider these and list produced • Open additional places in phases (dependent upon completion of building works and education setting ‘readiness’) <p>Stage 2</p> <ul style="list-style-type: none"> • Vision Document including core principles to be co-produced • Mapping exercise underway and 	<p>number of places available in specialist provisions.</p> <p>Review of effectiveness of resource bases and alternative provision is undertaken.</p>	<p>the local area to meet demand to 2021/22 and beyond.</p>

Action	Milestones			
	July 2020	July RAG	November 2020	March 2021
			baseline control Plan is to create flexing provision to meet demand – ongoing annual process	

Improvement Priority 5	Outcomes we are aiming to achieve Parents and carers have a positive experience of the SEND system in Bristol and their confidence in the system improves
Impact Measures	Findings from quality assurance activity (audits, feedback cards, surveys, complaints) demonstrate ongoing improvement in parental confidence and satisfaction with the SEND system and Local Offer.

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Action	Milestones			
	July 2020	July RAG	November 2020	March 2021
	Coproduce the Local Offer website with children, young people, parents and carers in order to ensure information is clear, comprehensive, accessible and up-to-date.	Developed working groups with young people, parents and carers to identify their key needs and agreed way forward for the Local Offer website. A co-produced Website	Due to Covid, unable to engage parent carers fully to make an informed decision for the development, so current focus is on promoting the Local Offer website. - Revised plan is to engage the whole	Completed stage one of the Website Development Plan in coproduction with young people, parents and carers.

Action	Milestones			
	July 2020	July RAG	November 2020	March 2021
	Development Plan, ratified by all.	community in the Local Offer website through promotion, with a specific focus on harder to reach communities.		

Bristol Schools Forum
Update on DSG 2021-22 with potential funding levels

Date of meeting:	22 September 2020
Time of meeting:	5.00 pm
Venue:	Virtual – via Zoom

1 Purpose of report

- 1.1 This report provides an outline of emerging DSG funding levels for 2021/22, and updates on any changes to regulations surrounding DSG. As details on allocations are yet to be confirmed any figures are indicative and should be treated with caution.

2 Recommendation

2.1 Schools Forum is invited to:

- a) **note the potential 2021/22 indicative funding levels.**
- b) **note the proposed restrictions relating to the DSG.**
- c) **Note that the LA will consult with schools on items in the local formula, particularly MFG, transfers between blocks, and formula factors.**
- d) **note that the LA will consult with schools on their views on de-delegation, and report the results of the consultation to Forum for their decision at the meeting in November.**

3 Background

- 3.1 The ESFA released some details of the Pre-16 schools revenue funding for 2021/2022 on Monday 20th July.
- 3.2 This information included provisional allocations for Schools Block (excluding Growth), High Needs Block and Central School Services Block for 2021-22, based on current pupil data. Actual allocations and the Growth allocations will be determined later in the Autumn, based on Autumn 2020 school census data. There was no information on Early Years funding in this release.

- 3.3 For 2021/22 the 2019 update to the Income Deprivation Affecting Children Index has been incorporated into the allocations, meaning deprivation data used for calculating the formula is the latest data.
- 3.4 Whilst funding in schools and high needs blocks is distributed to individual LAs using National Funding Formula (NFF), the LA retains discretion over the local formula in to distributing the schools block to individual schools.

4 Funding levels for 2021/22

- 4.1 The announcement has stated that national funding for schools will increase by 4% overall, as compared to 2020/21. The funding floor will allocate at least 2% more in pupil-led funding per pupil, and there is an increase in the NFF minimum per pupil funding. Primary age is increasing, from £3750 to £4180 and Secondary is increasing KS3 from £4800 to £5215, and KS4 from £5300 to £5715.
- 4.2 Included within these uplifts is the announcement that the key factors in the NFF are seeing the unit values raised by 3%, and that part of the increase in the minimum funding levels is due to the incorporation of the Teachers' Pay and Teachers' Pensions grants into the unit value. The NFF is incorporating these grants into the minimum funding at the rate of £180 for primary pupils and £265 for secondary pupils.
- 4.3 The provisional Schools Block allocation for Bristol has been published at £291.7m, with actual allocations expected to be published in December 2020.
- 4.4 The treatment of the teachers' pay grant and the teachers' pension grant is changing in 2021/22, with the announcement stating that the funding of these grants (including the supplementary fund) has been added to the Schools Block from 2021 to 2022. The value of the Teachers' Pay grant in 2020/21 is being paid at the rate of £19.59 for Primary pupils and £28.84 for Secondary pupils and the value of the Teachers' Pensions Grant is being paid at the rate of £55.36 for Primary pupils and £81.49 for Secondary pupils. These are the April to August rates and we are still awaiting the announcement of September to March rates.
- 4.5 Nationally high needs funding is to increase by £730m for 2021/22, with each LA receiving an increase of at least 8% per head of population, compared to 2020/21. The provisional High Needs Block allocation for Bristol has been published at £66.9m (a £6.1m increase from 2020/21), with actual allocations expected to be published in December 2020.
- 4.6 As with Schools Block mainstream funding the teachers' pay grant and the teachers' pension employer contribution grant amounts for High Needs have been incorporated within the block.
- 4.7 Nationally central schools services funding in 2021 to 2022 will increase by 4% for the ongoing responsibilities that local authorities continue to have for all schools, while funding for historic commitments within this block will decrease by a further 20%. The provisional Central School Services Block allocation for Bristol has been published at £2.6m, with actual allocations expected to be published in December 2020. This is an overall reduction of

£72k reflecting a £186k reduction in historical prudential borrowing, offset by an increase in funding for ongoing responsibilities.

- 4.8 These provisional allocations are based on 2020/21 data. Final allocations of the 2021/22 funding will use information from the Autumn census are expected to be issued in December 2020.
- 4.9 Table 1 shows the potential increases in DSG funding for Bristol for 2021/22.

Table 1: Indicative 2021/22 DSG funding

Comparative allocations	2020/21 DSG allocation	Pay and Pension Grants Apr-August 2020/21	Estimated Pay and Pension grant allocations Sept-March 2020/21	Total: 2020/21 DSG plus Estimated grants – to enable comparison.	Indicative 2021/22 DSG allocation	% increase
	£m				£m	
Schools Block excl growth	271.2	5.4	7.6	284.2	291.7	2.7%
Central School Services Block	2.7			2.7	2.6	-2.6%
High Needs Block	60.8	0.4	0.5	61.7	66.9	8.5%
Total	334.7	5.8	8.1	348.5	361.2	3.6%
Early Years	37.1				No data	-

*Ignoring any changes in pupil numbers/characteristics
Allocations before any movements between blocks
Sept-March Pay & Pension Grant figures not known at this stage*

5 Restrictions on use and allocations

- 5.1 For 2021/22 we will continue to set a local schools formula. The government has confirmed again its intention to move to a single 'hard' national funding formula to determine every school's budget but no timescale for this change has been announced.
- 5.2 Minimum funding levels per pupil are set as described above and remain a mandatory factor in the local formula.
- 5.3 MFG for 2021/22 must be set at between +0.5% and +2%. An MFG of 0.5% was applied for 2020/21. Forum will need to discuss and agree what MFG rate is set for 202/22 within this range.
- 5.4 Local authorities will continue to be able to transfer up to 0.5% of their schools block to other blocks of the Dedicated Schools Grant (DSG), with schools forum approval with the caveat that the total schools block available for such transfers must exclude the additional funding local authorities have been allocated for the teachers' pay and pension grant, thereby guaranteeing that all of this funding remains with schools. A disapplication will be required for transfers above 0.5%, or for any amount without schools forum approval..
- 5.5 In 2020/21 we transferred £1.369m (0.5%) from the schools block to high needs block, this was matched by the LA and earmarked specifically to contribute towards the Education Transformation Programme.
- 5.6 Consultation will be carried out with schools, prior to the November forum meeting to seek their views of the following items;
 - Level of MFG to be applied.
 - Changes to formula factors
 - Transfers between blocks

6 De-delegation of services to Maintained Schools

- 6.1 In order that schools and academies can be funded on the same basis, the funding for a number of services have been identified by the DfE as services that must be delegated as part of the initial formula.
- 6.2 Maintained mainstream schools, by a majority vote of the Schools Forum in each sector, can opt to 'de-delegate' the funding for their sector i.e. the LA will hold the funding centrally for the agreed services with the funding spent on that sector only. The agreed retention will not be given to maintained schools in the formula.
- 6.3 The LA will consult with maintained mainstream schools to canvass opinion on the currently de-delegated services. The result of this consultation will be reported to the November meeting of Schools Forum where the maintained school representatives will vote on which services to de-delegate for 2021/22.
- 6.4 The current de-delegated services are:

Primary schools

- Premises & employee insurance
- FSM assessment
- Maternity Supply Cover
- Trade Union Facility time
- Education Psychology

Secondary schools

- Premises & employee insurance
- FSM assessment
- Maternity Supply Cover
- Trade Union Facility time
- Health & Safety Reps
- Education Psychology