

Bristol Schools Forum

Agenda Tuesday, 24th November, 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	Chair	
2.	17:05	Forum Standing Business (a) Apologies for Absence; (b) Confirmation meeting is quorate; (c) Appointment of new members/Resignations: Rob Endley (NASUWT) replacing William Brown (NEU) as School Union Representatives; (d) Notification of Vacancies: <ul style="list-style-type: none"> • Two Primary Academy Heads; • Two Primary Maintained Heads; • Two Primary Academy Governors; • Two Secondary Academy Heads; • One Secondary Academy Governor; (e) Declarations of Interest	A	Clerk	
3.		Chair's Update	I	Chair	Verbal
4.	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
5.		Verbal Update from Director: Education and Skills	I	AH	Verbal
6.		Dedicated School Grant (DSG) Budget Monitor 2020-21 (Period 7)	Di	GB	10 - 18
7.		Schools Block School Funding Formula 2021/22	De	GB/TY	19 - 38
8.		De-delegation	De	GB/TY	39 - 47
9.		Trading with Schools Annual Report	I	AM	48 - 75

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

Clerk: Corrina Haskins email: corrina.haskins@bristol.gov.uk**Chair:** Christine Townsend (contact via clerk)**FUTURE MEETINGS**

Date	Items
13 January 2021	Funding Formula; ALP Review Outcome; Update on Education Transformation Programme Milestones;

	Pupil Places/Sufficiency; Composition of Schools Forum
30 March 2021	Schools Forum Self Evaluation
11 May 2021	
13 July 2021	

Bristol Schools Forum

Minutes of the meeting held on Tuesday, 22nd September, 2020

at 5.00 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
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, Cabot Learning Federation
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
Steve Mills	Non School Member, UNISON
Sam Packer	Private Voluntary Independent (PVI) Early Years Rep
Ruth Pickersgill	Academy Secondary Governor Rep, City Academy
Chris Pring	Maintained Primary Headteacher Rep, Cabot Primary
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
Stephanie Williams	Academy Primary Head Rep, Bannerman Road Community Academy

In attendance from Bristol City Council:

Graham Booth	Finance Manager
Corrina Haskins	Clerk to Schools Forum
Alison Hurley	Director of Education & Skills
Denise Murray	Director of Finance
Travis Young	Corporate Finance

	Action
1. Welcome	
In the absence of the current Chair, Carew Reynell, Sarah Lovell welcomed everyone to the meeting and advised that Carew's term of office was due to expire next month and this would have been his last meeting. On behalf of members and officers, she thanked Carew for his work in chairing and supporting Bristol Schools Forum.	
2. Election of Chair	
Members were asked to elect a new Chair and the Clerk advised that there had been two nominations, Simon Eakins and Christine Townsend. Following a ballot, the Clerk announced Christine Townsend had been elected. RESOLVED that Christine Townsend be elected Chair of Bristol Schools Forum for 2020/21-2021/22. Christine Townsend took the Chair for the remainder of the meeting.	

<p>3. Election of Vice-Chair</p>	
<p>The Clerk asked for nominations for Vice-Chair and Sarah Lovell put her name forward. There were no other nominations and it was;</p> <p>RESOLVED that Sarah Lovell be elected as Vice-Chair for 2020/21-2021/22.</p>	
<p>4. Forum Standing Business</p>	
<p>a. Apologies for absence Apologies for absence were received from: Carew Reynell (Secondary Academy Governor); Rob Davies (Nursery Governor Rep, Speedwell and Little Hayes Nursery Federation) and Emma Richards (Special School Head Rep, Claremont School), Cllr Anna Keen (Cabinet Member: Education and Skills, Bristol City Council).</p> <p>b. Quorate The Clerk confirmed the meeting was quorate.</p> <p>c. Resignations The Clerk confirmed that Carew Reynell's term of office was due to expire in October and he would not be seeking re-election.</p> <p>d. Appointment of New Members There were no new members appointed.</p> <p>e. Notification of Vacancies The Clerk advised of the following Schools Forum Vacancies:</p> <ul style="list-style-type: none"> • Two Primary Academy Heads • Two Primary Maintained Heads • Two Primary Academy Governors • Two Secondary Academy Heads <p>f. Declarations of Interest There were no declarations of interest.</p>	
<p>5. Minutes of the Previous Meeting</p>	
<p>RESOLVED - that the minutes be confirmed as a correct record subject to the following amendment: Page 3 – ITrent: "moved to the new system" to be changed to "moved to a new external payroll provider"</p> <p><u>Matters Arising</u> In reference to the delegated year end balances, CP questioned whether maternity was spent to budget and was advised that a reserve was used to balance the budget. It was agreed that further information be provided in future to show where there was a shortfall to give an overall picture of the budget position.</p>	
<p>6. Update from Finance Sub-Group</p>	
<p>GB reported back from the Finance Sub-Group of 25th August as follows:</p>	

- The group discussed the latest budget monitor;
- At the time of the meeting the information relating to funding formula was not available but indicative figures had now been received;
- The Group agreed that it did not want to move away from the National Funding Formula;
- The Group discussed the growth fund; de-delegation and the High Needs Transformation Programme.

7. Verbal update from Director of Education and Skills

AH gave a verbal update as follows:

- Acknowledged the current pressure in schools as a result of the Covid 19 pandemic and thanked everyone for attending the meeting;
- Bristol was beginning to see positive cases of Covid 19 in schools and there would be an impact on school budgets in terms of supply cover where teachers were self-isolating;
- Early Years settings/post-16 providers had been particularly affected by the financial implications of Covid 19 as they did not qualify for the additional funding being provided by government;

Alternative Learning Provision Review:

- Work had begun and an independent person had been appointed to run the review which would take place over the next two months;
- A key ambition was to gain a full understanding of how alternative learning and early intervention bases were being used across the city;
- The Forum would be kept updated on the review.

Y7 Sufficiency:

- The bulge in school numbers would peak in Year 7 in September 2021;
- The opening of the new free school, Oasis Temple Quarter, would be delayed as the planning application approved by the Council in August could be called in by the Secretary of State;
- Alternative plans were being worked on for places for Year 7 students in September 2021 and Schools Forum would be updated at future meetings.

Composition of the Schools Forum

- This had been delayed due to other priorities and a report would be brought back in January 2021.

Members expressed concern about the ongoing costs associated with the Covid pandemic, which were continuing to escalate to meet demands e.g. for cleaning and supply cover. DM acknowledged the challenges being faced by schools and undertook to make representations about the ongoing pressures and the lack of additional funding for early years/post 16 providers to the Department for Education/Treasury.

SH undertook to liaise with Nursery Heads with a view to providing information to DM about the financial impact for early years' providers.

Members also raised a concern that the figures in the census may be affected by lower than usual attendance and limited meal options and that this would have an impact on the grant for next year. DM asked for further information to be provided so she could include this in her representations to government.

In response to a question about what type of virtual learning platform/portals would be used by schools in the event of partial closures, AH confirmed that this was for individual schools to

determine, however she acknowledged that more work was required to address the issue of digital poverty across the city and ensure that all children could access virtual learning.

Members questioned how the government “catch up” funding was allocated and AH confirmed that this was allocated directly to schools and it was a formula funding based on the size of the school. In terms of timing, GB undertook to advise when the funding would be processed to schools.

In response to a question about attendance, AH confirmed that this continued to be a high priority and the local authority was working with schools and families to ensure that students were attending school.

RESOLVED that the verbal update be noted.

8. DSG Budget Monitor 2020/21 P4

GB introduced the report and drew attention to the following:

- This was the first budget monitor of the year, and showed the position as at the end of July (period 4);
- There was a £2.8m deficit at the start of the year carried forward from last year;
- Schools block, central block and de-delegation were forecast in a balance position;
- There was a small pressure in the early years’ block most of which was from emerging SEN;
- The biggest pressure was the high needs block which showed an in year variance of over £3m. Most of the pressure was due to top ups, the SEN Team had made good progress in processing the backlog of Education and Health Care Plans but this had a knock on effect on finances.

Members questioned whether schools could get more top up allocation than they applied for and AH responded that, during lockdown, top up was allocated on a formula basis which meant that a small proportion ended up with either slightly more or less. It was suggested that, in future allocations, no school should be given more than they apply for in light of the pressure on the High Needs budget.

In response to a question about why Commissioned Services had an overspend, GB confirmed that it was often necessary to commission extra services throughout the year in terms of alternative provision, however this would be addressed as part of the ongoing review.

Members questioned whether, in view of the current unprecedented crisis, the local authority had any power to use reserves to help the most vulnerable children. DM responded that the local authority was not able to use reserves for the High Needs deficit and although a case could be made to the government for additional funding arising from Covid expenditure, the deficit was not related to the current pandemic.

In response to a question about a figure of £12m in a recent Cabinet report, GB clarified that this represented all the balances of all maintained schools and was not the reserves of the council.

Further clarification was sought on the position in relation to High Needs funding and in particular why the position had changed since the final outturn report for 2019/20 and whether the deficit was likely to increase further. GB responded that the outturn figures did not include

the £2.4m advanced funding, and that the figure was likely to increase as more EHCPs were processed. DM confirmed that further analysis was required to look at the trends and forecast what the final deficit would be and although additional government funding would be available for the High Needs block, it was likely that this would be enough to meet demand.

RESOLVED that the in-year 2020/21 position for the overall DSG be noted.

9. Education Transformation Programme - update on progress and spend

AH gave an update on the Education Transformation Programme as follows:

- Progress had been made against the milestones as detailed in the report;
- The report outlined how the money transferred to the High Needs block was being spent to ensure there was a transparency;
- There was clear governance in place and a lot of scrutiny and challenge including the Children’s Improvement Board which was chaired by a Local Government Association member and formal visits from DfE and NHS England against the Written Statement of Action;
- In relation to the specialist provision project, schools had been asked how this could be provided to meet the shortfall and there were 78 expressions of interest from 30 schools which were now being considered through a feasibility perspective;
- The “First Call” – front door service for families accessing information about SEND had been re-badged as “local offer live” to avoid confusion with other services;
- There would be a review of how top up funding was allocated and this would incorporate early years’ top up funding;
- A Belonging and Attendance Task Group had been set up to ensure a joined up approach with children’s services to make sure children were safe and back in schools whenever possible;
- Some co-production projects had been delayed due to the Covid pandemic and consideration was being given to how this could work in the virtual world;
- Focus was now on the November milestones and whether resources needed to be redirected from areas where it was not possible to deliver to those where progress could be made.

In response to concerns raised about the work experience and careers advice opportunities missed by Key Stage 4 students during lockdown, AH confirmed that the Skills Team were looking at how much support could be offered on line, as well as supporting the roll out of the government’s Kickstart scheme. She reassured Members that a lot of thought and planning was going into supporting students into employment in the context of the pandemic.

The Forum welcomed the work going on to support post-16 students especially the focus on young people with special educational needs and disabilities. It was also noted that it was important that information about the work of groups such as the Belonging and Attendance Group should be disseminated to schools and other settings.

In response to a question about the timescales and process for decisions being made about alternative learning provision, AH confirmed that there were a number of issues to consider in making a decision including the location of school/setting and identifying where the need was and also the existing staffing capability. In terms of decision making, she also advised that academies had their own governance route and this had to be built into the timeframe.

In response to a question about early years, AH clarified that there was no specific piece of work but that it was included as part of the wider pieces of work.

In response to a question about the impact on next year's DSG in progressing the programme, it was confirmed that the programme was always intended to be medium term rather than one year, but decisions would need to be taken in relation to funding for future years.

RESOLVED that the report be noted.

10. Update on DSG 2021-22 with potential funding levels

TY reported that the Education and Skills Funding Agency had published indicative information on next year's allocations and updates to formula regulations at the end of July as follows:

- The information was incomplete and did not include early years;
- The information and numbers were calculated on current pupil cohorts (from October 2019 census) which would be updated following the October 2020 census;
- The Income Deprivation Affecting Children Index (IDACI) data set would change from 2015 to 2019 and indicative values were based on the 2019 data;
- Local Authorities still retained discretion and there was no proposal to move to a hard national funding formula although National Funding Formulas had been published;
- Schools block:
 - Nationally there was a 4% increase with a funding floor to ensure that no Local Authority would get less than 2%, Bristol was estimated as 2.7% increase;
 - Increase per pupil funding levels incorporated some of teachers pay and pensions grant;
- High Needs:
 - £730m in the national funding pot, each Local Authority was not likely to receive less than 8% increase (8.5% for Bristol);
 - Pay and pension grants for special schools were incorporated into this allocation;
- CSS block:
 - This had reduced over the last few years as SFA looked to unwind historic commitment funding (prudential borrowing for Bristol) and this element would be further reduced but there would be a small increase for the inclusion of pay and pension grants for centrally employed teaching staff (-2.6% for Bristol);
- DSG overall 3.6% increase for Bristol;
- Minimum funding guarantee would be between +0.5-2%;
- The next step was for schools to be consulted on the minimum funding level guarantee; any block movements; de-delegation and formula factors prior to Schools Forum taking a decision in November.

It was agreed that a meeting of the Finance Sub-Group be held in advance of the next meeting to discuss the details of consultation.

In response to a question about whether any schools were still being funded on the prediction of a cohort rather than an actual cohort, TY confirmed that last year there had been 2 schools, Trinity and the former Steiner Academy that had transformed from an all through school to a primary school and an adjustment would be made in the case of the former Steiner School to reflect its new position as a primary while Trinity would have real statistics for this year which would supersede previous data.

Members questioned if feedback from primary schools was that it was harder to put forward a balanced budget as the National Funding Formula in Bristol favoured secondary schools and larger primaries. TF confirmed that smaller schools were protected under the minimum funding guarantee and a bigger challenge for them were static and falling rolls combined with increasing costs. It was suggested that the issue of falling roles and place projections could be a topic of discussion for the Finance Sub Group.

In relation to a question about maternity supply cover, GB confirmed that the two maintained secondary schools were contributing enough to cover their side of the de delegation, but he would look at coding the secondary and primary money separately in the future.

RESOLVED

- that the potential 2021/22 indicative funding levels be noted;
- that the proposed restrictions relating to the DSG be noted;
- that the proposed LA consultation with schools on items in the local formula, particularly MFG, transfers between blocks, and formula factors be noted;
- that the proposed LA consultation with schools on their views on dedelegation be noted, and the results of the consultation be reported to Forum for decision at the meeting in November.

11. Any Other Business

In response to a question about whether Q2 Outturn figures could be submitted late, DM advised that any schools facing a particular challenge should approach Trading with Schools in the first instance to ask for an extension.

The meeting closed at 6.57pm.

Bristol Schools Forum **DSG Budget Monitor 2020/21 P7**

Date of meeting:	24 November 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 7 (to end October 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 At the September meeting Schools Forum was presented with a budget monitor reporting the position as at Period 4 (end of July). At this point the forecast overall carry forward position was a deficit of £6.078m.
- 3.2 The report updates Schools Forum on the position at Period 7 (end of October) 2020/21.

4 Budget monitoring 2020/21

- 4.1 The previously reported position in September was a forecast £3.186m in-year deficit on the Dedicated Schools Grant budget at Period 4 2020/21.
- 4.2 This position has moved adversely by £4.827m giving a forecast in-year deficit of £8.013m, adding this to the brought forward balance gives a forecast carry forward deficit of £10.904m. The main area for concern continues to be the High Needs block which is forecasting an overspend in-year of £7.648m. The Period 7 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 7 (October 2020)

<i>All figures £'000</i>	<i>b/f</i>	<i>DSG Funding 2020/21</i>	<i>Forecast Outturn Period 07 2020/21</i>	<i>In-year variance</i>	<i>Forecast Carry-forward Period 07 2020/21</i>	<i>Forecast Carry-forward Period 04 2020/21</i>	<i>Movement Period 04 to Period 07</i>
Schools Block	(174)	272,492	272,492	0	(174)	0	0
De-delegation	(464)	0	0	0	(464)	0	0
Schools Central Block		2,386	2,385	0	0	0	0
Early Years	20	37,119	37,484	365	385	92	273
High Needs Block	3,509	62,511	70,160	7,648	11,157	3,094	4,554
Funding		(374,508)	(374,508)	0	0	0	0
Total	2,892	0	8,013	8,013	10,904	3,186	4,827

- 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 (£0.365m 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 £0.351m.
- 4.8 **High Needs Block (£7.648m forecast overspend).** The High Needs block is forecasting a significant in-year overspend of £7.648m at this stage of the year.

- 4.9 Top-up funding is experiencing the biggest pressure, with a significant increase from 2019/20. The current forecast is £7.034m over budget. As this is the area experiencing the most pressure further analysis of the numbers and spend has been carried out and this is presented in Appendix 2.
- 4.10 The table in Appendix 2 looks at the numbers of top-ups at the start of last year, the beginning of this financial year and also the latest period, by setting and top-up band. Monthly costs are shown for each band as well as a full year cost of the increase in top-ups from April 2019 to present. The increase of round £7m is in line with the current overspend in this area.
- 4.11 For top-ups in Special Schools it can be seen there is an increase of 118 top-ups, the annual impact of this is £3.4m. What the data is showing is a movement up the banding levels, with a reduction at Band 3 and 4, but an increase in Bands 5, 6 and 7. The increase of 45 at Band 3 costs an extra £1m per year and the increase of 7 at Band 7 costs £1.4m.
- 4.12 Mainstream Schools have seen an increase of 395 pupils with top-up payments, the annual impact of this is £3.6m. The increase of 188 at Band 4 is the most significant adding £2m to the annual cost, £0.9m has also been added by the increase of 128 pupils at Band 3.
- 4.13 GFE (General Further Education) settings have also seen a significant rise in both student numbers and cost, Table 2 shows the forecast for 2020/21 alongside the previous 2 financial years. The number of students has increased by over 100 in this financial year as well as average top-up rates increasing. The cost is increasing at the rate of £1m per year.

Table 2: GFE (General Further Education) top-up and cost

	18/19 Financial year	18/19 Financial Year pupil No.s	18/19 Average topup	19/20 Financial Year	19/20 Financial year Pupil No.s	19/20 Average topup	20/21 Financial Year	20/21 Financial year Pupil No.s	20/21 Average topup
	£'000	number	£	£'000	number	£	£'000	number	£
GFE total	1,831	443	4,137	2,674	480	5,572	3,784	586	6,454

- 4.14 Further data explaining the increases is provided in Appendix 3.
- 4.15 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.

- 4.16 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 has started 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.
- 4.17 **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 adjustment in Early Years reflecting the final year-end actual position.

**Appendix 1 - Forecast position for Overall DSG 2020/21 as at Period 7
(Block financing position)**

	Brought forward 1.4.20 £'000	Funding 2020/21 £'000	Forecast Outturn Period 07 2020/21 £'000	In-year movement £'000	Carry forward 31.3.21 £'000	P4 Variance £'000	Movement P4 to P7 £'000
Maintained Schools		78,340	78,340				
Academy Recoupment		191,439	191,439				
Growth Fund		2,712	2,712				
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		29,269	29,305	37		(58)	95
2 Year Old Funding		3,448	3,448				
Pupil Premium (EYPP)		538	538				
Additional Support Services		805	805				
SEN Top up		1,275	1,625	351		200	151
Staffing		1,680	1,658	(23)		(50)	27
Disability Access Fund		105	105				
Early Years Block	20	37,119	37,484	365	385	92	273
Commissioned Services		2,301	2,803	502		52	450
Core Place Funding		10,302	10,216	(87)		(87)	
Staffing		1,160	1,175	14		182	(167)
Top Up		27,950	34,978	7,028		2,718	4,309
Placements		9,044	9,288	244		301	(57)
Pupil Support		814	763	(51)		(56)	5
HOPE Virtual School		236	233	(3)		(16)	14
Academy Recoupment		9,335	9,335				
Education Transformation		1,369	1,369				
High Needs Block	3,509	62,511	70,160	7,648	11,157	3,094	4,554
Funding		(374,508)	(374,508)				
Total	2,892	0	8,013	8,013	10,904	3,186	4,827

Appendix 2: Top-up numbers and cost

School Type	Band	Average Band rate pa	April 2019		April 2020		October 2020		Increase Apr 2019-Oct 2020		
			Number	Monthly cost	Number	Monthly cost	Number	Monthly cost	Number	Monthly Cost	Annual Cost
		£		£'000		£'000		£'000		£'000	£'000
Special Schools	BAND_1	2330	0		0		1		1		2
	BAND_3	9503	321	249	300	232	306	243	-15	(6)	(75)
	BAND_4	14959	243	304	248	304	233	290	-10	(14)	(169)
	BAND_5	23083	175	335	202	386	220	422	45	87	1,040
	BAND_6	33050	16	41	21	59	31	85	15	44	527
	BAND_7	55623	25	111	34	159	49	225	24	115	1,376
	VEN1	12602	65	68	97	94	115	120	50	52	625
	VEN2	15500	1	2	2	3	2	3	1	1	13
	VEN3	24000	17	34	22	44	22	44	5	10	120
	VEN4	38000	0		2	6	2	6	2	6	76
Other	n/a		186		175		175		(12)	(139)	
Total			863	1,330	928	1,463	981	1,613	118	283	3,394
Bristol Pupils in OLA	BAND_3	4755	0		2	1	5	2	5	2	24
	BAND_4	10000	0		0		1	1	1	1	10
	OOA	n/a	146	135	149	142	145	142	-1	7	83
	Total		146	135	151	143	151	145	5	10	117
Resources bases	BAND_1	2460	5	1	2		2		-3	(1)	(7)
	BAND_2	4910	27	11	23	9	16	7	-11	(5)	(54)
	BAND_3	9830	116	94	130	105	130	105	14	11	131
	BAND_4	14139	11	13	13	16	13	16	2	3	33
	BAND_5	21539	2	4	5	9	5	9	3	5	59
	BAND_7	14343	1	1	0		0		-1	(1)	(6)
	Other	n/a				1					1
Total			162	124	173	142	166	137	4	13	157
Mainstream	BAND_2	977	137	10	138	11	171	14	34	4	45
	BAND_3	4237	538	160	638	224	666	234	128	74	892
	BAND_4	9029	175	98	293	213	363	273	188	175	2,097
	BAND_5	13661	10	9	25	28	43	50	33	41	491
	BAND_6	22204	2	2	11	19	17	32	15	30	359
	BAND_7	18803	9	11	7	10	6	11	-3	(1)	(3)
	Other	n/a		32		15		10		(22)	(263)
Total			871	323	1112	520	1266	625	395	301	3,617
PRUs	BAND_3	9199	126	94	123	83	64	48	-62	(46)	(551)
	BAND_4	10593	1		18	14	13	12	12	11	138
	BAND_5	16120	3	1	16	22	14	19	11	17	205
	BAND_6	25793	0		3	4	3	6	3	6	73
	BAND_7	52928	4	14	2	9	3	13	-1	(1)	(14)
	Other	n/a				2		6		6	72
Total			134	110	162	134	97	103	-37	(6)	(76)
Overall total			2176	2,022	2526	2,402	2661	2,623	485	601	7,209

Appendix 3 : Explanation of top-up (Element 3) increases

There are a number of drivers impacting the increasing demand and cost for SEND. Much of the Education Transformation Programme is focused on increasing statutory compliance and system reform. A key element to this reform is ensuring the system is fully inclusive and identifies emerging needs and targets support earlier. However, a significant amount of current resource is focused on the improvements in the Education, Health and Care Plan (EHCP) system.

Details in this appendix, demonstrates the rise in requests and significant increase in the number of plans finalised since last year.

Further analysis is underway to fully understand what is driving the rise in costs elsewhere in the system, e.g. Top Up funding without an EHCP.

Increase in demand for EHCPs

New Requests for an EHC Needs Assessment Received

- **2019 and 2020 (January to September)**

In 2020 the number of **new requests received between January and September** for an EHC Needs Assessment has **increased by 17%** compared to the same period last year. This can be seen in the table below.

New Requests for an EHC Needs Assessment Received										
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Total (Jan to Sep)
2020	65	62	84	52	55	71	54	7	43	493
2019	58	48	59	41	41	58	73	14	30	422
Number Difference	7	14	25	11	14	13	-19	-7	13	71
% increase/decrease	12%	29%	42%	27%	34%	22%	-26%	-50%	43%	17%

Data source: BCC client database

Increase in New EHC Plans finalised

- **2019 and 2020 (January to September)**

2020 has seen an increase of 144% of new EHC Plans finalised between January and September compared to the same period in 2019.

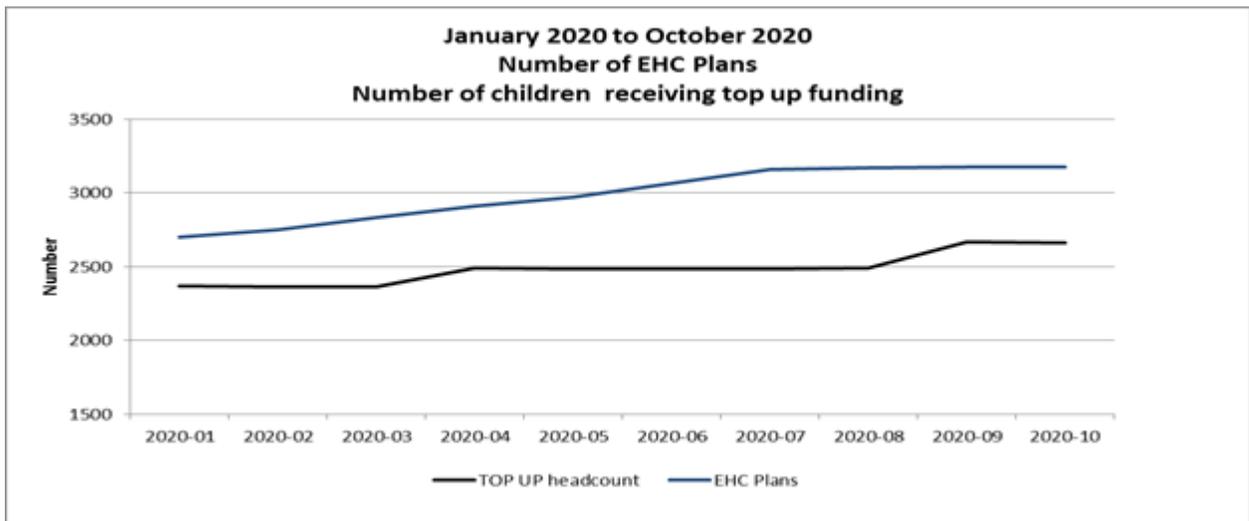
Number finalised EHC Plans										
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Total (Jan to Sep)
2020	38	51	50	77	81	98	101	26	58	580
2019	12	23	16	11	29	9	72	31	35	238
Number Difference	26	28	34	66	52	89	29	-5	23	342
% increase/decrease	217%	122%	213%	600%	179%	989%	40%	-16%	66%	144%

Data source: BCC client database

Increase in the numbers of Children and Young People with a Bristol EHC Plan

- 2020 (January to October)

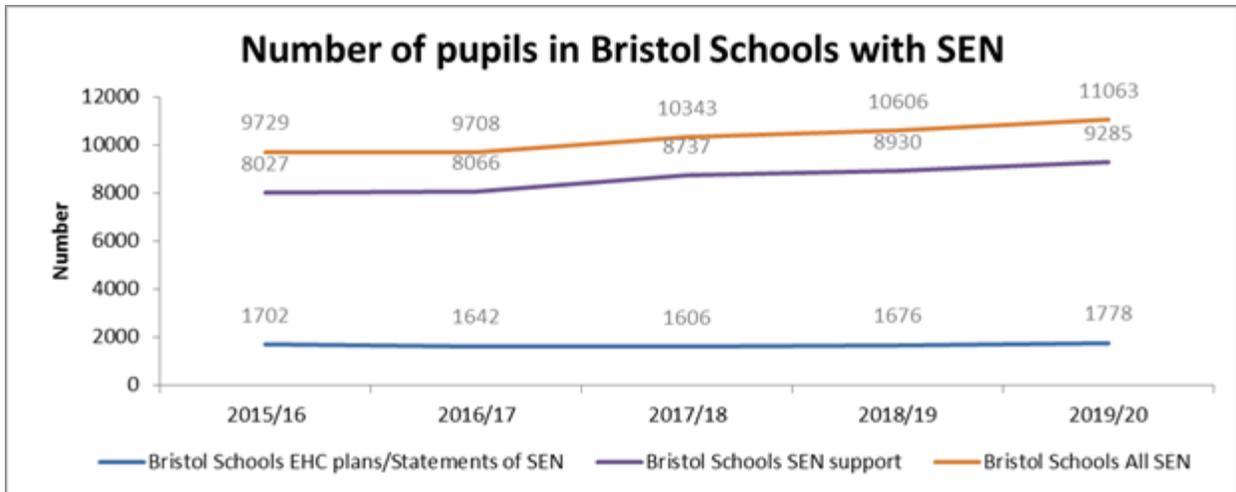
A snapshot at the end of each month of the number of EHC Plans over the last 10 months has shown a month on month increase, with a 17% difference in the number of EHC Plans at end of January 2020 (2702) compared to October 2020 (3177). Over the same period, number of children receiving top up funding increased by 12%.



Pupils with Special Educational Needs in a Bristol schools (school SEN support, EHCP and those at school SEN support and with an EHCP)

The number of **pupils with identified special education needs in a Bristol school** has increased from 10,606 in 2019 to 11,063 pupils in 2020, **an increase of 4.3%** (457 more pupils classified as SEN).

Breaking down SEN into two sub groups (EHC Plans and SEN support) this year, the increase in Bristol is driven by **a rise in number of pupils with an EHC Plan (+6.1% or 102 pupils)**. The number of **pupils receiving SEN support has also risen, although by a smaller amount (+4.0% or 355 pupils)**.



Data source: School Census 2020- These figures relate to those children / YP attending a Bristol School as at January each year (with the latest published data up to January 2020).

Special Schools

Requests as well as identified need for specialist education provision (across all need types) within the city continue to grow, with a gap between demand and capacity at the current time. The special school sufficiency project is in place to address this issue. Further work is planned with Special School Head Teachers to understand the demand in requests for increased Top Up funding.

Bristol Schools Forum **Schools Block School Funding Formula 2021/22**

Date of meeting:	24 th November 2020
Time of meeting:	5:00 pm
Venue:	Virtual Meeting : Zoom

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 2021/22, prior to final allocations being made available by the ESFA in December, for final formula agreement in January 2021.

2. Recommendations

Schools Forum is invited to:

- 2.1 Note the changes in the formula methodology for 2021/22
- 2.2 Provide feedback, as appropriate on the proposed arrangements for the 2021/22 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 2021/22 in January 2021. Specifically;
- transfer 0.5% to High Needs Block
 - set MFG at 0.5%
 - retain lump sum at current level
 - allocate any spare funding (after mandated items) to AEN
 - allocate £2m to Growth Fund
- 2.3 Agree the submission of the disapplication of the present MFG and use of a recalculated MFG for Avanti Gardens in 2021/22.

3. Changes between the 2020/21 NFF and the 2021/22 NFF

- 3.1 The main formula in 2021/22 is similar in operation to the formula in 2020/21. However, the ESFA has introduced some changes for 2021/22.
- 3.2 NFF Unit values have been increased as set out in **Appendix A**.
- 3.3 The ESFA has used 2019 data from the Income Deprivation Affecting Children Index (IDACI) in place of 2015 data. The ESFA has also changed the basis on which pupils are assigned to the seven IDACI bands: they are now assigned based on rank rather than score. For example, Band A now consists of pupils in the most deprived 2.5% of lower super output areas (LSOAs), instead of consisting of pupils in LSOAs with an IDACI score greater than 0.5. More details are given in **Appendix B**.

- 3.4 From 2021/22, funding previously received through the Teachers' Pay Grant (TPG) and Teachers' Pension Employer Contribution Grants (TPECG) to mainstream schools for pupils from reception to year 11 will be allocated through the schools block NFF by adding to the baseline, by increasing the basic per pupil funding and by increasing the minimum per pupil funding.
- 3.5 The LA-level protection has not been continued after being introduced in 2020/21

4. Funding available

- 4.1 Provisional allocations announced in July 2020 are set out in the table below, and are based upon the October 2019 school census data. Schools Forum is cautioned to note that final allocations will be different, being based upon the October 2020 school census data.

This indicates that the funding for Schools Block in 2021/22 is provisionally to be £278.76m plus an as yet unannounced allowance for Growth. **Table 1** sets out how this funding is composed.

Table 1: Initial indicative Schools Block Budget 2021/22

	Unit of funding	2020/21 pupil numbers	£ total
Primary	£4,616	36,151	£166,884,146
Secondary	£6,001	19,181	£115,101,375
Actual 2021-22 funding through the premises factors			£9,753,070
Growth funding element			Not yet announced
Provisional NFF 2021-22 schools block funding (excluding funding through the growth factor)			£291,738,591
Element of Schools Block relating to Teachers Pay Grant and Teachers Employer Contribution Pension Grant			
Primary	£179.88	36,151	£6,502,842
Secondary	£264.78	19,181	£5,078,745
Total			£11,581,587
Provisional allocation(excl. growth)			£291,738,591

Less Provisional element related to TPG & TECPG			£(11,581,587)
Schools Block sub-total to calculate transfer			£280,157,004
Less 0.5% transfer to High Needs (if enacted)			£(1,400,785)
Balance remaining in Schools Block for formula			£278,756,219

5. Funding formula

- 5.1 The DfE continues to base the calculations for each authority on a soft National Funding Formula (ie the NFF is calculated on a per pupil, per school basis, but this determines how much the Local Authority gets, not how much each individual school is entitled to – a local formula for distributing DSG still prevails).
- 5.2 A number of changes have been made to the Schools Block Funding Formula for 2021/22, these are the key points that impact most on BCC;
- 5.3 **Minimum per pupil funding levels.** Minimum funding levels per pupil are set as part of the NFF, for 2021/22 these will be £4,180 for primary schools and £5,215 for KS3 and £5,715 for KS4 in secondary schools (the calculation includes the lump sum but excludes other premises factors). This averages at £5,415 across secondary phases.
- 5.4 This minimum per-pupil funding was introduced as a mandatory factor in the local formula for the first time in 2020/21, and now it has been raised in value for 2021/22. There are currently 41 primary schools and 8 secondary schools in Bristol that are funded below these levels (bearing in mind current per pupil funding doesn't include the pay and pension elements).
- 5.5 It should be noted that these increased minimum per pupil funding levels include the allocations for the Teachers Pay Grant and Teachers Employer Contributions Pensions Grant. See 5.9 for detail on this element of the increase.
- 5.6 **Positive Minimum Funding Guarantees (MFG).** For 2021/22 funding formula the MFG can be set within the range +0.5% and +2.0%.
- 5.7 For the 2020/21 funding formula, the MFG had to be set within the range of +0.5% to +1.84%. An MFG of +0.5% 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.
- 5.8 For 2021/22 the LA is proposing setting at the minimum allowable again, at +0.5% for the same reasons as last year, and in line with discussions at School Forum,

the sub-group and in line with the consultation results (**the consultation is discussed at 6.46 and full consultation results are shown in Appendix C**).

5.9 **Introduction of the Teacher Pay and Teacher Employer Contribution Pensions Grants into the formula..**: From 2021/22 the previously separate Teacher Pay Grant and Teacher Pension Employer Contribution Grant funding streams are being incorporated into the mainstream school funding formula.

5.10 The ESFA is achieving this through two means:

- Adding the per pupil amounts onto the age-weighted pupil (AWPU)
- Adding the same per pupil amounts to the minimum per pupil funding levels (MPPLs)
- Adding an amount representing the funding schools receive through the grants and supplementary fund into the baselines

5.11 The amounts for these items per pupil are:

£	TPG	TPECG	Total
Primary	47	133	180
Secondary	69	196	265

5.12 LAs looking to make block transfers out of Schools Block must calculate the transfer value after deducting the TPG and TPECG funding element from the Schools Block allocation

5.13 **Growth Funding.** The DfE continues to struggle to develop a fair and sustainable way of including sufficient resource in the formula to take account of growing pupil numbers. Previously they have used historic spend as the basis, but this did not help authorities with new, rapid growth. For 2021/22, the DfE are 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 2021/22 will not be known until it is announced, which is expected during December 2020.

5.14 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.

5.15 **Movements between blocks.** The government's announcement of more funding into 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 2021/22 enforce this. However LAs retain much discretion over where and the amount passed on.

5.16 As in previous years, the position of the High Needs budget remains of concern. Whilst additional funding has been made available for the High Needs block directly, in 2020/21 we transferred 0.5% of the Schools Block (£1.3m) to assist with the High Needs Transformation programme. For 2021/22 the LA has scope to

again seek permission to transfer up to 0.5% of the Schools Block (up to an estimated £1.4m) into the High Needs Block.

- 5.17 The Authority continues to explore all options in closing the High Needs funding gap, and this includes considering the transfer of funding from Schools Block. Transfers between blocks is discussed elsewhere in this document, however for the purposes of this paper the maximum transfer that can be locally agreed has been modelled, based on current funding announcements, alongside the results with no transfer.
- 5.18 **Use of IDACI 2019 data.** As mentioned in the section above, the ESFA has updated the formula to use the 2019 IDACI data set.
- 5.19 IDACI is a relative measure of Income Deprivation. The new data set suggests a relative reduction in deprivation in Bristol's LSOAs when compared to the rest of England.
- 5.20 The effect of the updated data set is most apparent when compared to the 2015 data set. **The tables in Appendix D** compare the APT results from the two data sets, using the 2019 school census data and the 2020/21 funding formula values in both instances, and show a reduction in targeted IDACI funding of £1.2m.
- 5.21 Schools Forum is reminded that the actual effect of the change will depend on the 2020 school census data, however Forum may wish to consider this effect of the update when considering where to target any unallocated funding, once commitments such as the minimum per pupil funding and the minimum funding guarantees have been met.

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 The LA is aware of School Forum's previously expressed concerns around transfers supporting general High Needs activities and so, just as with the transfer last year, any funds transferred would be used to support the continuing High Needs transformation programme. This amount would be ring-fenced for this purpose and there will be clear and transparent reporting to Schools Forum on the use of this money. The prime focus of the continuation of the Transformation Programme will need to be in addressing the deficit in the High Needs Block.
- 6.3 A block transfer was one of the areas consulted upon, with 19 of the 25 responding schools supporting a transfer of up to 0.5%

- 6.4 Comments were received both in support of any transfer, and opposed to any transfer:
- a. *Ensure the funds are clearly utilised to support with the transformation programme and other priorities to support HN pupils*
 - b. *How and where is it reported how this funding is used in more detail? It would be good to have some feedback on this Eg how much the work to provide additional SEND places is costing?*
 - c. *It is useful to know how the transfer will be used – at the consultation briefing it was mentioned that this would be ringfenced to fund the Educational Transformation programme. Is all of the funding transferred ringfenced for this programme or is some of it used for Top Up/AP?*
 - d. *We do not receive enough funding for children in high needs. The transfer does not appear to help our school.*
 - e. *This request is similar to one made 12 months ago and clearly indicates that BCC still hasn't got full control over its High Needs funding. This is another "short term" response to a long term failure to manage High Needs funding effectively. This will not be an option in the future at the point when a "Hard" formula is introduced. Therefore, we need a very clear strategy in place to bring the High Needs budget into balance in the long term without drawing from the Schools Block indefinitely. It is important that the High Needs budget is sustainable moving forward without constantly raiding the Schools Block funding. The Local Authority needs to be aware of the possible implications of the funding unknowns hitting schools, such as unfunded additional COVID expenditure and future pay increases. It is therefore important to maximise the impact of any potential funding increases to provide schools with long term security.*
 - f. *If/when NFF is introduced this will not be allowed and High Needs is going to need to become self-sufficient. Whilst we acknowledge this may reduce our top-up funding it will increase our per pupil funding and allow us to manage the money ourselves and direct it as we see appropriate.*

6.5 **Minimum Funding Guarantee:** One of the changes for 2021/22 is that the range within which LAs have local discretion to set the MFG has moved.

6.6 For 2021/22 LAs can set the MFG within the range +0.5% to +2.0%. The LA has previously discussed this with Schools Forum and 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 any available funding remaining after dominating formula commitments to target areas of local priority.

6.7 The consultation with schools also sought their views on the level of MFG for 2021/22 and the unanimous view of all 25 respondents was to support the MFG being set at +0.5%.

- 6.8 Comments received stated:
- a. *The school think that a hard funding formula is more fair for everyone, this proposed funding guarantee really helped us last year.*
 - b. *Obviously we would like more, but we understand the budget constraints BCC are operating within.*

- 6.9 Given the consensus of opinion and previous practice, the LA once again proposes to set the MFG at the lowest allowable value of +0.5% for 2021/22.
- 6.10 **Lump Sum for 2021/22:** When setting the 2020/21 funding formula, the LA and Schools Forum discussed whether to move towards the lower NFF funding values for the lump sum or retain the higher local value. In the final consideration the LA proposed and School Forum supported retaining the higher local level, primarily to support smaller schools and primary schools who disproportionately benefit from the lump sum formula factor.
- 6.11 For the 2021/22 formula, the ESFA has raised the value of the NFF lump sum to £117,800 for both Primary and Secondary – so is now much closer to the LA's value of £125,000 for Primary and Secondary schools.
- 6.12 The funding formula allows a separate lump sum value at primary and at secondary, and so opinion is requested as to whether the local level of £125,000 should be retained again for primary, secondary, both or neither, or if either sector should have a different lump sum value.
- 6.13 There are 106 primary schools in Bristol and 22 secondary/all through schools. The table below shows the difference in cost to the formula of funding each at these levels.

		<u>£</u>	<u>£</u>	
		125,000	117,800	Difference
Primary	106	13,250,000	12,486,800	763,200
Secondary	22	2,750,000	2,591,600	158,400
	128	16,000,000	15,078,400	921,600

- 6.14 As the table demonstrates, funding all schools at the lower level will reduce the cost of the lump sum factor by £0.92m. Reducing secondary only will reduce by £0.16m and the reduction for primary is £0.76m.
- 6.15 Forum is reminded that lump sum funding is not protected by the MFG, and the LA is obliged to allocate the Schools Block in full. Therefore any reduction in the lump sum factor will result in more funding being applied to the other factors in the formula.
- 6.16 The question of supporting the lump sum was put to schools participating in the consultation. Schools were given a choice from six options, three of which options involved preserving the lump sum at the existing value. 25 schools answered the question, with 24 of them opting to preserve the lump sum, and one school preferring not to preserve the lump sum.

- 6.17 **Remaining formula funding:** Once mandated formula commitments such as the minimum per pupil funding, minimum funding guarantee, lump sum and 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.
- 6.18 In previous years any remaining funding has been targeted at the Additional Educational Needs (AEN) factors: Deprivation, EAL and Prior Attainment.
- 6.19 Forum is being asked whether it will continue to support targeting the AEN factors, or if the AWPU should be prioritised, or any other component of the funding formula.
- 6.20 In its deliberations, Forum may wish to consider the effect of the new IDACI dataset too, which has seen Bristol's LSOAs reduce in relatively to the rest of England, and so will now attract less funding based on current unit values.
- 6.21 The question as to whether the AWPU or the AEN should be targeted by any remaining available funding was put to schools in the consultation. Schools were free to choose from six options, in various combinations of the AWPU, the AEN and the lump sum. 25 schools answered this question, with 19 opting to support the AEN and not the AWPU, 4 schools opted to support the AWPU and not the AEN, whilst two schools wanted to support both the AWPU and the AEN with any remaining funding.
- 6.22 **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.
- 6.23 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 some schools are experiencing a decline in roll.
- 6.24 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.
- 6.25 This question was asked of schools responding to the consultation. Of the 25 schools that replied: seven schools wanted to see Primary targeted exclusively, ten schools wanted no distinction between sectors made, whilst eight schools suggested a third way, where 70% of any available funding be targeted to primary school unit values and 30% to secondary school unit values.
- 6.26 Comments received stated:
- *We have considered Q6 above in a Senior Leadership Meeting and opted for 'Prioritise primary school factors'. We discussed how small primary schools such as ours cannot benefit from economies of scale in the same way that large secondary schools are able to. There has been an increase to additional costs this year due to the Covid-19 pandemic which means that primary schools may*

have incurred higher costs, in proportion to the size of the schools, due to remaining open for vulnerable children etc.

- *It is important to spread any unallocated funding across all schools and not to single out any particular school sector.*
- *I found the briefing yesterday evening very helpful but would question the timing. The majority of people attending are not teachers (and even if they were would finish at 3.30pm) and therefore the meeting (especially as it was held remotely) could have happened a lot earlier. By 5.30pm the majority of school staff have finished work.*

6.27 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
- Retaining the current split-sites policy

6.28 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 F**. This projection is based on the current policy, the expected growth in September 2020 and the current rates at which the LA supports growth.

6.29 This table also includes a forward projection of growth in these schools through to September 2024.

6.30 As reported to the finance sub-group in August, there are no new growth or Growth Fund commitments expected in Primary Schools, and all existing growth commitments are expected to end by 2022. There are no new commitments expected in Secondary Schools for 2020/21 either, however the expectation is for growth in the Secondary sector in 2021/22, particularly with the delay to Oasis Temple Quarter opening.

6.31 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.

6.32 Whilst the projection is for no new growth commitments in existing schools for 2021/22, 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.

6.33 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 2020/21 funding values.

6.34 What is becoming clear is that existing growth pressures are shifting away from Primary Schools and into Secondary Schools. The degree at which there will need to be expansion of existing secondary schools in September 2021 and beyond is not yet certain, but the projection includes a small level of expansion of existing schools.

- 6.35 The commitment on the Growth Fund for 2021/22 – projected in the appendix at 2020 funding levels – is projected at £1.4m. The actual cost will depend on actual pupil numbers recorded in the Autumn 2021 census, the prevailing 2021/22 funding formula values, and the possible need to identify further expansions resulting from the Spring 2021 admissions round. Therefore the actual cost is likely to be higher than £1.4m, but this increase cannot be quantified at this time.
- 6.36 The LA proposed and School Forum supported establishing a Growth Fund of £2.0m for 2020/21. Whilst commitments in Primary schools is expected to reduce in 2021/22, commitments to secondary school growth will increase, so again the LA is proposing to allocate £2.0m to the Growth Fund.
- 6.37 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 2020 alongside the release of the final DSG allocations and the final school census data.
- 6.38 Allocations will be available once the ESFA releases the data on their website, and will be shown to School Forum at the January 2021 meeting, alongside presentation of the proposed final formula.
- 6.39 **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.
- 6.40 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.
- 6.41 The School Forum finance sub-group revisited consideration of a Falling Rolls fund for 2020/21 at their meeting of 16th July 2019. The decision was not to re-establish a Falling Rolls fund for 2020/21.
- 6.42 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 E**
- 6.43 At this time the LA is not proposing to reinstate the Falling Rolls fund for 2021/22.
- 6.44 **Summary of proposals:**
- a. Note the changes made to the formula by the ESFA
 - b. That the MFG be set at +0.5%
 - c. The transfer of 0.5% of the Schools Block, after TPG and &TECPG consideration

- d. The lump sum be preserved at £125,000 for both Primary and Secondary
- e. That funds remaining after meeting mandated requirements be distributed to the AEN factors
- f. No bias of this distribution to either primary or secondary
- g. Premises factors (NNDR, PFI, Split Sites) are appropriately funded, consistent with previous years
- h. £2.0m be allocated to the Growth Fund
- i. No re-establishment of a Falling Rolls fund
- j. Agree to the disapplication application being made in regard of Avanti Gardens historic MFG, derived when all-through

6.45 The table below sets out the position of the proposals, based on the 2020-21 pupil data. Both the funding into the LA and the formula expenditure will change with the 2021-22 pupil data, as will the balance between the formula components as funding is awarded to the factors.

	£m	£m
Provisional Schools Block excl. Growth	291.7	
Growth funding	not yet announced	
	<hr/>	291.7
tfr to HN Block	1.4	
Minimum cost of formula	287.0	
	<hr/>	288.4
-with MFG at +0.5%		
-lump sum is £125k for all schools		
- includes allocation of TPG and TECPG		
- includes minimum per pupil funding		
-includes premises factors		
Balance remaining to support:		3.3
-difference in growth		
-AEN priorities		
-any Falling Roll fund		

6.46 **Consultation with schools:** the LA consulted with schools on various aspects of the funding formula for 2021/22. The consultation was issued via the Head Teachers Bulletin and ran from 13th October to 6th November. The LA also provided a virtual presentation and question and answer session via Zoom on 4th November.

6.47 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

6.48 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.

6.49 Twenty-five schools responded to the consultation:

	Maintained	Academy
Primary	7	10
Secondary	2	4
All-through		1
Special		1
PRU		
Nursery		
Grand Total	9	16

6.50 The summarised responses to the questions were:

		Yes	No
Q1	Agree to Block transfer	19	6
Q2	comments	Three from "Yes"	Three from "No"
Q3	Agree to MFG 0.5%	25	0
Q4	comments	Two from "Yes"	No "No" responses
Q5	Preferred formula option	A=19, B=0, C=3, D=1. E=2. F=0	
Q6	Prefer any sector? All / Primary	All = 18 , Primary = 7	
Q7	comments	Three comments,	

6.51 Appendix C contains the anonymised results received.

7. Disapplications

- 7.1 Forum should note that **we have submitted** a disapplication of the MFG relating to Avanti Gardens Academy Bristol due to the change of age range (to 4-11 from 4-16) from September 2020. This is to ensure their historic MFG derived from being all-through does not continue to apply now that they are primary age range only.
- 7.2 Forum members may remember this disapplication was originally submitted last year. The subsequent advice from the ESFA was as the school had not yet at that point changed from all-through to primary age only, an in-year adjustment would be made after the change in age range had occurred, for 2020/21, and that a disapplication request should be submitted for the 2021/22 funding year.

8. Future funding arrangements

- 8.1 The DfE still intends to introduce a hard National Funding Formula however the timescale for this remains unknown. Some of the mandated changes to the formula options for 2021/22 continue the move towards a hard formula, such as increased restrictions on block transfers and minimum pupil funding levels.
- 8.2 Whilst not formally announced by the ESFA, officers from the ESFA continue to indicate that future years will see greater restrictions on block movements (and possibly prohibited entirely), and tightening of local decision making on the allocation of funding.

Appendix A - comparison of 2021/22 NFF unit values to Bristol's 2020/21 formula unit values

	2021/22 National Funding Formula values	Local 2020/21 Formula Values
Factor		
Basic Entitlement (Primary)	£3,123.00	£2,857.00
Basic Entitlement (KS3)	£4,404.00	£4,018.00
Basic Entitlement (KS4)	£4,963.00	£4,561.00
Free School Meals (Primary)	£460.00	£482.64
Free School Meals (Secondary)	£460.00	£482.64
Free School Meals Ever 6 (Primary)	£575.00	£600.62
Free School Meals Ever 6 (Secondary)	£840.00	£874.12
IDACI (P F)	£215.00	£225.23
IDACI (P E)	£260.00	£268.14
IDACI (P D)	£410.00	£402.20
IDACI (P C)	£445.00	£434.38
IDACI (P B)	£475.00	£466.56
IDACI (P A)	£620.00	£643.52
IDACI (S F)	£310.00	£321.76
IDACI (S E)	£415.00	£434.38
IDACI (S D)	£580.00	£573.81
IDACI (S C)	£630.00	£622.07
IDACI (S B)	£680.00	£670.34
IDACI (S A)	£865.00	£900.93
EAL3 (P)	£550.00	£573.81
EAL3 (S)	£1,485.00	£1,544.46
Low Attainment (P)	£1,095.00	£1,142.26
Low Attainment (S)	£1,660.00	£1,726.79
Lump Sum P	£117,800.00	£125,000.00
Lump Sum S	£117,800.00	£125,000.00

Appendix B – IDACI methodology

Socio-economic deprivation – Area-level deprivation data: Income Deprivation Affecting Children Index (IDACI)

The IDACI element of the deprivation factor is based on the IDACI dataset for 2019, which is published by the Ministry for Housing, Communities and Local Government (MHCLG). IDACI is a relative measure of socio-economic deprivation: an IDACI 'score' is calculated for a lower super output area (LSOA, an area with typically about 1,500 residents) based on the characteristics of households in that area. The IDACI score of a given area does not mean that every child living in that area has particular deprivation characteristics: it is a measure of the likelihood that a child is in a household experiencing relative socio-economic deprivation. LSOAs are ranked by score, from the most deprived LSOA, with the highest score, to the least deprived LSOA.

For school funding purposes, the NFF uses IDACI ranks to group LSOAs into seven bands of decreasing deprivation; The six bands that attract funding are shown in the table below. In the past the ESFA has defined IDACI bands on the basis of scores. The 2021/22 NFF uses ranks instead of scores to define bands. For example, Band A comprises the most deprived 2.5% of LSOAs.

The ESFA matches IDACI data to pupils' home postcode data recorded in the October 2019 school census in order to find their LSOA, and hence the IDACI band for each pupil in a school. It is not possible to do this for schools that opened after the date of the October 2019 school census, so the ESFA uses the 2015 IDACI data in the 2020/21 APT. The amount of IDACI funding received by a school depends on the IDACI band of each pupil.

Factor	Ranks	Band	Primary funding	Secondary funding
Pupils in the most deprived 2.5% of LSOAs	1 to 821	A	£620	£865
Pupils in next the most deprived LSOAs	822 to 2463	B	£475	£680
Pupils in next the most deprived LSOAs	2464 to 4105	C	£445	£630
Pupils in next the most deprived LSOAs	4106 to 5747	D	£410	£580
Pupils in next the most deprived LSOAs	5748 to 9032	E	£260	£415
Pupils in next the most deprived LSOAs	9033 to 12316	F	£215	£310

Appendix C – Consultation results (separate Excel document)

Appendix D – IDACI comparison (separate Excel document)

Appendix E – 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:

Year Group	Year 7	Year 8	Year 9	Year 10	Year 11	Total
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 **1st 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 F – Current and projected Growth commitments

Type of Growth	Sector	School	Additional Forms of Entry				
			Sep-20	Sep-21	Sep-22	Sep-23	Sep-24
Growth Fund	Primary	Ashton Gate	1	1	0	0	0
Growth Fund	Primary	Cotham Gardens	1	1	0	0	0
Growth Fund	Primary	St Werburgh	1	0	0	0	0
Growth Fund	Primary	Southville	1	0	0	0	0
Growth Fund	Primary	Whitehall	1	1	0	0	0
Growth Fund	Primary	St Bernard's	1	0	0	0	0
Growing school APT	Primary	Redfield	1	0	0	0	0
Growing school APT	Primary	Marksbury	1	1	0	0	0
Growing school APT	Primary	Fairlawn	1	1	0	0	0
Growth Fund	Secondary	Orchard	1	0	0	0	0
Growth Fund	Secondary	Bristol Free Sch	1	0	0	0	0
Growth Fund	Secondary	Cathedral	1	1	0	0	0
Growth Fund	Secondary	City Academy	1	2	2	2	2
Growth Fund	Secondary	Fairfield	1	1	0	0	0
Growth Fund	Secondary	Redland Green	2	0	0	0	0
Growth Fund	Secondary	Bristol Brunel	2	3	2	2	1
Growth Fund	Secondary	Bristol Met	2	2	2	1	0
Growth Fund	Secondary	Colston Girls	2	2	2	1	0

Growth Fund	Secondary	Cotham	1	1	1	0	0
Growth Fund	Secondary	St Bedes	1	1	1	0	0
Growing school APT	Secondary	Trinity	4	6	6	6	6
Growing school APT	Secondary	Oasis Temple Q	0	0	8	8	8
Growing school APT	Secondary	Oasis S Bristol	0	0	6	6	6
TOTAL number of forms of entry (ie classes of 30)			28	24	30	26	23

Type of Growth	Sector	Average amount for 7/12ths of year	Sep-20	Sep-21	Sep-22	Sep-23	Sep-24
Growth Fund	Primary	£2,013	6	3	0	0	0
Growing school APT	Primary	£2,013	3	2	0	0	0
Growth Fund	Secondary	£3,022	15	13	10	6	3
Growing school APT	Secondary	£3,022	4	6	20	20	20
TOTAL number of forms of entry (ie classes of 30)			28	24	30	26	23

Forecast cost (£'000)	£2,266	£2,024	£2,720	£2,357	£2,085
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Growth fund cost (£'000)	1,722	1,359	906	543	271
Growing schools cost (£'000)	543	664	1,813	1,813	1,813
Total (£'000)	2,266	2,024	2,719	2,357	2,085

	Sep-20	Sep-21	Sep-22	Sep-23	Sep-24
TOTAL number of forms of entry (ie classes of 30)	28	24	30	26	23
Forecast cost (£'000)	£2,266	£2,024	£2,719	£2,357	£2,085

Appendix C: Schools block consultation collected responses document

School Formula consultation										
		Yes / No	Comments		Yes / No	Comments		a/b/c/d/e/f	All/Primary	Comments
Phase	Academy	Date received	Q1 : In line with DfE permitted transfers across blocks would you support a transfer of up to 0.5% from the Schools Block to the High Needs Block for 2021/22 financial year?	Q2 : Are there any factors or comments that you would want decision-makers to take into account if the Authority was to pursue such a transfer?	Q3 : The Schools Forum proposed that the Minimum Funding Guarantee be +0.5%, do you agree with this level of MFG?	Q4 : Do you have any other comments you wish to make about the operation of the MFG that should be considered by decision-makers for 2021/22?	Q5 : After meeting mandated commitments, which of the following options for distributing any remaining unallocated funding would you prefer?	Q6 : Should the choice in number 5 be spread across all mainstream schools equally or should we prioritise primary school factors?	Q7 : Do you have any other comments you wish to make about the arrangements for the operation of the mainstream funding formula that should be considered by decision-makers for 2021/22?	
Primary	Yes	10/11/20	Yes	Ensure the funds are clearly utilised to support with the transformation programme and other priorities to support HN pupils.	Yes	-	A	Yes favour primary slightly but still increase secondary factors too. 70% to primary and 30% to secondary	-	
Primary	No	04/11/20	Yes	How and where is it reported how this funding is used in more detail? It would be good to have some feedback on this Eg how much the work to provide additional SEND places is costing?	Yes	-	A	Primary	-	
Primary	Yes	05/11/20	Yes	-	Yes	-	A	All	-	
Primary	Yes	10/11/20	Yes	Ensure the funds are clearly utilised to support with the transformation programme and other priorities to support HN pupils.	Yes	-	A	Yes favour primary slightly but still increase secondary factors too. 70% to primary and 30% to secondary	-	
Primary	Yes	10/11/20	Yes	Ensure the funds are clearly utilised to support with the transformation programme and other priorities to support HN pupils.	Yes	-	A	Yes favour primary slightly but still increase secondary factors too. 70% to primary and 30% to secondary	-	
Primary	Yes	05/11/20	Yes	-	Yes	-	A	All	-	
Primary	Yes	10/11/20	Yes	Ensure the funds are clearly utilised to support with the transformation programme and other priorities to support HN pupils.	Yes	-	A	Yes favour primary slightly but still increase secondary factors too. 70% to primary and 30% to secondary	-	
Primary	Yes	05/11/20	Yes	-	Yes	-	A	All	-	
Primary	Yes	05/11/20	Yes	-	Yes	-	A	All	-	
Primary	Yes	05/11/20	Yes	-	Yes	-	A	All	-	
Primary	No	15/10/20	Yes	-	Yes	-	A	Primary	-	
Primary	Yes	05/11/20	Yes	-	Yes	-	A	All	-	
Primary	Yes	10/11/20	Yes	Ensure the funds are clearly utilised to support with the transformation programme and other priorities to support HN pupils.	Yes	-	A	Yes favour primary slightly but still increase secondary factors too. 70% to primary and 30% to secondary	-	
Primary	No	06/11/20	No	-	Yes	-	C	Primary	-	
Primary	No	06/11/20	No	We do not receive enough funding for children in high needs. The transfer does not appear to help our school.	Yes	The school think that a hard funding formula is more fair for everyone, this proposed funding guarantee really helped us last year.	D	Primary	-	
Primary	No	06/11/20	No	-	Yes	-	C	Primary	-	
Primary	No	05/11/20	Yes	It is useful to know how the transfer will be used – at the consultation briefing it was mentioned that this would be ringfenced to fund the Educational Transformation programme. Is all of the funding transferred ringfenced for this programme or is some of it used for Top Up/AP?	Yes	-	A	Primary	We have considered Q6 above in a Senior Leadership Meeting and opted for 'Prioritise primary school factors'.	
Primary	No	05/11/2020 & 6/11/20	No	-	Yes	-	C	Primary	-	
Secondary	Yes	10/11/20	Yes	Ensure the funds are clearly utilised to support with the transformation programme and other priorities to support HN pupils.	Yes	-	A	Yes favour primary slightly but still increase secondary factors too. 70% to primary and 30% to secondary	-	
Secondary	No	06/11/20	No	This request is similar to one made 12 months ago and clearly indicates that BCC still hasn't got full control over its High Needs funding. This is another "short term" response to a long term failure to manage High Needs funding effectively. This will not be	Yes	Obviously we would like more, but we understand the budget constraints BCC are operating within.	E	All	It is important to spread any unallocated funding across all schools and not to single out any particular	
Secondary	No	06/11/20	No	If/when NFF is introduced this will not be allowed and High Needs is going to need to become self-sufficient. Whilst we acknowledge this may reduce our top-up funding it will increase our per pupil funding and allow us to manage the money ourselves and direct it as we see appropriate.	Yes	-	E	All	I found the briefing yesterday evening very helpful but would question the timing. The majority of people	
Secondary	Yes	10/11/20	Yes	Ensure the funds are clearly utilised to support with the transformation programme and other priorities to support HN pupils.	Yes	-	A	Yes favour primary slightly but still increase secondary factors too. 70% to primary and 30% to secondary	-	
Secondary	Yes	05/11/20	Yes	-	Yes	-	A	All	-	
All-through	Yes	05/11/20	Yes	-	Yes	-	A	All	-	
Secondary	Yes	10/11/20	Yes	Ensure the funds are clearly utilised to support with the transformation programme and other priorities to support HN pupils.	Yes	-	A	Yes favour primary slightly but still increase secondary factors too. 70% to primary and 30% to secondary	-	
Special	Yes	05/11/20	Yes	-	Yes	-	A	All	-	

Appendix D - Comparison of IDACI data sets from 2015 and 2019

2019 IDACI data set and resulting allocations from 2019 census data

Description	Primary amount per pupil	Secondary amount per pupil	Eligible proportion of primary NOR	Eligible proportion of secondary NOR	Sub Total	Total
IDACI Band F	£225.23	£321.76	3,999.16	2,283.79	£1,635,581	£13,685,482
IDACI Band E	£268.14	£434.38	3,467.14	1,795.83	£1,709,732	
IDACI Band D	£402.20	£573.81	2,277.69	1,279.22	£1,650,121	
IDACI Band C	£434.38	£622.07	2,685.86	1,515.11	£2,109,187	
IDACI Band B	£466.56	£670.34	4,107.52	2,260.22	£3,431,492	
IDACI Band A	£643.52	£900.93	2,860.87	1,452.19	£3,149,369	

2015 IDACI data set and resulting allocations from 2019 census data

Description	Primary amount per pupil	Secondary amount per pupil	Eligible proportion of primary NOR	Eligible proportion of secondary NOR	Sub Total	Total
IDACI Band F	£225.23	£321.76	4,435.15	2,368.32	£1,760,980	£14,871,997
IDACI Band E	£268.14	£434.38	3,699.18	1,966.74	£1,846,191	
IDACI Band D	£402.20	£573.81	2,011.37	1,199.50	£1,497,264	
IDACI Band C	£434.38	£622.07	3,057.42	1,740.08	£2,410,534	
IDACI Band B	£466.56	£670.34	5,680.06	3,029.66	£4,680,959	
IDACI Band A	£643.52	£900.93	2,383.46	1,267.85	£2,676,069	

Bristol Schools Forum **De-delegation 2021/22**

Date of meeting:	24 th November 2020
Time of meeting:	5.00 pm
Venue:	Virtual meeting - Zoom

1. Purpose of report

- 1.1 To inform the Schools Forum of the outcome of the de-delegation consultation, which ran from 13th October to 6th November 2020.
- 1.2 To seek agreement from the maintained primary school members of the Forum to the primary school de-delegated services for 2021/22.
- 1.3 To seek agreement from the maintained secondary school members of the Forum to the secondary school de-delegated services for 2021/22

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 2021-22:**
 - 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**

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 2021-22:

- 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**

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

	Primary rate £	Secondary rate £
Employee and Premises Insurance	31.06	39.38
FSM Eligibility	1.14	1.14
Maternity Supply Insurance	31.17	45.27
Schools in Financial Difficulty	5.17	n/a
Trade Union Facility time	3.85	3.85
Health and Safety Roving Reps	n/a	0.91
Educational Psychology	5.63	5.63

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 2021-22 de-delegation the LA consulted with schools to seek the views of stakeholders.

4. De-delegation in 2020/21

4.1 The table below shows the services that Schools Forum voted to de-delegate for 2020/21, and the funding generated for each of those services.

Table 2: De-delegated services and funding in 2020/21

2020-2021 De-delegation following consultation	Primary		Secondary	
	Total £'000	Per Pupil	Total £'000	Per Pupil
'Insurance' type Services				
Employee & Premises Insurance	503	31.06	72	39.38
Assessment of Eligibility for free school meals	18	1.14	2	1.14
Maternity Supply Cover	492	30.34	80	44.06
Schools In Financial Difficulty	n/a	n/a	n/a	n/a
TU Facility Time	62	3.85	7	3.85
Health & Safety Roving Reps	n/a	n/a	2	0.91
Services to Schools				
Educational Psychology	89	5.48	10	5.48
Total de-delegated	1,164	71.87	173	94.82

4.2 Schools Forum will remember decisions were taken not to de-delegate additional funding for Schools in Financial Difficulty or for H&S Roving Reps in Primary Schools due to the accumulated balance being felt sufficient for 2020/21.

5. De-delegated items 2021/22.

5.1 The services in scope for 2021/22 are those as de-delegated in 2020/21.

5.2 Two services have seen changes in per-pupil rates for 2021/22 from 2020/21: both the Education Psychology and Maternity Supply Cover de-delegation rates have been increased by 2.7% in order to reflect the pay award in these largely service led provisions.

5.3 The charge for Schools in Financial Difficulty has been re-introduced in anticipation of increased support being required as more maintained primary schools experience inflationary cost pressures combined with potentially falling rolls. Re-introducing the charge provides approximately £82k should there be 16,000 maintained primary school pupils in 2021/22.

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

Table 3: Areas of de-delegation

<p>Employee & Premises Insurance This funds mandatory insurance covers 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>Per-pupil charge unchanged from 2020/21</p>
<p>Assessment of eligibility for free school meals This funding enables the service to schools for the checking of free school meal eligibility.</p>	<p>Per-pupil charge unchanged from 2020/21</p>
<p>Maternity Supply Cover Supports schools by funding the costs incurred covering staff taking maternity / paternity leave or staff on adoption leave.</p>	<p>Per-pupil charge increased from 2020/21</p>
<p>Schools In Financial Difficulty for Primary schools Provides support to schools in or forecasting a deficit. Access to the support is generally dependent on a school producing an agreed Recovery Plan. The use of funds is directed by the head of school partnerships.</p>	<p>Per-pupil charge re-introduced for 2021/22</p>
<p>Trade Union Facility Time This service enables schools to access TU representatives, in city-wide roles. The pooled budget for TU facilities time enables adequate representation across all TUs and more predictable costs at school level.</p>	<p>Per-pupil charge unchanged from 2020/21</p>
<p>Health & Safety Roving Reps in Secondary schools "Roving" reps are safety representatives who are appointed by TUs to cover multiple school sites. Their work includes effective consultation with employees in relation to employee health and safety issues. Compared to previous years, there are fewer safety representatives, and the cost of training is reduced. School head teachers retain overall responsibility, with the TU rep acting on the Head's behalf.</p>	<p>Per-pupil charge unchanged from 2020/21</p>
<p>Educational Psychology (EP) The Education Psychology Service provides professional advice to young people, families and educational settings. The de-delegated funding supports the delivery of EP visits to schools to discuss and identify vulnerable children and young people, and support a robust graduated response to needs including cost effectiveness. This is in addition to the Educational Psychology work in to the SEN</p>	<p>Per-pupil charge increased 2.7% from 2020/21</p>

assessment process, paid for by the LA as a statutory responsibility.	
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- 5.5 The de-delegation consultation was launched 13th October and ran for just over three weeks to 6th November. The de-delegation consultation was communicated to schools through the Service Director for Education, Skills regular newsletter.
- 5.6 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.
- 5.7 Seven of a possible 48 primary schools responded, whilst both of the two eligible secondary schools responded. The response to de-delegation is shown in the tables below.

Table 4: Primary de-delegation

Service	Votes Pool	Votes Delegate	Votes: No indication	% Pool	% Delegate	% No indication
Employee and Premises Insurance	7	0	0	100	0	0
FSM Eligibility	4	0	3	57	0	43
Maternity Supply Insurance	3	1	3	43	1	43
Schools in Financial Difficulty	3	2	2	43	29	29
Trade Union Facility time	4	1	2	57	14	29
Education Psychology	4	3	0	57	43	0

Table 5: Secondary de-delegation

Service	Votes Pool	Votes Delegate	Votes: No preference	% Pool	% Delegate	% No preference
Employee and Premises Insurance	1	1	0	50	50	0
FSM Eligibility	1	1	0	50	50	0
Maternity Supply Insurance	1	1	0	50	50	0
Trade Union Facility time	2	0	0	100	0	0
H&S Roving Reps	1	1	0	50	50	0
Education Psychology	1	1	0	50	50	0

5.8 Comments received in response to the questions are shown below:

Primary

Employee and premises:

- *Pool - LA Maintained Schools are locked into a 5 year agreement – if delegated we would still be locked into current agreement*

Assessment of eligibility for free school meals:

- *How is the LA obtaining value for money for a system which is not reliable?*

Maternity Supply Cover:

- *Is this a schools only service?*

Schools In Financial Difficulty:

- *Given the above balance have a nil contribution this year – can this be used to fund covid expenditure for schools?*

Trade Union Facility Time:

- *Given the above balance have a nil contribution this year*

Secondary

Trade Union Facility Time:

- *Pooled but c/f balance to be used before further funding allocated*

- 5.9 As reported to School Forum in the meeting of 20th May 2020, both the Schools In Financial Difficulty and the Trade Union Facilities Time carried forward surplus balances, of £335k and £129k, into 2020-21 respectively. Comments received from the consultation question whether there could be nil contribution to the Schools In Financial Difficulty Fund, and whether the accumulated balance on TU Facilities Time could be used first.
- 5.10 So far in 2020-21, there have been no charges to the SIFD fund, whilst the TU fund has expended £50k.
- 5.11 There were approximately 16,000 primary age pupils in maintained schools in 2020/21, whilst there were approximately 1,800 secondary age pupils. Assuming these pupil numbers continue into 2021-22, if School Forum supports further contributions via de-delegation, for SIFD in primary schools this would contribute approximately £82k to the fund for 2021-22 whilst if Schools Forum supports de-delegation for TU Facility Time this would contribute £68k to the fund for 2021-22. These funds are for activity in maintained schools, activity in academy schools is charged separately.
- 5.12 **Employees and Premises Insurance.** Comments were also received around the Employees and Premises Insurance, and whether the ESFA supported “Risk Protection Arrangement (RPA) for schools” was an alternative option. The authors of this report have taken advice from the LAs insurance team.
- 5.13 The council tendered its main insurance arrangements in 2017 in respect of its building assets and liabilities (including in respect of its schools). The basis for this tender was 5 years with an option to extend for a further two years. The renewal is due in 2022. This includes the schools building assets and liabilities including Employers Liability and Public Liability.
- 5.14 The LMS pooled fund arrangement is an agreement which schools enter into to manage certain losses within the councils prescribed excess limit and pay the associated insurance premiums with specific cover (such as motor, school journey and governors liability). This is in respect of material

damage for contents, motor, travel (school journey) and liabilities specific to their scope of business (such as governors liability). The LMS cover offers cover to a lesser excess than that of the councils main insurance arrangements and therefore operates as a pooled fund system for material damage losses for contents below the excess.

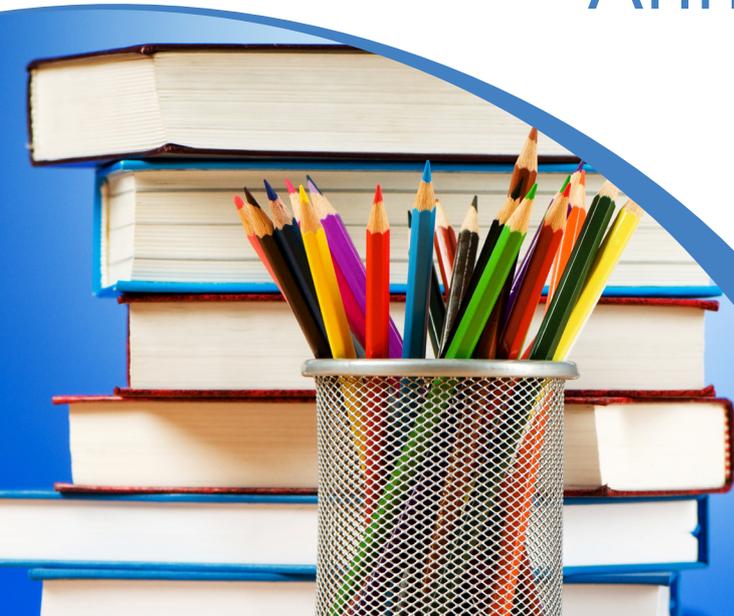
- 5.15 The rationale for the LMS arrangement is that schools would not be able to self-fund such losses to the self-insured (excess) limit (currently up to £50k) identified by the councils main portfolio and to ensure that the schools have the legally required cover in place in respect of motor.
- 5.16 The Department for Education states that where long term agreements are already in place these will not be encouraged to be broken Therefore current arrangements should be reviewed in time for the 2022 renewal/retender, as school building assets/liabilities were notified as part of the 2017 tender process.
- 5.17 The RPA is an 'all or nothing' arrangement and therefore even if the schools were seeking to replace the LMS pooled fund scheme by using the RPA this could create dual cover for certain aspects of cover (most notably buildings material damage, public liability and employers liability) and make handling large losses extremely complicated (this is also likely to be a breach insurance/RPA terms).
- 5.18 Currently the RPA is not an alternative for the present insurance arrangements, and as stated in the consultation document, the purpose of de-delegation is to avoid the administrative burden to schools. The alternative to de-delegation is that the current arrangements would be invoiced to schools instead.
- 5.19 The Local Authority recommendation to Schools Forum is that all of the services are de-delegated to maintained schools in 2021/22. De-delegation supports the provision of a coherent core offer by the Council 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.

- 5.20 **Eligibility for Free School Meals.** The Free School Meals Service is offered as a de-delegated service to Bristol LA Maintained Primary Schools and as a traded service to Bristol Primary and Secondary Academies. The current product was developed by Bristol City Council in collaboration with IT provider Liquid Logic and as with any new product or service development there has been the requirement for ongoing improvements and refinement.
- 5.21 In addition to providing a de-delegated service to Bristol LA Maintained Primary Schools, the service continues to be a popular traded product which has been consistently purchased, over and above other products available within the marketplace, by more than 70 Academies on an annual basis since 2017.
- 5.22 We recognise that changes in welfare benefits including the implementation of Universal Credit have further complicated entitlement to Free School Meals and Pupil Premium and in acknowledgement of this a series of training and awareness sessions have been scheduled to commence early in February 2021. These sessions are designed to support customers and further enhance the current service offer.
- 5.23 **Education Psychology.** The Educational Psychology Service have provided a de delegated service to schools for a number of years. This has been organised in a transparent way with schools receiving a number of visits from their link EP which directly corresponds to the funds paid in to the de delegation scheme. Days of EP time are effectively prioritised and purchased in advance through this approach.



TRADING WITH SCHOOLS

Annual Report 2019-20



BRISTOL
LEARNING CITY



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Introduction

Welcome to the Sixth Trading with Schools Annual Report 2019/20

Whilst the main focus of this report relates to a period before the Coronavirus pandemic, I feel that it is important to acknowledge the very different place in which we find ourselves and the significant challenges that continue to impact on our customers, partners and colleagues.

A year which was filled with considerable organisational and operational change for Trading with Schools prior to the pandemic, culminated in the requirement for the most rapid reorganisation of ways of working, where 'transformation' and 'disruption' have become, and will continue to be, the new 'business as usual' for the foreseeable future.

Our customers, colleagues and partners have quickly adapted, becoming more agile, rapidly reskilling and adjusting to managing their workloads and wellbeing in very different ways. And, to quote a recent conversation with a school business manager, who was reflecting on the significant challenges currently faced within educational settings, *'the kids have been absolutely amazing'*; a really clear reminder to me of why we do what we do.

This report outlines many examples of the outstanding collaborative and dedicated work undertaken by colleagues who are committed to the continued support of educational settings and the best possible outcomes, particularly for children and young people.

We look forward to continuing to work in partnership with Head teachers, School Business Managers and Governors in the future, and are committed to providing the highest quality service provision and continued support to enable an effective and safe transition through the challenges ahead to a 'new normal'.

I hope that you find the information contained in this report helpful and informative.

If you have any questions or comments, please contact myself, Sue Finch or Billy Forsythe directly.

Ali Mannering

Head of Trading with Schools

TwS Staff

The service continues to be led by Ali Mannering who is supported by Deputy Managers Becky Wilkins and Billy Forsythe who also manage a number of the TwS School Support Services.

Sue Finch is the Finance and Resource Manager for TwS and her key role is supporting the organisation to achieve the surplus income targets through improved economy, efficiency and effectiveness in service delivery.

Sue in addition manages the Procurement and Contracts Service and Outdoor Education.

Following the transfer of TwS to the Commercialisation and Citizens Directorate in December 2018 a series of other organisational changes took place throughout 2019/20 which resulted in the transfer of HR Payroll and Advice, Education and Psychology services out of TwS.

As you are aware these services continue to be marketed to customers under the TwS brand which provides customers with:

- clearly defined service offers and transparent pricing frameworks
- traceable and auditable end to end service delivery with accurate and timely invoicing
- a single point of contact through the Client Manager function
- simplified traded relationships with Council departments

As a result of these changes the format of this report differs from previous years. The financial information provided relates only to those services that remained within TwS for the whole of the 2019/20 financial year. You will therefore not be able to directly compare this report with those from previous years.

The organisational staffing structure shown on page 26 is as of 1.4.19

Financial Review

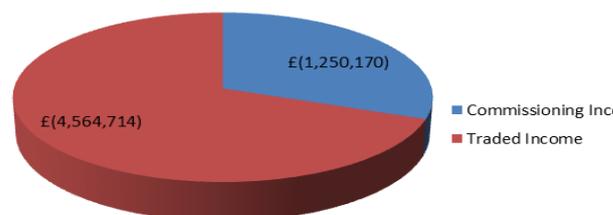
TwS has 5 main sources of income. These are:

1. Local Authority (LA) Commissioning specifications for the delivery of statutory and discretionary services funded from both Dedicated Schools Grants (DSG) and General Fund.
2. DSG De-delegated funding for a limited number of services which are delivered on behalf of primary and secondary schools and is commissioned through School's Forum.
3. Annual Orders
4. Pay As You Go (PAYG) income from bespoke consultancy work secured during the financial year.
5. PAYG from Continuing Professional Development (CPD) opportunities.

Figure 1- illustrates the total amount of income which was secured during the financial year. The traded income generated represented 79% of the turnover, with the remaining 21% of income secured through commissioning by the Local Authority and de-delegated funding from the LA maintained primary and secondary sectors.

Income Breakdown 2019-2020

TwS secured orders for traded work totalling £4.565m. £2,955m was generated through annual orders, secured from 186 schools and educational settings. The annual orders include



TwS Services, as well as a number of internal and external Partner Services.

Table 1 shows the number of schools, which purchased TwS annual contracts for services at the start of the financial year.

Sue Finch

Finance and Resource Manager

TwS Service	2019-2020
EDUCATION SERVICES	
Educational Psychology Service	0
Every Child a Reader (ECaR)	23
Governor Development Service	103
Newly Qualified Teacher Induction	101
School Improvement Advice & Support	44
Bristol Tracker	0
Academy Moderation	0
School Support Services	
School Admissions Service	42
Mapping Software	9
Free School Meals (Academies)	70
Education Welfare Service	38
School Finance Service	
Finance System	84
Standard Consultancy	35
Bronze Consultancy	20
Silver Consultancy	11
Gold Consultancy	7
Ezepay	0
Orovia (new 18/19)	54
Schools Absence Insurance	
Teaching Staff	28
Non Teaching Staff	25
CC teaching staff	2
CC non teaching staff	4
Maternity Scheme	
Maternity Scheme	17
HR Advice and Support	
HR Bronze	64

TwS Service	2019-2020
Hr Operations	
Annual Contract	75
Contracts	61
Procurement, Contracts & Catering Management	
Cleaning Contract	42
Catering Contract	73
Kitchen Equipment	71
School ICT Service	
ICT Hardware	18
Remote Admin	11
Whole School Remote	16
Whole School On Site 2 hrs per week	22
Whole School On Site 2 hrs additional per week	2
Emails	69
SIMS	112
SIMS on site	0
SIMS Dinner Money	59
SIMS other	11
Internet	142
Internet Plus	60
Internet Virtual Server Hosting	1
Backup	46
Telephones	136
PARTNER SERVICES	
Legal Services	80
Security - Key Holding Service	125
Security - Cash in Transit	104
Eteach	145
Total setting purchasing services	186

In addition to annual orders, a number of services provide pay-as-you-go bespoke consultancy services. A total of £1.610 was secured through this route.

Notable purchasing trends include continuing take up of existing services as well increased take up of services including School Admissions, ICT Purchasing and Free School Meals. Other notable trends include a further reduction in the take up of the Absence and Maternity Schemes in 19/20.

EDUCATION SERVICES



Bristol Educational Psychology Service

Introduction to Service and changes due to pandemic:

The Educational Psychology Service provides psychological assessment and intervention to support the learning and wellbeing of children and young people.

The educational psychologists use research and evidence based approaches for a range of Local Authority activities. They work with children and young people from birth to age 25, and with families, schools, education settings and agencies.

The Covid-19 pandemic has had a significant impact this year on both the focus of work for the Educational Psychology Service (EPS) and the way work has been delivered, with a move to online platforms and phone discussions to ensure safety for all.

The educational psychologists have used psychology in practical ways to mitigate anxiety and distress during the Covid-19 pandemic. The team has worked to provide resources across Bristol, reaching out in new ways such as webinars and YouTube and publishing helpful resources on Bristol websites. To give some examples:

- A weekly psychologically informed practical resource to support wellbeing and mental health has been shared through the Head Teacher's newsletter; Bristol City Council's Twitter account and emails to settings.
- Parent webinars focusing on topics such as supporting learning in the home and preparing for the transition back to school have been produced.
- A video based resource on staying connected for parents and school staff.
- 18 virtual 'surgeries' were offered to schools so that school staff could problem-solve providing effective support to their pupils and families.
- Three Parent wellbeing webinars based on Acceptance and Commitment Therapy/ training (ACT) were delivered live in June and recorded.

- School staff who work with year 11 and 13 students were trained to use a therapeutic expressive writing intervention. The staff could then set this up with pupils who had not had the opportunity for the usual endings and transition activities for pupils finishing GCSEs and A levels. 14 Secondary schools and Post-16 settings signed up for this training.

Please see the table at the end of this report for the links and full range of webinars/ video information produced.

The Educational Psychology team reviewed all documents and processes for Critical Incidents during the lockdown so that the team would be ready to respond to bereavements or other traumatic events, whether these were related to Covid-19 or not. Documents specifically for Coronavirus related Critical Incidents produced include:

- 'Coronavirus Related Critical Incident Support to Schools and Settings'.
- 'Bereavement and Coronavirus: Guidance for Parents/Carers'
- 'Bereavement and Coronavirus: Guidance for schools'.

The EPS worked jointly with others in the Local Authority to provide support in response to the stress caused by the pandemic. For example by contacting Head Teachers and Special Educational Needs and Disability Co-ordinators (SENDCos) regularly, contributing to a joint Covid-19 recovery plan, supporting schools with risk assessments and holding surgeries for schools to problem solve when schools were concerned about pupils.

The work to support recovery from the Covid-19 disruption will clearly need to continue into the next academic year.

Other significant changes to working this year:

There have been two other major changes for the EPS over this year:

The Local Area Special Educational Needs and Disability inspection by Ofsted and the Care Quality Commission (CQC). This led to a 'Written Statement of Action' and clear tasks that need to be done by the EPS.

The service has moved from being within the 'Resources' Directorate to the 'People' Directorate.

These changes have meant a shift in the relationship between trading focus and Local Authority commissioning. Line management has also changed, with a new structure for the EPS under 'Accessible City'.

Statutory advice, work in schools (de-delegated and traded) and capacity:

The EPS has a vital role in providing detailed psychological advice reports for children and young people going through an Education and Health Care needs Assessment (EHCA).

The number of EHCA requests has increased substantially over the last 3 years, and this increase has happened both in Bristol and nationally. This has had an impact on educational psychologists' capacity to produce timely reports. Last year the capacity issue in the EPS was recognised and recruitment for 7 new posts was agreed. Due to a national shortage of trained educational psychologists all appointees were in their final year of training and so were unable to start work until September 2020. With Covid-19 restrictions educational psychologists have had to adapt ways of gathering EHCA information and have followed guidelines by the Department of Education (DfE), and professional bodies such as the British Psychological Society.

In conjunction with Special Educational Needs (SEN) Team colleagues, the EPS has worked on ways of improving the EHCA process so that it will be much more person centred.

This has been in response to feedback from parents and carers about their experience of the EHCA process and noted in the WSoA. Training in using a person centred approach called Planning Alternative Tomorrows with Hope ('PATH') has been implemented across the EPS and SEND teams.

Parent organisations, Accessible City Teams, SENDCos, Social Care and Health have all had representatives joining this training and there has been further work outside the training so that this approach can be used next year.

Prior to Covid-19 restrictions educational psychologists were regularly in schools to provide consultations, assessment and support for Bristol children and young people.

Annual Reviews of Education and Health Care Plans:

The EPS has carried out assessment and worked to develop needs, provision and outcomes for Annual Reviews of EHCPs. This has been done for cases where issues are complex and SEN colleagues request this support, or when schools have commissioned this support.

SENDCo conference, briefings and clusters:

In March the EPS ran a large SENDCo conference, attended by over 150 SENDCos and staff within the Local Authority. The conference covered themes from the Local Area inspection. Key notes were provided by directorate leaders, the DfE and, importantly, a parent giving their perspective on SEND support for his daughter.

Five new SENDCo Clusters have been set up, to complement the 12 that were already being run by schools, and there have been three SENDCo Briefings. The July Briefing was done on Zoom, resulting in the number of attendees increasing to over 80. There is now a clear and co-ordinated set of ways for communicating with Bristol SENDCos timetabled over the year.

Critical Incidents:

The Educational Psychology Team has responded to all critical incidents where the Local Authority or schools have notified us. There has been a wide range of work, such as supporting a school after a death or traumatic incident.

The incidents require varying levels of intensity of work, and an immediate response. Those settings that have experienced an incident report that the Educational Psychology support is important and useful. This support is available to all settings as required.

Bristol Educational Psychology

Service continued

Strategic Local Authority development:

The Principal Educational Psychologist has driven various improvements at a strategic level across the city. These include:

- The joint implementation of the written statement of action (WSOA) following the local area OFSTED inspection.
- Developing a relationship based and trauma-informed behaviour policy for settings to adopt.
- Developing an 'Ordinarily Available Provision' document that is ready for wider consultation.
- Agreeing work through Annual Consultation Meetings (ACMs) for all schools to support improvements in attendance, reduce exclusions and to close the gap for SEND attainment. This was commissioned through the Learning City/School Improvement team, however with the pandemic it was impossible to review impact.

Senior educational psychologists have attended and facilitated weekly SEN panels and contributed to Top-Up processes and other Local Authority decision making and planning for children and young people. Designated educational psychologists have delivered a commission for Early Years. They have also taken on responsibility for priority areas in the written statement of action (WSOA). This has included designing a local area response to well-being and mental health and work force development.

Children in Care:

The Service has been involved with a large number of children in care, at different levels, including: telephone advice; assessments and consultations within schools and children's homes and with foster parents; and assessments in secure units when necessary. There is now an identified link educational psychologist for the Hope Virtual School.

Adverse Childhood Experiences (ACEs):

Adverse Childhood Experiences (ACEs) refer to events that cause children to experience chronic

stress, and can put people at risk of long-term physical and mental health difficulties. Research has found that by building resilience the risk of these outcomes can be reduced. Bristol City Council has committed to being an ACE aware city. To support this educational psychologists have delivered: 6 ACE ambassador training sessions; one 'train the trainer' day; 4 ACE aware schools training sessions (on zoom during lockdown); a workshop to the youth mayors, youth parliament and other young people identified by Families in Focus; presented at the 'leading edge day'; a workshop at the SENDCo Conference and contributed to the relationship-based behaviour guidance by writing the section on resilience.

Therapeutic offer for Social, Emotional, Mental Health and Wellbeing:

The EPS has been developing an outstanding range of therapeutic interventions that it can offer schools and settings so that they can support the social, emotional, mental health and wellbeing needs of children and young people. During Covid-19 this offer has been formalised within a catalogue that will be available shortly through the Trading with Schools website.

The catalogue sets out information on approaches that Educational Psychologists can train schools to use or implement directly: Acceptance and Commitment Therapy (ACT) both for direct work with young people or for staff wellbeing; Consultative approaches; Emotionally Literate Support Assistants (ELSA); The Good Behaviour Game; Restorative Approaches; Expressive Writing; and Video Interactive Guidance (VIG).

Learning Offer:

The EPS have planned and developed a 6 day training for Learning Support Assistants (LSAs). This training will help LSAs use effective, psychologically informed practice for developing learning and cognition skills in children with SEND. This training should be ready to roll out in spring 2021.

Webinars created during the COVID-19 crisis and views as of 07.10.20

Title, creator, link	Views as of 07.10.2020
<ul style="list-style-type: none"> How to Support Your Child in Asking for Help – by Dr Mary Stanley-Duke https://www.youtube.com/watch?v=gZ5ZXyT4QbM 	1,100 30 views on BCC YouTube channel upload
<ul style="list-style-type: none"> Helping Children and Young People Make Sense of Returning to School – by Dr Mary Stanley-Duke https://www.youtube.com/watch?v=LF2hZ6iE9lc 	850
<ul style="list-style-type: none"> How to Support Children Through Tricky Times in their Learning – by Dr Ryan Bull-Beddows https://www.youtube.com/watch?v=A0vL6Z1h0DI 	123
<ul style="list-style-type: none"> Supporting Parental Wellbeing and Parent Practice through Values-Guided Action (Part One) – by Dr Duncan Gillard and Dr Alison Benson https://www.youtube.com/watch?v=dD7mtyoOwm4 	743
<ul style="list-style-type: none"> Supporting Parental Wellbeing and Parent Practice through Values-Guided Action (Part Two) – by Dr Duncan Gillard and Dr Alison Benson https://www.youtube.com/watch?v=4MmWJnrLGsM 	327
<ul style="list-style-type: none"> Supporting Parental Wellbeing and Parent Practice through Values-Guided Action (Part Three) – by Dr Duncan Gillard and Dr Alison Benson https://www.youtube.com/watch?v=JGc9cpsaU8c&t=11s 	235
<ul style="list-style-type: none"> Managing Emotional Wellbeing during Covid19 through Expressive Writing with Dr Rebecca Stewart https://youtu.be/mVBLDktkCRs 	175
<ul style="list-style-type: none"> Maintaining Connection Whilst Socially Distancing with Bristol EPS https://www.youtube.com/watch?v=2aKReJbI6GU&t=686s 	417
Total of 4000 views	

NQT Induction Service

A total of 73 schools are currently using Bristol as their Appropriate Body with 168 registered newly qualified teachers. The service provides a number of events and training, quality assurance and support and advice to schools and teachers.

Over 50 NQTs attended a successful Welcome to Bristol event at M Shed in September and a number of new NQT courses have been offered. A close working partnership continues with the Bristol Primary Teaching School Alliance, who offers a range of CPD sessions run by SLEs (Specialist Leaders of Education).

Thank you. I have found this friendly and useful
NQT Mentor CPO, December 2019

Made me want to go back and plan! Thank you. Inspiring and thought-provoking!
NQT Curriculum CPO, January 2020

Thank you. This has made me feel very confident and excited to move forward
NQT Lesson Observation CPD, October 2019

Teaching & Learning

Mathematics and English network meetings have continued this year where possible. One maths network meeting was held alongside one maths webinar. Both sessions were held in partnership with other educational providers such as the Bristol Primary Teaching School Alliance and the Boolean Hub. Best practice has been shared and national updates discussed such as the DfE and NCETM year group maths guidance.

Thank you so much - very useful, as always!
Mathematics Network Meeting - December 2019

SACRE has supported the teaching of RE in both primary and secondary schools.

Moderation, Monitoring & Assessment

As required by Standards and Testing Agency (STA), Bristol LA provides a process of moderation for end of Y2 teacher assessments in reading, writing and mathematics and for end of Y6 teacher assessment in writing in 25% of maintained and academy schools. This also includes the monitoring of the administration of KS2 SATs and the Y1 phonics screening check.

Due to the COVID-19 pandemic, all moderation and monitoring activities were cancelled by the Government for the academic year 2019 – 2020. Despite the cessation of these statutory duties, a number of moderation, monitoring and assessment practices and CPD did take place. Fourteen courses were attended by 135 teachers, including the new KS1 and KS2 moderation workshops.

'It was great to be in small groups and have the opportunity to all have the time to share ideas, books and questions in a lovely and supportive atmosphere. I am new to year 2 so signposting to useful documents and clear examples of evidence needed was very useful' (New KS1 moderation workshop, January 2020)

Thank you, so very useful! Before this I would have panicked, now I know what I need to do for my pupils so I feel more prepared' (New to Y2, November 2019)

'Thank you for a fantastic course!' (Assessing writing in Y6, February 2020)

'Trainer knowledge and experience helpful. A chance to chat to others before the course started.' (New to Y6, October 2019)

Following a formal recruitment procedure, 11 new moderators were appointed this year, 5 at KS2 and 6 at KS1.

Every Child a Reader

- Working towards a city of readers
- Delivering quality training for everyone who teaches children to read
- Intervening early to ensure children have the best start in life

An integral part of the Teaching and Learning Service is the nationally recognised team of ECAR consultants. Two Reading Recovery Teacher Leaders have continued to provide ongoing accreditation from the Institute of Education, UCL, for 20 Reading Recovery (RR) teachers which are part of the Every Child a Reader (ECaR) project. The Teacher Leaders have offered schools a range of evidenced-based interventions for children struggling to read and write such as: Reading Recovery,

A-Z programme, Boosting Reading @ Primary, Switch-on and Inference training. In these schools, nearly 3000 children a year benefit from ECaR and this has contributed to the improvements in standards of reading.

The Teacher Leaders have also run the Best Practice Network meetings for English Subject Leaders and offered TWS CPD and bespoke training to all schools across the City

The Teachers leaders provided BRP training for all 2nd Year UWE Education students to support children who are struggling with reading in Inner City Schools.

The Bristol Every Child a Reader team continues to link up and work with a EU transnational exchange of in- innovative practices regarding reading, literacy and language development. The team will be working alongside teams from Sweden, Belgium, Italy and Finland in order to strengthen the professional's capacity to guide young children and their families. The project aims to create opportunities to develop, test and implement new skills and methods to support vulnerable families. The project commenced December 2017 in Gothenburg and it ended in Milan October 2019. The Bristol team will look forward to sharing their findings.

Data for ECaR schools is collected onto a national data collection site. Four in every five children who completed Reading Recovery(81%) were lifted to age appropriate levels of literacy. 43% of these children were in receipt of Pupil Premium and 24% had English as an additional language. There has also been a 13% increase in the number of children working at the expected standard in reading at KS1 and an increase of 9% in writing compared to 2019.

Consultants have also been leading on Bristol; a Reading City Project. Twelve mini cloakroom libraries are being set up across the City. This work is part of the One City Plan with a focus on making books more accessible to vulnerable children and families

I always feel so fortunate to be part of the best CPD in education

The Reading Recovery intervention is working well. As a result, more pupils catch up and are closer to meeting the expected standard for their age Ofsted Report

Prevent

As part of the Local Authorities responsibility under the Counter Terrorism and Security Act 2015 we continue to support schools with the Prevent Duty. As we are not a Prevent national priority locality area so we don't qualify for additional funds from central Government but continue to support the function for 1.5 days a week.

The education Prevent lead has focused on supporting:

- the mainstreaming of Prevent in schools through a resilience based approach.
- a local virtual Prevent network for schools to facilitate cooperation and collaboration and disseminate local and national information, ideas and initiatives that relate to Prevent, training, and resources from both the LA and other agencies.
- developing and facilitating central and school based training for teachers, other staff and Governors.
- a self-assessment framework and action plan to support schools in monitoring and evaluating their involvement in Prevent education

The role over the past year has provided support and advice to schools on their compliance with the Prevent statutory duty and in challenging controversial issues whilst ensuring they are provided with opportunities to develop best practice.

The Prevent lead for schools is the single point of contact in the LA for partners when radicalisation concerns arise in education settings. They also continue to develop and maintain effective working relationships with a range of Prevent partners whilst representing Prevent education on relevant bodies and governance forums. A key part of the role is to also ensure that we keep up to date with changes and guidance issued by the Counter terrorism unit and Department for Education highlighting relevant information on extremism and radicalisation impacting on education settings and young people.



Equality & Diversity

The equality in education lead continues to raise awareness of equalities, promoting change and diversity strategies. The role has supported schools with advice and guidance on equality and diversity and discrimination translating equality legislation into practice to ensure schools meet their statutory requirements.

There has been a focus this year on:

- developing, monitoring and reviewing policies and strategies
- producing new guidance on preventing and responding to racist incidents in schools and developing systems for the reporting of incidents
- supporting staff and schools with Equality Impact Assessments
- representing equalities in education on partnerships whilst also liaising with community groups and other relevant organisations.

Governor Development Service

Training, support and advice for Academy and LA Maintained School trustees, governors and clerks

The service continued to provide a full range of training, support and communications that has become well established over many years, with around 80% of all Bristol schools (including both LA maintained schools and academies) choosing to subscribe to our service in 2019/20.

A number of the schools that don't subscribe to our full service (including independent schools) attended our training courses on a 'pay-as-you-go' basis.

The service also continued to provide three optional services at preferential subscription rates: GovernorHub, The Key and Modern Governor. Over 100 schools chose to purchase at least one of these services.

We offered 48 centrally delivered courses as part of our core training programme and there were over 1,200 attendances by clerks and governors at these sessions. Five new or significantly updated courses were included in the training programme, covering areas such as Pupil Premium, Teacher Workload and Academy Governance. More than 99% of the course evaluations indicated that the delegate would recommend the session to other governors or clerks.

The team also delivered six bespoke sessions for individual schools, including governance self-reviews, one session for a group of schools and two Briefings facilitated on behalf of the Service Director – Education and Skills. We also delivered a number of one-to-one induction sessions for newly appointed clerks to governors.

We provided regular updates and guidance documents to chairs of governors to support them when schools closed due to the Covid pandemic, and introduced virtual training and briefing sessions to replace the remainder of our annual training programme when face to face training was unavoidably cancelled. We worked with other LA teams on this to ensure a coordinated approach.

We provided a wide range of advice and support for individual schools via telephone and email on issues from interpretation of changes in legislation to handling complex complaints. Our termly on-line newsletter, 'Governance Essentials', continued to be well received by governors, clerks and headteachers, and included Governor Development Service valuable updates and links to time saving resources such as the Annual Year Planner, as well as information about education issues affecting Bristol schools.

In addition, we worked closely with the DfE's Inspiring Governance service to support schools with their governor recruitment and successfully placed 11 LA governors. We also assisted 5 schools with either the reconstitution or federation of their governing bodies.

The team have continued to develop strong links with the Schools' Partnerships service, helping to ensure the training and support offered is tightly aligned with school priorities. We worked with the Lead for Schools' Partnerships to produce a comprehensive guidance pack for governors going through the process of recruiting a headteacher, and provided bespoke recruitment support for three governing bodies. The service has kept up to date with the changing education landscape and offers appropriate support for academies and multi-academy trusts as well as LA Maintained schools. We support governing boards in ensuring they are legally compliant and aware of new statutory obligations as they arise, such as advising on steps to be taken to ensure compliance with the General Data Protection Regulations (GDPR)

We also support and train governing boards to achieve the necessary standard of governance to meet Ofsted inspection criteria for Good or Outstanding and provide appropriate challenge and strategic leadership to maintain the improvement in standards in Bristol schools.

Education Welfare Service

The Education Welfare Service provides:

Poor Attendance Casework

Education Welfare Officers (EWOs) worked on a total of 158 poor attendance cases during the last financial year.

Pupil Tracking Casework

341 Pupil Tracking cases were processed. This process aims to trace and locate pupils who have gone missing from Bristol schools.

Child Missing Education (CME) Casework

820 Children Missing Education (CME) cases were processed. This process aims to ensure that any pupil found to be resident in Bristol but not on a school roll, has access to education.

New Arrivals (Refugee & Asylum Seeker) Casework

The EWS supported 29 newly arrived children, ranging from Reception to Year 11, to access the education system. The families were mainly from Africa, Asia and other European countries such as Albania. We received a large number of families from Iraq and Syria, who came through the government Vulnerable Refugee Families Resettlement Scheme; the majority of families from Africa entered the UK through family re-union.

Elective Home Education (EHE)

During the period 628 children were known to have been electively home educated at some point. When notified of children becoming home educated, the EWS makes contact with the family to establish the plans for the child's education. The EWS makes follow up contact as necessary, and if it appears to the EWS that a child is not receiving suitable EHE the EWS works with the family to resolve the situation. If necessary, the School Attendance Order process is followed, see paragraph 15 below.

Attendance Support to Academies and Free Schools

The EWS provided attendance support to 95 academies and free schools. This support included bespoke training, whole school attendance reviews, individual case work,

attendance surgeries and supervision sessions for attendance officers.

Chaperone Vetting

9 Chaperones were approved as suitable to provide assistance to children and young people that work in the entertainment industry.

Issuing Work Permits

166 Child Employment Work Permits were processed and issued to allow statutory school aged children to work in part time employment.

Processing Child Performance Licences

277 Child Performance Licences were processed and issued to allow statutory school aged children perform in the entertainment industry.

General 'Duty' Phone Calls

EWOs provided ad-hoc advice and guidance to more than 1212 parents/carers and professionals that contacted the EWS by telephone during the last financial year.

EWS Training for Schools

Over the course of the financial year the EWS delivered 5 CME training sessions attended by over 57 delegates. 3 Penalty Notice training sessions were attended at least 31 delegates. Attendance Clinics have been held 3 times a year over 3 days and have been attended by over 25 school delegates. 9 School Attendance Network Sessions have been held and attended by over 180 school based attendance leads.

Issuing Penalty Notices

3491 Penalty Notices were issued to parents/carers of compulsory school aged children in respect of their child's irregular attendance at school.

School Improvement

Irregular Attendance Prosecutions

451 S444 School Attendance Prosecutions were instigated against parents/carers for failing to ensure the regular school attendance of a compulsory school aged child.

School Attendance Orders

9 School Attendance Orders were made as part of the enforcement process to ensure that young people not on a school roll and not receiving suitable EHE could access the education they are legally entitled to.

Future Plans

The model of direct school support will continue so that there will be more ongoing support for attendance leads as well as building the capacity of schools to manage attendance.

The School Attendance Network meetings (SANs) will continue and will become the primary support for schools. They will be held three times per year in each of the three localities: North Bristol, East and Central Bristol and South Bristol. They will be focused on providing updates, support and guidance as well as developing the skills and expertise of attendance leads in schools.

In addition to the above, maintained schools will also be able to access attendance clinics with Education Welfare Officers. These clinics will be held three times per year and be open to any maintained school who wishes to bring particular attendance cases to the clinic for advice and support. The aim is that the clinics provide an offer to schools that is more needed rather than offering the same limited level of support (i.e. one annual visit) to all schools regardless of their context and attendance issues.

The EWS continues to work closely with the Attendance Strategy Manager and the Information and Data Team to provide schools with attendance data packs at agreed intervals during the academic year.

The EWS will continue to work closely with the Safeguarding in Education team to triage all new elective home education requests.

The school improvement team provided a core offer of one half day this year. This was accessed by a total of 66 schools (52 local authority maintained and 14 academies). 39 schools also accessed additional school improvement visits in the spring and/or summer term. Support was also given to 9 schools in the appointment of new headteachers.

Outcomes in 2019 improved in EYFS, narrowing the gap with the national average whilst phonics outcomes are now just above the national average. At key stage 2, reading, writing and mathematics combined has improved and is in line with the national average. At key stage 4, preliminary outcomes indicate Bristol is in line with the national average.

2019-20 The School Partnerships Team provided a core offer of school improvement visits to all maintained primary schools and primary academies. This was accessed by 44 LA maintained primary schools and 15 primary academies. A group of 9 of the LA maintained primary schools were also included in the Progress Review Cycle to support them with ongoing school improvement guidance and scrutiny in line with Post-Ofsted action plans and/or in preparation for upcoming inspection.

5 LA maintained special schools were offered the equivalent funding to engage with external school improvement advisors. Over the COVID-19 period between March and July 2020 when schools were operating at reduced on-site capacity in line with central government guidance all LA maintained schools were contacted regularly by the School Partnerships Team. They were offered a combination of general updates and advice in line with the dynamic national guidance as well as bespoke guidance depending on their individual circumstances. No national assessments were conducted at the end of the academic year due to the continued COVID-19 situation.

Dean Field Study Centre

Residential and day visit outdoor learning in the Forest of Dean and at schools

The Dean Field Study Centre is now into its 49th year of operation and is going from strength to strength. 2019-20 was a busy year with more than 3000 children experiencing high quality outdoor learning courses. 64 schools came for periods of either 3 or 5 days residentially or for day visits. The Pandemic lockdown affected just the last two school visits of the financial year but will potentially have a greater affect going forward into 2020/21.

The Forest of Dean provides some great learning experiences with groups exploring it via orienteering courses; night walks; treasure hunts; canoeing and mountain bike journeys. They have built dens, walked up streams and learnt about the environment through pond dipping and habitat investigations. For most children it will be their first night-walk in a forest; sadly, for some it will be their first ever walk in a natural environment. To want to look after our environment you need to first experience it and enjoy it.

In the Centre grounds groups have made good use of the climbing tower and high ropes course along with the underground tunnels system and team problem solving challenges. All these activities are designed to develop team work and other personal development objectives. Bushcraft sessions were also run with young people learning to light a fire with flint and steel and cook dough twist dampers over the embers. This activity has also been taken into schools along with orienteering and team challenges in the school grounds. Archery is another activity that can be done at the Centre or taken into schools.

Outdoor learning is being recognised more and more as being an essential part of young people's development and wellbeing and it has an important role to play in the challenging new world we find ourselves in.

The Centre has a continuing programme of building development and several projects were completed over the year including refurbishment of the lounge and dining room as well as a complete refurbishment of the self-catering kitchen. An en suite was refurbished for a staff bedroom as well as refurbishment of some student shower cubicles.

Other developments are also underway including the building of a new low ropes course that maximises teamwork. You can stay in touch with

the progress of this and other developments via the Centre's Blog pages: dfsc-bristol.blogspot.co.uk

Another good way to learn more about the activities run at the Centre is to visit its You Tube Channel with an expanding range of short videos of groups in action on different activities: <https://www.youtube.com/playlist?list=PLRcs1uzc2EeHIppGhfpdvB0ZfiO0SvzRj>

One of the most notable achievements of the year was for the Centre to be awarded the prestigious AHOEC Gold Standard. This is the Outdoor Learning sector equivalent of an OFSTED Outstanding. It reflects the very high quality of courses delivered and the excellent customer service of the staff team and we are very proud of securing this prestigious award during 2019/20.

Outdoor Learning is a very effective way of developing key skills such as communication and problem solving and also has the ability to increase motivation and an appetite for learning.

OFSTED states "When planned and implemented well, learning outside the classroom contributed significantly to raising standards and improving pupils' personal, social and emotional development."

Quotes from Course Evaluations

2019-2020:

All of the activities are well structured and age appropriate. We had a fabulous time

Food and catering amazing! A huge thank you to the lovely catering staff, they were so great and the food was always delicious.

Staff were really encouraging but also made all the children feel safe.

The students pushed themselves to achieve personal bests and built their teamwork skills. The problem solving activities are great at bringing them together. We want to come again and have already booked.

Aims all met... So many children achieved their own personal goals...My first time organising - Debbie in the (Deanfield) office was a godsend! We will be booking again next year. Thank you so much!"

Visiting schools rated their courses highly against Personal Development of pupils eg: increased confidence, self-reliance, perseverance & commitment.

The service also supports the following areas:

- PSHE & Citizenship
- Developing Key Skills: communication, problem solving, leadership & teamwork
- General support to School Curriculum & enrichment
- Geography, Environmental Awareness
- Science
- Contribution to improving educational attainment (increased motivation and appetite for learning)
- Promoting Healthy Lifestyle & Fitness

For 2020/21 the Centre has adapted to make its courses Covid secure and is still providing very valuable learning experiences for students that

Exmouth Camp

Based at the gateway of the Jurassic Coast UNESCO World Heritage Site, Exmouth Camp offers a unique under-canvas experience for young people in full time education.

Ahead of the summer season 2019, we were delighted to be able to make significant improvements to the camp's infrastructure which would enhance the visitors camping experience. The improvements made included some new and some replacement items. please see a list below which is by no means exhaustive:-

- New high quality tent flooring
- New marquee
- Replacement wooden marquee flooring
- New handmade wooden village seating,
- New replacement mattresses for all tents
- New replacement tents

During the summer season 2019, a total of 9 schools and 3 other organisations (930 students and 109 teachers) benefited from their residential visit to Exmouth Camp.

The camp worked with a range of local providers, but particularly Red Rock Leisure, to offer a range of opportunities for schools. This included a variety of watersports, archery, circus skills, woodland skills, team building, boat trips and mackerel fishing.

930 students took part in adventurous activities which has benefitted individuals to varying degrees through team work, building self-confidence, improved fitness, agility and coordination.

The students lived in a residential environment making new friends, improving social skills, communication, motivation and concentration.

Sadly towards the end of the season the extreme weather conditions and a significant number of acts of vandalism meant the curtailment and early finish to the season which was extremely disappointing both for our school visitors and TwS Staff.



Thanks for a fantastic week. It's really a highlight of the year for everyone (staff included) and we really appreciate your support.

Many thanks again, and have a brilliant season!

Just wanted to send one last big thank you for making our stay last week so enjoyable. You really do run a wonderful place there in Exmouth

Thanks again for an absolutely great week, the kids didn't care about the weather they definitely made the most of it.

SUPPORT SERVICES



Admissions Service

The Admissions Service met the local authority's statutory duty to offer every child in Bristol a school place for September 2020 in each phase of education. All published deadlines were met.

The Admissions Service processed 5,497 on-time applications for reception places in 102 primary schools in 2020, compared to 5,247 in 2019. 98% of children were offered a preference with 87.5% being offered their first preference, an increase of 0.5% compared to 104 in 2019.

In the secondary sector, 4,877 applications were processed, compared to 4,983 in 2019. 93% of young people were offered a place at one of their preferred schools with 76% of young people offered a place at their first preference school. This represents a 4% increase compared to 2019. 318 children were not offered a preferred school, compared to 435 in 2019 and 488 in 2018. The majority of young people were offered a place at their in area school, if requested as a preference.

346 Year 7 appeals were lodged for Bristol Schools compared to 353 in 2019 and 455 in 2018.

In-year, 1,245 admissions were processed for primary and secondary education.

3,828 applications for free school meals were processed for 126 schools.

For in-year admissions all children were offered a place at a Bristol School if resident in the City.

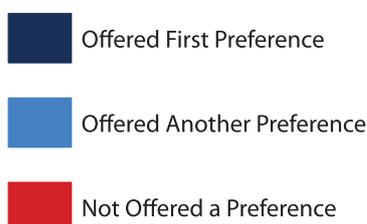
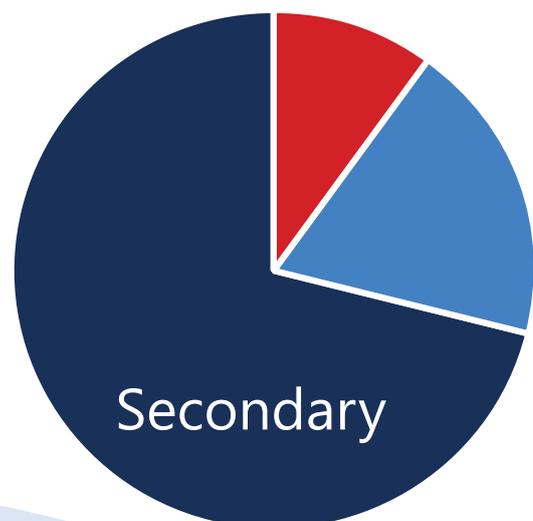
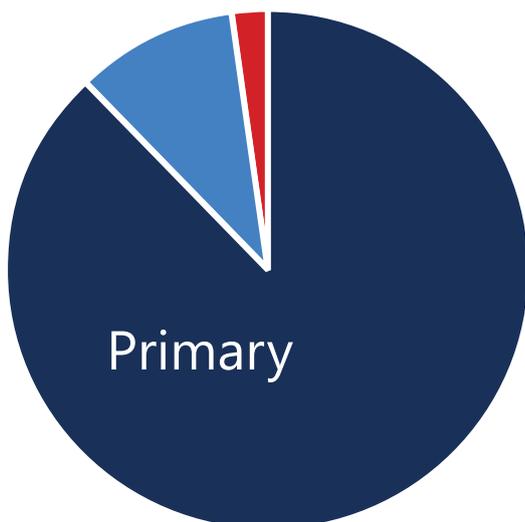
Overall, the number of children offered a preference school in primary and secondary phases is broadly similar to 2019.

The number of appeals lodged for secondary transfer has reduced, with appeals spread over a greater number of schools. This illustrates the increased popularity of Bristol schools.

Free School Meals Service

The Free School Meals Service is offered as a de-delegated service to Bristol LA Maintained Primary Schools and as a traded service to Bristol Primary and Secondary Academies.

The service was a popular traded product which has been consistently purchased by more than 70 Academies on an annual basis since 2017.



HR Operations

HR Operations is a fully comprehensive transactional service, providing a fully compliant support and payroll function to Educational settings. The service meets the statutory requirements including all returns and pensions administration.

During 2019/20 the service supported 78 settings across Bristol, including Secondary, Primary, Nursery and Childrens Centres, LA Maintained and Academies.

The service processed transactions on behalf of their customers to ensure all staff were paid correctly, on time and all statutory requirements were fulfilled.

The income generated from this service for 2019/20 was £473,402.

The benefit of providing this service allows the Council to adequately carry out their statutory function in terms of pension submissions.

It also allows the council to retain the required information on their own staff, ensuring staff are paid correctly, pension information is sent in a timely manner and DBS checks are carried out.

The benefit for the customer is a fully inclusive service. We also ensure schools are issued with the correct BCC contract, within statutory timescales.

Pay increases are applied at the correct point and paid in a timely manner.

HR Advice and Support

HR Advice were contacted for support at some point throughout the year by almost every school and Academy which buys into our service.

Some schools that do not buy our service bought bespoke consultancy.

We opened a significant number of cases which covered the full range of Employee Relations issues as well as Recruitment, safeguarding and some Freedom of Information Requests.

We were able to give additional support to individual establishments whenever it was requested.

We continue to provide the legally required model policies and procedures free of charge for all maintained schools, allowing schools the benefit of not having to draw up and /or consult on their own.



Schools ICT Service

The Schools ICT service continued to prove popular, with a number of schools returning to the service from external providers.

Internet: 137 subscribing schools/sites:
99% internet availability for schools. Multiple DDOS attacks throughout the year caused problems but this has now been successfully mitigated.
1007 users actively using remote access, 4073 active Office 365 email accounts

Backups: 44 subscribing schools
87TB of data on school servers backed up centrally.

SIMS: 110 subscribing schools:
37 SIMS courses delivered, attended by 123 delegates.
4299 SIMS support tickets closed.

Admin & Curriculum support: 49 subscribing schools
6368 tickets closed.

Telephony: The Virgin Media and Vodafone telephony contracts are managed on behalf of 135 schools, providing over 1300 telephone lines.

Purchasing:

- 91 laptops for staff and students
- 73 PCs for staff and students
- 17 Surface Pro
- 209 Chromebooks
- 5 Interactive Screens
- 52 iPads

Hardware:

Average turnaround time for repairs was 2.6 days.

Admin/Curriculum:

- Moved large quantities of data to the cloud to allow schools to spend less on servers. This also meant the impact of Covid19 was far less severe than it would have been 12 months ago
- Setup hundreds of remote access accounts

for school staff

- We have supported a number of schools to get up and running with their online Learning Platforms
- Worked with staff to make use of Zoom, Microsoft Team meeting and Google Meet
- There has been a huge Windows 10 roll out programme happening in schools since Windows 7 is no longer supported

SIMS:

- Creation of SIMS reports to help obtain key funding figures for settings
- Bespoke assessment analysis report creations
- Collaborative working with LA departments to help with key tasks using SIMS
- Information sharing between LA departments and the SIMS team supplies schools with a wraparound service for all school matters - not just MIS specific ones

I may have already said this but THANK YOU and your team very much for all your support. You were/are brilliant

I just wanted to say thank you from the whole team for helping set up remotely. You have all been very patient with us not very techie people.

May I please pass on my personal thanks regarding the work of Roger over the last two days

I cannot thank you enough for the new 8 Port PoE; the noticeable difference is phenomenal!!!!!!

Procurement & Contract Management

During 2019/20 the TwS Procurement and Contract Management Service continued to undertake a number of tender exercises either on behalf of a group/cluster of schools or for all schools and settings to be able access. This has provided our school customers with legally compliant and value for money contracts as well as benefitting from volume based discounted tenders. All of our contracts have been procured in accordance with National and European Procurement, Legal and Pensions' Regulations.

We also provided a comprehensive contract management service which enables our school customers to concentrate on curriculum activities whilst we ensure contracts are delivered to the required standards including relevant KPI's which are set and reviewed as part of the tender process.

Our Contract Management Service Offer includes undertaking face to face school audits, monitoring contracts, issue resolution which includes a robust escalation process and regular supplier relationship and KPI meetings.

School Cleaning

47 schools continue to access the Glen Cleaning framework contract, which includes TwS cleaning advice, monitoring and on site support., The team also has a dedicated Contracts Quality & Monitoring Officer to support the Contract Management element of this Contract. This role includes auditing cleaning standards.

The existing contract has been accessed by 47 of our schools/settings and is due to expire on 31 May 2020. The team with a Stakeholder group of School Business Managers have worked together to award a new contract due to start on 1 June 2020. More details in the section please see below for further information on the work undertaken on behalf of our school customers.

New School Cleaning Tender

The team has been working in partnership/ collaboration with a Stakeholder group made up of Business Managers from schools within the tender to ensure that a robust specification of requirements and expectations went out to

the marketplace in the autumn of 2019. The areas for scoring the tender submissions included Quality, Price and Social Value. Following the stakeholders independent scoring and moderation as a collaborative group, the contract was awarded in March 2020 and the new contract is due to start on the 1 June 2020.

An integral part of this new contract will be the continued delivery of contract management and a schedule of meetings with the new cleaning contractor with be put in place as part of the mobilisation plan. The KPIs will be discussed along with a rolling 'issues log' where any issues or compliments that have been raised by schools will be discussed and recorded in a formal process.

Food Supply

The Food Supply Dynamic Purchasing System (DPS) framework contract was awarded in June 2019 and comprises six contractual lots for use by both Schools and Local Authority Services. Lots include fresh meat, fruit, vegetables and milk, general groceries and frozen foods.

This contract enables local food suppliers to request to register and if they meet our selection criteria, will be permitted to join the DPS lot, which will be truly dynamic and will allow customers to be able to purchase specialist bespoke commodities as needed. The continued benefits of this contract include competitive prices for commodities, quality products which meet school and Local Authority food standard requirements, along with government food buying standards, ethical and sustainable requirements.

There are currently 35 clients who will benefit from the contract and there is no additional cost for school customers to join this contract.

Online Support for School Leaders and Governors (The Key)

This contract was procured in order that school customers can continue to benefit from accessing this online service which provides support and advice for school leaders and school governors and it remains a popular option when schools are making their purchasing decisions.

Schools Information Management System (SIMS)

This MIS software package is provided by Capita SIMS and secures 68% of the L.A. Maintained Bristol School market to access and use this service. TwS ICT Service provides the support and helpdesk for this product and continues to work with Capita on future product developments.

School Milk (School Milk Services)

This contract remains extremely popular with our school customers. This contract provides schools with the daily supply and delivery of school milk that is sourced locally. Additional contract benefits included the complete administration of the Governments School Milk Scheme and milk can also be provided for over 5's. The supplier has also supplied the free provision of milk storage fridges. The contractor continues to review their packaging arrangements to improve the environment.

Schools Recruitment Package (E-Teach)

This on line school recruitment contract provides a bespoke professional advertising mechanism for school vacancies covering teaching and non-teaching support vacancies. Advertisements included National and/or international coverage and Eteach also offered recruitment support. This contract is very competitively priced and continues to deliver a value for money solution for schools recruitment.

Educational Supplies (Findel and ESPO)

This is a framework contract and is being delivered by two suppliers, Findel Education who is a leading independent education resources supplier with an extensive range of over 25,000 products and ESPO who have over 35 years' experience of supplying schools with a comprehensive range of products.

This contract continues to provide a wide range of school resources including Stationery, Curriculum Resources, Classroom Resources, Art and Craft Materials, Janitorial and Catering Goods, Classroom Furniture, Musical Instruments, Postage Stamps etc.

The benefits for schools have been:

- Top 200' specially priced products for Bristol Schools,

- Regular benchmarking to ensure value for money
- Special Offers throughout the year
- Free Delivery within 48 hours
- Catalogues uploaded on E1 Finance.

School Catering (Chartwells)

The School Catering Framework Contract is currently operated by Chartwells for 70 schools and continues to deliver the provision of school meals consisting of a two course hot meal, breakfast and tuck services which all meet the School Food Standards required for Schools and the Caroline Walker Trust for Nurseries. This represents a value for money service with benefits including the provision of special diets and religious requirements at no extra cost, Gold Food for Life accreditation, and reached the 20% sugar reduction target before 2020.

This contract also offers added value activities including Chartwells Bristol Nutritionist who has been supporting the education of pupils with fun food workshops, classroom activities and school assemblies. Schools within this contract will benefit from the New Bristol Eating Better Gold Award that is pending

TWS Kitchen Equipment Replacement Scheme

The Equipment Replacement Scheme is very popular with Bristol Schools, it provides a guaranteed replacement of condemned heavy kitchen equipment for a fixed annual fee (subject to a conditional survey), thereby allowing schools to spread the costs and liabilities of heavy equipment over several years.

Catering Management Support Service

We provide a Catering Management Support Service to schools who operate their own in-house catering function. This service has delivered support and guidance directly to catering teams including menu planning, food supply purchasing, service planning, pricing, staffing, budgeting and a bespoke food safety system.

To enhance this service offer TwS set up a network group which provides an opportunity for school catering managers to share best practice, network and for us to inform schools of any important industry updates going forwards.

Schools Finance Service

The Schools Finance team provides a traded service offering:

- Financial products and product support for Accounting and Budgeting solutions to maintain good financial management at schools.
- Product Training to ensure clients are fully prepared to undertake their role effectively.
- Financial Consultancy Team to deliver both Strategic and Operational Finance support as required by the client.

Finance consultancy was accessed by 65 schools throughout the year. The provision of Gold and Silver support remained steady at 14 packages provided, during the year. During the year Schools increased the level of support from that originally purchased to help manage increasingly complex and challenging school budgets.

We continued to provide the RM accounting system to 75 settings.

After the successful roll out of Orovia Budget Planning Software in 17/18, 58 schools continued to purchase the system.

There are over of 400 users on the centrally managed RM finance system. During 19/20 we processed 17101 Receipts, 45466 Payments and managed 15296 transactions through the central Bank Account.

The value of these transactions totalled:

£62,900,188 in payments and £9,447,954 in

Client Managers

The Client Manager function is very important in TwS. It provides a reliable and responsive first point of contact for School Business Managers who have specific questions about TwS Services and also general questions about council services.

The role is highly regarded by School Business Managers.

The Deputy Managers undertook this function and maintained their close contact and responsive customer focussed attitude to schools. They continued to act as advocates for the customer, ensuring that the best possible customer outcomes are always considered as a priority.

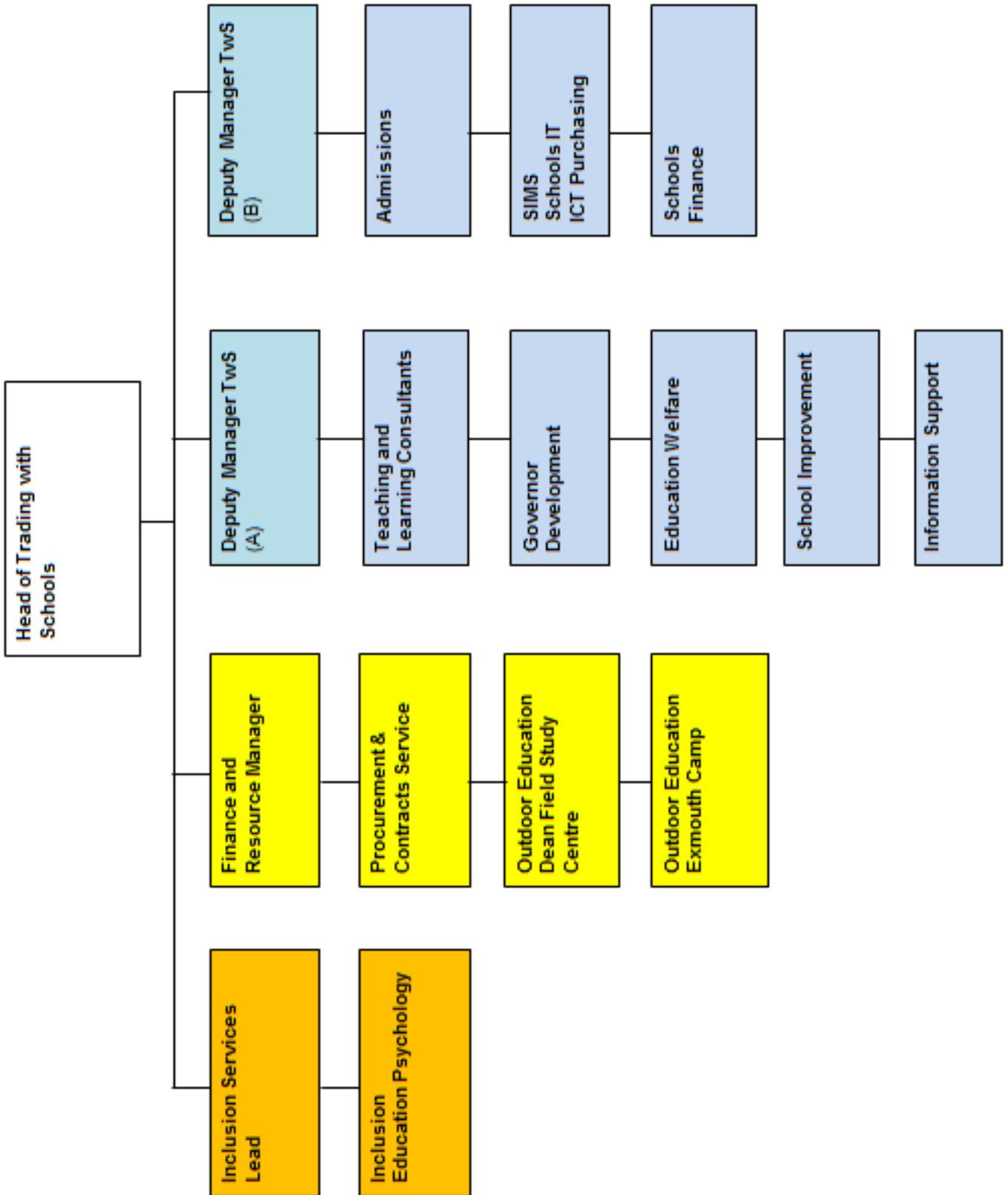
Schools use the email in box or phone line to raise questions and issues and the Deputy Managers respond quickly. They liaise with Service Leads and Partner Services to ensure that all queries are answered promptly and accurately.

Information Support

The team provides high quality technical, administration and financial support to Trading with Schools, ranging from the management of training courses and conferences, securing the timely procurement of goods and services, management of the dedicated TwS inbox and front line responsive support to customers.

Their work includes:

- providing technical guidance and support across the range of TwS services, designing and producing a wide range of marketing publications;
- managing and updating the Trading with Schools website;
- collating monthly management information reports to provide business data which is used to inform management decisions and drive a performance driven culture;
- streamlining and automating processes to increase operational efficiency and improve service delivery models;
- managing the customer accounts function, including accurate invoicing of goods and services and the timely resolution of elevated customer queries. In the last year TwS invoicing process has been refined; with customers now receiving invoices on a monthly basis.



If you would like this information in another language, Braille, audio tape, large print, easy English, BSL video or CD or plain text use contact details below.



tradingwithschools.org



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0117 922 2444

By virtue of paragraph(s) 3 of Part 1 of Schedule 12A
of the Local Government Act 1972.

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