

Bristol Schools Forum
DSG Management Plan (consultation with Schools Forum)

Date of meeting:	Tuesday 8 June 2021
Time of meeting:	5pm
Venue:	Zoom

1. Purpose of report

The purpose of the report is to present the first iteration of the DSG Management Plan (“the Plan”) to Bristol Schools Forum for information, consultation, and discussion.

2. Recommendation(s)

The recommendation is that Schools Forum note:

- the baseline position stated in the first iteration of the Plan
- that this is an initial consultation with Schools Forum regarding the Plan following review by High Needs and Early Years Task & Finish Groups
- that the Plan is intended as a dynamic document that will continue to evolve in future iterations
- additional stakeholder engagement, coproduction and engagement is required as the Plan evolves, and must include Schools Forum, education institutions, parents and carers, children and young people, elected members and health partners
- the next version of the Plan will be brought to Schools Forum in September 2021

3. Background

Local Authorities with an overall deficit on their DSG account at the end of a financial year must be able to present a plan to the DfE for managing their future DSG spend. The ESFA have designed a template to help local authorities manage their DSG and Bristol is using the template.

The Plan is intended to help LAs to develop evidence-based and strategic plans covering the provision available for children and young people with special educational needs and disabilities. Completion of the Plan will enable us to:

- comply with paragraph 5.2 of the DSG: conditions of grant 2020 to 2021
- monitor how DSG funding is being spent
- compare data on high needs spend between LAs
- highlight areas that may require a ‘deep dive’ to ensure resources are being used efficiently and best value is secured

- form evidence-based and strategic future plans for the provision of children and young people with SEND
- present complex funding information simply to Schools Forum and other external stakeholders
- provide a consistent reporting format to help us share best practice and initiatives

The template for the Plan is a large and complex Excel file. It includes a mixture of narrative relating to the current and recent position of the DSG, with a focus on the High Needs Block (HNB), actions to be taken, financial performance, SEND data and the ability to undertake benchmarking comparisons with other LAs, including the closest statistical neighbours.

The ESFA expect the plan to be updated and presented at Schools Forum meetings and any subgroups regularly and at least on a termly basis. The ESFA recognise that the management of DSG balances, both bringing spend in line with income and repaying deficits, will take time for some LAs. The template has therefore been developed in such a way that it is intended to be a live document and able to readily track progress. In summary, the Plan is:

- a needs-led tool to aid LAs' management of the DSG
- a DfE requirement for LAs with DSG deficits
- a means of sharing complex information with a range of stakeholders
- a live document that will constantly develop and change

4. Baseline Position

In presenting the first iteration of the DSG Management Plan for Bristol, the 'do nothing' baseline position is a forecast of £70m deficit by 2024/25. This doesn't account for any planned interventions which will have a mitigating impact, the value of which is complex to determine and the subject of ongoing analysis. While delivering much needed improvements in the system, it is unlikely that the combined impact of planned interventions and improvements will address the deficit in full and, set against the current trajectory of demand and increasing costs, the position remains challenging.

Whilst the ESFA tool presents a good aid to DSG deficit management, and a wide range of data is pre-populated, there remains a substantial amount of data for the LA to collate, verify, add and subsequently update. The first iteration of this work is presented as an Appendix¹ to this report but will continue to be developed, alongside a programme of stakeholder engagement, coproduction, and consultation.

¹ Due to the file size and as advised by the ESFA, 3 Summary pages have been extracted from the Management Plan to include as appendices. A full extract of the narrative from the Plan is appended.

5. High Needs & Early Years Funding Task & Finish Groups

Two Task & Finish Groups, comprising representatives from Schools Forum and officers have been established. The key aims of these groups are:

- Understand the structure of the DSG MP, its functionality and benefits
- Review the data and finance baseline, identify gaps and further development
- Develop a clearer understanding of the current and future forecast pressures
- Prepare to report back to Schools Forum on a termly basis

Both groups met during May 2021 and will meet again in Term 6. Terms of Reference and minutes of the first meetings are included as appendices.

6. Equalities Impact Assessment

An Equality Impact Assessment is underway for the planned interventions and initiatives that may contribute to the management of the deficit position. The Education Transformation Programme is the delivery mechanism for the majority of planned activity and it is important to note that there are no savings directly attributable to its programme of work.

7. Financial Implications

No financial implications arise from completing the DSG Management Plan template. It is, however, expected to be a valuable tool in developing an effective response to the DSG deficit recovery requirements. The road to financial recovery will become clearer and more specific as the Plan evolves and becomes fully populated.

The Schools Forum has committed to the management of the deficit by funding the Education Transformation programme by using 0.5% top-slice of the Schools block in 202/21 (£1.396m) and 2021/22 (£1.4m) to fund initiatives and activities that will ensure cost drivers are better understood and outcomes contained in the SEND Written Statement of Actions (WSOA) and wider Education Transformation programme are delivered. There are no explicit savings attributed to these programmes of work. They are, however, expected to deliver improved outcomes throughout the SEND system, achieve value for money and set the course towards financial sustainability over the medium to long-term.

8. Appendices

No.	Document
1.	Schools Forum cover report
2.	Summary Extract of the Plan
3.	Narrative Extract of the Plan
4.	High Needs Funding Task & Finish Group Terms of Reference and Minutes from the first meeting
5.	Early Years Funding Task & Finish Group Terms of Reference and Minutes from the first meeting