

# Public Document Pack



## Notice of BCP Shadow Schools Forum

Date: Friday, 14 December 2018 at 8.00 am

Venue: Main Hall, Bournemouth Learning Centre, Ensbury Ave,  
Bournemouth BH10 4HG

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### Membership:

#### Chairman:

Phil Keen

#### Vice Chairman:

Patrick Earnshaw

Russell Arnold  
Mark Avoth  
Andy Baker  
Karen Boynton  
Kate Carter  
Jon Chapple  
Geoff Cherrill

Linda Duly  
Phillip Gavin  
Jason Holbrook  
Sue Johnson  
Bob Kennedy  
Jacqui Kitcher  
Angela Malanczuk

David Newman  
Jeremy Payne  
Sean Preston  
Michael Reid  
Dave Simpson  
David Todd

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All Members of the BCP Shadow Schools Forum are invited to attend this meeting to consider the items of business set out on the agenda below.

The press and public are welcome to attend.

If you would like any further information on the items to be considered at the meeting please contact: Marilyn Scofield-Marlowe or email [marilyn.scofield-marlowe@poole.gov.uk](mailto:marilyn.scofield-marlowe@poole.gov.uk)

Press enquiries should be directed to Ceri Tocock: Tel: 01202 795455 or email [ctocock@christchurchandeastdorset.gov.uk](mailto:ctocock@christchurchandeastdorset.gov.uk)

This Notice of Meeting and all the papers mentioned within it are available at [moderngov.bcpshadowauthority.com](http://moderngov.bcpshadowauthority.com)

JANE PORTMAN  
**DESIGNATED INTERIM HEAD OF PAID SERVICE**

**Thursday, 6 December 2018**



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on the Mod.gov app



# AGENDA

Items to be considered while the meeting is open to the public

- |   |           |
|---|-----------|
| <b>1. Apologies for Absence</b><br>To receive any apologies for absence.  |           |
| <b>2. Declarations of Interest</b><br>To receive any declarations of disclosable pecuniary interest   |           |
| <b>3. Minutes</b><br>To approve the Minutes of the meeting held on 13 November 2018.  | 1 - 8     |
| <b>4. Report of the High Needs Block Financial Strategy Group</b><br>To consider the report.  | 9 - 26    |
| <b>5. Mainstream Schools Formula Consultation</b><br>To consider the report   | 27 - 94   |
| <b>6. Central Services for all Schools</b><br>To consider the report.   | 95 - 100  |
| <b>7. Funding Transfer from Schools Block to High Needs Block</b><br>To consider the report.  | 101 - 122 |
| <b>8. Forward Plan</b><br>To discuss meeting dates for 2019 and consider the forward plan.  | 123 - 124 |
| <b>9. Any Other Business</b><br>To consider any other business which, in the opinion of the chairman, is of sufficient urgency to warrant consideration.  |           |
| <b>10. Exclusion of Public and Press</b><br>To consider passing the following Resolution (if required):<br><br>“RESOLVED that, in accordance with Section 100A (4) of the Local Government Act 1972, the public and press be excluded from the Meeting for the following item(s) of business on the grounds that it/they may involve the likely disclosure of exempt information as defined in paragraph(s) ... of Part 1 of Schedule 12A of the Said Act as the public interest in withholding the information outweighs the public interest in disclosing it. |           |

No other items of business can be considered unless the Chairman decides the matter is urgent for reasons that must be specified and recorded in the Minutes.

## **BOURNEMOUTH, CHRISTCHURCH AND POOLE**

### **SHADOW SCHOOLS FORUM**

**13 NOVEMBER 2018**

The meeting commenced at 12.30pm and concluded at 2.40pm.

Present:

#### **Maintained - Primary**

Karen Boynton – Headteacher, Highcliffe Primary

#### **Maintained – Secondary**

Marie Lane – St Edwards School substituting on behalf of David Newman – Director of Finance and Operations, Poole High School.

#### **Maintained – Special**

Geoff Cherrill – Head Teacher, Winchelsea School

#### **Mainstream Academies – Primary**

Jeremy Payne – Principal, St James CE School  
Bob Kennedy - Headteacher, St Michael's School  
Dave Simpson – Headteacher, The Epiphany School  
Sean Preston - Chief Financial Officer, Hamwic  
Kate Carter – CEO, TEACH Academy Trust  
Jon Chapple – Headteacher, Twynham Primary

#### **Mainstream Academies – Secondary**

Phil Keen – Headteacher, Corfe Hills School  
Andy Baker – Headteacher, Poole Grammar School  
Patrick Earnshaw – Headteacher, Highcliffe School, Christchurch  
Mark Avoth – Headteacher, Bourne Academy  
Adam Cushan substituting on behalf of Jason Holbrook – Headteacher, Avonbourne College

#### **All-Through Academies**

David Todd – Headteacher, St Peter's School, Bournemouth

#### **Mainstream PRU**

Phillip Gavin - Headteacher, Christchurch Learning Centre

## **AP Academy**

Russell Arnold, Headteacher, The Quay School

## **Academies – Special**

Vacant

## **Early Years Representative**

Linda Duly – Cuddles Day Nursery

Sue Johnson – Jack in the Box, Bournemouth

## **14-19 Representative**

Jacqui Kitcher – Bournemouth & Poole College, 14-19 Representative

## **Diocesan Representatives**

Vacant

## **Invited Attendees**

Councillor Mike White – Borough of Poole

Councillor Nicola Greene - Bournemouth Borough Council

Councillor Trish Jamieson - Christchurch Borough Council

Nicola Webb – Assistant Chief Finance Officer, Bournemouth and Poole

Vicky Wales – Head of Children, Young People & Learning, Poole

Neil Goddard - Service Director - Community Learning & Commissioning, Bournemouth

Not Present:

Jan Thurgood – Strategic Director, People Theme, Poole

Sue Ross – Director, Adults and Children, Bournemouth

Angela Malanczuk – Principal and Chair of PSA, Stanley Green Infant Academy

## 1. **APOLOGIES FOR ABSENCE**

David Newman - Director of Finance and Operations, Poole High School and Jason Holbrook – Headteacher, Avonbourne College provided substitutes for the meeting.

The Chair requested that all present confirmed that they were willing for their presence to be noted on the website as per GDPR requirements and signed a form provided to this effect.

The Chair thanked all officers involved for their hard work to produce reports under the tight timescale required.

**RESOLVED by unanimous agreement that all present confirmed acceptance of their presence being noted on the relevant page of the BCP Shadow Authority website.**

2. DECLARATIONS OF DISCLOSABLE PECUNIARY INTERESTS

There were no declarations of disclosable pecuniary interests.

3. MINUTES

**RESOLVED by unanimous agreement that the Minutes of the Meeting held on 31 October 2018, having been previously circulated, be taken as read, signed and confirmed by the Chairman as a correct record.**

4. EARLY YEARS FUNDING FORMULA CONSULTATION

Amanda Gridley, Early Years Services Manager, Children Young People and Learning and Steve Ellis, Education Accountant, Financial Services, were welcomed to the table by the Chair, in order to provide an overview of the Early Years Funding Consultation papers provided prior to the meeting.

Key points raised:

- (i) A minimum amount of 95% funding to be passed through to providers.
- (ii) A universal base rate for all types of provider, to be set by local authorities by 2019-20.
- (iii) The total value of supplements used must not be more than 10% of the total value of planned funding to be passed through to providers.
- (iv) Deprivation supplement is a mandatory supplement.
- (v) A requirement for authorities to establish a special educational needs and disability inclusion fund.

The following principles were presented to Forum:

- (i) Minimise the amount retained centrally, maximising funding to providers.
- (ii) Using a supplement to support children with a background of deprivation, to narrow the gap between the most disadvantaged children and their peers, at a level that will improve their outcomes.
- (iii) Set a formula which allows providers to better forecast and business plan.
- (iv) SEND funding for every hour the child attends a setting at a level to support improvements in their outcomes.

Impact of the proposals was queried. It was noted that Child Minders are the most impacted when looking at lowered levels of funding, however, not all providers will see a reduction in funding.

Overall, the funding proposal would broadly see:

- Reductions in Bournemouth of 2.5%, although an increase in SEND inclusion funding.
- Increases in Christchurch of 2%
- Increases in Poole of 0.6%

Questions were raised by Forum members around the amount of retention requested. It was confirmed that the Local Authority can retain up to 5% of funding. The total retained for the Local Authority, including the proposed amount of 1% for transfer to the High Needs Block (HNB), totals 1.9% of the budget. This is lower than the amount most Local Authorities retain; for example, Dorset County Council for Christchurch providers currently retains 5%.

Concerns were raised that Early Years Providers cannot continue at the level of funding proposed; the only option for continued business is to raise the fees of those parents that pay for services amounting to an increase in 4-5%. It was considered that this may affect parents' ability to access the service.

It was stated that Early Years Providers had expected a transfer of 0.5% to the High Needs Block; the increase to 1% was stated to not be supported by Providers.

The cost of providing HNB funding to Early Years Providers was requested. It was explained that there has been an increase in funded provision for SEND children from 15 hours per week to 30 hours per week. There has also been a growth in the number of EHCPs in Early Years. Early Years has access to the Portage service. The total cost of SEND provision for Early Years was stated to be £735,000, before the cost of EHCPs is applied, although a proportion of this would be claimed from Health. The transfer to the HNB amounts to £200,000.

It was felt that a further question needed to be included in the consultation regarding the HNB transfer.

The Forum was asked to approve:

1. The proposed central retention of £100,000 representing 1.4% from the 3 and 4 year old allocation of funding and £81,000 (4%) from the 2 year old allocation.

The Forum was requested to endorse:

1. The principles outlined in the draft consultation document.
2. The proposals set out in the consultation paper.

**RESOLVED that:**

- (i) Approval given for the proposal for a central retention budget of £181,000; 12 in favour, 3 abstentions and 2 against.
- (ii) Endorsement provided for the principles outlined in the draft consultation document; 16 in favour and 1 abstention.

- (iii) The consultation document was considered fit for purpose with the addition of 1 question regarding the HNB transfer; 16 in favour and 1 abstention.**

## **5. MAINSTREAM SCHOOLS FUNDING FORMULA CONSULTATION**

Jack Cutler presented the papers in detail relating to the Mainstream Schools Funding Formula Consultation.

This information was presented in order for the Forum to take a decision whether to:

- (i) Support the recommendations of the formula subgroup in establishing the formula changes required to achieve a 1.5% transfer, the scaling of this option for smaller transfers, and the approach illustrated to achieve transfers above 1.5%.
- (ii) Agree whether these recommendations should form the basis of the LA formula consultation with schools.
- (iii) Agree/ disagree disapplication requests to the DfE could be submitted in preparation for decision-making after the consultation process was complete.

The Mainstream Formula Sub-Group of 6 Schools Forum members met on 12 November 2018 to look at the principles for the formula. It was noted that the members were a good cross-section of schools by phase and BCP area. The Sub-Group did not consider the amount of transfer to the HNB only the NFF adjustment should one be agreed. 2 options were considered:

- a. Add to schools 2018/19 funding incrementally.
- b. Take away from 2019-20 National Funding Formula (NFF) incrementally.

The Sub-Group selected option b.

In addition, the Sub-Group considered principles on which any funding should be released from NFF.

- a. Certain groups of schools contribute only/ disproportionately; for example those schools that would be due to receive significant increases to funding under NFF.
- b. All schools share the transfer as equitably as possible.

The Sub-Group selected option b.

The Forum discussed the merits of taking into account school balances when determining the share of the transfer. It was felt that this was not a fair determination as this could not take into account the reasons for any balance held by individual schools, or the differences in accounting date of this information between maintained schools and academies.

The impact on individual schools was discussed.

- Generally, the NFF continues to provide the greatest level of increase for those schools with the lowest level of funding per pupil. This is because:
  - Minimum per pupil funding levels (MPPFLs) introduced in 2018-19 have been raised for 2019-20.
  - Poole did not implement the 2018-19 levels in full this year
  - Regulations provide that these increases cannot be capped.
- Schools on formula allocations have increases capped at 3%.
- Schools with historic funding greater than the NFF provides, will see:
  - Maximum 1% increase (if the floor factor is introduced)
  - Funding reductions (if the floor factor is not introduced) depending where the level of the minimum funding guarantee (MFG) is set.
- Any funding increases under the NFF reduces as the level of transfer increases.

It was requested that further data showing impact by school groupings (as per above bullets) to be provided in the Consultation Paper.

**ACTION: The Consultation Paper is to include funding impact for schools grouped by those at the cap, floor, MPPFL and on formula for each transfer option.**

The Forum determined that decisions would be made following discussion of the HNB paper.

## 6. HIGH NEEDS BLOCK

Vicky Wales presented the High Needs Block report.

The HNB Task and Finish Groups in Poole and Bournemouth have been brought together, along with representation from Christchurch, as per the request at the previous meeting. The new combined group is titled the BCP HNB Financial Strategy Group.

Members of the new Group have been identified and the first meeting is to be held on 15 November 2018. Vicky Wales and Dave Simpson have worked together to create a Terms of Reference and Forward Plan for the Group. There are 3 meetings scheduled prior to the December meeting of the Shadow Schools Forum.

It was acknowledged that the timescales given were tight; the Group has a lot of very challenging work to do before the Forum meeting in December with some potentially unpalatable decisions to be made. It was considered that methods considered deliverable in reducing spend have already been taken into account in calculating the £5.7 million shortfall.

Outreach services across Bournemouth and Poole were discussed; data is being collated to determine the way forward.

It was raised that there was no Early Years representative in the HNB Financial Strategy Group. A volunteer was requested.



**ACTION: The Clerk will provide the dates for the BCP HNB Financial Strategy Group to the early years representatives.**

It was considered that there was a danger that cuts in budgets had the potential to increase spend, not reduce it; the success of schemes may not be able to be measured in terms of lower spend, but rather in the reduction in of increases in costs.

The timescale for the decision about the size of the transfer to the HNB was discussed. A transfer of larger than 0.5% needs to be lodged with the DfE by the 30 November 2018; this does not have to specify the amount of the transfer. The decision regarding the amount of transfer needs to be completed at the December meeting of Forum.

On completion of the discussion regarding the HNB funding, Forum considered the recommendations of the Mainstream Formula Sub-Group:

- (i) Support the recommendations of the formula subgroup in establishing the formula changes required to achieve a 1.5% transfer, the scaling of this option for smaller transfers, and the approach illustrated to achieve transfers above 1.5% and agree whether these recommendations should form the basis of the LA formula consultation with schools.
- (ii) Agree/ disagree disapplication requests can be submitted to the DfE in preparation for decision-making will be in December.

**RESOLVED by unanimous agreement that:**

- (i) **The consultation is to include figures for a transfer to the HNB of 0.5%, 1.0%, 1.5% and 3.0%; the consultation is to make clear that the amount being transferred has not as yet been decided..**
- (ii) **It should be lodged with the DfE by 30 November 2018 that a transfer of greater than 0.5% may be requested. A disapplication request to be made to vary the MFG calculation for all all-through schools adding primary year groups.**

Previous discussions considered setting a variable MFG such that for any school whose funding is protected at >20% through MFG would have MFG set at -1.5% and no floor, regardless of the MFG level set in the formula. This option did not have the support of the formula working group and so it is proposed not to submit a disapplication request for this.

## **7. FORWARD PLAN**

The Chair advised uncertainty in the Forward Plan, due to the work of the BCP HNB Financial Strategy Group.

## **8. ANY OTHER BUSINESS**

It was acknowledged that collectively schools and the 3 Local Authorities have come together to complete a lot of work to resolve these issues in a very short of period of time.

The Early Years Reference Group are meeting on 17 December 2018.

It was discussed that it would be beneficial if the meeting of Forum in December was held later in the month, and earlier in the day.

**ACTION: The Clerk is to move the December meeting of Shadow Schools Forum later in the month and earlier in the day.**

The Chair thanked all members for their time and contribution.

**Appended:**

Following the meeting, the revised date confirmed as: Friday 14 December 2018 at 8.00am.

**Chairman**



## **BOURNEMOUTH, CHRISTCHURCH and POOLE (BCP) SHADOW SCHOOLS FORUM**

Subject	Work and recommendations of the HNB Financial Strategy Group
Meeting Date	14 December 2018
Report Author	Dave Simpson, Headteacher, The Epiphany School, Bournemouth Vicky Wales, Head of Children, Young People & Learning, Poole
Contributors	Steve Ellis, Education Accountant. Children, Young People & Learning
Distributed to	<p><u>BCP HNB Financial Strategy Group Members:</u>            Dave Simpson (Bournemouth Primary and Chair)            Alison Timmings (Christchurch Primary)            Helen Roderick (Poole Primary)            Nadine Lapskas (Bournemouth Secondary)            Mel Strachan (Christchurch Secondary)            Sam Davidson (Poole Secondary)            Nicki Morton / Geoff Cherrill (Special School)            Leigh Bailey-Pearce (AP Provider)            Vanessa Grizzle (Bournemouth SEND Lead)            Geraint Griffiths (Bournemouth AP Lead)            Vicky Wales (Poole Senior Officer)            Teresa Jones (Poole SEND Lead)            Julie Gale (Poole AP Lead)            Nicola Webb (Bournemouth and Poole Finance Lead)</p> <p><u>Early Years Representatives on Shadow Schools Forum:</u>            Linda Duly            Sue Johnson</p>
Status	Public
Classification	For decision by all members
Executive Summary	This report provides details of the work and recommendations from the BCP HNB Financial Strategy Group
<b>Recommendations</b>	The following recommendations are being brought forward to the SSF.

	<ul style="list-style-type: none"> <li>• Continue to lobby central government to ensure that there is sufficient funding to ensure the Dedicated Schools' Block can cover the demand upon it.</li> <li>• The Early Years Sector needs to continue their focus on early identification and intervention ensuring consistent process is across BCP.</li> <li>• While the introduction of banding in Bournemouth and Dorset has reduced expenditure within the HNB; the costs have been passed onto individual schools through reduced top-up funding. Within BCP, banding needs to be clear and transparent and the impact on individual school budgets should be carefully considered to ensure equity and impact on all schools' budgets. A protection factor should be explored for 2019-20.</li> <li>• Outreach services are an integral part of any financial strategy and clear targets linked to impact are required within a streamlined offer across BCP.</li> <li>• Permanent exclusion rates need to reduce through better collaboration and partnership work between schools, alternative provision providers and Local Authority officers.</li> <li>• BCP should continue to explore and develop capacity within the new authority to ensure value for money and reduce placements in the independent and non-maintained sector including post 16 education.</li> <li>• The HNB Financial Strategy Group needs to continue to meet to draw together a joint action plan to reduce the financial demands on the HNB. The BCP High Needs Financial Strategy Group needs to monitor the impact of the action plan and report regularly to the SSF and from April 2019 the BCP Schools Forum.</li> </ul>
Reasons for Recommendations	These recommendations are in order to build a BCP financial strategy for the rising demands on the HNB.

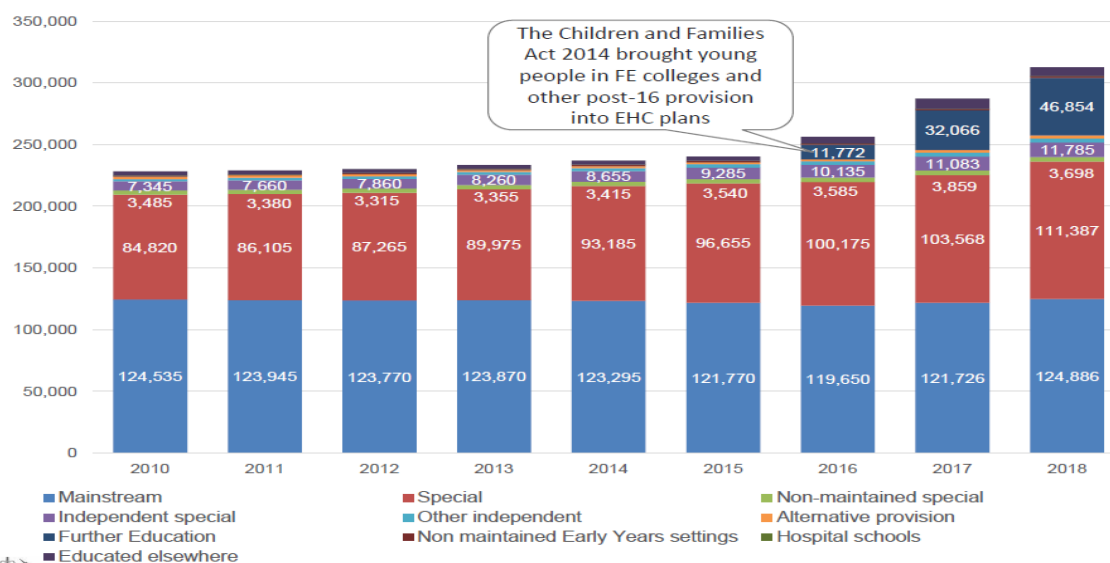
## **1. Background**

- 1.1 The Shadow Schools Forum (SSF) on 13 November 2018 agreed the Terms of Reference, membership and Forward Plan for a HNB Financial Strategy Group.
- 1.2 A report was requested for the SSF's next meeting, detailing any recommendations regarding the HNB spend and financial strategy.
- 1.3 The group met 3 times during the 5 week period and were provided with the following data and reports (see Appendix A which provides some overview data):
  - Independent / non-maintained providers and costs
  - Map of special schools and alternative providers across BCP
  - Draft 2019/20 BCP SEND Budget Build
  - Special school numbers
  - Bournemouth High Needs Board action plan
  - Poole High Needs Block group action plan
  - High Needs Funding and the Local Offer
  - Average costs and trends utilised for EHCPs
  - Alternative Provision, permanent exclusions and costs
  - Outreach
  - Banding
  - Mainstream Banding Report
  - The Impact of Banding
  - Poole and Bournemouth's Mainstream Plus offers

## **2. Understanding the National and Local Picture**

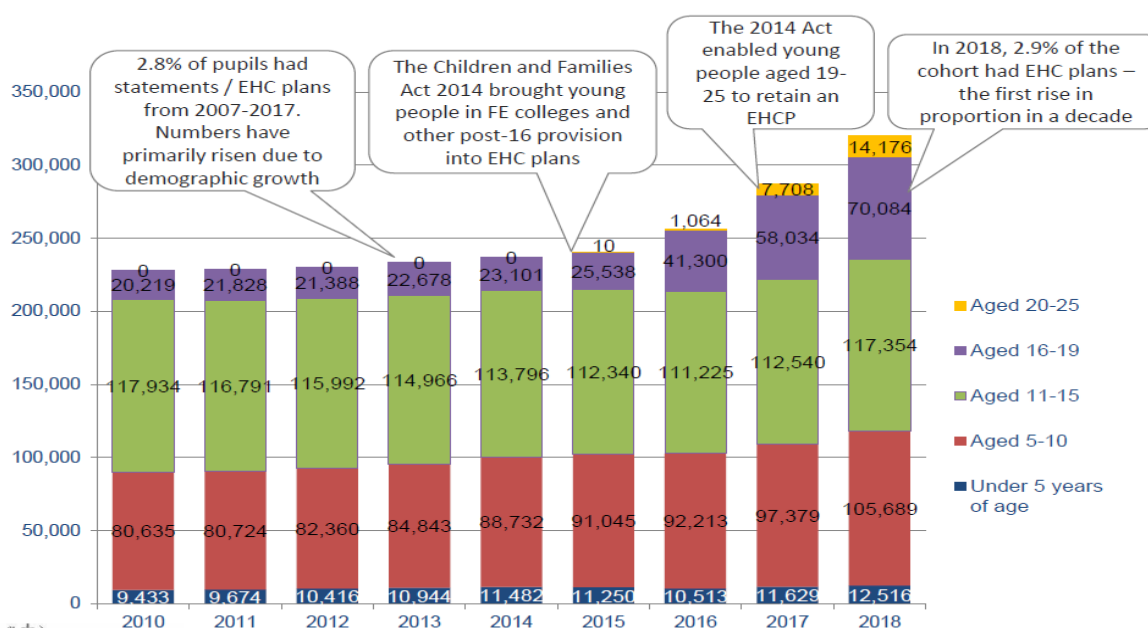
- 2.1 It is clearly recognised by the group that the issues around the growing demands on the HNB are a national picture. The following 2 graphs have been produced by the Department for Education (DfE), and show all local areas are experiencing growth in Education, Health and Care Plans (EHCPs) and that in all areas independent specialist placements are rising. A table showing additional information and trends across Bournemouth and Poole is also available. (See appendix A). At the time of the publication of this report historic data relating to Christchurch was not available. However, it is the opinion of the group that the emerging data from Christchurch is unlikely to be significantly different to that of Bournemouth and Poole.

## The local offer – changing placements



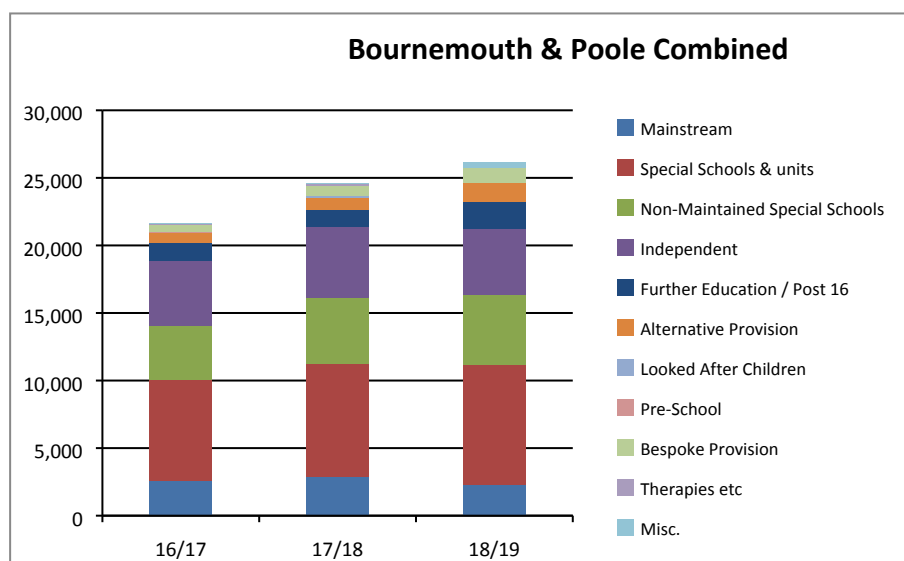
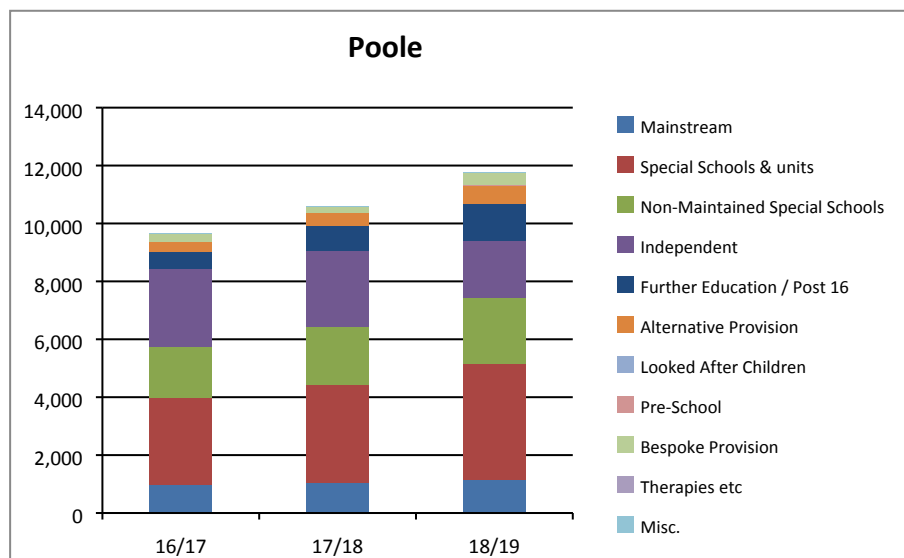
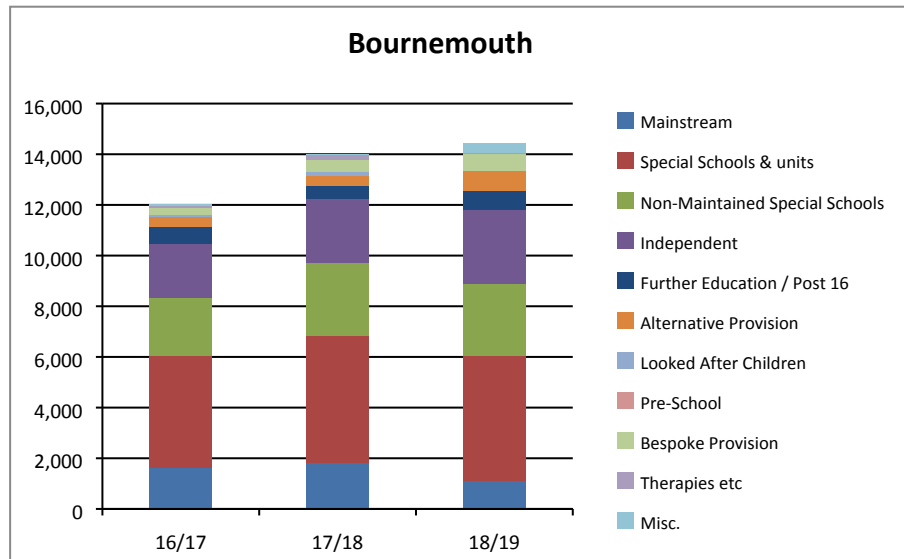
Department  
for Education

## The local offer – growing numbers



Department  
for Education

2.2 The graphs below using Bournemouth and Poole data show the similarities experienced locally to those at a national level:



- 2.3 The tables below provide data on Bournemouth and Poole combined rise in EHCPs and HNB.

<b>Pupil Numbers School Year Bournemouth and Poole Combined</b>						
<b>Table 1</b>	2014/15	2015/16	2016/17	2017/18	2018/19 projection	2019/20 projection
0 - 24 Population Data	107,793	99,968	100,707	101,723	101,723	101,723
Total Number with EHCPs	1,213	1,301	1,517	1,710	1,881	2,055
% of Pupils with an EHCP	1.1%	1.3%	1.5%	1.7%	1.8%	2.0%

<b>DSG Financial Year (April to March) Bournemouth and Poole Combined</b>			
<b>Table 2</b>	2017/18	2018/19	2019/20 projection
Total Financial Allocation £m	30.66	33.71	34.22
Total High Needs Block Spend £m	34.60	37.27	38.89
% of Total Budget	113%	111%	114%

### **3. BCP HNB Financial Strategy Group**

- 3.1 The HNB Financial Strategy Group was clear that a consistent and equitable financial strategy was now required across BCP, which was based on collaborative working between schools and officers. That data needed to be shared in an open and transparent way and that, in making changes and decisions, the impact both on individual pupils and schools needed to be taken into account. Both the new Local Authority and individual schools have joint responsibility for ensuring that the High Needs Block remains sustainable within the Dedicated Schools' Block.



#### **4. Summary of work undertaken and next steps.**

##### **4.1 Out of Borough Placements:**

The Group considered and discussed the combined BCP placements in independent specialist provision. It was noted that both Bournemouth and Poole were already reducing their spend and that in comparison Christchurch had a greater number placed in independent specialist provision. This can be considered due to the fact that there are no Local Authority special schools in this area.

##### **Emerging Effective Practice and Next Steps:**

- Bournemouth and Poole officers have tightened up criteria for SEND panel meetings and there have been savings made as a result of a more robust system and greater scrutiny.
- Bournemouth and Poole officers are attending Dorset panel meetings to ensure that, where decisions are being made, the BCP financial strategy to reduce independent specialist placements is implemented.
- BCP will be part of a new contractual framework being put in place across the South West Region to ensure value for money.
- Bournemouth and Poole will continue to review the individual placements to consider whether pupils can be returned to local provision.
- BCP must continue to build capacity and improve effective provision to reduce the number of out of borough placements.

##### **4.2 Banding:**

Bournemouth and Christchurch already have a banding system in place for top up payments for EHCPs. The group recognised this methodology provided a clear process for the funding of EHCPs. The move to EHCP banding had significantly reduced the spending from the High Needs Budget in Bournemouth and Christchurch. However, a far greater proportion of the actual cost of fulfilling the statutory obligations within these plans has been passed onto individual school budgets. There was a collective understanding that a move to banding across BCP has been implemented within the budget build document for 2019/20. There was also a recognition that the impact of introducing banding for 2019/20 across BCP needed to be clear, transparent and fully understood by all schools. Consideration was given to the specific impact on schools across BCP with greater than average numbers of pupils on role with EHCPs.

##### **Emerging Effective Practice and Next Steps:**

- The move to EHCP banding gives the opportunity to reduce the number of 1:1 and or teaching assistant hours in favour of a broader and more

flexible personal budget based on need. This has been welcomed as a positive move in schools already implementing the change.

- Local Authority Officers need to provide clear and concise guidance on how the proposed banding will operate equitably across BCP and ensure schools are made aware of the extent of the financial impact on their resources in order that they themselves can plan their budgets.
- The Group requested that further work be undertaken to include a protection factor for 2019-20 across BCP schools where numbers of EHCPs exceeded 3%, through an exceptional circumstance funding model.

#### 4.3 Special Schools:

All special schools have increased their place numbers to accommodate the increase in demand and their role in meeting the pressures in the system is recognised. Special schools are at capacity across BCP.

##### Emerging Effective Practice and Next Steps:

- Special Schools have shown a willingness to expand to meet growing need. There is on-going dialogue taking place to continue to expand provision in Special Schools in order to reduce more expensive out of borough placements.
- Further work to be carried out between the special schools and Local Authority officers regarding their offer and how placements are made across BCP.

#### 4.4 Mainstream Plus:

Both Bournemouth and Poole have been working to develop models for schools to provide resources so that more pupils can be maintained in mainstream schools.

##### Emerging Effective Practice and Next Steps:

- Poole special schools have also been exploring classes for their pupils in mainstream schools to release places in local special schools for more pupils. This idea is now being actively discussed within Bournemouth.
- Mainstream schools, special schools and Local Authority officers to further develop and implement the Mainstream Plus offers across BCP. This work will require monitoring by the BCP HNB Financial Strategy Group.

#### 4.5 Outreach:

The Group were fully supportive of the continuation of the allocation of the HNB of £486,648 for these services to continue 2019-20. These services were viewed as an essential element of maintaining pupils in mainstream schools and therefore reducing the cost of more expensive placements in specialist settings.

#### Next steps:

- All outreach services to meet with Local Authority officers to ensure there is a clear and transparent methodology for allocation, impact and avoiding any duplication and ensuring access for Christchurch schools.

#### 4.6 Alternative Provision: The Group noted the rise in permanent exclusions, particularly in the secondary phase. This is putting a growing pressure on the High Needs Block.

There was evidence provided of initiatives across BCP that schools and the AP providers working together to reduce exclusions and this work needs to be shared across BCP. There is some work already being done to support managed moves. The results of this work are encouraging.

#### Emerging Effective Practice and Next Steps:

- A BCP Permanent Exclusions Reduction Group has been proposed, which focuses on exclusions from secondary schools across BCP which has representation from primary schools.
- A group which will focus on In Year Fair Access arrangements will also be required and this is also due to be set up.

#### 4.7 Early Years:

Early Years providers were not part of the HNB Financial Strategy Group but the 2 Shadow Forum representatives have received the papers.

The sector is working with Local Authority officers to ensure there are consistent systems across BCP for the identification and allocation of resources for children with SEND.

The sector have already developed systems for identification at an early stage of children whose development is a cause for concern. They work in partnership with Heath, Children's Centres and parents / carers to ensure there is a holistic assessment of individual children's needs.

Sector practitioners undertake a significant amount of early intervention support work with children identified early and this early intervention frequently results in children transitioning into mainstream provision with effective support plans already in place and in some instances with children having made such significant progress that they do not need additional support in their mainstream settings.

#### Emerging Effective Practice and Next Steps:

- The implementation of a consistent approach in early years to the identification of SEND and supporting smooth transition to school is proving effective and the number of EHCPs is decreasing.
- Continuing to ensure a positive relationship is established with parents and carers from the earliest stage in a child's learning experience.
- Continuing the commitment of the sector to ensure staff access appropriate training and development regarding SEND.

#### 4.8 Working with parents / carers and partners:

The group in discussion has identified that it is very important that there are consistent messages to parents and carers regarding the high quality provision available locally and that ensuring all those involved with a family work together to meet need is essential.

##### Next steps:

- From 1 April 2019 there will be a single Parent / Carer Forum for BCP and it will be essential to engage them at a strategic level with the work to reduce demand on the HNB.
- There will also be one Children's Trust for BCP and this partnership will be essential; in ensuring there is continued joint working across all agencies regarding pupils with SEND.

## **5. Recommendations**

### 5.1 The following recommendations are being brought forward to the SSF.

- Continue to lobby central government to ensure that there is sufficient funding to ensure the Dedicated Schools' Block can cover the demand upon it.
- The Early Years Sector needs to continue their focus on early identification and intervention ensuring consistent process is across BCP.
- While the introduction of banding in Bournemouth and Dorset has reduced expenditure within the HNB; the costs have been passed onto individual schools through reduced top-up funding. Within BCP, banding needs to be clear and transparent and the impact on individual school budgets should be carefully considered to ensure equity and impact on all schools' budgets. A protection factor should be explored for 2019-20.

- Outreach services are an integral part of any financial strategy and clear targets linked to impact are required within a streamlined offer across BCP.
- Permanent exclusion rates need to reduce through better collaboration and partnership work between schools, alternative provision providers and BCP officers.
- BCP should continue to explore and develop capacity within the new authority to ensure value for money and reduce placements in the independent and non-maintained sector including post 16 education.
- The HNB Financial Strategy Group needs to continue to meet to draw together a joint action plan to reduce the financial demands on the HNB. The BCP High Needs Financial Strategy Group needs to monitor the impact of the action plan and report regularly to the SSF and from April 2019 the BCP Schools Forum.

## **6. Legal Implications**

- 6.1 The mainstream schools funding formula is decided by the Shadow Local Authority after consultation with all schools and the Shadow Schools Forum and is required to be sent to the ESFA by 21 January 2019.

## **7. Conclusion**

- 7.1 The HNB Financial Strategy Group has been provided with further data and information in order to begin to draw together the work around SEND and AP across BCP.
- 7.2 In a short timescale, the group has considered a range of issues but further work is required and it needs to establish a further meeting schedule and forward plan for 2019-20.
- 7.3 Considering the fact that the Group has been pulled together from three different existing Local Authorities, each with their own unique ways of working there has been a unity in the appreciation of the challenges ahead due to the financial constraints that schools and Local Authorities are working within. There is also a widespread acknowledgement within the Group that the changes to the SEND Code of Practice in 2014 have put unprecedented pressures on the High Needs Block.
- 7.4 There is a need to build and develop greater provision and capacity within BCP. It is likely that this will take time to implement, embed and bear fruit. Planned savings may not be obvious in the short term and the expectation is that there will be a lag in time between initiatives being set up and any significant financial impact on the High Needs Budget.
- 7.5 When making decisions to reduce spending in the High Needs Block it will be important that Schools Forum members fully reflect upon the long term

financial and operational impact of any such decision on the schools block as a whole.

## **5. Background Papers**

### **5.1 Previous HNB reports to Shadow Schools Forum.**

# Bournemouth Christchurch and Poole HNB Financial Strategy Group

## **Dataset used by the BCP HNB Financial Strategy Group**

### Contents

1. Average costs and trends utilised
2. Alternative Provision
3. Outreach
4. Banding
5. Independent and Non Maintained Schools

14 December 2018



# 1. Average costs and trends utilised.

Current number of EHCPs used in BCP budget build									
	Bournemouth		Christchurch		Poole		Total		
	No. EHCPs	Ave. Cost	No. EHCPs	Ave. Cost	No. EHCPs	Ave. Cost	No. EHCPs	Ave. Cost	
Independent	41	51,435	14	73,585	25	72,854	80	62,005	
Non-Maintained Special Schools	74	34,670	13	32,670	55	37,371	142	35,538	
Colleges	77	3,180	39	3,952	79	2,051	195	2,877	
Independent Colleges	18	51,301	11	48,391	13	53,135	42	51,107	
Special Schools	327	12,824	72	8,980	274	12,707	673	12,365	
Mainstream	327	2,917	119	3,567	277	2,418	723	2,833	
Mainstream Bases	22	16,124			2	7,614	24	15,415	
Medical / Therapies	3	19,373			4	13,944	7	16,270	
Bespoke	22	20,355			20	22,318	42	21,290	
Pre-School	9	19,572	3	12,000			12	17,679	
Zero Top-up	91	0	8	0	68	0	167	0	
Awaiting Placement	12	11,000			8	11,700	20	11,280	
<b>Current EHCPs</b>	<b>1,023</b>	<b>11,886</b>	<b>279</b>	<b>11,643</b>	<b>826</b>	<b>11,515</b>	<b>2,128</b>	<b>11,710</b>	
LAC - EHCP agreed by OLA	14	27,306			6	7,400	20	21,334	
<b>Current Total</b>	<b>1,037</b>	<b>12,094</b>	<b>279</b>	<b>11,643</b>	<b>832</b>	<b>11,485</b>	<b>2,148</b>	<b>11,800</b>	
Numbers of EHCPs by Phase (BCP)									
	Bournemouth		Christchurch		Poole		Total		
	No. EHCPs	Ave. Cost	No. EHCPs	Ave. Cost	No. EHCPs	Ave. Cost	No. EHCPs	Ave. Cost	
Under 5	39	8,016	18	7,881	23	19,824	80	11,345	
5-11	347	10,879	99	8,869	268	8,688	714	9,778	
11-16	369	13,975	92	13,642	275	13,559	736	13,778	
16-19	242	12,134	56	14,558	212	12,016	510	12,351	
Post-19	40	9,006	14	11,301	54	9,228	108	9,415	
	<b>1,037</b>	<b>12,094</b>	<b>279</b>	<b>11,643</b>	<b>832</b>	<b>11,485</b>	<b>2,148</b>	<b>11,800</b>	
Bournemouth EHCP trends since 2014									
	Jan-15		Jan-16		Jan-17		Jan-18		Oct-18
Independent Special School	28	0%	28	7%	30	30%	39	5%	41
Non-Maintained Special School	43	12%	48	33%	64	13%	72	3%	74
Special School	300	0%	300	1%	302	7%	323	1%	327
SEN Unit	22	-32%	15	47%	22	0%	22	0%	22
Mainstream School/ Academy	294	-3%	286	4%	297	5%	312	5%	327
Other	16	31%	21	43%	30	107%	62	-26%	46
<b>Total - Pre-16</b>	<b>703</b>	<b>-1%</b>	<b>698</b>	<b>7%</b>	<b>745</b>	<b>11%</b>	<b>830</b>	<b>1%</b>	<b>837</b>
Mainstream Colleges			42	145%	103	14%	117	-34%	77
Specialist Post 16			8	25%	10	50%	15	20%	18
<b>Total - Post-16</b>			<b>50</b>	<b>126%</b>	<b>113</b>	<b>17%</b>	<b>132</b>	<b>-28%</b>	<b>95</b>
Zero Top-up									91
<b>Total EHCPs</b>	<b>703</b>	<b>6%</b>	<b>748</b>	<b>15%</b>	<b>858</b>	<b>12%</b>	<b>962</b>	<b>6%</b>	<b>1,023</b>
Poole EHCP trends since 2014									
	Jan-15		Jan-16		Jan-17		Jan-18		Oct-18
Independent Special School	42	-19%	34	-9%	31	10%	34	-26%	25
Non-Maintained Special School	43	-7%	40	23%	49	8%	53	5%	55
Special School	217	6%	229	1%	232	14%	264	4%	274
SEN Unit	-	-	-	-	-	-	-	-	2
Mainstream School/ Academy	196	0%	196	13%	221	7%	237	17%	277
Other	11	109%	23	22%	28	64%	46	-30%	32
<b>Total - Pre-16</b>	<b>509</b>	<b>3%</b>	<b>522</b>	<b>7%</b>	<b>561</b>	<b>13%</b>	<b>634</b>	<b>5%</b>	<b>666</b>
Mainstream Colleges	0	#DIV/0!	20	290%	78	24%	97	-19%	79
Specialist Post 16	1	1000%	11	82%	20	-15%	17	-24%	13
<b>Total - Post-16</b>	<b>1</b>	<b>3000%</b>	<b>31</b>	<b>216%</b>	<b>98</b>	<b>16%</b>	<b>114</b>	<b>-19%</b>	<b>92</b>
Zero Top-up									68
<b>Total EHCPs</b>	<b>510</b>	<b>8%</b>	<b>553</b>	<b>19%</b>	<b>659</b>	<b>14%</b>	<b>748</b>	<b>10%</b>	<b>826</b>
Current Special School Data (by school)									
	Bournemouth		Christchurch		Poole		Total		
	No. EHCPs	Ave. Cost	No. EHCPs	Ave. Cost	No. EHCPs	Ave. Cost	No. EHCPs	Ave. Cost	
Linwood School	220	12,590	19	12,747	34	13,854	273	12,758	
Linwood CHI	12	10,105	2	12,747	5	10,709	19	10,542	
Longspee Academy	2	11,220	3	12,820	30	18,865	35	17,910	
Montacute School	9	13,405	7	12,971	53	16,299	69	15,584	
Tregonwell Academy	22	16,729	1	12,747	28	13,828	51	15,058	
Tregonwell Academy (NBC)	34	16,597					34	16,597	
Tregonwell Academy (TLC)	1	7,700					1	7,700	
Winchelsea School	6	12,782	2	10,846	111	9,342	119	9,540	
<b>Current Total</b>	<b>306</b>	<b>13,238</b>	<b>34</b>	<b>12,688</b>	<b>261</b>	<b>12,944</b>	<b>601</b>	<b>13,080</b>	
Pemanent Exclusions									
	2014/15		2015/16		2016/17		2017/18		2018/19 (as at 09/11/18)
Bournemouth	23	39%	32	22%	39	46%	57		5
Christchurch	unknown		unknown		8	100%	16		7
Poole	43	-47%	23	17%	27	26%	34		10
<b>Total</b>					<b>74</b>	<b>45%</b>	<b>107</b>		<b>22</b>



## 2. Alternative Provision

<b>AP current placements (by year group)</b>								<b>Total</b>
	<b>11</b>	<b>10</b>	<b>9</b>	<b>8</b>	<b>7</b>	<b>6</b>	<b>5</b>	<b>On-Roll</b>
Tregonwell (Petersfield)	14	9	6	3				32
Tregonwell (TLC)	2		1					3
Nigel Bowes School				1	1			2
Christchurch Learning Centre	1							1
Quay School								0
Others	7	4	4	1				16
<b>Bournemouth Residents</b>	<b>24</b>	<b>13</b>	<b>11</b>	<b>5</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>54</b>
Christchurch Learning Centre	9	4	3					16
Forum Learning Centre	1						1	2
Home Tuition							1	1
<b>Christchurch Residents</b>	<b>10</b>	<b>4</b>	<b>3</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>2</b>	<b>19</b>
Quay School	22	23	9	2				56
Other AP providers						2		2
<b>Poole Residents</b>	<b>22</b>	<b>23</b>	<b>9</b>	<b>2</b>	<b>0</b>	<b>2</b>	<b>0</b>	<b>58</b>
<b>Total</b>	<b>56</b>	<b>40</b>	<b>23</b>	<b>7</b>	<b>1</b>	<b>2</b>	<b>2</b>	<b>131</b>

In building the BCP budget for 19-20, it is assumed the current 131 pupils above will continue in AP and that this number will be added to at a rate matching the level of exclusions over the 17-18 academic year, allowing for year 11 pupils to age out in Sept 19. If this trend is realised, pupils in AP will reach 244 by the end of March 2020, with BCP requiring to fund an average of 218 pupils over the financial year. BCP intends to commission the following places at local AP provision:

	Places	Cost of 10k places (£'000s)	Ave. top-up (£'000s)	Cost of top-up (£'000s)	Total Cost (£'000s)
Tregonwell	44	440	8.1	356	796
The Quay School	68	680	9.5	646	1,326
Christchurch Learning Centre	28	280	9.0	252	532
	<b>140</b>	<b>1,400</b>		<b>1,254</b>	<b>2,654</b>

Using all BCP provision would not meet the anticipated need for AP places and BCP would be required to purchase bespoke packages of provision. This type of provision costs on average £40 ph. Based on 15 hours per week support, this equates to an annual cost of £22,800.

	Places	Ave. top-up (£'000s)	Cost of top-up (£'000s)	Total Cost (£'000s)
Other AP	78	22.8	1,778	1,778
<b>Total AP (excluded pupils)</b>	<b>218</b>			<b>4,433</b>
Less exclusion charges				-260
<b>Cost to High Needs Budget</b>				<b>4,173</b>

### 3. Outreach

#### Outreach Services - BCP

Delivered By	Service	Contract Ends	Annual Cost
Linwood	Communication & Interaction (C&I) Outreach Service: including speech, language & communication (SLCN) and autistic spectrum condition (ASC)	24/07/2020	£160,000
Tregonwell	SEMH Outreach Service: includes attention deficit hyperactivity disorder (ADHD), attention deficit disorder (ADD), oppositional defiant disorder (ODD), attachment disorder, anxiety and depression.	24/07/2020	£100,000
Longspee	SEMH includes attachment disorder, ODD anxiety, mental health, associated illness/disorders.	31/03/2019	£94,886
Montacute	SLCN including support re communication aids, LD, ASD / ADHD, life skills.	31/03/2019	£69,614
Winchelsea	LD, ASD, sensory, independent life skills, staff training, advice re differentiation.	31/03/2019	£62,148
<b>TOTAL</b>			<b>£486,648</b>

### Overview of Mainstream School EHCP Banding

The key benefits of introducing a Banding System are:

- ✓ A transparent and simplified approach to top-up funding in mainstream schools
  - Reduces administrative burdens
- ✓ Removes association between EHCP plan and funded TA hours
  - Removes risk of parental frustration that TA hours of support provided does not match that named on the EHCP.
- ✓ Encourages consistency in the Local Area:
  - Dorset adopted mainstream banding from 2017-18
  - Bournemouth adopted mainstream banding from September 2018.

### Summary of Band Funding used in Bournemouth and Dorset

Funding Band	Band Zero	Band A / A Lower	Band B / A Upper	Band C / B Lower	Band D / B Upper	B Plus (DCC only)
Value (Total)	£6,000	£7,000	£8,300	£9,600	£11,000	As B Upper but additional £7.31 paid if support above 37.5hrs pw
Notional SEN (element 2)	£6,000	£6,000	£6,000	£6,000	£6,000	
Top-up (element 3)	-	£1,000	£2,300	£3,600	£5,000	

Moving to banding of mainstream school EHCP's payments saved the High Needs Block in Bournemouth c. £874k.

In building the BCP SEND budget for 2019-20, it has been assumed the above banding will be applied to all schools. This saves a further £480k.

## 5. Independent and Non-Maintained Schools

HNB Financial Strategy Group   INMSS - Breakdown by Provider at October 2018												
	Bournemouth			Christchurch			Poole			BCP 2019-20 DRAFT BUDGET		
	Current EHCPs	Cost	Average Top-Up	Current EHCPs	Cost	Average Top-Up	Current EHCPs	Cost	Average Top-Up	Current EHCPs	Cost	Average Top-Up
<b>INDEPENDENT SCHOOLS</b>												
Apple Orchard	1	42,328	42,328							1	42,328	42,328
Appleford School	1	18,765	18,765				1	31,491	31,491	2	50,256	25,128
Aurora Hanley School	1	44,445	44,445							1	44,445	44,445
Bournemouth Christian School (Switched On Christian School)	5	100,799	20,160							5	100,799	20,160
Clayesmore School	1	29,020	29,020							1	29,020	29,020
Coxlease School	11	745,787	67,799	6	402,126	67,021	4	249,437	62,359	21	1,397,350	66,540
Grateley House School							1	132,897	132,897	1	132,897	132,897
Hill House	3	76,349	25,450							3	76,349	25,450
Hillcrest-Hayling Island	1	20,141	20,141							1	20,141	20,141
More House School				1	27,000	27,000				1	27,000	27,000
New Forest School	3	112,900	37,633				3	206,100	68,700	6	319,000	53,167
North Hill House				1	100,000	100,000				1	100,000	100,000
Purbeck View School							3	210,848	70,283	3	210,848	70,283
Shapwick School	1	30,204	30,204							1	30,204	30,204
Sheiling School	5	255,816	51,163				2	197,712	98,856	7	453,528	64,790
Somerset Progressive School							1	67,600	67,600	1	67,600	67,600
Southlands School	5	390,277	78,055	5	441,065	88,213	1	139,000	139,000	11	970,342	88,213
St Edward's School				1	60,000	60,000	6	450,243	75,041	7	510,243	72,892
The Forum School	3	262,764	87,588				2	76,034	38,017	5	338,798	67,760
Woodlands Care Setting	1	3,246	3,246							1	3,246	3,246
TBC Independent	1	70,000	70,000				1	60,000	60,000	2	130,000	65,000
Total Independent	43	2,202,841	51,229	14	1,030,191	73,585	25	1,821,362	72,854	82	5,054,394	61,639
<b>NON-MAINTAINED SPECIAL SCHOOLS</b>												
Langside School	6	262,943	43,824				13	485,427	37,341	19	748,370	39,388
Moor House School	1	52,922	52,922							1	52,922	52,922
Portfield School	42	1,590,343	37,865	4	155,204	38,801	18	744,267	41,348	64	2,489,814	38,903
Victoria	25	659,367	26,375	9	269,505	29,945	23	759,041	32,438	57	1,687,913	29,406
Wesc Foundation School							1	81,605	81,605	1	81,605	81,605
Total Non-Maintained Special Schools	74	2,565,575	34,670	13	424,709	32,670	55	2,070,339	37,371	142	5,060,623	35,538

NB: There has been a data refresh between the production of figures for Appendix A item 1 and item 5.



## BOURNEMOUTH, CHRISTCHURCH and POOLE SHADOW SCHOOLS FORUM

## Agenda Item 5

Subject	MAINSTREAM SCHOOLS FUNDING FORMULA CONSULTATION RESPONSES
Meeting Date	14 December 2018
Report Author (s)	Jack Cutler, Planning and Statistics Officer, Community Learning and Commissioning, Bournemouth Email: <a href="mailto:Jack.cutler@bournemouth.gov.uk">Jack.cutler@bournemouth.gov.uk</a> Phone: 01202 456141
Contributors	Neil Goddard, Service Director, Community Learning and Commissioning, Bournemouth Vicky Wales, Head of Children, Young People and Learning, Poole Nicola Webb, Assistant Chief Finance Officer, Bournemouth & Poole
Status	Public
Classification	For consultation
Executive Summary	<p>This report provides the outcome of the main School Funding Consultation 2019-20.</p> <p>The consultation sought views on the options for the mainstream schools formula within the context of high needs pressures and budgets within the central school services block.</p> <p>The outcome of a separate consultation, supported by the work of the High Needs Block Budget Strategy Group, will report on the level of school support for a transfer of mainstream school funding to central high needs budgets (most of which is allocated to schools) and if so at what level.</p> <p>The response rate to the consultation was 63 from mainstream schools (71%), with 2 Specialist providers and 1 Diocesan general response in the form of a letter.</p> <p>There was general agreement with the principles behind the local funding formula being consulted on, although schools also took the opportunity to comment on the level they might support in terms of any funding transfer to High Needs.</p>
Recommendations	Shadow Schools Forum to consider whether they continue to support the funding formula principles set out within the consultation paper in full or whether a number of adjustments should be made. The recommendation should be made after



	all papers at the meeting have been presented and discussed.
Reasons for Recommendations	The Schools Forum needs to consider the outcome of all consultations before forming a view.
Background Papers	Shadow Schools Forum 13 November Agenda 5.

### **List of Appendices**

Appendix 1: Schools Formula Funding Consultation 2019-20

Appendix 2: List of schools responding to the consultation

## **1. BACKGROUND - MAINSTREAM SCHOOLS FUNDING FORMULA CONSULTATION**

- 1.1. The consultation principles were based on decisions taken by the Shadow Schools' Forum at the November meeting.
- 1.2. A copy of the funding consultation to schools is provided in Appendix 1.
- 1.3. To assist schools with completing an informed response to the consultation a series of Consultation event evenings were held during the consultation window; one each in Bournemouth, Christchurch and Poole. The first and last events were well attended; copies of the presentation slides were made available to all schools.

## **2. CONSULTATION RESPONSES**

- 2.1. From mainstream schools, a high response rate of 71% was received, corresponding to 63 out of 89 mainstream schools across BCP. Only two response were received from a school funded from the High Needs Block (two Special Academies). This lower response rate from stakeholders outside of mainstream schools is typical for a consultation where the main focus is the mainstream schools' formula.
- 2.2. The response by phase was relatively even with 66% of primary schools responded, and 83% of Secondary schools. There was also good balance across infant, junior and primary.
- 2.3. A summary of schools responding is provided in Appendix 2.

## **3. ANALYSIS OF THE RESPONSES**

- 3.1. The consultation response options lead themselves to both quantitative and qualitative analysis.

### 3.2. Response Rate

43 Primary, 20 Secondary, (including all-through), and two special schools responded. Further breakdown by school type and phase is provided below.

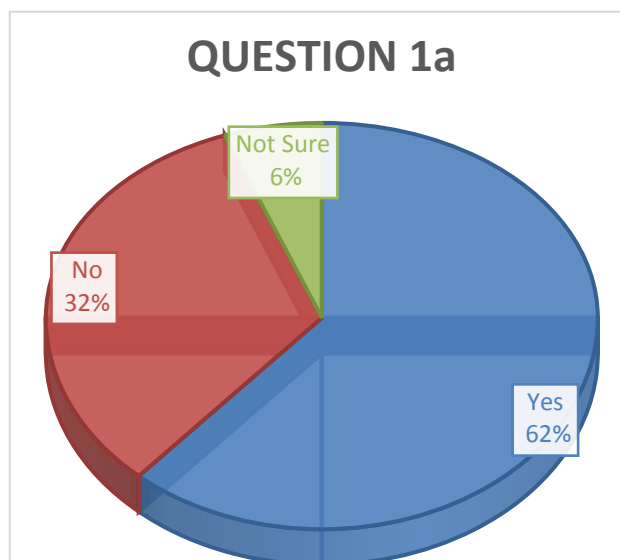
Phase	Count of responders	% of mainstream schools
Infant/ First	12	75%
Primary	22	59%
Junior	9	75%
Secondary	18	86%
All- through	2	67%
Special Academy	2	N/A

Type	Count of maintained responders	% of mainstream schools
Academy	50	68%
Maintained	13	81%
Total	63	71%

### 3.3. QUESTION 1a (Option 1 – if no transfer is made to high needs)

*Do you agree the MFG should be set at minus 1.5% per pupil so that the changes in the 2019-20 NFF and school data from the October 2018 can be reflected in funding allocations to schools?*

Response	Count	% of Responses
Yes	40	62%
No	21	32%
Not Sure	4	6%
No Response	0	0%
Total	65	100%



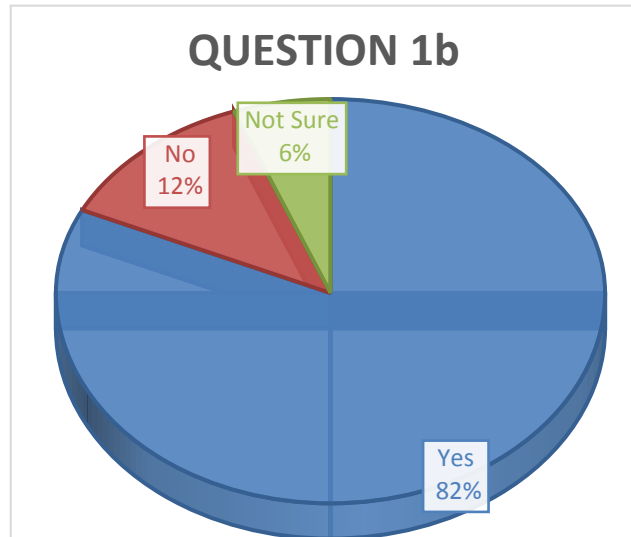
### General Comments

There was a lower number of additional comments for this question. The majority of responses are in agreement with the proposal but some, did not fully comprehend the technicalities of the question, and there was some confusion between MFG at minus 1.5% and a level of funding transfer into High Needs.

### 3.4. QUESTION 1b

*Do you agree that if no transfer to high needs is made that the NFF funding floor should be introduced so that schools receive an increase per pupil of at least 1% compared with 2017-18?*

Response	Count	% of Responses
Yes	53	82%
No	8	12%
Not Sure	4	6%
No Response	0	0%
Total	65	100%



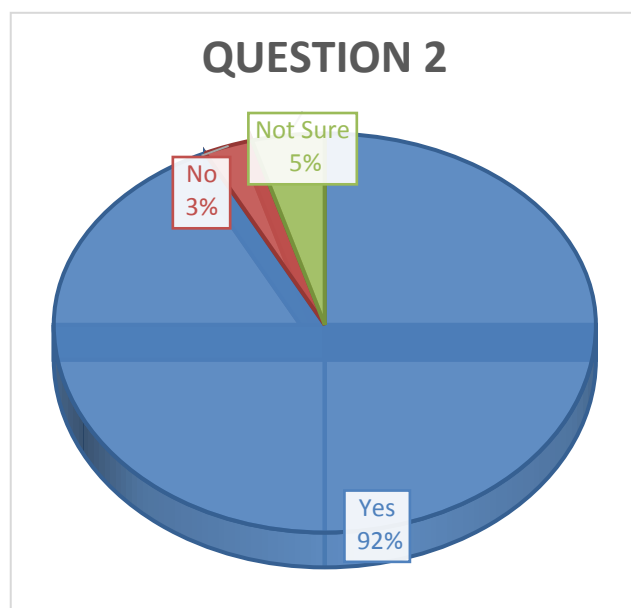
### General Comments

Although the categorical response indicated strong agreement with the question, the commentary received generally related to the size of any transfer between block rather than whether or not a funding protection of +1% should be applied against a 2017-18 per pupil funding baseline.

### 3.5. QUESTION 2

*Do you agree the disapplication request to adjust the MFG baseline for all through schools adding primary year groups represents a fair adjustment to the local formula?*

Response	Count	% of Responses
Yes	60	92%
No	2	3%
Not Sure	3	5%
No Response	0	0%
Total	65	100%





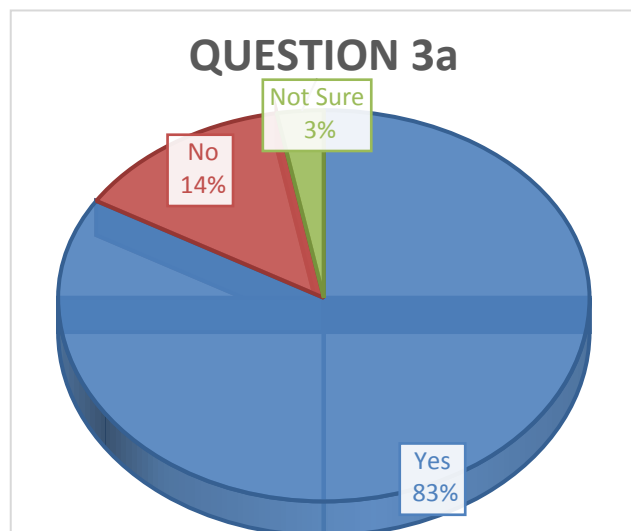
### General Comments

There was generally strong agreement with this proposal. There was a view from a particular school that would be impacted by the disapplication request, and a fellow school within their trust, that view the additional protection this request would adjust for as an alternative to a separate lump sum the Primary phase would receive were it a separate school. It should be noted that the ESFA have been clear historically that all through schools should not receive more than one lump sum and expect the adjustment proposed for previously secondary schools adding primary year groups. A more appropriate method to address the school's concerns could be to establish the two phases as separate schools, which would draw additional funds into the LA quantum for distribution to the schools that would then receive separate lump sums.

### 3.6. QUESTION 3a

*Do you agree with the principle that if a funding transfer takes place all schools should make a contribution through a lower budget allocation than would otherwise have been the case?*

Response	Count	% of Responses
Yes	54	83%
No	9	14%
Not Sure	2	3%
No Response	0	0%
Total	65	100%



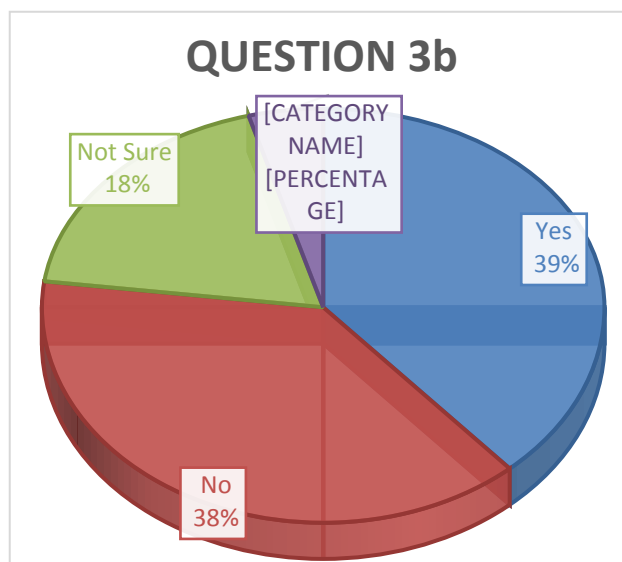
### General Comments

There was a high level of support for all schools to make a contribution. Two schools indicated that Lever 1, which is to include all premises factors except rates within the Minimum Per Pupil Funding Levels impacts significantly on just one school, and therefore is not in alignment with the principle of equitable contributions from all schools as far as is possible. The particular primary school affected would contribute £66k of the £69k (96%) of funding released through this mechanism at the 0.5% transfer level. The reason for this is that including split site funding within the MPPFL's results in the school not receiving an enhanced funding level that recognises their split site status, since they sit at the MPPFL - essentially the school is no longer considered in receipt of spit site funding, and is funded at the same level as any non-split site primary MPPFL school. It is recommended that the Shadow Schools Forum reflect on the fairness of the Lever 1 contribution.

### 3.7. QUESTION 3b

*If you agree that all schools should make a contribution, do you agree with the approach outlined in Table 5 and Table 6 for varying levels of transfer?*

Response	Count	% of Responses
Yes	25	38%
No	25	38%
Not Sure	12	18%
No Response	3	5%
Total	65	100%



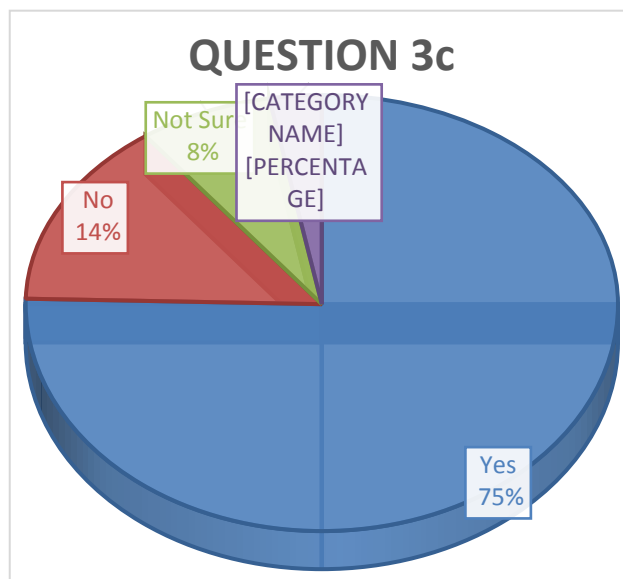
### General Comments

There was a very mixed response to this question, with almost equal responses in agreement or not, with a significant number of responders unsure or not responding (24% across both of the last 2 categories). Although the intention behind this question was to establish whether the 4 levers utilised constituted an appropriate mechanism for varying the level of funding distributed between school, the majority of responses received responded to the levels of funding transfer being illustrated, rather than the mechanisms and formula values utilised to realise such transfer levels.

### 3.8. QUESTION 3c

*Do you agree the basic entitlement is the most appropriate formula factor to adjust?*

Response	Count	% of Responses
Yes	49	75%
No	9	14%
Not Sure	5	8%
No Response	2	3%
Total	65	100%



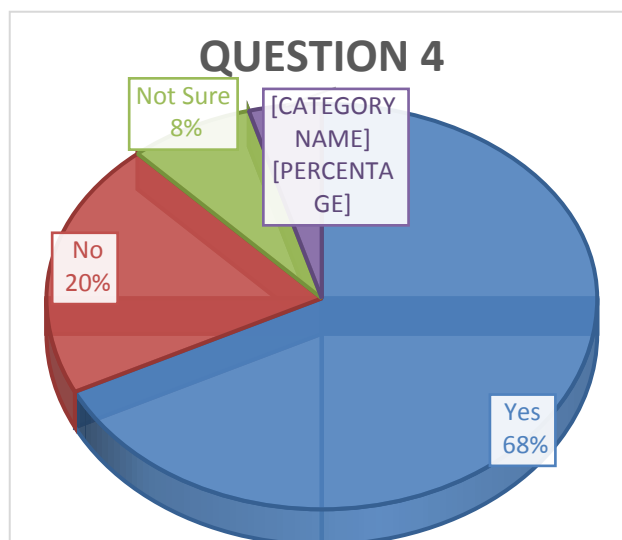
### General Comments

There was general agreement with the proposal, although a significant number of responses used the opportunity to reiterate that they did not support any transfer, or only supported a particular level of transfer. One response provided an alternative approach to varying the Basic Entitlement factor that established an identical per-capita contribution from all schools. However, such an approach is not possible under current regulations, and does not address the fact that a fixed per capita contribution results in a disproportionate contribution from schools, since schools with a lower per - pupil funding NFF allocation would transfer a larger proportion of their funding. It also does not address the issue of all schools requiring protection of at least an MFG of minus 1.5%.

### 3.9. QUESTION 4

*Do you agree that to manage any funding shortfall or excess the unit values of the Basic Entitlement for each phase should be adjusted by the same proportion?*

Response	Count	% of Responses
Yes	44	68%
No	13	20%
Not Sure	5	8%
No Response	3	5%
Total	65	100%



#### General Comments

The majority of responses agreed with the proposal, however a large number of responses did not reference the technicalities of the question within their response but used the opportunity to comment on the level of funding transfer they would/ would not support. One particular respondent commented that because the High Needs Budget is disproportionately spent on Key Stages 3 - 5, that Secondary schools should contribute a greater proportion of funding to any established transfer to High Needs. The principle behind this question is that Basic Entitlement is scaled back at the same proportion across all phases, rather than reduced by a fixed amount across phases, which would impact more in Primary schools since it would reflect a larger proportion of their budget. This response considers an alternative approach whereby different phases contribute different proportions of BE towards any transfer, based on the proportion of HN budget spent within their phase/ phases of education.

### 3.10. QUESTION 5

*Do you have any comments on the budgets in the LA Central Services Block?*

#### General Comments

There was considerable request for a more detailed breakdown of Admissions and Servicing of Schools Forum budgets.



There was a view from a small proportion of responses that academies do not see any (or little) of the expenditure on 'all schools' of the ex ESG services.

There was a general view that schools would like to see further savings from these budgets, particularly as a result of LGR.

These comments are addressed in the separate report on the meeting agenda.

### 3.11. QUESTION 6

*Are there any further comments you would like to make about any issues in this consultation?*

#### **General Comments**

There were a large number of differing responses to this question, although the general theme of responses was that there was insufficient funding within the DSG. Some responses requested that the LA should lobby local government for additional funding into High Needs, and there was concern that transferring funding into the HN block could mask a lack of funding within the DSG, potentially resulting in proliferating lower levels of funding for future allocations. Some responses suggested council-tax payers could be asked to top-up the High Needs Block, rather than expecting this funding to be provided through central government taxation. A considerable number of responses state that the HN pressures should be managed within budget; however, no solutions to this were forthcoming. There was a strong view that action needed to be taken, and there was strong support for the view that any action should not have a detrimental impact on the funding mainstream schools receive through High Needs top - up funding. Some schools responded that it could be beneficial long term to actually channel more funding into mainstream schools to support High Needs pupils with the view to retain a larger proportion within mainstream provision, at a lower per - pupil cost than if the pupil were being educated within specialist provision. However, this has not been observed to be the case so far, with the balance of placements in recent years shifting more towards specialist provision away from mainstream.

## **4. RECOMMENDATIONS**

Schools Forum are asked to consider whether they wish to support

- (1) an alternative approach for the local formula in light of the consultation outcome or
- (2) should final proposals proceed to be drawn up for the January SFF meeting as set out in the consultation in full dependent on the level of transfer finally agreed?
- (3) should final proposals proceed to be drawn up for the January SFF meeting as set out in the consultation with some amendments (for example, not using Lever 1) dependent on the level of transfer finally agreed?

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**Bournemouth, Christchurch and Poole  
School Funding 2019-2020 Consultation  
23 November 2018**

**Consultation closes on 7 December 2018**





## **CONTENTS**

<b>1</b>	<b>Introduction</b>	<b>4</b>
<b>2</b>	<b>School Funding for BCP 2019-20</b>	<b>8</b>
<b>3</b>	<b>Mainstream Schools National Formula (Option 1)</b>	<b>9</b>
<b>4</b>	<b>Development of Local BCP Formula</b>	<b>12</b>
<b>5</b>	<b>High Needs Block</b>	<b>18</b>
<b>6</b>	<b>Transfer of Mainstream Funding to High Needs (Option 2)</b>	<b>22</b>
<b>7</b>	<b>Formula Affordability – Impact of Final Data</b>	<b>27</b>
<b>8</b>	<b>Financial Summary of Formula Options</b>	<b>28</b>
<b>9</b>	<b>Central Schools Services Block – Services for all Schools</b>	<b>29</b>
<b>10</b>	<b>Next Steps</b>	<b>31</b>
<b>Appendix 1</b>	<b>National Funding Formula 2019-20</b>	<b>33</b>
<b>Appendix 2</b>	<b>National Formula 2019-20 applied to BCP Schools</b>	<b>34</b>
<b>Appendix 3</b>	<b>BCP Draft DSG Budget 2019-20</b>	<b>36</b>
<b>Appendix 4</b>	<b>a. Illustrative Transfer Levels: NFF Funding Released</b>	<b>37</b>
	<b>b. School Level Impact of Transfer Options</b>	<b>39</b>
<b>Appendix 5</b>	<b>Funding for LA Services for Schools</b>	<b>47</b>
<b>Appendix 6</b>	<b>LA Statutory Education Functions for Schools</b>	<b>48</b>
<b>Appendix 7</b>	<b>Summary of Consultation Questions</b>	<b>52</b>
<b>Appendix 8</b>	<b>Glossary of Terms</b>	<b>53</b>

### **1 Introduction**

Local Government Reorganisation in Dorset means that one Local Authority (LA) will deliver services to Bournemouth, Christchurch & Poole (BCP) residents from April 2019. This includes services funded by the Dedicated Schools Grant (DSG) with each existing LA working together to ensure service continuity is maintained for all stakeholders.

This consultation concerns DSG funding allocations for the financial year 2019-20 only. It contains the detail of the DfE national school funding system through the DSG and options for implementation by the new LA.

Schools will be aware that a Shadow Schools Forum (SSF) has been established to undertake the consultation and decision-making role to support the Shadow LA preparing for 1 April 2019. The SSF has met twice, supported by working groups, and has made good progress in steering proposals within a challenging timetable. Work has needed to be prioritised with key issues and potential solutions identified early. These are the main focus of this consultation as we must achieve the timescales for decision-making set by central government. To provide the overall context for the DSG other budgets are considered only in outline in this consultation with the SSF considering these in more detail at the December and January meetings.

The DSG is allocated to the LA through four separate funding blocks to support expenditure on early years, mainstream schools, pupils with high needs and central school services. The national arrangements for financial year 2019-20 are similar to last year but schools will see some changes in the local approach in the move towards consistency across the new geographical area.

A national funding formula (NFF) for early years (2, 3 & 4 year olds) was introduced from 2017-18 for the three years up to 2019-20. The DSG funding for 2017-18 provided an increase compared with the previous year but with funding levels remaining static throughout the three years. Each of the three Dorset LAs have the same hourly funding rate from the DfE but have implemented different local formulae for providers. The development of a consistent approach for BCP is in progress with a separate consultation currently underway with the sector, including where there are nursery classes in mainstream schools.

This document, therefore, considers only the national changes and local proposals for the remaining three DSG funding blocks. Section 2 provides a summary of forecast funding levels for BCP.

#### **Schools National Funding Formula (NFF) 2019-20**

The most significant decision for BCP Council and the SSF is how the mainstream schools NFF will be implemented to take into account the growing level of funding needed to support pupils with high needs. The new BCP formula will be effective for maintained schools from April 2019 and for academies from September 2019.

It remains the Government's aspiration to fund all mainstream schools in the same way and the factors and methods within the NFF schools formula are expected to prevail now for some years. Unit values will continue to change over time and there is likely to be some evolution and refinement to reflect changing government policy.

## **Bournemouth, Christchurch & Poole School Funding Consultation 2019-20**

The updated 2019-20 NFF for mainstream schools is described in Section 3. As indicated last year the DfE has not provided LAs with sufficient funding to implement in full for 2019-20. Individual school gains are capped at a further 3% per pupil (cumulative 6.09% compared with 2017-18) for national affordability.

The starting point before any other options are considered is to look at the impact of the 2019-20 NFF calculated for each school. This is considered in Section 4 as Option 1. It requires a new discretionary factor to be introduced into the local formula to enable almost all aspects of the NFF methodology to be adopted in the calculation of individual school budgets. The additional factor is needed because the NFF uses 2017-18 as the base year for Minimum Funding Guarantee (MFG) per pupil changes, rather than the previous year (2018-19) as for the current local formulae.

It is important to note in considering Option 1 that the NFF uses data from the October 2017 school census (lagged) to provide the total funding to the LA but the local formula must use the equivalent data at October 2018. Data movements could therefore prevent this option being fully affordable. A method to adjust the formula when final data is received from the Education Skills Funding Agency (ESFA) is considered towards the end of this document in Section 7.

Other options need to be considered should it be agreed that a level of the NFF should be transferred to support pupils with high needs from central budgets rather than be allocated directly to mainstream schools through the local formula.

### **High Needs Budget Pressures**

High needs budgets include funding for special schools, alternative provision and pupils with high needs in mainstream schools and further education (FE) colleges. It is clear that the growth in demand for Education Health and Care Plans (EHCPs) and the trend of pupils permanently excluded from schools is unaffordable within the high needs funding allocation from the DfE for 2019-20. Details of the national and local picture are provided in Section 5.

The SSF received a report in October considering the high needs budgets across BCP. This included an analysis from consultants of the main drivers of growth in recent years with an assessment of what actions, including those already planned or being implemented, should be considered to manage demand. The link to the report is included in Section 5.

Policies and tools have been developed and action plans are in place within each LA working in partnership with schools to address high needs cost pressures. However, it must be recognised that potential solutions to reduce costs significantly are for the medium and longer term, and will require more pupils with an EHCP or currently excluded remaining in a mainstream setting. Work is on-going to manage demand and consider the pattern of high needs provision across BCP and this will be supported by a High Needs Block Financial Strategy Group of the SSF.

### **Funding Transfer to High Needs 2019-20**

Schools Forum has an important consultation role with oversight of all DSG budgets and will need to decide if a level of mainstream school funding is to be transferred to support the growth in pupils with SEND or excluded from mainstream schools. The decision can be made for 2019-20 only with a fresh decision needed next year for 2020-21.

## **Bournemouth, Christchurch & Poole School Funding Consultation 2019-20**

A funding transfer can be agreed by the SSF of up to 0.5% of Schools Block funding. A higher level would require the approval of the DfE. The alternative to a funding transfer is that the high needs budget growth is restricted to the level of funding provided through the national high needs formula. With the growing number of pupils needing provision within the high needs budget, there continues to be pressure on the level of top up funding and the affordability of other services supporting pupils, including those in mainstream schools.

How the NFF could be adjusted to support varying levels of transfer is considered in Section 6. The development of these proposals for consultation has been supported by the SSF but it is important to note that no decision has been made. The transfer levels modelled provide no indication of what that level might be (if at all).

The financial impact on categories of schools under all options is shown in Section 8 at summary level with the detail for individual schools in Appendix 4.

Final decisions on the local formula for BCP will be made at the Shadow Executive meeting on 15 January 2019, after taking into account the views of schools and decisions made by the SSF.

During December 2018 the ESFA will provide the October 2018 mainstream school data to enable final mainstream budgets to be calculated and overall affordability of planned unit values to be assessed.

### **Growth Fund**

As in previous years, the SSF is to agree the level of the Growth Fund and how it is to be allocated to schools with basic need growth. Proposals will be considered by the SSF by January 2019. The SSF has needed to prioritise its work with this document not including growth fund proposals for all schools to consider. However, as plans are already in place for September 2019 the impact of any changes will need to be carefully considered. Similar methods are currently adopted across BCP but for 2020-21 onwards schools should note that a fully consistent policy will need to be established.

### **Central Schools Services Block**

Central schools services include LA support to all schools for a range of services, charges from the DfE over which locally there is no control (copyright licenses) and other statutory services supporting individual pupils or the schools funding system as a whole. The proposal to the SSF will be that the budget overall is to be set at the level of funding. The allocation to individual LA central budgets will be considered and agreed by the SSF by January 2019.

### **Next Steps**

Consultation events to consider this document have been arranged as follows:

- 4 – 6pm, 27<sup>th</sup> November at Bournemouth Learning Centre
- 5 – 7pm, 29<sup>th</sup> November at Poole Civic Centre.

In order to book on to the event in Bournemouth please click [here](#), or to book on to the event in Poole please click [here](#). The links will take you to the relevant pages within <https://schools.bournemouthcpd.co.uk>.

If you have any difficulty booking onto an event please contact:

## Bournemouth, Christchurch & Poole School Funding Consultation 2019-20

Marilyn Scofield-Marlowe | Business Support Officer  
School Monitoring and Intervention Team | Children, Young People & Learning  
Poole  
T. 01202 262731  
Email to: [marilyn.scofield-marlowe@poole.gov.uk](mailto:marilyn.scofield-marlowe@poole.gov.uk)

The SSF on 14th December 2018 will make its recommendation to the LA on the mainstream schools formula element of the consultation. At the same meeting final budget decisions will be made concerning any transfer of mainstream school funding to high needs budgets.

The Shadow Executive of Elected Members on 15 January 2019 is scheduled to consider the outcome of this consultation with all schools and the recommendations of the Shadow Schools Forum. The mainstream schools formula for 2019-20 will be agreed at this meeting.

The unit values in the proposed formula will be tested for affordability following receipt of the October 2018 school census data from the ESFA in December, with any final adjustments made according to an agreed method.

All final mainstream school budgets and the level and detail of the Growth Fund are to be provided to the ESFA by the 21 January 2019.

### Budget Timetable

Consultation Issued	23 November 2018
Consultation Events	27 November 2018 29 November 2018
Consultation Closes	7 December 2018
SSF recommendations and decisions	14 December 2018
SSF updated on final formula (updated data applied)	Early January 2019
Shadow Executive decide local formula	15 January 2019
Mainstream school budgets sent to ESFA	21 January 2019

This document has been distributed to all Headteachers and Chairs of Governors in mainstream, special and alternative provision across the new area.

## 2 School Funding for BCP 2019-20

### 2.1 DSG Summary

A summary of the indicative funding provided by the DfE for 2019-20, excluding early years, is detailed in the table below:

**Table 1: Indicative DSG Funding 2019-20**

<b>DSG Funding Block</b>	<b>2018-19 £000's</b>	<b>2019-20 £000's</b>	<b>Change £000's</b>	<b>%</b>
Schools Formula	188,657	193,293	4,636	2.5%
Growth Fund	2,331	1,374	(957)	(41.1%)
High Needs	37,543	38,087	544	1.4%
Central School Services	2,082	2,037	(45)	(2.2%)
<b>Total</b>	<b>230,612</b>	<b>234,790</b>	<b>4,178</b>	<b>1.8%</b>

Some elements of funding are now fixed but final funding for BCP will be updated to reflect the October 18 school census, final growth fund allocation, high needs place return, and January 2019 census to account for change in the cross border flow of high needs pupils.

The allocation of the DSG for 2019-20 includes some elements of historic funding according to the local budgets in either 2017-18 (high needs and central services) or 2018-19 (amounts outside the NFF in the schools block). The reset of the high needs and schools block baselines in 2017-18 means that funding transfers between schools and high needs up to 2017-18 are now locked in to the high needs historic protection arrangements with funding restored to schools through the new NFF. In the budget strategy for 2019-20 we should be mindful that the baseline could be reset again for 2020-21 to reflect the most recent local budgets.

### 2.2 Schools Block Funding for Mainstream Schools

The Schools Block comprises 3 funding elements:

1. **Schools National Formula (NFF)** with separate primary and secondary per pupil funding levels. The NFF has been applied to the 2018-19 data for each school, the outcome being amalgamated and divided by pupil numbers to derive the primary and secondary unit funding levels to the LA.
2. **Local formula elements outside of the national formula.** This is provided at the historic (now 2018-19) budgeted level. This includes business rates (funded at cost to all schools), exceptional premises factor (joint use agreements for 2 Poole schools, split site factor for 2 Bournemouth schools) and pupil mobility allocations (a number of Bournemouth and Christchurch schools). The funding will need to cover estimated costs on a consistent basis across BCP.
3. **Growth Fund allocations for basic need pupil growth.** The DfE is changing the previous historic allocation basis to one using demographic data. A local estimate has been used in the above table with final allocations being notified in December.

## Bournemouth, Christchurch & Poole School Funding Consultation 2019-20

Table 2 below summarises the detail of BCP Schools Block Funding for 2019-20, with the still estimated amounts shaded.

**Table 2: BCP Estimated Schools Block Funding 2019-20**

Funding Stream	NOR 2018-19 Number	Budget Baseline 2018-19 £000's	Funding Rates 2019-20	Equivalent Funding 2019-20 £000's
Primary	27,400		£3,714	
Secondary	17,782		£5,002	
<b>National Formula</b>	<b>45,182</b>	186,856	Updated NFF	191,508
Business Rates		1,470	At 2018/19 levels	1,422
Joint Use Factor		101		101
Split Site Factor		230		230
Mobility		32		32
<b>Total Formula</b>	<b>45,182</b>	<b>188,657</b>		<b>193,293</b>

<b>Growth Fund</b>	<b>2,330</b>	<b>Protected</b>	<b>1,374</b>
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- The 2018-19 and 2019-20 funding totals for the NFF both use 2018-19 pupil numbers and data from the October 2017 census. The October 2018 census pupil numbers will be applied to the above funding rates to calculate final funding.
- The Primary and Secondary funding rates per pupil have yet to be confirmed by the DfE as BCP is new and these remain estimated. Total funding will be updated to reflect numbers on roll (NOR) for each phase separately from the October 2018 census.

### 3 Mainstream Schools National Formula

#### 3.1 Summary of Formula

The NFF was set as a formula to apply for 2018-19 and 2019-20 with 2017-18 as the budget baseline reference point for considering changes in per pupil funding.

Figure 1 below shows the formula elements that constitute the NFF. The associated factors and unit funding rates for 2019-20 are provided for reference in Appendix 1. In addition to these factors, the formula includes protection arrangements to provide a minimum increase per pupil for individual schools and a gains cap for national affordability:

+1% per pupil funding floor against 2017-18 individual school budget baseline

+6.09% Gains Cap against 2017-18 individual school budget baseline

Minimum per Pupil Funding Levels (MPPFLs) were first introduced in 2018-19 at transitional levels and these have been increased as expected for 2019-20 by £200 for each phase.



**Figure 1: Factors in the schools national funding formula**

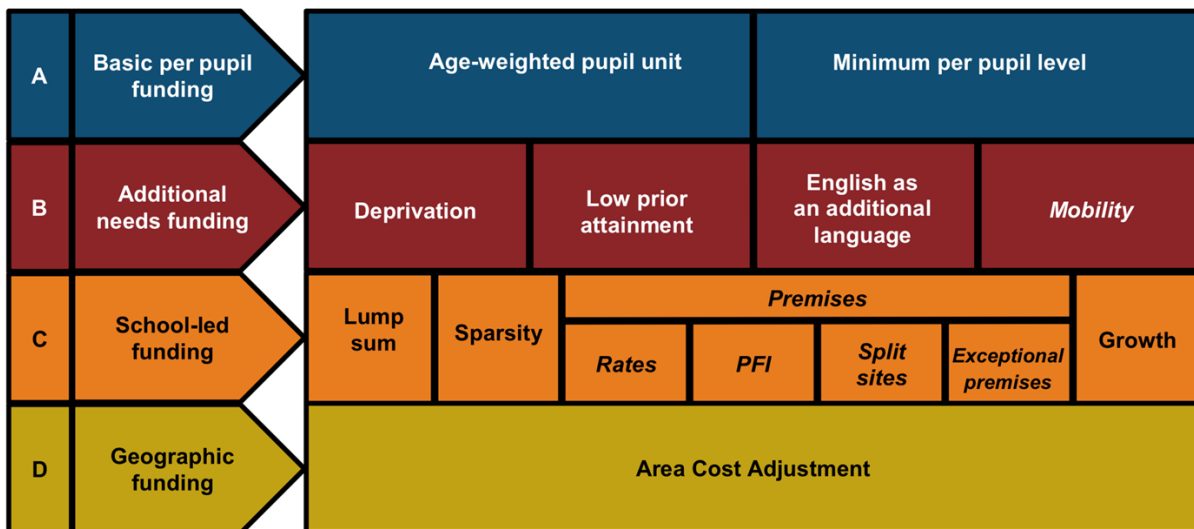


Figure 1: This shows the factors that are used when calculating schools block funding allocations through the national funding formula. It is not to scale. Funding for factors in italics will be allocated to local authorities in 2019-20 on the basis of historic spend (further details below).

Note that the area cost adjustment in Figure 1 is not relevant for BCP as a low cost area.

## 3.2 National Implementation of the Schools NFF 2018-19

The 2019-20 announcements from the DfE in July 2018 included the national context of how LAs had responded to the introduction in the mainstream school NFF in 2018-19 (total of 150 LAs). The progress made across BCP has been added as follows:

- 73 moved all factors closer to NFF (includes Poole)
- 41 mirrored NFF almost exactly (includes Bournemouth)
- 62 set Minimum Funding Guarantee (MFG) at + 0.5% (includes Bournemouth)
- 112 introduced a minimum per pupil for each phase (includes BCP, but not equal levels)

The announcements include that local formulae will continue in 2020-21 but the expectation is that they should continue to make progress towards the NFF.

There is already a high level of consistency between the 3 BCP LA formulae but there are also a number of differences that need to be resolved through the budget setting process for 2019-20.

## 3.3 Summary of NFF Changes 2019-20

The estimated 2.5% NFF growth shown in Table 1 is the net impact of:

- Change in funding for primary low prior attainment with a reduced unit of funding but nationally aimed to be cost neutral. There are more pupils eligible for NFF funding based on 2018-19 data compared with 2017-18 (used in the 2018-19 NFF).



## Bournemouth, Christchurch & Poole School Funding Consultation 2019-20

- Increase in funding for schools on the new formula but capped in 2018-19 by the maximum 3% increase per annum in per pupil funding with up to a further 3% now released.
- Increase in minimum per pupil funding level (MPPFL) where additional funding is provided to a school when for all other formula elements, the outcome of the NFF is **below nationally set 2019-20 phase levels** (DfE now refer to as floor schools)
- Increase of a further 0.5% (now 1% in total from 2017-18) for schools where additional funding is provided when the outcome of the NFF is **below the school historic funding level** (DfE now refer to this 1% top up funding as floor funding).

### 3.4 Detail of NFF for 2019-20

The level of funding through the NFF for individual schools is used to derive the Primary and Secondary unit values for the BCP allocation.

National Formula allocations by factor for 2019-20 compared with the local formula for 2018-19 are shown below in Table 3.

**Table 3: Impact by factor of the National Formula for 2019-20**

Formula Factors	BCP Formulae £000's 2018-19	National Formula £000's 2019-20	Growth / (Reduction)	
			£000's	%
Primary Basic Entitlement	75,855	75,855	0	0.0%
Secondary Basic Entitlement	72,372	72,372	0	0.0%
Deprivation Primary	7,089	7,145	56	0.8%
Deprivation Secondary	6,078	6,190	112	1.8%
Low Prior Attainment Primary	7,608	8,250	642	8.4%
Low Prior Attainment Secondary	5,399	5,732	333	6.2%
EAL Primary	1,359	1,328	-31	-2.3%
EAL Secondary	565	565	0	0.0%
Looked After Children	59	0	-59	-100.0%
Lump Sum	9,870	9,790	-80	-0.8%
Floor Factor Primary (MPPFL)	111	1,280	1,169	1055.3%
Floor Factor Secondary (MPPFL)	664	2,090	1,426	214.9%
Minimum 1% uplift from 17/18	0	1,648	1,648	Not part of local in 18/19
MFG – not part of NFF	1,615	0	-1,615	-100.0%
Cap at 6.09% from 17/18	-2,421	-792	1,629	-67.3%
<b>Total Local / National Formula</b>	<b>188,035</b>	<b>193,307</b>	<b>5,272</b>	<b>2.8%</b>
Total Primary Phase	96,803	99,322	2,519	2.6%
Total Secondary Phase	91,232	93,985	2,753	3.0%

Table 3 above shows how the NFF for 2019-20 compares with the distributed BCP total in 2018-19. This difference therefore includes any transfer to high needs in 2018-19 that was not passed on to BCP schools.

The higher MPPFL in 2019-20 apply to potentially 25 Primary schools, 1 Middle School and 6 Secondary schools. This includes those few schools where gains capping would otherwise have brought their average per pupil funding down to below the MPPFLs.

## **Bournemouth, Christchurch & Poole School Funding Consultation 2019-20**

The DfE have signalled that the NFF is still a work in progress. The current structure is expected to remain unchanged in the use of factors and data but with a formulaic approach being developed for 2020-21 for factors currently funded outside the NFF.

It is possible for 2019-20 to almost replicate all aspects of the National Funding methodology in the local formula for individual schools. The local formula will, however, retain the MFG and a cap. Both continue to restrict per pupil funding changes in 2019-20 compared with 2018-19 rather than refer back to 2017-18 as in the NFF. Depending on the specific circumstances, these funding adjustments may not be covered by the NFF to the LA.

### **4 Development of a Local BCP Formula**

#### **4.1 Principles and Options**

The 3 local formulae have a high level of consistency with almost 80% of overall funding allocated on the same basis. The underlying principle in considering options is that we should in the first instance adopt the NFF methodology in full. There is no guarantee that the current formula elements will remain unchanged for 2020-21 but the main formula should remain relatively stable for a period of time.

The main options for consultation are whether to adopt the NFF in all aspects as affordable (option 1) or to make adjustments to the NFF to accommodate a transfer to support pupils with high needs (option 2).

In adopting the NFF methodology in full, Poole schools will see the Looked After Child (LAC) factor no longer used but where eligible the mobility factor will be introduced for consistency in allocating the historic funding level across all BCP schools. The factor is retained because the DfE is considering how to include this factor into the NFF in 2020-21 rather than being allocated at historic levels, which disadvantages those LAs that have not historically used the factor.

The sparsity factor has not been relevant for Bournemouth and Poole schools, but Dorset has used this factor with one Christchurch school eligible (Parkfield). This is planned to continue in BCP as calculated by the NFF.

All proposals have been drawn up using data from 2018-19 to set unit values. This is to enable a direct comparison to be made with the current unit values and formula allocations across schools. This means that unit values may need to be updated should there be a significant change in the pupil data for 2019-20 when released by the ESFA in December. Proposals therefore include how the formula should be updated in considering overall affordability later in the process in Section 7.

The overall financial impact for individual schools will change from that estimated in this document when the data is updated in December, particularly where there is a change in pupil numbers, and schools should bear this in mind when estimating final funding for 2019-20.

#### **4.2 Comparison BCP 2018-19 and NFF 2019-20**

The local formula includes the NFF funded factors and those related to business rates (funded at cost) and any specific premises-related factors that have been agreed with the ESFA individually for a small number of schools.

## Bournemouth, Christchurch & Poole School Funding Consultation 2019-20

Table 4 below compares each BCP local formula for 2018-19 with the NFF 2019-20 (option 1).

**Table 4: Comparison of Local Formulae 2018-19 and BCP NFF 2019-20**

**(a) Factors within the NFF**

<b>Factor</b>	<b>Bournemouth Formula 2018-19</b>	<b>Christchurch Formula 2018-19</b>	<b>Poole Formula 2018-19</b>	<b>Option 1 NFF 2019-20</b>
Basic Entitlement – Primary	NFF	NFF	NFF	£2,747
Basic Entitlements Secondary	NFF	NFF	NFF	KS3 £3,863 KS4 £4,386
Deprivation – FSM data	NFF	NFF	NFF	£440
Deprivation*- IDACI bands	NFF	Below NFF Range (£145 to £435)	NFF	Range (£200 to £600)
Prior Attainment Primary	Unit value £1,050 with 93% data scaling	Unit value £882 with 75% data scaling	Unit value £984. No data Scaling	£1,022 Data scaling not applicable
Prior Attainment Secondary	NFF	Below NFF (£1,240)	Below NFF (£1,453)	£1,550
LAC	Not used	Not used	Used (£600)	Not used
EAL Primary	NFF	Above NFF (£750)	NFF	£515
EAL Secondary	NFF	NFF	NFF	£1,385
Lump Sum Primary	NFF	NFF	NFF	£110,000
Lump sum Secondary	NFF	Above NFF (£130,000)	NFF	£110,000
Sparsity	n/a	NFF Method £14,500	n/a	NFF Method
Minimum per pupil funding level (MPPFL)	At 2018/19 NFF	At 2018/19 NFF	Below 2018/19 NFF.	Primary £3,500 Middle KS3 £4,600 Secondary £4,800
Capping & Scaling **	Cap only 3.5%	Cap 3% Scale above at 50.6%	Cap only 3.0%	Cap 3% no scaling
Minimum increase per pupil (floor)	Through MFG plus 0.5%	Through MFG 0%	Through MFG 0%	Plus 1% on 2017/18

\* Upper range shown is IDACI band 5 as band 6 is not relevant across BCP.

\*\* Capping and scaling not applicable for schools with minimum per pupil funding level

**(b) Factors and mechanisms outside the NFF**

<b>Factor</b>	<b>Bournemouth Formula 2018-19</b>	<b>Christchurch Formula 2018-19</b>	<b>Poole Formula 2018-19</b>	<b>Option 1 NFF 2019-20</b>
Business Rates	At cost	At cost	At cost	At cost
Exceptional Premises	n/a	n/a	£101,017 (2 schools)	£101,017 (2 schools)
Split sites	£230,288 (2 schools)	n/a	n/a	£230,288 (£2 schools)
Mobility	£22,471	£9,514	Not used	£31,985
MFG (annual per pupil change)	plus 0.5%	0%	0%	Minus 1.5%

It is proposed that with the exception of the MFG, the same treatment is adopted for formula elements not included within the NFF regardless of which option is taken forward.

### **4.3 Exceptional Premises (Joint use Agreements) and Split Site Factors**

Exceptional premises and split sites factors are funded by the ESFA at historic levels outside the NFF for 2 schools in Bournemouth (split site) and 2 schools in Poole (joint use). Their use has previously been agreed by the ESFA based on evidence provided of additional costs of operating over a split site or from the provision of joint use with the community of sports facilities. No other schools across the new area meet the criteria used in establishing these factors so it is proposed that the allocations continue without change.

### **4.4 Mobility**

This is an optional factor that has not previously been used in Poole but Bournemouth and Dorset have used. It works as follows:

The measure counts pupils who entered a school during the previous 3 academic years but did not start in September. A 10% threshold is applied and funding allocated based on the proportion of pupils above the threshold (for example, a school with 12% mobility will attract mobility funding for 2% of pupils). The unit funding rate for BCP has been derived according to the level of funding provided divided by the number of eligible pupils.

### **4.5 Funding Floor - budget increase per pupil compared with 2017-18**

The NFF to the LA for each school for 2019-20 provides a minimum increase of 1% per pupil compared with 2017-18. The local formula can be adjusted using a new floor factor in 2019-20 to reflect the uplift from the same base year. If the factor is used it must be set at 1% as there is no option to vary the level.

The factor is needed to replicate the NFF because the operation of the MFG within the local formula may not achieve the same outcome in year 2 as this protects funding compared with the 2018-19 level. The introduction of the separate floor mechanism could provide greater flexibility in considering the appropriate level of the MFG.

#### **4.6 MFG – budget change per pupil compared with 2018-19**

The MFG is important as it provides funding stability between years. It must be set between minus 1.5% and plus 0.5% per pupil as last year. It is also to apply to top up funding rates for special schools and alternative provision (although total funding change considers both place and top-up funding) but this MFG can be set at a different level from that used in the mainstream formula.

Funding changes for mainstream schools in 2019-20 will be due to the introduction of a new BCP formula as well as data changes from the October 2018 census. A negative MFG can be used to ensure funding is more aligned to the current school data, as well as facilitating faster progress to achieve school funding consistency across BCP. It also reduces the risk that an individual school's allocation might exceed that provided through the NFF.

It is important to note that the MFG allocations in 2019-20 school budgets protect funding at the higher 2018-19 level without reference to the budget in 2017-18. Therefore, some schools with MFG allocations can still see significant increases compared with the NFF base year.

If the separate floor factor (minimum per pupil increase compared with 2017-18 of 1%) is not introduced then a number of schools would see reductions compared with 2017-18 if a negative MFG is set.

If there is to be no transfer to High Needs then it is proposed that the funding floor factor is used to provide the minimum 1% per pupil increase to all schools with the MFG set at minus 1.5%. Setting a negative MFG will enable data changes that reduce funding from 2018-19 to be reflected. This will ensure some transition to the BCP formula across schools and improve overall formula affordability as well as provide a minimum increase of 1% per pupil compared with 2017-18 for all schools.

Where the operation of the MFG would give rise to an unreasonably high level of protection a request can be made to the ESFA to use an alternative calculation. A fresh disapplication request must be made each year and this is considered in the next section.

##### **QUESTION 1a: Option 1 (no transfer is made to high needs)**

Do you agree the MFG should be set at minus 1.5% per pupil so that the changes in the 2019-20 NFF and school data from the October 2018 can be reflected in funding allocations to schools?

- ☐ **Yes**
- ☐ **No**
- ☐ **Unsure**

If no, what do you consider an appropriate level and why?

**QUESTION 1b:**

Do you agree that if no transfer to high needs is made that the NFF funding floor should be introduced so that schools receive an increase per pupil of at least 1% compared with 2017-18?

- ☐ Yes
- ☐ No
- ☐ Unsure

If no, please explain your rationale.

#### **4.7 Disapplication Requests to ESFA - applicable for all options**

##### **4.7.1 Process**

Disapplication from aspects of the School Finance Regulations can be made where there is evidence that a school budget would be set unfairly. Due to the ESFA deadline of 28 November 2018, a disapplication request to adjust the formula has been submitted for approval. This is to ensure a decision can be received in time to meet the DfE timetable for the completion of the school budgets submission.

The potential formula adjustments below, if agreed by the ESFA, will not be implemented until a recommendation from Schools Forum has been taken into account.

##### **4.7.2 Disapplication to adjust the MFG calculation for all through schools adding primary year groups**

It is proposed to vary the calculation of the MFG for two Bournemouth all-through schools (St Peters Comprehensive and Avonbourne College) that are growing in the primary phase. The protection method needs to be weighted to reflect the lower funding levels of primary pupils.

If this adjustment is not made then these growing schools could trigger MFG protection at a higher rate simply as a result of having more primary pupils, rather than due to a change in the characteristics of pupils at the school.

The disapplication request reduces the 2018-19 budget baseline used in the national MFG calculation method. An adjustment of this type is expected by the DfE with a template provided for their approval.

The calculation is formulaic based on pupil numbers by Key Stage in both 2018-19 and 2019-20 to derive the adjusted 2018-19 baseline for the MFG. The DfE has

approved a disapplication request of this nature from Bournemouth LA in previous years.

### **QUESTION 2:**

Do you agree the disapplication request to adjust the MFG baseline for all through schools adding primary year groups represents a fair adjustment to the local formula?

- ☐ Yes
- ☐ No
- ☐ Unsure

If no, what do you consider an appropriate adjustment and why?

## **4.8 LA Funding for Services for Maintained Schools only**

### **4.8.1 Central LA Duties**

The DfE stopped funding the LA from September 2017 for services to be provided to maintained schools only, with funding instead to be provided from maintained school budget shares. A separate consultation process is underway with maintained schools to consider how much funding can be retained from their budget shares to support central LA costs for these statutory duties. These duties are those that pass to academies on conversion. This decision is to be made collectively by maintained school members of the SSF only with it not impacting on budgets for academies or other DSG areas. Appendix 6 provides the comparison of these maintained school services and those supplied to all schools (the latter including the management of the DSG system as a whole and is considered in Section 9).

### **4.8.2 De-delegated School Duties**

It is also possible for the LA to provide centrally for a small range of services and costs where the statutory duty remains with maintained schools (for example, checking eligibility of pupils for free school meals). Funding can be provided to the LA through de-delegation of individual maintained mainstream school budget shares with agreement through the SSF for each phase separately.

De-delegation does not apply for special schools or alternative provision. Bournemouth and Poole no longer offer de-delegation of duties but Dorset Council County Schools Forum agreed a small number of budgets in 2018-19. Discussions have established that Christchurch maintained mainstream schools are content to adopt the current Bournemouth and Poole approach. No proposals will therefore be



brought forward to the SSF for de-delegation of funding from mainstream schools budget shares.

Where it can be efficient to provide centrally for all schools (maintained and academy, both mainstream and specialist) traded services will be established for consideration by all schools individually. Bournemouth and Poole currently offer a service level agreement for checking free school meal eligibility with BCP developing an offer for all schools in 2019-20.

## 5 High Needs Block (HNB)

### 5.1 Overview

The HNB primarily supports individual pupils, either through additional funding within mainstream, special school funding or funding to specialist providers. It also includes the funding for those unable to attend school due to exclusion or medical needs.

HNB pressures are now recognised as a national issue linked to a number of drivers, including government policy changes. The introduction of a new Code of Practice for Special Educational Needs and Disabilities (SEND) from age 0 to 25 (previously age 0 to 19) has seen an increase in pupils requiring EHCPs (previously statements of SEND). There has also been an increase in alternative provision due to high exclusion rates.

The DfE at a recent conference acknowledged the context of rising costs for pupils with high needs as follows:

- *A higher proportion of children and young people in more specialist provision, which costs more, driven in part by mainstream schools' behaviour and accountability systems.*
- *A shortage of special school places leading to more reliance on the (more expensive) independent sector.*
- *More EHC plans in the 0-5s cohort, and enhanced expectations of continuing education beyond the age of 19.*
- *Greater complexity of need – e.g. more identification of autism and development of specialist provision to cater for children with such needs, mental health needs more apparent.*



Figure 2: National Picture of Growing Numbers

## The local offer – growing numbers

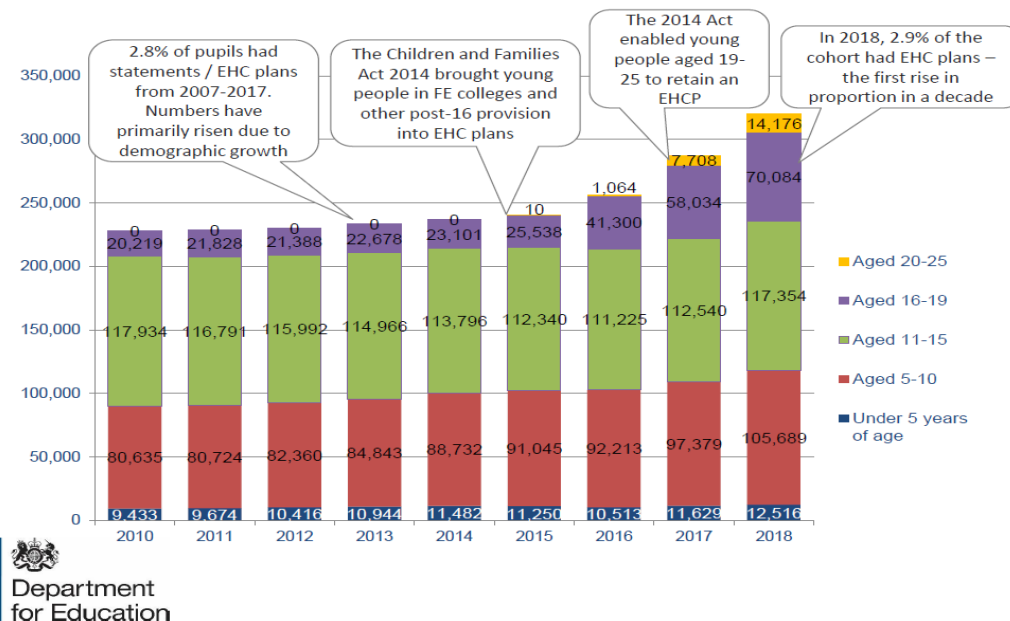
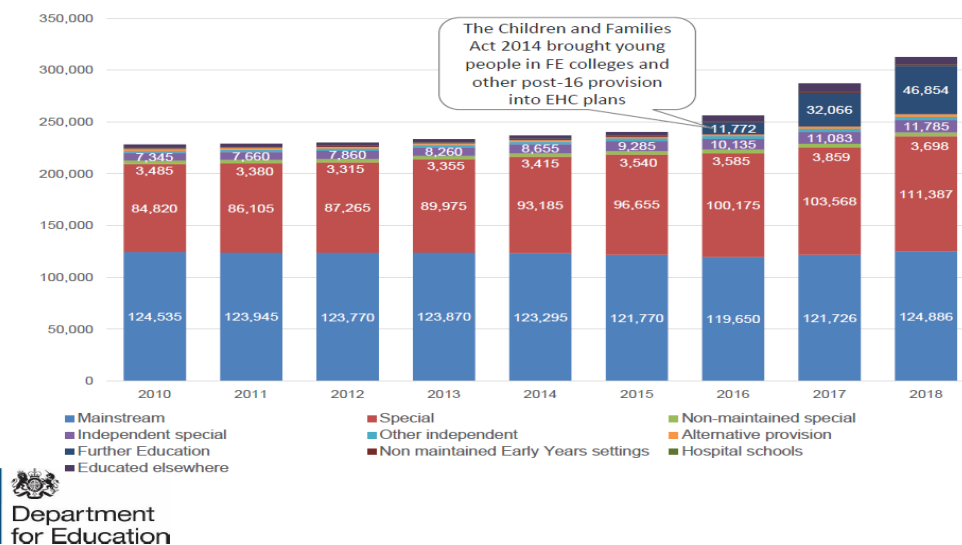


Figure 3: National Picture of High Needs Placements

## The local offer – changing placements



Funding relief is not expected for 2019-20 but it is hoped that the Spending Review next year will start to address this issue following mounting pressures from schools, local government and national organisations supporting the sector.

## 5.2 Context for BCP

Pupils with SEND in mainstream schools are supported by a combination of the school delegated budget (Schools Block funding) and top up funding (SEN packages) and outreach services funded from the HNB.

## **Bournemouth, Christchurch & Poole School Funding Consultation 2019-20**

In the Schools NFF the largest impact on overall funding (and costs) is in most cases from changing numbers on roll. In contrast, funding through the national formula for the HNB is remaining relatively fixed with only a small increase to reflect demographic growth across the area. The cost of the growing numbers of children in the high needs budget is far greater than the additional funding for BCP with a funding gap of £5.7 million currently identified.

BCP funding growth in the High Needs block is expected to remain low in the medium term without a significant boost in national funding levels because of high historic spending across BCP that reflects the current pattern of provision.

Budget pressures are growing in this area of expenditure due to the:

- High level of permanent exclusion for younger children (particularly in year 9) in recent years, with this trend continuing in academic year 2018-19.
- Increasing numbers of pupils with EHCPs.
- Local specialist provision becoming full with greater use of higher cost providers.

### **5.3 BCP Budget Position 2018-19**

The high needs budgets across BCP in 2018-19 are forecast to be overspent by £1.7 to £2 million. There are savings in other DSG budgets and also a level of reserves in Poole so the DSG deficits brought forward will not increase by this level. Action plans are in place to dampen funding demands but further budget growth will be needed with current trends continuing in 2019-20.

### **5.4 Budget Progress 2019-20**

The October SSF report provided some detail of the 2019-20 high needs budget shortfall at £5.7m. Included in the shortfall is further budget growth for pupils with EHCPs and a continuation of the trend for permanently excluded pupils from mainstreams schools over the remainder of 2018-19 and the next financial year.

The high needs budgets are detailed in Appendix 3 as reported to the SSF in October.

The shortfall of £5.7m identified would require a 3% funding transfer from mainstream schools to balance the DSG.

The BCP budget for high needs has been high compared nationally over many years and this reflects the pattern of provision rather than providing for a greater proportion of pupils with SEND. LA historic expenditure up to 2017-18 is protected in the new National High Needs Formula through an MFG mechanism in a similar way to the 1% funding floor for mainstream school funding.

The report for the SSF in October contained the local actions in place to reduce the demand on the high needs budget where possible. The report is available at:

[BCP Shadow Schools Forum Meeting October 2018](#)

The detailed appendices in the above report include a comprehensive analysis of the high needs budgets prepared by consultants (ISOS) appointed jointly by Bournemouth and Poole in 2017. The position for the Christchurch area within the Dorset LA currently is known to show a similar picture.

The main conclusion is that budget growth is linked to the rising number of requests for EHCP and specialist placement. A review of the costs of individual placements may

## **Bournemouth, Christchurch & Poole School Funding Consultation 2019-20**

be able to find some savings but the greatest reduction in the budget requirement needs to be found by reducing the demand for EHCPs and maintaining more pupils in mainstream and local settings.

The draft budget in Appendix 3 includes an increase in places and top up funding for pupils with an EHCP in mainstream school bases and the FE College, as well as within maintained and academy special schools. Also reflected is reduced reliance on more costly independent school placements.

Included within post school budgets, there is significant further growth for the cost of post 19 EHCPs, as the changes in the 2014 SEND Code of practice are still impacting. Parental expectations have continued to grow over time and particularly for education up to age 25. It should be noted that Plans for individuals can be determined through a legislative process and this can direct a more costly placement through the SEND Tribunal system.

Additional places and top up funding have also been allowed for pupils permanently excluded from a mainstream school. As state-provided places are becoming full earlier in the academic year, the budget has also allowed for increased use of costly independent and bespoke alternative provision.

Already taken into account in the draft budget:

- £0.480m reduced top up funding rates for Poole mainstream school EHCPs to reflect the banding system already implemented by Bournemouth and Dorset LAs.
- £0.385m removal of LA central costs for SEN assessment teams and SEN transport previously charged to the high needs budget by Bournemouth and Dorset Councils. These costs will instead add to budget pressures in BCP LA.
- £0.203m transfer from early years funding to support the high needs costs for this age group.

A funding transfer from schools of 1% would generate circa £2m, a similar level of transfer for the BCP area in 2018-19.

### **5.5 Exploring Solutions**

An alternative to a funding transfer is that the high needs budget is set at the level of funding. In this case the SSF would need to advise where potential savings could be made, in addition to those already identified, without significant detriment to pupils in mainstream and special schools, alternative provision, or be counterproductive for the system as a whole and longer term budget prospects.

#### **High Needs Block Financial Strategy Group**

The SSF at the meeting on 31 October 2018 agreed to establish a High Needs Block Financial Strategy Group comprising representatives from the existing Bournemouth and Poole High Needs Task and Finish Groups and to include representation from Christchurch. Over three meetings the group will explore short and medium term measures to reduce the current pressure on the high needs budgets and report to the December SSF. The work will specifically be to consider:

1. Financial pressures on the high needs block.
2. Implications of introducing a banding system for mainstream EHCPs for BCP.
3. Impact of outreach services and funding for 2019-20.

## **Bournemouth, Christchurch & Poole School Funding Consultation 2019-20**

4. Special school place numbers for 2019-20 and budget impact.
5. Preparation of a detailed report to the SSF for the 14 December.
6. Establishment of a clear joint action plan regarding an on-going financial strategy that takes account of sustainability and cost reduction.
7. Details of the Bournemouth and Poole ISOS reviews and how to build on them for BCP.
8. How best to share the financial strategy with all stakeholders to build awareness of the actions required from schools, parents, carers and the NHS.

### **Consideration of Options**

A large proportion of the high needs budget is supporting individual pupil placements in specialist provision and as such the areas to reduce the budget are, therefore, limited.

It is clear that to maintain the current level of services for mainstream schools and individual pupils within the HNB a transfer of funding will be required from mainstream schools. The outcomes from the reviews may identify some solutions to reduce costs but these are likely to be for the longer term.

A transfer of funding to high needs budgets would reduce the amount of funding available for the mainstream formula. The SSF is unable yet to make an assessment of what level of transfer should be agreed. In preparation for this decision, the next section considers how funding could be found from the NFF for varying levels of transfer when this is established.

## **6 Transfer of Mainstream Funding to High Needs (Option 2)**

### **6.1 DSG Regulations**

It is possible to transfer funding from mainstream schools to support expenditure in other funding blocks. This requires the agreement of the SSF. A transfer can be made of up to 0.5% of mainstream school funding. A transfer above this level requires the approval of the Secretary of State.

Any decision is for 2019-20 only and will be needed at the December SSF meeting so that work can progress to finalise the mainstream school formula.

### **6.2 Summary of Approach**

The SSF considered which of two main approaches should be adopted in considering how to allocate the increased funding provided through the 2019-20 NFF to establish varying levels of transfer to high needs.

The approach of starting from 2018-19 funding and adding incrementally was rejected in favour of starting with the 2019-20 NFF and considering where allocations could be reduced. The rationale being that we should now always aim to mirror the NFF as closely as possible with the BCP formula seeking to move all schools towards it as affordable.

The current funding shortfall on the high needs budget for 2019-20 is still under review with the SSF not yet having sufficient information to make a decision on the level of

## **Bournemouth, Christchurch & Poole School Funding Consultation 2019-20**

transfer from the NFF. This consultation therefore considers how varying levels of transfer could be found using four illustrative examples as follow:

- 0.5% transfer, being the level that could be approved by the SSF, without further approval from the DfE – circa £1m
- 1% transfer as in 2018-19 – circa £2m
- 1.5% transfer, half way to meeting the projected shortfall – circa £2.9m
- 3.0% transfer, needed to balance the projected high needs budget in full – circa £5.7m

### **6.3 Principles**

It is proposed that all schools should see reduced funding compared with their potential NFF allocations as equitably as possible. The SSF supports the view that the alternative of targeting only certain groups of schools, such as those with the greatest increases, would not be fair, particularly as schools are starting from different LA funding formulae.

A further consideration is that all schools need to support activity to reduce the demands on the high needs budgets so that less of the NFF funding is used to support individual pupils through the high needs budget in future years.

### **6.4 Levers to Adjust Funding**

It was reported to the SSF in November that an amount was expected to be available from unused growth funding and small issues within the NFF methodology that prevents 100% mirroring at local level. Further modelling indicates this may not be the case and the level of funding to be received remains uncertain. We have not yet reached agreement with Dorset on the split of historic growth funding being used in the new DfE calculation method. Both new LAs expect to receive a level of historic funding protection.

A relatively low number of schools across BCP in 2019-20 would potentially receive NFF allocations according to the funding factors only. Other schools have formula allocations capped or uplifted so adjusting the formula factors only would not provide a contribution from all schools.

Schools have been categorised by the potential levers to adjust funding and these are summarised below:

1. Premises factors included within the minimum per pupil funding level (MPPFL)
2. Funding Protection - floor factor use (1% uplift on 2017/18) or not using a floor factor (funding protection only at the level of the MFG which could be negative). Level of the MFG between + 0.5% and minus 1.5%
3. Level of the gains cap between 0% (no gains allowed for this group) and 3% (the NFF level)
4. Varying the MPPFL for each phase
5. Reduce a formula unit value

There would be some compound effect from using a combination of levers. The illustrations of funding levels released through each lever in this document assume they are applied in the order shown in the above paragraph.

## **Bournemouth, Christchurch & Poole School Funding Consultation 2019-20**

The paragraphs below illustrate how a funding transfer of 1.5% could be found by adjusting each lever.

### **6.5 Lever 1 - Premises factors included within MPPFL**

Including premises factors within the MPPFL calculation reduces the top up funding required to achieve the NFF minimum levels. In 2018-19 Bournemouth included the split site factor in the calculation and this is relevant for one school in the MPPFL group. In Poole the 2 schools with joint use agreements are not in the MPPFL group.

It is proposed to exclude business rates from the calculation. A number of maintained schools are within the MPPFL group and they would be unfairly penalised compared with academies due the latter's 80% charitable relief from business rates. This releases £69,000 of NFF funding and would be applied in all options.

### **6.6 Lever 2 – Removing the +1% funding floor and setting a minus MFG**

Removing the + 1% funding floor protection against the 2017-18 baseline funding and setting the MFG at its lowest level of minus 1.5% releases the maximum possible of £454,000. At this level of MFG funding some schools see losses against both 2018-19 and 2017/18 funding. Setting the MFG at minus 1.5% allows schools that see reduced funding under the NFF make progress towards it.

### **6.7 Lever 3 – Reducing the gains cap below NFF 3%**

Reducing the gains cap from 3% to 2% releases a further £317,000 from the NFF. This level was selected for a 1.5% transfer as it provided a reasonable step change and released an amount similar to the lever 2 schools group and allowed some progress towards their NFF level.

### **6.8 Lever 4 – Reducing MPPFL below the NFF**

Reducing the MPPFL across all phases by £50 (these would be £150 higher than the 2018-19 NFF levels), releases £939,000 from the NFF. This is considered equitable compared with the total for schools in other groups. An absolute level of reduction rather than a percentage is proposed to reflect that the increase from 2018-19 is £200 for each phase.

### **6.9 Lever 5 - Reduction in a factor unit value below NFF**

The majority of formula gains for schools on the formula or with capped funding are as a result of NFF increases for low prior attainment funding. However, reducing this factor would impact on schools with the highest levels of SEN and could be counter production in trying to resolve the high needs budget.

In considering deprivation factors, the NFF allocates less through this factor than previous LA formula prior to 2017-18 with this the main reason for schools being in the 1% floor or protected by the MFG. This factor would require a large adjustment to generate a significant impact on funding levels.

It is proposed that the Basic Entitlement factor unit values are reduced by the same percentage for each phase so that there is an equal impact for schools on the formula. A proportionate adjustment is proposed so that primary phase schools are not disadvantaged by a flat rate. A reduction of 2% in each phase would release £954,000, similar to the amount for the group of schools impacted by lever 4.



## 6.10 Varying Levels of Funding Transfer

The funding released illustrated in the above paragraphs is for a 1.5% transfer. Other levels of transfer could be achieved by varying the levers in proportion (as far as considered reasonable) to ensure that all schools continue to contribute at progressively lower or higher levels. Table 5 below illustrates how the NFF could be adjusted for varying levels of transfer to high needs with Table 6 illustrating the related formula values.

**Table 5: Transfer Options – Proposals to Release Funding from the NFF**

Transfer Level	Formula factors (Levers)				
Formula Changes (implemented in this order)	MPPFLs: premises factors to include	Floor / MFG	Gains Cap %	MPPFLs changed against 2019-20 NFF	Basic Entitlement all phases %
No Transfer	Exclude all	Floor +1%; MFG -1.5%	3%	0	100%
(a) 0.5%	Inc. all but rates	No Floor; MFG 0%	2.75%	£15	99.40%
(b) 1.0%	Inc. all but rates	No Floor; - MFG 0.75%	2.40%	£35	98.82%
(c) 1.5%	Inc. all but rates	No Floor; - MFG 1.5%	2.00%	£50	98.00%
(d) 3.0%	Inc. all but rates	No Floor; - MFG 1.5%	1.00%	£170	95.00%
Max Possible against NFF £000's	Inc. all but rates	No Floor; - MFG 1.5%	Gains Cap 0%	No MPPFLs	All schools on minus 1.5% MFG

**Table 6: Comparison of Option Unit Values / Mechanisms for 2019-20**

Factor	Option 1 NFF	Option 2 a 0.5%	Option 2 b 1%	Option 2 c 1.5%	Option 2 d 3%
Basic Entitlement – Primary	£2,747	£2,730.51	£2,714.58	£2,692.05	£2,609.64
Basic Entitlement KS 3	£3,863	£3,839.47	£3,817.07	£3,785.40	£3,669.52
Basic Entitlement KS 4	£4,386	£4,359.50	£4,334.06	£4,298.09	£4,166.52
Minimum per Pupil Funding Level (MPPFL)	P £3,500 KS3 £4,600 S £4,800	P £3,485 KS3 £4,585 S £4,785	P £3,465 KS3 £4,565 S £4,765	P £3,450 KS3 £4,550 S £4,750	P £3,330 KS3 £4,430 S £4,630
Gains Cap	3%	2.75%	2.4%	2.0%	1%
MFG (change from 2018-19)	-1.5%	0%	-0.75%	-1.5%	-1.5%
Floor (change from 2017-18)	+1%	Not used	Not used	Not used	Not used

**QUESTION 3a:**

Do you agree with the principle that if a funding transfer takes place all schools should make a contribution through a lower budget allocation than would otherwise have been the case?

- ☐ Yes
- ☐ No
- ☐ Unsure

If no, please suggest an alternative

**QUESTION 3b:**

If you agree that all schools should make a contribution, do you agree with the approach outlined in Table 5 and Table 6 for varying levels of transfer?

- ☐ Yes
- ☐ No
- ☐ Unsure

If no, what do you consider an appropriate adjustment and why?

**QUESTION 3c:**

Do you agree that the basic entitlement is the most appropriate formula factor to adjust?

- ☐ Yes
- ☐ No
- ☐ Unsure

If no, which unit values should be different from those proposed and why?



## **7 Formula Affordability - Impact of Final Data**

Final school budgets will be calculated following receipt of the October 2018 census data from the DfE in December and application of the agreed local formula. Affordability of planned unit values and other formula elements will need to be assessed again at that time.

These final formula adjustments could involve:

### 1. In the case of a funding shortfall:

- Capping gains at a level below the planned threshold % making slower progress towards longer term funding levels.
- Applying lower MFG protection (if greater protection than minus 1.5% is initially planned) making faster progress towards the formula funding levels for schools with protected historic funding.
- Reduction in formula unit values.
- Reducing the MPPFL.
- A combination of the above.

### 2. In the case of a funding surplus:

- Capping gains at a higher threshold than planned to make faster progress towards the higher longer term formula funding level.
- Applying greater MFG protection (if a level less than +0.5%) is initially planned).
- Increase a factor unit value for any set below the NFF.
- Increasing the level of the MPPFL
- A combination of the above.

## **Proposal**

It is proposed to manage any shortfall or excess in funding by adjusting the values of the Basic Entitlement factor for each phase by the same proportion.

### **QUESTION 4:**

Do you agree that to manage any funding shortfall or excess the unit values of the Basic Entitlement for each phase should be adjusted by the same proportion?

- ☐ **Yes**
- ☐ **No**
- ☐ **Unsure**

If No please explain your choice and suggest an alternative method.

## 8 Financial Summary of Formula Options

### 8.1 Funding Impact of Proposals for Individual Schools

A summary of the impact for schools of Option 1 and Option 2 for varying levels of transfer is provided in Table 7 and Table 8 below:

**Table 7: Summary Final Formula Positions (based on 2018-19 data)**

<b>Number of schools</b>	<b>NFF</b>	<b>Levels of Transfer to High Needs</b>			
<b>Transfer Level</b>	<b>0%</b>	<b>0.5%</b>	<b>1%</b>	<b>1.5%</b>	<b>3.0%</b>
MFG from 18/19 level	19	30	22	15	42
MPPFL	32	32	31	31	28
Capped funding	15	13	13	12	9
Fully formula funded	23	14	23	31	10
<b>Total Schools</b>	<b>89</b>	<b>89</b>	<b>89</b>	<b>89</b>	<b>89</b>

**Table 8: Comparison of NFF (no Transfer) and 3% Transfer per pupil funding % changes against schools 2018-19 per pupil funding baseline**

**Table 8a: NFF (option 1 no Transfer)**

<b>Funding % Change</b>	<b>MFG/Floor Schools</b>	<b>Capped Schools</b>	<b>MPPFL Schools</b>	<b>Formula Schools</b>	<b>Total</b>
Above 6%	0	0	12	0	12
Range 3% to 6%	0	0	15	0	15
Range 0% to 3%	18	15	5	22	60
Range -1.5% to 0%	1	0	0	1	2
<b>Total Schools</b>	<b>19</b>	<b>15</b>	<b>32</b>	<b>23</b>	<b>89</b>

**Table 8b: NFF (option 2 illustration - 3.0% Transfer)**

<b>Funding Increase %</b>	<b>MFG Schools</b>	<b>Capped Schools</b>	<b>MPPFL Schools</b>	<b>Formula Schools</b>	<b>Total</b>
Above 6%	0	0	0	0	0
Range 3% to 6%	0	0	2	0	2
Range 0% to 3%	0	9	17	2	28
Range 0% to -1.5%	42	0	9	8	59
<b>Total Schools</b>	<b>42</b>	<b>9</b>	<b>28</b>	<b>10</b>	<b>89</b>

Appendix 4a shows the impact of the change for each formula element of the schools formula, while the schedules in Appendix 4b provides the indicative impact of the proposals for each school for each transfer level within option 2. The estimated budgets use the data applicable to the 2018-19 local formula. This removes the impact of changing pupil numbers and pupil data and enables a direct comparison to be made with 2018-19 funding levels.

## 9 Central Schools Services Block

### 9.1 Funding and Draft Budget 2019-20

It is proposed to allocate the central services block funding to the LA for the related services. A national formula was introduced for 2018-19 to determine LA allocations for on-going central service for all schools. It is largely based on pupil numbers but with an allowance to reflect relative levels of deprivation across LAs. There is a protection arrangement in places with BCP higher levels of historic spend being protected with a maximum reduction of 2.5% per year. Other funding in this block is for historic commitments at cost for 2019-20 but this is expected to decrease in 2020-21.

Services for maintained schools only are not included in the Central Schools Services Block as described in section 3.

Central School Services are statutory duties of the LA but the allocation to budgets is decided by Schools Forum. Appendix 3 includes the draft budget for these services as follows.

**Table 9 – Central School Services 2019-20**

<b>Central School Services</b>	<b>2018-19 £000's</b>	<b>Savings £000's</b>	<b>2019-20 £000's</b>
School admissions	765	(15)	750
Licences purchased by DfE	226		226
Servicing Schools Forum	42	(11)	31
Ex ESG services all schools	746	(6)	740
Premature retirements (ex DCC)	16		16
Commitments - ASD Base / other	288	(13)	275
<b>Total Expenditure</b>	<b>2,082</b>	<b>(45)</b>	<b>2,037</b>
<b>Estimated Funding</b>	<b>2,082</b>	<b>(45)</b>	<b>2,037</b>

### 9.2 School Admissions and Servicing of the Schools Forum

Some savings are proposed from this budget to reflect efficiencies from LGR. Any further reduction would require schools to consider how individually they manage the Schools Admissions Forum or school admissions process in the absence of co-ordinated arrangements.

The Schools Forum Budget supports the cost of the meeting itself and attendance of early years voluntary and private sector members at sub group meetings. A reduction in this budget is proposed to reflect efficiencies from LGR.

### 9.3 DfE Licenses

The list of licences negotiated on behalf of all schools by the DfE is to be included in the budget 2019-20 consultation. However, the LA has no influence over which licenses are included or the level of the DfE change on the DSG.

The list of licenses included in the charge is the same as last year as follows:

Christian Copyright Licensing International (CCLI)

Copyright Licensing Agency (CLA)  
Education Recording Agency ERA)  
Filmbank Distributors Ltd (For the PVSL)  
Mechanical Copyright Protection Society (MCPS)  
Motion Picture Licensing Company (MPLC)  
Newspaper Licensing Agency (NLA)  
Performing Rights Society (PRS)  
Phonographic Performance Limited (PPL)  
Schools Printed Music Licence (SPML)

### **9.4 Ex ESG Services**

These services are LA statutory duties on behalf of all schools, including academies and special schools. The proposed budget allocations have been reduced to reflect saving from LGR. The list of these services is included in Appendix 6 alongside the different duties for maintained schools only for clarity.

If this level of funding is not allocated to support the LA costs then the consequences could be that:

- Activity supporting the Learning Partnership would need to be reduced.
- Pupils with poor school attendance could be left unsupported.
- Support to schools with basic need capital projects would reduce, for example existing schemes for Avonbourne Trust schools and the two Grammar schools in Bournemouth, Carter Secondary in Poole and any new projects needed for BCP.
- Central activity is reduced in SEND capital projects forming part of the BCP high needs action plan. This plan includes, for example, expansion or creation of resource bases in mainstream schools (currently at Kingsleigh and Malmesbury Park with projects for other mainstream schools in development) as well as creating additional special school places (for example, currently 5 new places at Tregonwell Special school)
- Potential capital bidding rounds could be left unsupported with lost opportunity of drawing government funds into Poole. As an illustration of activity, in a previous year support was provided to early years private providers in bidding successfully for expansion projects.

### **9.5 Historic Commitments**

The commitment of £275k is fully funded by the DfE in 2019-20 and is funding to repay prudential borrowing taken out by Bournemouth Council to fund the Springwood scheme. Springwood is an expansion of Linwood Special School on a separate campus that provides Autism Spectral Disorder provision for 54 pre-16 places and 6 post-16 places.

**QUESTION 5:**

Do you have any comments on the budgets in the LA Central Services Block?

**QUESTION 6:**

Are there any further comments you would like to make about any of the issues raised in this consultation?

## **10 Next Steps**

A summary of consultation questions is included at Appendix 7. The **consultation closes on 7 December 2018** but earlier responses are welcomed.

Please respond:

On - line (preferred) <https://www.snapsurveys.com/wh/s.asp?k=154297279901>

By using the Consultation Response Form as follows:

E-mail return to [consultation@bournemouth.gov.uk](mailto:consultation@bournemouth.gov.uk)

Or Post to:

Jacqui Phillips  
Schools Commissioning  
Community Learning and Commissioning, E3  
Bournemouth Town Hall  
Bournemouth  
BH2 6EB

Responses will be collated and considered at the Shadow **Schools Forum meeting on 14 December where the level of any transfer to high needs will be decided and recommendations made for the mainstream schools formula.**

At the 14 December meeting The Shadow Schools Forum will also make final decisions on the level of the Growth Fund and Central Services supporting schools.

Schools Forum recommendations and comments from schools will be taken into account by the Shadow Executive of BCP LA on 15 January 2015.

Schools Forum will receive a report at the **January 2019** meeting detailing the outcome of the agreed mainstream formula for 2019-20 and final schools budget calculations to be sent to the ESFA taking into account the October 2018 census.

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National Funding Formula (NFF) 2019-20

Funding Factors	Unit values	Total Funding (including ACA)	Proportion of core total
<b>Basic per-pupil funding</b>		<b>£24,525m</b>	<b>73.1%</b>
Age Weighted Pupil Unit (AWPU): Primary	£2,747	£12,722m	37.9%
Age Weighted Pupil Unit (AWPU): Secondary - KS3	£3,863	£6,823m	20.3%
Age Weighted Pupil Unit (AWPU): Secondary - KS4	£4,386	£4,793m	14.3%
Minimum per pupil funding level	NA	£187m	0.6%
<b>Additional needs funding</b>		<b>£5,922m</b>	<b>17.6%</b>
<b>Deprivation</b>		<b>£3,022m</b>	<b>9.0%</b>
Current FSM top up (Pupils currently claiming FSM at the last census): Primary	£440	£287m	0.9%
Current FSM top up (Pupils currently claiming FSM at the last census): Secondary	£440	£171m	0.5%
FSM6 (Any pupil that has ever claimed FSM in the past 6 years): Primary	£540	£608m	1.8%
FSM6 (Any pupil that has ever claimed FSM in the past 6 years): Secondary	£785	£646m	1.9%
IDACI band F: Primary	£200	£95m	0.3%
IDACI band F: Secondary	£290	£82m	0.2%
IDACI band E: Primary	£240	£102m	0.3%
IDACI band E: Secondary	£390	£98m	0.3%
IDACI band D: Primary	£360	£131m	0.4%
IDACI band D: Secondary	£515	£110m	0.3%
IDACI band C: Primary	£390	£123m	0.4%
IDACI band C: Secondary	£560	£104m	0.3%
IDACI band B: Primary	£420	£166m	0.5%
IDACI band B: Secondary	£600	£139m	0.4%
IDACI band A: Primary	£575	£89m	0.3%
IDACI band A: Secondary	£810	£70m	0.2%
<b>Low prior attainment</b>		<b>£2,472m</b>	<b>7.4%</b>
Low prior attainment: Primary	£1,022	£1,548m	4.6%
Low prior attainment: Secondary	£1,550	£924m	2.8%
<b>English as an additional language</b>		<b>£407m</b>	<b>1.2%</b>
English as an additional language: Primary	£515	£301m	0.9%
English as an additional language: Secondary	£1,385	£106m	0.3%
<b>Mobility</b>		<b>£21m</b>	<b>0.1%</b>
<b>School led funding</b>		<b>£2,933m</b>	<b>8.8%</b>
<b>Lump sum</b>		<b>£2,266m</b>	<b>6.8%</b>
Lump sum: Primary	£110,000	£1,884m	5.6%
Lump sum: Secondary	£110,000	£383m	1.1%
<b>Sparsity</b>		<b>£25m</b>	<b>0.1%</b>
Sparsity: Primary	£25,000	£21m	0.1%
Sparsity: Secondary	£65,000	£5m	0.0%
<b>Premises</b>		<b>£641m</b>	<b>1.9%</b>
<i>Area Cost Adjustment: A multiplier that is applied to basic per pupil, additional needs and school led funding (ACA is already included in each of the factor subtotals)</i>		£831m	
<b>Core Total (Excluding funding floor)</b>		<b>£33,380m</b>	
<b>Funding Floor</b>		£681m	
<b>Total (including funding floor)</b>		<b>£34,061m</b>	



## National Formula 2019-20 applied to BCP Schools

NFF	2018-19 per pupil Budget	NFF 19-20 per pupil Budget	Change against 2018- 19		Total Budget £000's	Formula Type Sch. Classification	% EHCP
<b>BCP TOTAL</b>	<b>4,142</b>	<b>4,258</b>	<b>116</b>	<b>2.8%</b>	<b>193,307</b>		<b>1.3%</b>
Stourfield Infant	3,300	3,516	216	6.6%	1,259	Cap < MPPFL	2.8%
Lilliput CE Infant	3,340	3,519	179	5.4%	1,267	MPPFL	0.8%
Springdale First	3,391	3,515	124	3.7%	1,054	MPPFL	0.0%
Courthill Infant	3,441	3,511	70	2.0%	1,246	MPPFL	1.7%
Broadstone First	3,457	3,516	59	1.7%	1,041	MPPFL	1.7%
Christchurch Infant	3,474	3,627	154	4.4%	1,306	MPPFL	1.4%
Merley First	3,485	3,522	37	1.1%	1,060	Formula	1.0%
Canford Heath Infant	3,501	3,513	12	0.4%	1,258	MPPFL	0.8%
Queen's Park Infant	3,613	3,629	16	0.5%	1,303	Floor/ MFG	1.4%
Stanley Green Infant	3,633	3,665	32	0.9%	891	Floor/ MFG	0.0%
Ad Astra Infant	3,680	3,713	32	0.9%	995	Floor/ MFG	1.9%
Twin Sails Infant	3,680	3,687	7	0.2%	1,283	Floor/ MFG	1.0%
Mudeford Infants'	3,803	3,896	93	2.4%	701	Cap	0.0%
Sylvan Infant	4,057	4,113	55	1.4%	1,123	Formula	1.5%
Old Town Infant	4,260	4,297	37	0.9%	821	Floor/ MFG	1.4%
St Clement's & St J's CE	4,581	4,607	26	0.6%	1,216	Floor/ MFG	0.0%
<b>Infant/ First Total</b>	<b>3,627</b>	<b>3,702</b>	<b>75</b>	<b>2.1%</b>	<b>17,824</b>		<b>1.1%</b>
Hill View Primary	3,300	3,514	214	6.5%	2,301	MPPFL	1.2%
Moordown St J's CE	3,300	3,517	217	6.6%	1,456	MPPFL	1.2%
Muscliff Primary	3,300	3,536	236	7.1%	2,210	MPPFL	1.8%
St James' CE Primary	3,300	3,514	214	6.5%	1,465	MPPFL	1.5%
St Katharine's CE	3,300	3,510	210	6.4%	1,751	MPPFL	1.6%
The Epiphany CE	3,300	3,517	217	6.6%	1,477	MPPFL	2.2%
Highcliffe St M. Primary	3,314	3,514	200	6.0%	2,118	MPPFL	1.9%
St Walburga's Catholic	3,338	3,512	173	5.2%	1,679	MPPFL	0.8%
St Mark's CE Primary	3,355	3,518	163	4.9%	1,464	MPPFL	3.4%
Winton Primary	3,368	3,526	158	4.7%	2,839	Cap < MPPFL	1.0%
St Michael's CE	3,389	3,516	128	3.8%	2,310	Cap < MPPFL	0.7%
Bishop Aldhelm's CE	3,407	3,529	122	3.6%	2,139	MPPFL	1.6%
St Luke's CE Primary	3,412	3,670	258	7.6%	1,582	Cap < MPPFL	2.1%
Longfleet CE Primary	3,449	3,519	69	2.0%	2,203	MPPFL	0.5%
Heatherlands Primary	3,537	3,575	37	1.1%	2,241	Formula	0.8%
Pokesdown Community	3,550	3,649	98	2.8%	1,605	Cap	1.1%
St Mary's Catholic	3,568	3,576	8	0.2%	1,438	Formula	1.3%
Burton CE Primary	3,576	3,672	95	2.7%	1,252	Cap	1.1%
The Priory CE Primary	3,596	3,688	92	2.6%	804	Cap	3.2%
Malmesbury Park	3,636	3,710	74	2.0%	2,315	Formula	2.3%
Twynham Primary	3,673	3,757	84	2.3%	658	Formula	0.0%
St Joseph's C. (Xchu)	3,688	3,783	95	2.6%	817	Cap	0.0%
Corpus Christi Catholic	3,698	3,738	39	1.1%	1,615	Formula	1.4%
St Joseph's C. (Poole)	3,806	3,817	11	0.3%	1,542	Formula	1.2%
Talbot Primary School	3,857	3,879	22	0.6%	2,126	Formula	1.1%
Hillbourne Primary	3,873	3,886	13	0.3%	1,201	Formula	1.0%
Bearwood Primary	3,890	3,915	25	0.6%	799	Floor/ MFG	0.0%
Kingsleigh Primary	3,926	3,950	24	0.6%	2,627	Floor/ MFG	2.0%
Kings Park Academy	4,154	4,176	22	0.5%	2,627	Floor/ MFG	0.7%
Somerford Primary	4,172	4,202	30	0.7%	1,534	Floor/ MFG	4.1%
Kinson Primary	4,214	4,235	21	0.5%	1,389	Floor/ MFG	1.3%
Manorside Academy	4,329	4,368	39	0.9%	1,153	Floor/ MFG	1.5%
Bayside Academy	4,422	4,435	13	0.3%	1,362	Formula	2.9%
Christ The King Catholic	4,437	4,406	- 31	-0.7%	1,392	Floor/ MFG	2.0%
Jewell Academy	4,524	4,548	25	0.5%	1,760	Floor/ MFG	0.8%
Elm Academy	4,790	4,817	27	0.6%	2,110	Floor/ MFG	0.6%
Heathlands Primary	5,483	5,532	48	0.9%	1,090	Floor/ MFG	2.6%
<b>Primary Total</b>	<b>3,684</b>	<b>3,788</b>	<b>103</b>	<b>2.8%</b>	<b>62,448</b>		<b>1.5%</b>



## Bournemouth, Christchurch & Poole School Funding Consultation 2019-20

NFF	2018-19 per pupil Budget	19-20 per pupil Budget	Change against 2018- 19		Total Budget £000's	Formula Type Sch. Classification	% EHCP
Baden-Powell & St P's	3,267	3,524	257	7.9%	2,544	MPPFL	1.5%
Stourfield Junior	3,300	3,451	151	4.6%	1,667	MPPFL	1.9%
Christchurch Junior	3,406	3,581	175	5.1%	1,801	MPPFL	2.6%
Canford Heath Junior	3,464	3,513	49	1.4%	1,665	MPPFL	1.3%
Mudford Junior	3,558	3,649	92	2.6%	963	Cap	0.0%
Oakdale Junior	3,610	3,616	6	0.2%	1,743	Formula	0.6%
Queen's Park Infant	3,645	3,678	33	0.9%	1,847	Floor/ MFG	0.6%
Ocean	3,732	3,742	10	0.3%	1,199	Formula	1.1%
Haymoor Junior	3,831	3,847	16	0.4%	1,339	Formula	1.7%
Hamworthy Park Junior	3,838	3,887	49	1.3%	1,703	Formula	2.1%
Branksome Heath Junior	4,113	4,126	13	0.3%	1,069	Formula	0.0%
Bethany CE Junior	4,331	4,352	21	0.5%	1,510	Floor/ MFG	1.1%
<b>Junior Total</b>	<b>3,616</b>	<b>3,704</b>	<b>88</b>	<b>2.4%</b>	<b>19,050</b>		<b>1.3%</b>
Broadstone Middle	3,859	4,078	220	5.7%	1,905	MPPFL	1.1%
Parkstone Grammar	4,471	4,829	358	8.0%	4,370	MPPFL	0.0%
Poole Grammar	4,479	4,837	358	8.0%	4,363	MPPFL	0.4%
Bournemouth School	4,600	4,850	250	5.4%	3,608	MPPFL	0.3%
BSG	4,600	4,836	236	5.1%	4,101	MPPFL	0.0%
Twynham School	4,627	4,827	200	4.3%	6,193	MPPFL	1.2%
Highcliffe School	4,631	4,831	200	4.3%	5,604	MPPFL	0.7%
Winton Academy	4,717	4,853	136	2.9%	3,824	Cap	1.0%
Glenmoor Academy	4,728	4,865	136	2.9%	3,425	Cap	0.4%
TBOWA	4,769	4,908	138	2.9%	4,692	Cap	3.0%
St Edward's RC	4,867	4,879	12	0.2%	4,430	Formula	1.8%
Corfe Hills School	4,945	5,013	68	1.4%	3,805	Formula	1.2%
Poole High School	5,019	5,042	23	0.5%	7,679	Formula	0.8%
Magna Academy	5,187	5,208	21	0.4%	4,000	Formula	1.1%
The Bourne Academy	5,244	5,396	152	2.9%	4,517	Cap	2.5%
Harewood College	5,258	5,408	150	2.8%	2,920	Cap	1.5%
The Grange School	5,357	5,509	152	2.8%	2,529	Cap	2.7%
LeAF Studio	5,442	5,585	143	2.6%	1,028	Cap	2.9%
Oak Academy	5,721	5,721	-	0.0%	2,752	Formula	1.0%
Carter Community School	6,095	6,155	61	1.0%	2,000	Floor/ MFG	2.8%
St Aldhelm's Academy	6,117	6,154	37	0.6%	2,400	Formula	4.2%
<b>Middle/ Sec. Total</b>	<b>4,879</b>	<b>5,031</b>	<b>151</b>	<b>3.1%</b>	<b>80,142</b>		<b>1.2%</b>
Parkfield School	4,248	4,359	112	2.6%	1,752	Cap	1.7%
St Peter's Catholic Comprehen	4,471	4,602	131	2.9%	6,737	Cap	1.9%
Avonbourne School	4,541	4,631	91	2.0%	5,353	Formula	1.5%
<b>All- through Total</b>	<b>4,468</b>	<b>4,581</b>	<b>113</b>	<b>2.5%</b>	<b>13,843</b>		<b>1.7%</b>

Please note that in all the NFF school level impacts table above cash amounts are provided in £ unless otherwise stated

# Bournemouth, Christchurch & Poole School Funding Consultation 2019-20

## Appendix 3

<b>Draft BCP DSG Budget</b>	<b>2018/19</b>	<b>2019/20</b>	<b>2019/20</b>	<b>2018/19</b>	<b>2019/20</b>	<b>2019/20</b>
<b>£000's</b>	<b>Budget</b>	<b>Change</b>	<b>Forecast</b>	<b>Funding</b>	<b>Change</b>	<b>Forecast</b>
<b>Mainstream Schools</b>						
Formula (18/19 data and NOR)	186,063	5,651	191,714	186,856	4,652	191,508
Transfer to High Needs Block 18/19				(1,855)	1,855	0
Rates / premises / mobility	1,749		1,749	1,801	(16)	1,785
Contingency	319	(319)	0			
Growth Fund (intrinsic + extrinsic)*	1,001	202	1,203	2,331	(957)	1,374
<b>Total</b>	<b>189,132</b>	<b>5,534</b>	<b>194,666</b>	<b>189,132</b>	<b>5,534</b>	<b>194,666</b>
<b>Central School Services</b>						
School admissions	765	(15)	750			
Licences purchased by DfE	226		226			
Servicing Schools Forum	42	(11)	31			
Ex ESG services all schools	746	(6)	740			
Premature retirements	16		16			
Commitments - ASD Base / other	288	(13)	275			
<b>Total</b>	<b>2,082</b>	<b>(45)</b>	<b>2,037</b>	<b>2,082</b>	<b>(45)</b>	<b>2,037</b>
<b>High Needs</b>						
Transfer from Schools /Early years				37,543	544	38,087
Maintained special school places	3,630	210	3,840	1,855	(1,652)	203
Academy special school places	2,150	76	2,226			
Post school / Linwood CHI / FE	606	644	1,250			
Mainstream post 16 EHCP	224	(38)	186			
Medical Places (cross border)	461	0	461			
Excluded places	1,240	330	1,570			
Medical places (BCP only)	860	0	860			
Resource base places	204	205	409			
EIP Projects brought forward***	169	-169	0			
Placements not yet confirmed	0	88	88			
Top up Maintained/academy	11,784	539	12,323			
Top up Independent special	11,691	(1,295)	10,396			
Top up Post Schools	2,167	1,585	3,752			
Top up Pre schools EHCP	176	36	212			
Top up excluded pupils/AP	1,229	1,052	2,281			
Outreach	377	196	573			
Hospital - private providers	128	0	128			
Other AP/Therapies	656	994	1,650			
Support for inclusion	111	130	241			
Specialist support - 2, 3 and 4's	891	(129)	762			
SEN and AP Transport (LA cost)	225	(225)	0			
Planned savings (Christchurch)	(11)	11	0			
Specialist Support	758	0	758			
<b>Total</b>	<b>39,724</b>	<b>4,240</b>	<b>43,964</b>	<b>39,724</b>	<b>(1,434)</b>	<b>38,290</b>
		<b>Shortfall</b>	<b>(5,674)</b>			

\* Intrinsic growth is that provided through the mainstream formula where a school is growing through adding year groups. Extrinsic growth is provided from a central budget outside the formula for schools where planned admission numbers have increased for existing year groups.

\*\* One off funding in 2018-19 (prior year early years adjustment) in Bournemouth

\*\*\* EIP – Early Intervention Project for pupils at risk of exclusion in the primary phase in Poole

**Illustrative Transfer Levels: NFF Funding Released**

The tables below illustrate the funding released from each change to the relevant formula factor required to achieve the varying illustrative levels of funding transfer.

In producing these figures, other than the factor for which the impact is being considered, all other factors have been kept at NFF.

**MPPFL & Premises Factors**

Transfer Level	MPPFLs: premises factors to include	Cumulative funding released from 2019-20 NFF £000's
NFF (No Transfer)	Exclude all	0
0.5%	Include all but rates	69
1.0%	Include all but rates	69
1.5%	Include all but rates	69
3.0%	Include all but rates	69
Max Possible	Include all but rates	69

**Floor / MFG Levels**

Transfer Level	MFG/ Floor	Cumulative funding released from 2019-20 NFF £000's
NFF (No Transfer)	1% Floor; -1.5% MFG	0
0.5%	No Floor; 0.0% MFG	157
1.0%	No Floor; -0.75% MFG	313
1.5%	No Floor; -1.5% MFG	454
3.0%	No Floor; -1.5% MFG	454
Max Possible	No Floor; -1.5% MFG	454

**Gains Cap**

Transfer Level	Gains Cap	Cumulative funding released from 2019-20 NFF £000's
NFF (No Transfer)	3.00%	0
0.5%	2.75%	83
1.0%	2.40%	193
1.5%	2.00%	317
3.0%	1.00%	674
Max Possible	0%	1,184

### MPPFLs Reduced Levels

Transfer Level	MPPFLs (all phases) change against 2019- 20 NFF	Cumulative funding released from 2019-20 NFF £000's
NFF (No Transfer)	0	0
0.5%	-£15	274
1.0%	-£35	627
1.5%	-£50	877
3.0%	-£170	2,398
Max Possible	No MPPFL's	3,258

### Reduced Basic Entitlement Unit Values

Transfer Level	Basic Entitlement (all phases) % of NFF values	Cumulative funding released from 2019- 20 NFF £000's
NFF (No Transfer)	100.00%	0
0.5%	99.4%	255
1.0%	98.8%	491
1.5%	98.0%	1,071
3.0%	95.0%	1,808
Max Possible	All school on MFG (except MPPFL schools)	1,967

When the changes to formula factors are applied in conjunction with other changes, this introduces compound effects that must be considered. For example, scaling back the basic entitlement factors may bring more school onto MFG protection. The table below show the total funding released from the formula as a result of applying all the formula changes made in Table 5 to achieve the illustrated level of transfer.

### Compound Impact of Formula Changes

Transfer Level	Compound impact of all changes above on funding released from 2019-20 NFF £000's
NFF (No Transfer)	0
0.5%	803
1.0%	1,767
1.5%	2,733
3.0%	5,637
Max Possible	8,575

School Level Impact of Transfer Options

		0.5%								
	2018-19 per pupil Budget	19-20 per pupil Budget	Change against 2018- 19		NFF	Change against NFF		Total Budget £000's	Formula Type Sch. Classification	% EHCP
<b>0.5%</b>										
<b>BCP TOTAL</b>	<b>4,142</b>	<b>4,240</b>	<b>98</b>	<b>2.4%</b>	<b>4,258</b>	<b>- 18</b>	<b>-0.4%</b>	<b>192,504</b>		<b>1.3%</b>
Stourfield Infant	3,300	3,501	201	6.1%	3,516	- 15	-0.4%	1,253	Cap < MPPFL	2.8%
Lilliput CE Infant	3,340	3,504	164	4.9%	3,519	- 15	-0.4%	1,262	MPPFL	0.8%
Springdale First	3,391	3,500	109	3.2%	3,515	- 15	-0.4%	1,050	MPPFL	0.0%
Courthill Infant	3,441	3,496	55	1.6%	3,511	- 15	-0.4%	1,241	MPPFL	1.7%
Broadstone First	3,457	3,501	44	1.3%	3,516	- 15	-0.4%	1,036	MPPFL	1.7%
Christchurch Infant	3,474	3,612	139	4.0%	3,627	- 15	-0.4%	1,300	MPPFL	1.4%
Merley First	3,485	3,506	21	0.6%	3,522	- 16	-0.5%	1,055	Formula	1.0%
Canford Heath Infant	3,501	3,501	0	0.0%	3,513	- 12	-0.4%	1,253	MPPFL	0.8%
Queen's Park Infant	3,613	3,613	0	0.0%	3,629	- 16	-0.5%	1,297	Floor/ MFG	1.4%
Stanley Green Infant	3,633	3,633	0	0.0%	3,665	- 32	-0.9%	883	Floor/ MFG	0.0%
Ad Astra Infant	3,680	3,680	0	0.0%	3,713	- 32	-0.9%	986	Floor/ MFG	1.9%
Twin Sails Infant	3,680	3,680	0	0.0%	3,687	- 7	-0.2%	1,281	Floor/ MFG	1.0%
Mudeford Infants'	3,803	3,888	85	2.2%	3,896	- 8	-0.2%	700	Cap	0.0%
Sylvan Infant	4,057	4,096	39	1.0%	4,113	- 16	-0.4%	1,118	Formula	1.5%
Old Town Infant	4,260	4,260	0	0.0%	4,297	- 37	-0.9%	814	Floor/ MFG	1.4%
St Clement's & St J's CE	4,581	4,581	0	0.0%	4,607	- 26	-0.6%	1,209	Floor/ MFG	0.0%
<b>Infant/ First Total</b>	<b>3,627</b>	<b>3,685</b>	<b>58</b>	<b>1.6%</b>	<b>3,702</b>	<b>- 17</b>	<b>-0.5%</b>	<b>17,740</b>		<b>1.1%</b>
Hill View Primary	3,300	3,499	199	6.0%	3,514	- 15	-0.4%	2,292	MPPFL	1.2%
Moor-down St J's CE	3,300	3,502	202	6.1%	3,517	- 15	-0.4%	1,450	MPPFL	1.2%
Muscliff Primary	3,300	3,521	221	6.7%	3,536	- 15	-0.4%	2,200	MPPFL	1.8%
St James' CE Primary	3,300	3,499	199	6.0%	3,514	- 15	-0.4%	1,459	MPPFL	1.5%
St Katharine's CE	3,300	3,495	195	5.9%	3,510	- 15	-0.4%	1,744	MPPFL	1.6%
The Epiphany CE	3,300	3,502	202	6.1%	3,517	- 15	-0.4%	1,471	MPPFL	2.2%
Highcliffe St M. Primary	3,314	3,499	185	5.6%	3,514	- 15	-0.4%	2,109	MPPFL	1.9%
St Walburga's Catholic	3,338	3,497	158	4.7%	3,512	- 15	-0.4%	1,672	MPPFL	0.8%
St Mark's CE Primary	3,355	3,503	148	4.4%	3,518	- 15	-0.4%	1,457	MPPFL	3.4%
Winton Primary	3,368	3,508	140	4.2%	3,526	- 18	-0.5%	2,824	Cap < MPPFL	1.0%
St Michael's CE	3,389	3,499	111	3.3%	3,516	- 17	-0.5%	2,299	Cap < MPPFL	0.7%
Bishop Aldhelm's CE	3,407	3,514	107	3.1%	3,529	- 15	-0.4%	2,130	MPPFL	1.6%
St Luke's CE Primary	3,412	3,503	91	2.7%	3,670	-167	-4.6%	1,510	Cap < MPPFL	2.1%
Longfleet CE Primary	3,449	3,504	54	1.6%	3,519	- 15	-0.4%	2,193	MPPFL	0.5%
Heatherlands Primary	3,537	3,558	21	0.6%	3,575	- 16	-0.5%	2,231	Formula	0.8%
Pokesdown Community	3,550	3,640	90	2.5%	3,649	- 8	-0.2%	1,602	Cap	1.1%
St Mary's Catholic	3,568	3,568	0	0.0%	3,576	- 8	-0.2%	1,434	Floor/ MFG	1.3%
Burton CE Primary	3,576	3,664	87	2.4%	3,672	- 8	-0.2%	1,249	Cap	1.1%
The Priory CE Primary	3,596	3,677	81	2.3%	3,688	- 11	-0.3%	802	Formula	3.2%
Malmesbury Park	3,636	3,694	58	1.6%	3,710	- 16	-0.4%	2,305	Formula	2.3%
Twynham Primary	3,673	3,741	68	1.8%	3,757	- 16	-0.4%	655	Formula	0.0%
St Joseph's C. (Xchu)	3,688	3,775	87	2.4%	3,783	- 8	-0.2%	815	Cap	0.0%
Corpus Christi Catholic	3,698	3,721	23	0.6%	3,738	- 16	-0.4%	1,608	Formula	1.4%
St Joseph's C. (Poole)	3,806	3,806	0	0.0%	3,817	- 11	-0.3%	1,538	Floor/ MFG	1.2%
Talbot Primary School	3,857	3,863	6	0.1%	3,879	- 16	-0.4%	2,117	Formula	1.1%
Hillbourne Primary	3,873	3,873	0	0.0%	3,886	- 13	-0.3%	1,197	Floor/ MFG	1.0%
Bearwood Primary	3,890	3,890	0	0.0%	3,915	- 25	-0.6%	794	Floor/ MFG	0.0%
Kingsleigh Primary	3,926	3,926	0	0.0%	3,950	- 24	-0.6%	2,611	Floor/ MFG	2.0%
Kings Park Academy	4,154	4,154	0	0.0%	4,176	- 22	-0.5%	2,613	Floor/ MFG	0.7%
Somerford Primary	4,172	4,172	0	0.0%	4,202	- 30	-0.7%	1,523	Floor/ MFG	4.1%
Kinson Primary	4,214	4,214	0	0.0%	4,235	- 21	-0.5%	1,382	Floor/ MFG	1.3%
Manorside Academy	4,329	4,329	0	0.0%	4,368	- 39	-0.9%	1,143	Floor/ MFG	1.5%
Bayside Academy	4,422	4,418	-3	-0.1%	4,435	- 16	-0.4%	1,356	Formula	2.9%
Christ The King Catholic	4,437	4,437	0	0.0%	4,406	31	0.7%	1,402	Floor/ MFG	2.0%
Jewell Academy	4,524	4,524	0	0.0%	4,548	- 25	-0.5%	1,751	Floor/ MFG	0.8%
Elm Academy	4,790	4,790	0	0.0%	4,817	- 27	-0.6%	2,098	Floor/ MFG	0.6%
Heathlands Primary	5,483	5,483	0	0.0%	5,532	- 48	-0.9%	1,080	Floor/ MFG	2.6%
<b>Primary Total</b>	<b>3,684</b>	<b>3,767</b>	<b>83</b>	<b>2.3%</b>	<b>3,788</b>	<b>- 20</b>	<b>-0.5%</b>	<b>62,114</b>		<b>1.5%</b>

# Bournemouth, Christchurch & Poole School Funding Consultation 2019-20

		0.5%								
0.5%	2018-19 per pupil Budget	19-20 per pupil Budget	Change against 2018- 19	NFF	Change against NFF	Total Budget £000's	Formula Type Sch. Classification	% EHCP		
Baden-Powell & St P's	3,266	3,509	243 7.4%	3,524	- 15 -0.4%	2,533	MPPFL	1.5%		
Stourfield Junior	3,300	3,436	136 4.1%	3,451	- 15 -0.4%	1,659	MPPFL	1.9%		
Christchurch Junior	3,406	3,566	160 4.7%	3,581	- 15 -0.4%	1,794	MPPFL	2.6%		
Canford Heath Junior	3,464	3,498	34 1.0%	3,513	- 15 -0.4%	1,658	MPPFL	1.3%		
Mudeford Junior	3,558	3,641	84 2.4%	3,649	- 8 -0.2%	961	Formula	0.0%		
Oakdale Junior	3,610	3,610	0 0.0%	3,616	- 6 -0.2%	1,740	Floor/ MFG	0.6%		
Queen's Park Infant	3,645	3,645	0 0.0%	3,678	- 33 -0.9%	1,830	Floor/ MFG	0.6%		
Ocean	3,732	3,732	0 0.0%	3,742	- 10 -0.3%	1,196	Floor/ MFG	1.1%		
Haymoor Junior	3,831	3,831	0 0.0%	3,847	- 16 -0.4%	1,333	Floor/ MFG	1.7%		
Hamworthy Park Junior	3,838	3,871	33 0.8%	3,887	- 16 -0.4%	1,695	Formula	2.1%		
Branksome Heath Junior	4,113	4,113	0 0.0%	4,126	- 13 -0.3%	1,065	Floor/ MFG	0.0%		
Bethany CE Junior	4,331	4,331	0 0.0%	4,352	- 21 -0.5%	1,503	Floor/ MFG	1.1%		
<b>Junior Total</b>	<b>3,616</b>	<b>3,689</b>	<b>72 2.0%</b>	<b>3,704</b>	<b>- 16 -0.4%</b>	<b>18,969</b>		<b>1.3%</b>		
Broadstone Middle	3,859	4,063	205 5.3%	4,078	- 15 -0.4%	1,898	MPPFL	1.1%		
Parkstone Grammar	4,471	4,814	343 7.7%	4,829	- 15 -0.3%	4,357	MPPFL	0.0%		
Poole Grammar	4,479	4,822	343 7.7%	4,837	- 15 -0.3%	4,349	MPPFL	0.4%		
Bournemouth School	4,600	4,835	235 5.1%	4,850	- 15 -0.3%	3,597	MPPFL	0.3%		
BSG	4,600	4,821	221 4.8%	4,836	- 15 -0.3%	4,088	MPPFL	0.0%		
Twynham School	4,627	4,812	185 4.0%	4,827	- 15 -0.3%	6,174	MPPFL	1.2%		
Highcliffe School	4,631	4,816	185 4.0%	4,831	- 15 -0.3%	5,586	MPPFL	0.7%		
Winton Academy	4,717	4,841	125 2.6%	4,853	- 11 -0.2%	3,815	Cap	1.0%		
Glenmoor Academy	4,728	4,853	125 2.6%	4,865	- 11 -0.2%	3,417	Cap	0.4%		
TBOWA	4,769	4,896	127 2.7%	4,908	- 12 -0.2%	4,681	Cap	3.0%		
St Edward's RC	4,867	4,867	0 0.0%	4,879	- 12 -0.2%	4,419	Floor/ MFG	1.8%		
Corfe Hills School	4,945	4,988	43 0.9%	5,013	- 25 -0.5%	3,786	Formula	1.2%		
Poole High School	5,019	5,019	0 0.0%	5,042	- 23 -0.5%	7,643	Floor/ MFG	0.8%		
Magna Academy	5,187	5,187	0 0.0%	5,208	- 21 -0.4%	3,984	Floor/ MFG	1.1%		
The Bourne Academy	5,244	5,384	140 2.7%	5,396	- 13 -0.2%	4,506	Cap	2.5%		
Harewood College	5,258	5,395	137 2.6%	5,408	- 12 -0.2%	2,913	Cap	1.5%		
The Grange School	5,357	5,496	140 2.6%	5,509	- 13 -0.2%	2,523	Cap	2.7%		
LeAF Studio	5,442	5,573	131 2.4%	5,585	- 12 -0.2%	1,025	Cap	2.9%		
Oak Academy	5,721	5,721	0 0.0%	5,721	- 0 0.0%	2,752	Floor/ MFG	1.0%		
Carter Community School	6,095	6,095	0 0.0%	6,155	- 61 -1.0%	1,981	Floor/ MFG	2.8%		
St Aldhelm's Academy	6,117	6,129	13 0.2%	6,154	- 24 -0.4%	2,390	Formula	4.2%		
<b>Middle/ Sec. Total</b>	<b>4,879</b>	<b>5,014</b>	<b>135 2.8%</b>	<b>5,031</b>	<b>- 16 -0.3%</b>	<b>79,884</b>		<b>1.2%</b>		
Parkfield School	4,248	4,350	102 2.4%	4,359	- 9 -0.2%	1,749	Cap	1.7%		
St Peter's Catholic Compreher	4,471	4,591	120 2.7%	4,602	- 11 -0.2%	6,721	Cap	1.9%		
Avonbourne School	4,541	4,609	69 1.5%	4,631	- 22 -0.5%	5,328	Formula	1.5%		
<b>All- through Total</b>	<b>4,468</b>	<b>4,566</b>	<b>98 2.2%</b>	<b>4,581</b>	<b>- 15 -0.3%</b>	<b>13,798</b>		<b>1.7%</b>		



# Bournemouth, Christchurch & Poole School Funding Consultation 2019-20

		1.0%								
1.0%	2018-19 per pupil Budget	19-20 per pupil Budget	Change against 2018- 19		NFF	Change against NFF		Total Budget £000's	Formula Type Sch. Classification	% EHCP
<b>BCP TOTAL</b>	<b>4,142</b>	<b>4,219</b>	<b>77.2</b>	<b>1.9%</b>	<b>4,258</b>	<b>- 39</b>	<b>-0.9%</b>	<b>191,538</b>		<b>1.3%</b>
Stourfield Infant	3,300	3,481	181	5.5%	3,516	- 35	-1.0%	1,246	Cap < MPPFL	2.8%
Lilliput CE Infant	3,340	3,484	144	4.3%	3,519	- 35	-1.0%	1,254	MPPFL	0.8%
Springdale First	3,391	3,480	89	2.6%	3,515	- 35	-1.0%	1,044	MPPFL	0.0%
Courthill Infant	3,441	3,476	35	1.0%	3,511	- 35	-1.0%	1,234	MPPFL	1.7%
Broadstone First	3,457	3,481	24	0.7%	3,516	- 35	-1.0%	1,030	MPPFL	1.7%
Christchurch Infant	3,474	3,592	119	3.4%	3,627	- 35	-1.0%	1,293	MPPFL	1.4%
Merley First	3,485	3,490	5	0.1%	3,522	- 32	-0.9%	1,050	Formula	1.0%
Canford Heath Infant	3,501	3,478	-23	-0.6%	3,513	- 35	-1.0%	1,245	MPPFL	0.8%
Queen's Park Infant	3,613	3,588	-25	-0.7%	3,629	- 41	-1.1%	1,288	Floor/ MFG	1.4%
Stanley Green Infant	3,633	3,609	-24	-0.7%	3,665	- 55	-1.5%	877	Floor/ MFG	0.0%
Ad Astra Infant	3,680	3,656	-24	-0.7%	3,713	- 57	-1.5%	980	Floor/ MFG	1.9%
Twin Sails Infant	3,680	3,655	-25	-0.7%	3,687	- 32	-0.9%	1,272	Floor/ MFG	1.0%
Mudeford Infants'	3,803	3,877	74	2.0%	3,896	- 19	-0.5%	698	Cap	0.0%
Sylvan Infant	4,057	4,080	23	0.6%	4,113	- 32	-0.8%	1,114	Formula	1.5%
Old Town Infant	4,260	4,233	-27	-0.6%	4,297	- 64	-1.5%	808	Floor/ MFG	1.4%
St Clement's & St J's CE	4,581	4,550	-31	-0.7%	4,607	- 57	-1.2%	1,201	Floor/ MFG	0.0%
<b>Infant/ First Total</b>	<b>3,627</b>	<b>3,664</b>	<b>36</b>	<b>1.0%</b>	<b>3,702</b>	<b>- 39</b>	<b>-1.1%</b>	<b>17,636</b>		<b>1.1%</b>
Hill View Primary	3,300	3,479	179	5.4%	3,514	- 35	-1.0%	2,278	MPPFL	1.2%
Moordown St J's CE	3,300	3,482	182	5.5%	3,517	- 35	-1.0%	1,441	MPPFL	1.2%
Muscliff Primary	3,300	3,501	201	6.1%	3,536	- 35	-1.0%	2,188	MPPFL	1.8%
St James' CE Primary	3,300	3,479	179	5.4%	3,514	- 35	-1.0%	1,451	MPPFL	1.5%
St Katharine's CE	3,300	3,475	175	5.3%	3,510	- 35	-1.0%	1,734	MPPFL	1.6%
The Epiphany CE	3,300	3,482	182	5.5%	3,517	- 35	-1.0%	1,463	MPPFL	2.2%
Highcliffe St M. Primary	3,314	3,479	165	5.0%	3,514	- 35	-1.0%	2,097	MPPFL	1.9%
St Walburga's Catholic	3,338	3,477	138	4.1%	3,512	- 35	-1.0%	1,662	MPPFL	0.8%
St Mark's CE Primary	3,355	3,483	128	3.8%	3,518	- 35	-1.0%	1,449	MPPFL	3.4%
Winton Primary	3,368	3,488	120	3.6%	3,526	- 38	-1.1%	2,808	Cap < MPPFL	1.0%
St Michael's CE	3,389	3,479	91	2.7%	3,516	- 37	-1.1%	2,286	Cap < MPPFL	0.7%
Bishop Aldhelm's CE	3,407	3,494	87	2.5%	3,529	- 35	-1.0%	2,117	MPPFL	1.6%
St Luke's CE Primary	3,412	3,487	75	2.2%	3,670	-183	-5.0%	1,503	Cap	2.1%
Longfleet CE Primary	3,449	3,484	34	1.0%	3,519	- 35	-1.0%	2,181	MPPFL	0.5%
Heatherlands Primary	3,537	3,542	5	0.1%	3,575	- 32	-0.9%	2,221	Formula	0.8%
Pokesdown Community	3,550	3,629	79	2.2%	3,649	- 20	-0.5%	1,597	Cap	1.1%
St Mary's Catholic	3,568	3,544	-24	-0.7%	3,576	- 32	-0.9%	1,425	Formula	1.3%
Burton CE Primary	3,576	3,652	76	2.1%	3,672	- 19	-0.5%	1,245	Cap	1.1%
The Priory CE Primary	3,596	3,661	65	1.8%	3,688	- 27	-0.7%	798	Formula	3.2%
Malmesbury Park	3,636	3,678	42	1.1%	3,710	- 32	-0.9%	2,295	Formula	2.3%
Twynham Primary	3,673	3,725	52	1.4%	3,757	- 32	-0.9%	652	Formula	0.0%
St Joseph's C. (Xchu)	3,688	3,764	76	2.1%	3,783	- 19	-0.5%	813	Cap	0.0%
Corpus Christi Catholic	3,698	3,705	7	0.2%	3,738	- 32	-0.9%	1,601	Formula	1.4%
St Joseph's C. (Poole)	3,806	3,784	-22	-0.6%	3,817	- 32	-0.8%	1,529	Formula	1.2%
Talbot Primary School	3,857	3,847	-10	-0.3%	3,879	- 32	-0.8%	2,108	Formula	1.1%
Hillbourne Primary	3,873	3,854	-19	-0.5%	3,886	- 32	-0.8%	1,191	Formula	1.0%
Bearwood Primary	3,890	3,865	-25	-0.6%	3,915	- 50	-1.3%	788	Floor/ MFG	0.0%
Kingsleigh Primary	3,926	3,898	-28	-0.7%	3,950	- 52	-1.3%	2,592	Floor/ MFG	2.0%
Kings Park Academy	4,154	4,124	-30	-0.7%	4,176	- 52	-1.2%	2,594	Floor/ MFG	0.7%
Somerford Primary	4,172	4,144	-28	-0.7%	4,202	- 58	-1.4%	1,513	Floor/ MFG	4.1%
Kinson Primary	4,214	4,185	-29	-0.7%	4,235	- 50	-1.2%	1,373	Floor/ MFG	1.3%
Manorside Academy	4,329	4,300	-29	-0.7%	4,368	- 68	-1.6%	1,135	Floor/ MFG	1.5%
Bayside Academy	4,422	4,402	-19	-0.4%	4,435	- 32	-0.7%	1,352	Formula	2.9%
Christ The King Catholic	4,437	4,406	-31	-0.7%	4,406	0	0.0%	1,392	Floor/ MFG	2.0%
Jewell Academy	4,524	4,492	-32	-0.7%	4,548	- 56	-1.2%	1,738	Floor/ MFG	0.8%
Elm Academy	4,790	4,756	-34	-0.7%	4,817	- 61	-1.3%	2,083	Floor/ MFG	0.6%
Heathlands Primary	5,483	5,447	-37	-0.7%	5,532	- 85	-1.5%	1,073	Floor/ MFG	2.6%
<b>Primary Total</b>	<b>3,684</b>	<b>3,746</b>	<b>62</b>	<b>1.7%</b>	<b>3,788</b>	<b>- 41</b>	<b>-1.1%</b>	<b>61,767</b>		<b>1.5%</b>

# Bournemouth, Christchurch & Poole School Funding Consultation 2019-20

		1.0%								
1.0%	2018-19 per pupil Budget	19-20 per pupil Budget	Change against 2018- 19		NFF	Change against NFF		Total Budget £000's	Formula Type Sch. Classification	% EHCP
Baden-Powell & St P's	3,266	3,489	223	6.8%	3,524	- 35	-1.0%	2,519	MPPFL	1.5%
Stourfield Junior	3,300	3,416	116	3.5%	3,451	- 35	-1.0%	1,650	MPPFL	1.9%
Christchurch Junior	3,406	3,546	140	4.1%	3,581	- 35	-1.0%	1,784	MPPFL	2.6%
Canford Heath Junior	3,464	3,478	14	0.4%	3,513	- 35	-1.0%	1,649	MPPFL	1.3%
Mudford Junior	3,558	3,625	68	1.9%	3,649	- 24	-0.7%	957	Formula	0.0%
Oakdale Junior	3,610	3,585	-25	-0.7%	3,616	- 31	-0.9%	1,728	Floor/ MFG	0.6%
Queen's Park Infant	3,645	3,620	-26	-0.7%	3,678	- 59	-1.6%	1,817	Floor/ MFG	0.6%
Ocean	3,732	3,710	-22	-0.6%	3,742	- 32	-0.9%	1,189	Formula	1.1%
Haymoor Junior	3,831	3,815	-16	-0.4%	3,847	- 32	-0.8%	1,328	Formula	1.7%
Hamworthy Park Junior	3,838	3,855	17	0.4%	3,887	- 32	-0.8%	1,688	Formula	2.1%
Branksome Heath Junior	4,113	4,093	-19	-0.5%	4,126	- 32	-0.8%	1,060	Formula	0.0%
Bethany CE Junior	4,331	4,301	-30	-0.7%	4,352	- 51	-1.2%	1,492	Floor/ MFG	1.1%
<b>Junior Total</b>	<b>3,616</b>	<b>3,668</b>	<b>52</b>	<b>1.4%</b>	<b>3,704</b>	<b>- 37</b>	<b>-1.0%</b>	<b>18,861</b>		<b>1.3%</b>
Broadstone Middle	3,859	4,043	185	4.8%	4,078	- 35	-0.9%	1,888	MPPFL	1.1%
Parkstone Grammar	4,471	4,794	323	7.2%	4,829	- 35	-0.7%	4,339	MPPFL	0.0%
Poole Grammar	4,479	4,802	323	7.2%	4,837	- 35	-0.7%	4,331	MPPFL	0.4%
Bournemouth School	4,600	4,815	215	4.7%	4,850	- 35	-0.7%	3,582	MPPFL	0.3%
BSG	4,600	4,801	201	4.4%	4,836	- 35	-0.7%	4,071	MPPFL	0.0%
Twynham School	4,627	4,792	165	3.6%	4,827	- 35	-0.7%	6,148	MPPFL	1.2%
Highcliffe School	4,631	4,796	165	3.6%	4,831	- 35	-0.7%	5,563	MPPFL	0.7%
Winton Academy	4,717	4,825	109	2.3%	4,853	- 27	-0.6%	3,802	Cap	1.0%
Glenmoor Academy	4,728	4,837	109	2.3%	4,865	- 27	-0.6%	3,406	Cap	0.4%
TBOWA	4,769	4,880	111	2.3%	4,908	- 28	-0.6%	4,665	Cap	3.0%
St Edward's RC	4,867	4,832	-35	-0.7%	4,879	- 47	-1.0%	4,387	Floor/ MFG	1.8%
Corfe Hills School	4,945	4,963	19	0.4%	5,013	- 50	-1.0%	3,767	Formula	1.2%
Poole High School	5,019	4,994	-25	-0.5%	5,042	- 48	-1.0%	7,605	Formula	0.8%
Magna Academy	5,187	5,161	-26	-0.5%	5,208	- 48	-0.9%	3,964	Formula	1.1%
The Bourne Academy	5,244	5,363	119	2.3%	5,396	- 33	-0.6%	4,489	Formula	2.5%
Harewood College	5,258	5,378	120	2.3%	5,408	- 30	-0.6%	2,904	Cap	1.5%
The Grange School	5,357	5,479	122	2.3%	5,509	- 30	-0.6%	2,515	Cap	2.7%
LeAF Studio	5,442	5,556	114	2.1%	5,585	- 29	-0.5%	1,022	Cap	2.9%
Oak Academy	5,721	5,680	-41	-0.7%	5,721	- 41	-0.7%	2,732	Floor/ MFG	1.0%
Carter Community School	6,095	6,052	-43	-0.7%	6,155	-103	-1.7%	1,967	Floor/ MFG	2.8%
St Aldhelm's Academy	6,117	6,106	-11	-0.2%	6,154	- 48	-0.8%	2,381	Formula	4.2%
<b>Middle/ Sec. Total</b>	<b>4,879</b>	<b>4,992</b>	<b>113</b>	<b>2.3%</b>	<b>5,031</b>	<b>- 38</b>	<b>-0.8%</b>	<b>79,529</b>		<b>1.2%</b>
Parkfield School	4,248	4,337	89	2.1%	4,359	- 22	-0.5%	1,743	Cap	1.7%
St Peter's Catholic Comprehen	4,471	4,576	105	2.3%	4,602	- 26	-0.6%	6,699	Cap	1.9%
Avonbourne School	4,541	4,588	47	1.0%	4,631	- 43	-0.9%	5,303	Formula	1.5%
<b>All- through Total</b>	<b>4,468</b>	<b>4,549</b>	<b>81</b>	<b>1.8%</b>	<b>4,581</b>	<b>- 32</b>	<b>-0.7%</b>	<b>13,745</b>		<b>1.7%</b>



# Bournemouth, Christchurch & Poole School Funding Consultation 2019-20

		1.5%								
	2018-19 per pupil Budget	19-20 per pupil Budget	Change against 2018- 19		NFF	Change against NFF		Total Budget £000's	Formula Type Sch. Classification	% EHCP
<b>1.5%</b>										
<b>BCP TOTAL</b>	<b>4,142</b>	<b>4,198</b>	<b>56</b>	<b>1.3%</b>	<b>4,258</b>	<b>- 60</b>	<b>-1.4%</b>	<b>190,573</b>		<b>1.3%</b>
Stourfield Infant	3,300	3,466	166	5.0%	3,516	- 50	-1.4%	1,241	MPPFL	2.8%
Lilliput CE Infant	3,340	3,469	129	3.9%	3,519	- 50	-1.4%	1,249	MPPFL	0.8%
Springdale First	3,391	3,465	74	2.2%	3,515	- 50	-1.4%	1,039	MPPFL	0.0%
Courthill Infant	3,441	3,461	20	0.6%	3,511	- 50	-1.4%	1,229	MPPFL	1.7%
Broadstone First	3,457	3,466	9	0.3%	3,516	- 50	-1.4%	1,026	MPPFL	1.7%
Christchurch Infant	3,474	3,577	104	3.0%	3,627	- 50	-1.4%	1,288	MPPFL	1.4%
Merley First	3,485	3,467	-18	-0.5%	3,522	- 55	-1.6%	1,044	Formula	1.0%
Canford Heath Infant	3,501	3,463	-38	-1.1%	3,513	- 50	-1.4%	1,240	MPPFL	0.8%
Queen's Park Infant	3,613	3,565	-48	-1.3%	3,629	- 64	-1.8%	1,280	Formula	1.4%
Stanley Green Infant	3,633	3,586	-47	-1.3%	3,665	- 79	-2.2%	871	Floor/ MFG	0.0%
Ad Astra Infant	3,680	3,633	-48	-1.3%	3,713	- 80	-2.2%	974	Formula	1.9%
Twin Sails Infant	3,680	3,632	-48	-1.3%	3,687	- 55	-1.5%	1,264	Formula	1.0%
Mudeford Infants'	3,803	3,863	60	1.6%	3,896	- 33	-0.9%	695	Formula	0.0%
Sylvan Infant	4,057	4,058	0	0.0%	4,113	- 55	-1.3%	1,108	Formula	1.5%
Old Town Infant	4,260	4,205	-55	-1.3%	4,297	- 92	-2.1%	803	Floor/ MFG	1.4%
St Clement's & St J's C	4,581	4,519	-62	-1.4%	4,607	- 88	-1.9%	1,193	Floor/ MFG	0.0%
<b>Infant/ First Total</b>	<b>3,627</b>	<b>3,644</b>	<b>17</b>	<b>0.5%</b>	<b>3,702</b>	<b>- 58</b>	<b>-1.6%</b>	<b>17,543</b>		<b>1.1%</b>
Hill View Primary	3,300	3,464	164	5.0%	3,514	- 50	-1.4%	2,269	MPPFL	1.2%
Moordown St J's CE	3,300	3,467	167	5.0%	3,517	- 50	-1.4%	1,435	MPPFL	1.2%
Muscliff Primary	3,300	3,486	186	5.6%	3,536	- 50	-1.4%	2,179	MPPFL	1.8%
St James' CE Primary	3,300	3,464	164	5.0%	3,514	- 50	-1.4%	1,444	MPPFL	1.5%
St Katharine's CE	3,300	3,460	160	4.8%	3,510	- 50	-1.4%	1,726	MPPFL	1.6%
The Epiphany CE	3,300	3,467	167	5.1%	3,517	- 50	-1.4%	1,456	MPPFL	2.2%
Highcliffe St M. Primary	3,314	3,464	150	4.5%	3,514	- 50	-1.4%	2,088	MPPFL	1.9%
St Walburga's Catholic	3,338	3,462	123	3.7%	3,512	- 50	-1.4%	1,655	MPPFL	0.8%
St Mark's CE Primary	3,355	3,468	113	3.4%	3,518	- 50	-1.4%	1,443	MPPFL	3.4%
Winton Primary	3,368	3,473	105	3.1%	3,526	- 53	-1.5%	2,796	Cap < MPPFL	1.0%
St Michael's CE	3,389	3,464	76	2.2%	3,516	- 52	-1.5%	2,276	Cap < MPPFL	0.7%
Bishop Aldhelm's CE	3,407	3,479	72	2.1%	3,529	- 50	-1.4%	2,108	MPPFL	1.6%
St Luke's CE Primary	3,412	3,475	63	1.8%	3,670	-196	-5.3%	1,498	Cap	2.1%
Longfleet CE Primary	3,449	3,469	19	0.6%	3,519	- 50	-1.4%	2,171	MPPFL	0.5%
Heatherlands Primary	3,537	3,520	-18	-0.5%	3,575	- 55	-1.5%	2,207	Formula	0.8%
Pokesdown Community	3,550	3,616	66	1.8%	3,649	- 33	-0.9%	1,591	Cap	1.1%
St Mary's Catholic	3,568	3,521	-47	-1.3%	3,576	- 55	-1.5%	1,416	Formula	1.3%
Burton CE Primary	3,576	3,640	64	1.8%	3,672	- 32	-0.9%	1,241	Cap	1.1%
The Priory CE Primary	3,596	3,639	43	1.2%	3,688	- 49	-1.3%	793	Formula	3.2%
Malmesbury Park	3,636	3,655	19	0.5%	3,710	- 55	-1.5%	2,281	Formula	2.3%
Twynham Primary	3,673	3,703	29	0.8%	3,757	- 55	-1.5%	648	Formula	0.0%
St Joseph's C. (Xchu)	3,688	3,752	63	1.7%	3,783	- 32	-0.8%	810	Cap	0.0%
Corpus Christi Catholic	3,698	3,683	-16	-0.4%	3,738	- 55	-1.5%	1,591	Formula	1.4%
St Joseph's C. (Poole)	3,806	3,762	-44	-1.2%	3,817	- 55	-1.4%	1,520	Formula	1.2%
Talbot Primary School	3,857	3,824	-33	-0.8%	3,879	- 55	-1.4%	2,096	Formula	1.1%
Hillbourne Primary	3,873	3,832	-42	-1.1%	3,886	- 55	-1.4%	1,184	Formula	1.0%
Bearwood Primary	3,890	3,842	-48	-1.2%	3,915	- 73	-1.9%	784	Formula	0.0%
Kingsleigh Primary	3,926	3,870	-56	-1.4%	3,950	- 79	-2.0%	2,574	Floor/ MFG	2.0%
Kings Park Academy	4,154	4,095	-59	-1.4%	4,176	- 81	-2.0%	2,575	Floor/ MFG	0.7%
Somerford Primary	4,172	4,116	-57	-1.4%	4,202	- 86	-2.1%	1,502	Floor/ MFG	4.1%
Kinson Primary	4,214	4,156	-58	-1.4%	4,235	- 79	-1.9%	1,363	Floor/ MFG	1.3%
Manorside Academy	4,329	4,271	-58	-1.3%	4,368	- 97	-2.2%	1,128	Floor/ MFG	1.5%
Bayside Academy	4,422	4,380	-42	-0.9%	4,435	- 55	-1.2%	1,345	Formula	2.9%
Christ The King	4,437	4,376	-61	-1.4%	4,406	- 30	-0.7%	1,383	Floor/ MFG	2.0%
Jewell Academy	4,524	4,460	-63	-1.4%	4,548	- 88	-1.9%	1,726	Floor/ MFG	0.8%
Elm Academy	4,790	4,722	-68	-1.4%	4,817	- 95	-2.0%	2,068	Floor/ MFG	0.6%
Heathlands Primary	5,483	5,410	-73	-1.3%	5,532	-121	-2.2%	1,066	Floor/ MFG	2.6%
<b>Primary Total</b>	<b>3,684</b>	<b>3,726</b>	<b>42</b>	<b>1.1%</b>	<b>3,788</b>	<b>- 61</b>	<b>-1.6%</b>	<b>61,435</b>		<b>1.5%</b>

# Bournemouth, Christchurch & Poole School Funding Consultation 2019-20

		1.5%								
	2018-19 per pupil Budget	19-20 per pupil Budget	Change against 2018- 19		NFF	Change against NFF		Total Budget £000's	Formula Type Sch. Classification	% EHCP
<b>1.5%</b>										
Baden-Powell & St P's	3,266	3,474	208	6.4%	3,524	- 50	-1.4%	2,508	MPPFL	1.5%
Stourfield Junior	3,300	3,401	101	3.0%	3,451	- 50	-1.4%	1,642	MPPFL	1.9%
Christchurch Junior	3,406	3,531	125	3.7%	3,581	- 50	-1.4%	1,776	MPPFL	2.6%
Canford Heath Junior	3,464	3,463	-1	0.0%	3,513	- 50	-1.4%	1,642	MPPFL	1.3%
Mudeford Junior	3,558	3,603	45	1.3%	3,649	- 47	-1.3%	951	Formula	0.0%
Oakdale Junior	3,610	3,561	-49	-1.4%	3,616	- 55	-1.5%	1,717	Formula	0.6%
Queen's Park Infant	3,645	3,594	-51	-1.4%	3,678	- 84	-2.3%	1,804	Floor/ MFG	0.6%
Ocean	3,732	3,688	-45	-1.2%	3,742	- 55	-1.5%	1,182	Formula	1.1%
Haymoor Junior	3,831	3,792	-39	-1.0%	3,847	- 55	-1.4%	1,320	Formula	1.7%
Hamworthy Park Junior	3,838	3,832	-6	-0.2%	3,887	- 55	-1.4%	1,678	Formula	2.1%
Branksome Heath Junior	4,113	4,071	-42	-1.0%	4,126	- 55	-1.3%	1,054	Formula	0.0%
Bethany CE Junior	4,331	4,271	-60	-1.4%	4,352	- 81	-1.9%	1,482	Floor/ MFG	1.1%
<b>Junior Total</b>	<b>3,616</b>	<b>3,647</b>	<b>31</b>	<b>0.9%</b>	<b>3,704</b>	<b>- 57</b>	<b>-1.5%</b>	<b>18,756</b>		<b>1.3%</b>
Broadstone Middle	3,859	4,028	170	4.4%	4,078	- 50	-1.2%	1,881	MPPFL	1.1%
Parkstone Grammar	4,471	4,779	308	6.9%	4,829	- 50	-1.0%	4,325	MPPFL	0.0%
Poole Grammar	4,479	4,787	308	6.9%	4,837	- 50	-1.0%	4,318	MPPFL	0.4%
Bournemouth School	4,600	4,800	200	4.3%	4,850	- 50	-1.0%	3,571	MPPFL	0.3%
BSG	4,600	4,786	186	4.0%	4,836	- 50	-1.0%	4,058	MPPFL	0.0%
Twynham School	4,627	4,777	150	3.2%	4,827	- 50	-1.0%	6,129	MPPFL	1.2%
Highcliffe School	4,631	4,781	150	3.2%	4,831	- 50	-1.0%	5,546	MPPFL	0.7%
Winton Academy	4,717	4,807	91	1.9%	4,853	- 45	-0.9%	3,788	Cap	1.0%
Glenmoor Academy	4,728	4,819	91	1.9%	4,865	- 45	-0.9%	3,393	Cap	0.4%
TBOWA	4,769	4,861	92	1.9%	4,908	- 46	-0.9%	4,648	Cap	3.0%
St Edward's RC	4,867	4,797	-70	-1.4%	4,879	- 81	-1.7%	4,356	Formula	1.8%
Corfe Hills School	4,945	4,929	-16	-0.3%	5,013	- 84	-1.7%	3,741	Formula	1.2%
Poole High School	5,019	4,960	-58	-1.2%	5,042	- 81	-1.6%	7,555	Formula	0.8%
Magna Academy	5,187	5,128	-60	-1.1%	5,208	- 81	-1.5%	3,938	Formula	1.1%
The Bourne Academy	5,244	5,330	85	1.6%	5,396	- 67	-1.2%	4,461	Formula	2.5%
Harewood College	5,258	5,358	100	1.9%	5,408	- 50	-0.9%	2,893	Cap	1.5%
The Grange School	5,357	5,458	102	1.9%	5,509	- 51	-0.9%	2,505	Cap	2.7%
LeAF Studio	5,442	5,537	95	1.7%	5,585	- 48	-0.9%	1,019	Cap	2.9%
Oak Academy	5,721	5,640	-81	-1.4%	5,721	- 81	-1.4%	2,713	Formula	1.0%
Carter Community School	6,095	6,009	-85	-1.4%	6,155	-146	-2.4%	1,953	Floor/ MFG	2.8%
St Aldhelm's Academy	6,117	6,073	-44	-0.7%	6,154	- 81	-1.3%	2,368	Formula	4.2%
<b>Middle/ Sec. Total</b>	<b>4,879</b>	<b>4,969</b>	<b>90</b>	<b>1.8%</b>	<b>5,031</b>	<b>- 62</b>	<b>-1.2%</b>	<b>79,158</b>		<b>1.2%</b>
Parkfield School	4,248	4,322	74	1.8%	4,359	- 37	-0.9%	1,737	Cap	1.7%
St Peter's Catholic	4,471	4,558	87	2.0%	4,602	- 44	-0.9%	6,673	Cap	1.9%
Avonbourne School	4,541	4,558	17	0.4%	4,631	- 73	-1.6%	5,269	Formula	1.5%
<b>All-through Total</b>	<b>4,468</b>	<b>4,527</b>	<b>59</b>	<b>1.3%</b>	<b>4,581</b>	<b>- 54</b>	<b>-1.2%</b>	<b>13,679</b>		<b>1.7%</b>

# Bournemouth, Christchurch & Poole School Funding Consultation 2019-20

		3.0%								
3.0%	2018-19 per pupil Budget	19-20 per pupil Budget	Change against 2018- 19		NFF	Change against NFF		Total Budget £000's	Formula Type Sch. Classification	% EHCP
BCP TOTAL	4,142	4,134	-8	-0.2%	4,258	-124	-2.9%	187,668		1.3%
Stourfield Infant	3,300	3,346	46	1.4%	3,516	-170	-4.8%	1,198	Cap < MPPFL	2.8%
Lilliput CE Infant	3,340	3,349	9	0.3%	3,519	-170	-4.8%	1,206	MPPFL	0.8%
Springdale First	3,391	3,346	-45	-1.3%	3,515	-169	-4.8%	1,004	MPPFL	0.0%
Courthill Infant	3,441	3,394	-47	-1.4%	3,511	-117	-3.3%	1,205	MPPFL	1.7%
Broadstone First	3,457	3,411	-46	-1.3%	3,516	-105	-3.0%	1,010	MPPFL	1.7%
Christchurch Infant	3,474	3,457	-16	-0.5%	3,627	-170	-4.7%	1,245	MPPFL	1.4%
Merley First	3,485	3,439	-47	-1.3%	3,522	-84	-2.4%	1,035	Floor/ MFG	1.0%
Canford Heath Infant	3,501	3,453	-48	-1.4%	3,513	-60	-1.7%	1,236	Floor/ MFG	0.8%
Queen's Park Infant	3,613	3,563	-49	-1.4%	3,629	-66	-1.8%	1,279	Floor/ MFG	1.4%
Stanley Green Infant	3,633	3,586	-47	-1.3%	3,665	-79	-2.2%	871	Floor/ MFG	0.0%
Ad Astra Infant	3,680	3,632	-49	-1.3%	3,713	-81	-2.2%	973	Floor/ MFG	1.9%
Twin Sails Infant	3,680	3,630	-50	-1.4%	3,687	-57	-1.5%	1,263	Floor/ MFG	1.0%
Mudeford Infants'	3,803	3,780	-23	-0.6%	3,896	-116	-3.0%	680	Formula	0.0%
Sylvan Infant	4,057	4,003	-55	-1.3%	4,113	-110	-2.7%	1,093	Floor/ MFG	1.5%
Old Town Infant	4,260	4,205	-55	-1.3%	4,297	-92	-2.1%	803	Floor/ MFG	1.4%
St Clement's & St J's CE	4,581	4,519	-62	-1.4%	4,607	-88	-1.9%	1,193	Floor/ MFG	0.0%
Infant/ First Total	3,627	3,593	-35	-1.0%	3,702	-110	-3.0%	17,294		1.1%
Hill View Primary	3,300	3,344	44	1.3%	3,514	-170	-4.8%	2,190	MPPFL	1.2%
Moordown St J's CE	3,300	3,347	47	1.4%	3,517	-170	-4.8%	1,386	Cap < MPPFL	1.2%
Muscliff Primary	3,300	3,366	66	2.0%	3,536	-170	-4.8%	2,104	MPPFL	1.8%
St James' CE Primary	3,300	3,344	44	1.3%	3,514	-170	-4.8%	1,394	MPPFL	1.5%
St Katharine's CE	3,300	3,340	40	1.2%	3,510	-170	-4.8%	1,666	MPPFL	1.6%
The Epiphany CE	3,300	3,347	47	1.4%	3,517	-170	-4.8%	1,406	MPPFL	2.2%
Highcliffe St M. Primary	3,314	3,344	30	0.9%	3,514	-170	-4.8%	2,015	MPPFL	1.9%
St Walburga's Catholic	3,338	3,342	3	0.1%	3,512	-170	-4.8%	1,597	MPPFL	0.8%
St Mark's CE Primary	3,355	3,348	-7	-0.2%	3,518	-170	-4.8%	1,393	MPPFL	3.4%
Winton Primary	3,368	3,400	32	1.0%	3,526	-126	-3.6%	2,737	Cap	1.0%
St Michael's CE	3,389	3,421	32	0.9%	3,516	-96	-2.7%	2,247	Cap	0.7%
Bishop Aldhelm's CE	3,407	3,359	-48	-1.4%	3,529	-170	-4.8%	2,036	MPPFL	1.6%
St Luke's CE Primary	3,412	3,443	31	0.9%	3,670	-227	-6.2%	1,484	Cap	2.1%
Longfleet CE Primary	3,449	3,400	-49	-1.4%	3,519	-118	-3.4%	2,129	MPPFL	0.5%
Heatherlands Primary	3,537	3,487	-50	-1.4%	3,575	-88	-2.4%	2,186	Floor/ MFG	0.8%
Pokesdown Community	3,550	3,583	33	0.9%	3,649	-66	-1.8%	1,577	Cap	1.1%
St Mary's Catholic	3,568	3,519	-49	-1.4%	3,576	-57	-1.6%	1,415	Floor/ MFG	1.3%
Burton CE Primary	3,576	3,575	-2	0.0%	3,672	-97	-2.6%	1,219	Formula	1.1%
The Priory CE Primary	3,596	3,556	-40	-1.1%	3,688	-132	-3.6%	775	Formula	3.2%
Malmesbury Park	3,636	3,585	-52	-1.4%	3,710	-126	-3.4%	2,237	Floor/ MFG	2.3%
Twynham Primary	3,673	3,628	-46	-1.2%	3,757	-130	-3.5%	635	Floor/ MFG	0.0%
St Joseph's C. (Xchu)	3,688	3,720	32	0.9%	3,783	-63	-1.7%	804	Cap	0.0%
Corpus Christi Catholic	3,698	3,647	-51	-1.4%	3,738	-91	-2.4%	1,575	Floor/ MFG	1.4%
St Joseph's C. (Poole)	3,806	3,753	-53	-1.4%	3,817	-64	-1.7%	1,516	Floor/ MFG	1.2%
Talbot Primary School	3,857	3,802	-55	-1.4%	3,879	-77	-2.0%	2,084	Floor/ MFG	1.1%
Hillbourne Primary	3,873	3,822	-51	-1.3%	3,886	-64	-1.7%	1,181	Floor/ MFG	1.0%
Bearwood Primary	3,890	3,840	-50	-1.3%	3,915	-75	-1.9%	783	Floor/ MFG	0.0%
Kingsleigh Primary	3,926	3,870	-56	-1.4%	3,950	-79	-2.0%	2,574	Floor/ MFG	2.0%
Kings Park Academy	4,154	4,095	-59	-1.4%	4,176	-81	-2.0%	2,575	Floor/ MFG	0.7%
Somerford Primary	4,172	4,116	-57	-1.4%	4,202	-86	-2.1%	1,502	Floor/ MFG	4.1%
Kinson Primary	4,214	4,156	-58	-1.4%	4,235	-79	-1.9%	1,363	Floor/ MFG	1.3%
Manorside Academy	4,329	4,271	-58	-1.3%	4,368	-97	-2.2%	1,128	Floor/ MFG	1.5%
Bayside Academy	4,422	4,298	-124	-2.8%	4,435	-137	-3.1%	1,319	Formula	2.9%
Christ The King Catholic	4,437	4,376	-61	-1.4%	4,406	-30	-0.7%	1,383	Floor/ MFG	2.0%
Jewell Academy	4,524	4,460	-63	-1.4%	4,548	-88	-1.9%	1,726	Floor/ MFG	0.8%
Elm Academy	4,790	4,722	-68	-1.4%	4,817	-95	-2.0%	2,068	Floor/ MFG	0.6%
Heathlands Primary	5,483	5,410	-73	-1.3%	5,532	-121	-2.2%	1,066	Floor/ MFG	2.6%
Primary Total	3,684	3,668	-16	-0.4%	3,788	-120	-3.2%	60,476		1.5%

## Bournemouth, Christchurch & Poole School Funding Consultation 2019-20

		3.0%								
3.0%	2018-19 per pupil Budget	19-20 per pupil Budget	Change against 2018- 19		NFF	Change against NFF		Total Budget £000's	Formula Type Sch. Classification	% EHCP
Baden-Powell & St P's	3,267	3,354	87	2.7%	3,524	-170	-4.8%	2,421	MPPFL	1.5%
Stourfield Junior	3,300	3,281	-19	-0.6%	3,451	-170	-4.9%	1,585	MPPFL	1.9%
Christchurch Junior	3,406	3,411	5	0.1%	3,581	-170	-4.7%	1,716	MPPFL	2.6%
Canford Heath Junior	3,464	3,416	-48	-1.4%	3,513	-98	-2.8%	1,619	MPPFL	1.3%
Mudford Junior	3,558	3,520	-37	-1.0%	3,649	-129	-3.5%	929	Formula	0.0%
Oakdale Junior	3,610	3,560	-50	-1.4%	3,616	-56	-1.6%	1,716	Floor/ MFG	0.6%
Queen's Park Infant	3,645	3,594	-51	-1.4%	3,678	-84	-2.3%	1,804	Floor/ MFG	0.6%
Ocean	3,732	3,681	-51	-1.4%	3,742	-61	-1.6%	1,180	Floor/ MFG	1.1%
Haymoor Junior	3,831	3,779	-52	-1.4%	3,847	-69	-1.8%	1,315	Floor/ MFG	1.7%
Hamworthy Park Junior	3,838	3,785	-54	-1.4%	3,887	-103	-2.6%	1,658	Floor/ MFG	2.1%
Branksome Heath Junior	4,113	4,058	-55	-1.3%	4,126	-68	-1.6%	1,051	Floor/ MFG	0.0%
Bethany CE Junior	4,331	4,271	-60	-1.4%	4,352	-81	-1.9%	1,482	Floor/ MFG	1.1%
<b>Junior Total</b>	<b>3,616</b>	<b>3,593</b>	<b>-23</b>	<b>-0.6%</b>	<b>3,704</b>	<b>-112</b>	<b>-3.0%</b>	<b>18,476</b>		<b>1.3%</b>
Broadstone Middle	3,859	3,908	50	1.3%	4,078	-170	-4.2%	1,825	MPPFL	1.1%
Parkstone Grammar	4,471	4,659	188	4.2%	4,829	-170	-3.5%	4,217	MPPFL	0.0%
Poole Grammar	4,479	4,667	188	4.2%	4,837	-170	-3.5%	4,209	MPPFL	0.4%
Bournemouth School	4,600	4,680	80	1.7%	4,850	-170	-3.5%	3,482	MPPFL	0.3%
BSG	4,600	4,666	66	1.4%	4,836	-170	-3.5%	3,956	MPPFL	0.0%
Twynham School	4,627	4,657	30	0.6%	4,827	-170	-3.5%	5,975	MPPFL	1.2%
Highcliffe School	4,631	4,661	30	0.6%	4,831	-170	-3.5%	5,406	MPPFL	0.7%
Winton Academy	4,717	4,762	45	1.0%	4,853	-91	-1.9%	3,752	Cap	1.0%
Glenmoor Academy	4,728	4,742	14	0.3%	4,865	-123	-2.5%	3,339	Formula	0.4%
TBOWA	4,769	4,815	46	1.0%	4,908	-92	-1.9%	4,603	Cap	3.0%
St Edward's RC	4,867	4,797	-71	-1.4%	4,879	-82	-1.7%	4,355	Floor/ MFG	1.8%
Corfe Hills School	4,945	4,873	-71	-1.4%	5,013	-140	-2.8%	3,699	Floor/ MFG	1.2%
Poole High School	5,019	4,945	-74	-1.5%	5,042	-97	-1.9%	7,531	Floor/ MFG	0.8%
Magna Academy	5,187	5,113	-75	-1.4%	5,208	-96	-1.8%	3,926	Floor/ MFG	1.1%
The Bourne Academy	5,244	5,208	-36	-0.7%	5,396	-189	-3.5%	4,359	Formula	2.5%
Harewood College	5,258	5,308	50	0.9%	5,408	-100	-1.8%	2,866	Cap	1.5%
The Grange School	5,357	5,370	14	0.3%	5,509	-139	-2.5%	2,465	Formula	2.7%
LeAF Studio	5,442	5,436	-6	-0.1%	5,585	-148	-2.7%	1,000	Formula	2.9%
Oak Academy	5,721	5,639	-81	-1.4%	5,721	-81	-1.4%	2,712	Floor/ MFG	1.0%
Carter Community School	6,095	6,009	-85	-1.4%	6,155	-146	-2.4%	1,953	Floor/ MFG	2.8%
St Aldhelm's Academy	6,117	6,031	-86	-1.4%	6,154	-123	-2.0%	2,352	Floor/ MFG	4.2%
<b>Middle/ Sec. Total</b>	<b>4,879</b>	<b>4,895</b>	<b>16</b>	<b>0.3%</b>	<b>5,031</b>	<b>-135</b>	<b>-2.7%</b>	<b>77,985</b>		<b>1.2%</b>
Parkfield School	4,248	4,285	37	0.9%	4,359	-74	-1.7%	1,722	Cap	1.7%
St Peter's Catholic	4,471	4,469	-2	-0.1%	4,602	-133	-2.9%	6,542	Formula	1.9%
Avonbourne School	4,541	4,475	-66	-1.5%	4,631	-157	-3.4%	5,172	Floor/ MFG	1.5%
<b>All- through Total</b>	<b>4,468</b>	<b>4,446</b>	<b>-22</b>	<b>-0.5%</b>	<b>4,581</b>	<b>-134</b>	<b>-2.9%</b>	<b>13,437</b>		<b>1.7%</b>

Please note that in all the school level impacts options tables above cash amounts are provided in £ unless otherwise stated.

### Funding for LA Services for Schools

There are four categories of services for schools with different funding streams:

1. **Maintained schools only de-delegated services** funded from the individual maintained mainstream school budget share.

These are services where the **LA has no statutory duty to provide** for maintained schools. These services can continue to be provided centrally by the LA with funding withheld from mainstream school budget shares through de-delegation. This is **applicable for maintained mainstream schools only**, with the arrangements for maintained special and AP providers to be the same as those for academies. Schools forum makes the decision on behalf of all maintained schools by primary and secondary phases separately. **BCP following discussions with maintained schools will not be bringing forward any proposals.**

2. **Maintained schools only central retention services** funded from the individual maintained school budget share and place funding.

These are services where the **LA retains a statutory duty to undertake activity** to support maintained schools. These services are to be funded from central retention of school budget shares. This is **applicable for all maintained mainstream, special and AP** schools. Schools forum makes the decision on behalf of all maintained schools collectively.

3. **All schools centrally provided statutory services** funded from the DSG Central Schools Services Block. Schools Forum makes the decision on behalf of all schools. These statutory services are included within the appendix to show how they differ from those in paragraph 2 for maintained schools only. These services are considered in Section 9 of the consultation.
4. **All schools service level agreements** decided individually by maintained schools and academies that are not statutory duties of the LA and **do not form part of this consultation or the business of Schools Forum.**

Where Schools Forum make the decision for maintained schools services (paragraphs 1 and 2 above), the relevant schools only (by phase or collectively) are able to vote. All Schools Forum members are eligible to vote on funding for services in paragraphs 3.

The differences between the services provided in paragraphs 2 and 3 are scheduled in **Appendix 6**.



LA Statutory Education Functions for Schools 2019-20

*Statutory and regulatory duties*

Responsibilities held for all schools	Responsibilities held for maintained schools only
<ul style="list-style-type: none"> <li>• Director of children's services and personal staff for director (Sch 2, 15a)</li> <li>• Planning for the education service as a whole (Sch 2, 15b)</li> <li>• Revenue budget preparation, preparation of information on income and expenditure relating to education, and external audit relating to education (Sch 2, 22)</li> <li>• Authorisation and monitoring of expenditure not met from schools' budget shares (Sch 2, 15c)</li> <li>• Formulation and review of local authority schools funding formula (Sch 2, 15d)</li> <li>• Internal audit and other tasks related to the authority's chief finance officer's responsibilities under Section 151 of LGA 1972 except duties specifically related to maintained schools (Sch 2, 15e)</li> <li>• Consultation costs relating to non-staffing issues (Sch 2, 19)</li> <li>• Plans involving collaboration with other LA services or public or voluntary bodies (Sch 2, 15f)</li> <li>• Standing Advisory Committees for Religious Education (SACREs) (Sch 2, 17)</li> <li>• Provision of information to or at the request of the Crown other than relating specifically to maintained schools (Sch 2, 21)</li> </ul>	<ul style="list-style-type: none"> <li>• Functions of LA related to best value and provision of advice to governing bodies in procuring goods and services (Sch 2, 57)</li> <li>• Budgeting and accounting functions relating to maintained schools (Sch 2, 74)</li> <li>• Authorisation and monitoring of expenditure in respect of schools which do not have delegated budgets, and related financial administration (Sch 2, 58)</li> <li>• Monitoring of compliance with requirements in relation to the scheme for financing schools and the provision of community facilities by governing bodies (Sch 2, 59)</li> <li>• Internal audit and other tasks related to the authority's chief finance officer's responsibilities under Section 151 of LGA 1972 for maintained schools (Sch 2, 60)</li> <li>• Functions made under Section 44 of the 2002 Act (Consistent Financial Reporting) (Sch 2, 61)</li> <li>• Investigations of employees or potential employees, with or without remuneration to work at or for schools under the direct management of the headteacher or governing body (Sch 2, 62)</li> <li>• Functions related to local government pensions and administration of teachers' pensions in relation to staff working at maintained schools under the direct management of the headteacher or governing body (Sch 2, 73)</li> <li>• Retrospective membership of pension schemes where it would not be appropriate to expect a school to meet the cost (Sch 2, 76)</li> <li>• HR duties, including: advice to schools on the management of staff, pay alterations, conditions of service and composition or organisation of staff (Sch 2, 64); determination of conditions of service for non-teaching staff (Sch 2, 65); appointment or dismissal of employee functions (Sch 2, 66)</li> </ul>

## Bournemouth, Christchurch & Poole School Funding Consultation 2019-20

Responsibilities held for all schools	Responsibilities held for maintained schools only
	<ul style="list-style-type: none"> <li>• Consultation costs relating to staffing (Sch 2, 67)</li> <li>• Compliance with duties under Health and Safety at Work Act (Sch 2, 68)</li> <li>• Provision of information to or at the request of the Crown relating to schools (Sch 2, 69)</li> <li>• School companies (Sch 2, 70)</li> <li>• Functions under the Equality Act 2010 (Sch 2, 71)</li> <li>• Establish and maintaining computer systems, including data storage (Sch 2, 72)</li> <li>• Appointment of governors and payment of governor expenses (Sch 2, 73)</li> </ul>

### *Education welfare*

Responsibilities held for all schools	Responsibilities held for maintained schools only
<ul style="list-style-type: none"> <li>• Functions in relation to the exclusion of pupils from schools, excluding any provision of education to excluded pupils (Sch 2, 20)</li> <li>• School attendance (Sch 2, 16)</li> <li>• Responsibilities regarding the employment of children (Sch 2, 18)</li> </ul>	<ul style="list-style-type: none"> <li>• Inspection of attendance registers (Sch 2, 79)</li> </ul>

### *Asset management*

Responsibilities held for all schools	Responsibilities held for maintained schools only
<ul style="list-style-type: none"> <li>• Management of the LA's capital programme including preparation and review of an asset management plan, and negotiation and management of private finance transactions (Sch 2, 14a)</li> <li>• General landlord duties for all buildings owned by the local authority, including those leased to academies (Sch 2, 14b)</li> </ul>	<ul style="list-style-type: none"> <li>• General landlord duties for all maintained schools (Sch 2, 77a &amp; b (section 542(2)) Education Act 1996; School Premises Regulations 2012) to ensure that school buildings have: <ul style="list-style-type: none"> <li>• appropriate facilities for pupils and staff (including medical and accommodation)</li> <li>• the ability to sustain appropriate loads</li> <li>• reasonable weather resistance</li> <li>• safe escape routes</li> <li>• appropriate acoustic levels</li> <li>• lighting, heating and ventilation which meets the required standards</li> <li>• adequate water supplies and drainage</li> <li>• playing fields of the appropriate standards</li> </ul> </li> </ul>

## Bournemouth, Christchurch & Poole School Funding Consultation 2019-20

Responsibilities held for all schools	Responsibilities held for maintained schools only
	<ul style="list-style-type: none"> <li>General health and safety duty as an employer for employees and others who may be affected (Health and Safety at Work etc. Act 1974)</li> <li>Management of the risk from asbestos in community school buildings (Control of Asbestos Regulations 2012)</li> </ul>

### *Central support services*

Responsibilities held for all schools	Responsibilities held for maintained schools only
<ul style="list-style-type: none"> <li>No functions</li> </ul>	<ul style="list-style-type: none"> <li>Clothing grants (Sch 2, 53)</li> <li>Provision of tuition in music, or on other music-related activities (Sch 2, 54)</li> <li>Visual, creative and performing arts (Sch 2, 55)</li> <li>Outdoor education centres (but not centres mainly for the provision of organised games, swimming or athletics) (Sch 2, 56)</li> </ul> <p><b>BCP do not plan to start providing these services</b></p>

### *Premature retirement and redundancy*

Responsibilities held for all schools	Responsibilities held for maintained schools only
<ul style="list-style-type: none"> <li>No functions</li> </ul>	<ul style="list-style-type: none"> <li>Dismissal or premature retirement when costs cannot be charged to maintained schools (Sch 2, 78)</li> </ul> <p><b>BCP do not plan to start providing these services</b></p>

### *Monitoring national curriculum assessment*

Responsibilities held for all schools	Responsibilities held for maintained schools only
<ul style="list-style-type: none"> <li>No functions</li> </ul>	<ul style="list-style-type: none"> <li>Monitoring of National Curriculum assessments (Sch 2, 75)</li> </ul>



## Bournemouth, Christchurch & Poole School Funding Consultation 2019-20

### *Other ongoing duties*

Responsibilities held for all schools	Responsibilities held for maintained schools only
<ul style="list-style-type: none"> <li>Licences negotiated centrally by the Secretary of State for all publicly funded schools (Sch 2, 8); this does not require schools forum approval</li> <li>Admissions (Sch 2, 9)</li> <li>Places in independent schools for non-SEN pupils (Sch 2, 10)</li> <li>Remission of boarding fees at maintained schools and academies (Sch 2, 11)</li> <li>Servicing of schools forums (Sch 2, 12)</li> <li>Back-pay for equal pay claims (Sch 2, 13)</li> <li>Writing to parents of year 9 pupils about schools with an atypical age of admission, such as UTCs and studio schools, within a reasonable travelling distance <sup>1</sup> (Sch 2, 23)</li> </ul> <p><b>This includes for LEAF academy in Bournemouth</b></p>	<ul style="list-style-type: none"> <li>No functions</li> </ul>

### *Historic commitments allowable*

Responsibilities held for all schools	Responsibilities held for maintained schools only
<ul style="list-style-type: none"> <li>Capital expenditure funded from revenue (Sch 2, 1 ) <b>Nothing in BCP</b></li> <li>Prudential borrowing costs (Sch 2, 2(a)) <b>£275k from Bournemouth in Section 9.5</b></li> <li>Termination of employment costs (Sch 2, 2(b)) <b>£16k historic costs coming across from DCC for Christchurch.</b></li> <li>Contribution to combined budgets (Sch 2, 2(c)) <b>Nothing in BCP</b></li> </ul>	<ul style="list-style-type: none"> <li>No functions</li> </ul>

<sup>1</sup>Funding for this duty was previously delivered to local authorities via a s.31 grant. Additional funding will be added to the CSSB baseline for this from 2018 to 19.

Summary of Consultation Questions

**QUESTION 1a: Option 1 (no transfer is made to high needs)**

Do you agree the MFG should be set at minus 1.5% per pupil so that the changes in the 2019-20 NFF and school data from the October 2018 can be reflected in funding allocations to schools?

**QUESTION 1b:**

Do you agree that if no transfer to high needs is made that the NFF funding floor should be introduced so that schools receive an increase per pupil of at least 1% compared with 2017-18?

**QUESTION 2:**

Do you agree the disapplication request to adjust the MFG baseline for all through schools adding primary year groups represents a fair adjustments to the local formula?

**QUESTION 3a:**

Do you agree with the principle that if a funding transfer takes place all schools should make a contribution through a lower budget allocation than would otherwise have been the case?

**QUESTION 3b:**

If you agree that all schools should make a contribution, do you agree with the approach outlined in Table 5 and Table 6 for varying levels of transfer?

**QUESTION 3c:**

Do you agree the basic entitlement is the most appropriate formula factor to adjust?

**QUESTION 4:**

Do you agree that to manage any funding shortfall or excess the unit values of the Basic Entitlement for each phase should be adjusted by the same proportion?

**QUESTION 5:**

Do you have any comments on the budgets in the LA Central Services Block?

**QUESTION 6**

Are there any further comments you would like to make about any of the issues raised in this consultation?

**SCHOOL AND LOCAL AUTHORITY FUNDING  
GLOSSARY OF KEY NATIONAL AND LOCAL TERMS**

Some of the terms in this glossary have not been used in this document but are included within DfE supporting information to which schools may refer in considering this consultation.

ACRONYM	TITLE	DEFINITION
ACA	Area Cost Adjustment	A weighting applied by the Government to local government areas to reflect differences in the costs of inputs required, such as pay expenditure.
AP	Alternative Provision	Education for pupils: <ul style="list-style-type: none"> <li>• Due to permanent exclusion, illness or other reasons, would not otherwise receive a suitable education.</li> <li>• On a fixed period exclusion.</li> <li>• Being directed by schools to off-site provision to improve their behaviour or requiring a different curriculum offer.</li> </ul>
APT	Authority Proforma Tool	The APT is the spreadsheet local authorities use to submit their agreed mainstream pre-16 schools block funding formula to the Education and Skills Funding Agency.
AWPU	Age Weighted Pupil Unit	See BPPE
BPPE	Basic Per-Pupil Entitlement	Funding allocated within the local schools funding formula to reflect age group entitlement difference for primary and secondary aged pupils. A mandatory factor in the local schools funding formula termed Basic Entitlement.
CAP	Capping	Formula ceiling that can be set within the local schools funding formula to reduce increases for schools gaining in school budgets between years. This has to be set on a per pupil basis unique to each Local Authority and it cannot clawback more than is required in cash terms to finance the Minimum Funding Guarantee.
DSG	Dedicated Schools Grant	National grant allocated to fund the provision of all schools, providers and other central services. Its deployment and grant conditions are prescribed in The School and Early Years Finance (England) Regulations.
	Deprivation	Deprivation is a compulsory funding factor in local authorities' mainstream pre-16 schools block funding formula that directs funding to the most deprived pupils.

## Bournemouth, Christchurch & Poole School Funding Consultation 2019-20

ACRONYM	TITLE	DEFINITION
EAL	English as an Additional Language	This is an optional funding factor in local authorities' mainstream pre-16 schools block funding formula.
ESFA	Education & Skills Funding Agency	An executive agency of the DfE responsible for the funding of all state provided education from 2 to 19.
ESG	Education Services Grant	Previously paid by the ESFA on a per pupil basis to: <ul style="list-style-type: none"> <li>Local Authorities for retained duties for all maintained schools and academies.</li> <li>Local Authorities for general duties for maintained schools only.</li> <li>Academies directly for general duties.</li> </ul>
EYB	Early Years Block	That part of the DSG notionally allocated by the DfE for Early Years provision, covering free entitlement for 3 & 4 year olds, and disadvantaged 2 year olds
EYFSP	Early Years Foundation Stage Profile	National standards set by the DfE for the learning, development and care of children from birth to aged 5.
FSM	Free Schools Meals	Pupils can qualify for such support subject to meeting national benefits entitlement criteria. One of the deprivation factors in the local school funding formula, which must contain at least one deprivation measure.
FY	Financial Year	Local Authority year from 1 <sup>st</sup> April to 31 <sup>st</sup> March. Also funding year for maintained schools.
GAG	General Annual Grant	This is the term used to describe the revenue funding allocated to academies on an academic year basis.
HNB	High Needs Block	That part of the DSG for pupils requiring high needs provision and to fund central special needs support services.
IDACI	Income Deprivation Affecting Children Index	A national index of deprivation measuring in a local area the percentage of children under age 16 that live in low income households. One of the deprivation factors in the local school funding formula, which must contain at least one deprivation measure.
ISB	Individual Schools Budget	The part of the DSG delegated as budget shares to individual schools and providers.
KS1	Key Stage 1	School year groups Reception to Year 2 (Age 4 to 6).
KS2	Key Stage 2	School year groups Year 3 to Year 6 (Age 7 to 10).
KS3	Key Stage 3	School year groups Year 7 to Year 9 (Age 11 to 13).

## Bournemouth, Christchurch & Poole School Funding Consultation 2019-20

ACRONYM	TITLE	DEFINITION
KS4	Key Stage 4	School year groups Year 10 to Year 11 (Age 14 to 15).
KS5	Key Stage 5	School and FE provider year groups Year 12 to Year 13 (Age 16 to 18).
LAC	Looked After Child	A child in the care of a Local Authority.
	Lagged Funding	A term used to describe funding based on the previous year's schools census. E.g. funding for an institution's 2018-19 financial year was based on census data from the autumn 2017 census.
LPA	Low Prior Attainment	Pupils designated as not reaching the required national standards as defined by the DfE: <ul style="list-style-type: none"> <li>• Primary – not achieving the expected level of development within the EYFSP (pre and post 2013).</li> <li>• Secondary – not reaching level 4 in KS2 English or Maths.</li> </ul>
LSFF	Local Schools Funding Formula	The methodology within the APT for calculating and allocating budget shares to all mainstream schools – maintained and academies – within the parameters and datasets prescribed by the DfE.
MFG	Minimum Funding Guarantee	Percentage set locally from 2018-19 within EFSA parameters to guarantee changes in school budgets between years on a per pupil basis cannot reduce below a prescribed level.
	Mobility	An optional funding factor in the local formula. It refers to pupils who did not start the school in August or September (or not in January for pupils joining in reception).
MPPFL	Minimum Per Pupil Funding Levels	A new formula factor introduced as part of the NFF that allows a minimum per pupil funding rate to be used that incorporates pupil-led and school led funding.
NNDR	National Non-Domestic Rates	NNDR are business rates incurred by schools and businesses.
NFF	National Funding Formula	Process of allocating funding to LA's through a formulaic process based on the funding individual pupils within the area attract based on their personal characteristics. Currently the LA then decides how to distribute this funding through SBS's.
NSEN	Notional SEN	An amount determined by each Local Authority via proxy indicators for each school within the school budget share local schools funding formula to support SEN.
NFF (NF in this document)	National Fair Funding Formula	Announced national arrangement from 2018-19 to cease the previous funding inequities between Local Authorities and individual schools.

## Bournemouth, Christchurch & Poole School Funding Consultation 2019-20

ACRONYM	TITLE	DEFINITION
NOR	Number on Roll	Actual pupils at each school on the national designated termly census dates (January, May and October).
NMSS	Non-Maintained Special Schools	Schools for high needs pupils not maintained by Local Authorities and not in the fully Independent Sector
PAN	Published Admission Number	The number of new pupils that can be admitted at the start of each school year in the schools admission year group.
PGF	Pupil Growth Fund	Subject to strict criteria, funding that can be operated outside of the local schools funding formula to support pupil growth for basic need, re-opening, diseconomy and reorganisation costs.
PNA	Pupil Number Adjustment	An adjustment process for academies that receive funding based on estimated pupil numbers, to make sure funding more accurately reflects the actual pupil numbers present during the year.
POG	Post-Opening Grant	Free schools, studio schools and university technical colleges (UTCs) are provided with a POG to reflect the additional costs of establishing a new publicly-funded school.
PP	Pupil Premium	Specific grant from the DfE allocated on national rates to support pupils eligible for FSM, service children, LAC and those adopted from care.
PUF	Primary Unit of Funding	The Secondary per pupil amount of the DSG allocate by the DfE and used to calculate the total SB DSG. (See SUF for Secondary)
PVI	Private, Voluntary and Independent Providers	Non-maintained early years providers. The nationally prescribed free entitlement provision for deprived 2 year olds and 3 and 4 year olds of 15 or 30 hours weekly provision for 38 weeks is funding from the EYB DSG on actual take up.
SB	Schools Block	That part of the DSG allocated by the DfE for pupils in mainstream schools.
SBS	School budget share	SBS forms the majority of schools revenue funding and is calculated by ESFA using the funding factors determined by the local authority.
SUF	Secondary Unit of Funding	The Secondary per pupil amount of the DSG allocate by the DfE and used to calculate the total SB DSG. (See PUF for Primary)
UIFSM	Universal Infant Free School Meals	UIFSM grant is funding for schools to provide free school meals to all pupils in reception, years 1 and 2.

Below is a list of schools that responded to the Schools Funding Formula Consultation.

Infant	Type
Ad Astra Infant School	A
Canford Heath Infant School	A
Christchurch Infant School	M
Courthill Infant School	A
Lilliput Infant School	A
Mudeford Community Infants School	M
Ocean Learning Trust (St. Clements & St. John's)	A
Old Town Infant School & Nursery	A
Queen's Park Infant Academy	A
Springdale First School	A
Sylvan Infant School	A
Twin Sails Infant & Nursery	A

Primary	Type
Bayside Academy	A
Bearwood Primary and Nursery	A
Bethany CE Junior School	A
Burton C of E Primary School	M
Christ the King Catholic Primary	A
Elm Academy	A
Heatherlands	M
Heathlands Primary Academy	A
Highcliffe St Mark Primary School	M
Kingsleigh Primary School	A
Longfleet Primary School	A
Manorside Academy	A
Moordown St. John's CE Primary	A
Somerford Primary School	M
St Katharine's	M
St Luke's	A
St Michael's CE Primary School	A
St. James' CE Primary Academy	A
St. Joseph's Catholic Primary School, Christchurch	M
Talbot Primary School	A
The Epiphany School	A
The Priory Church of England Primary School, Christchurch	M

Junior	Type
Baden Powell & St Peters Junior School	A
Branksome Heath Junior School	A
Canford Heath Junior School	A
Christchurch Junior School	M
Hamworthy Park Junior School	A
Haymoor Junior School	A
Mudeford Junior School	M
Oakdale Junior School	A
Queen's Park Academy	A

Secondary	Type
Bournemouth School	A
Bournemouth School for Girls	A
Carter	A
Corfe Hills	A
Glenmoor Academy	A
Harewood College	A
Highcliffe School	A
LeAF Studio	A
Oak Academy	A
Parkstone Grammar School	A
Poole Grammar School	A
Poole High School	M
St Aldhelm's Academy	A
St Edward's School	M
The Bishop of Winchester Academy	A
The Grange School	A
Twynham School	A
Winton Academy	A

All - Through	Type
Avonbourne	A
St Peter's Catholic Voluntary Academy Trust	A

Special	Type
Tregonwell Academy	A
Longspee Academy	A

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## BOURNEMOUTH, CHRISTCHURCH and POOLE (BCP) SHADOW SCHOOLS FORUM

Subject	Central School Services 2019-20
Meeting Date	14 December 2018
Report Author (s)	Nicola Webb Email: <a href="mailto:nicola.webb@poole.gov.uk">nicola.webb@poole.gov.uk</a> Phone: 01202 63 3296
Contributors	Neil Goddard, Vicky Wales
Status	Public
Classification	For decision - all members eligible to vote
Executive Summary	The Central School Services Block of the DSG provides funding to support services for all schools and the DSG funding system as a whole. It includes funding for historic commitments at the level of the 2018-19 allocations but with funding for on-going functions reducing by 2.5% per year.
<b>Recommendations</b>	The budgets for central school services are to be agreed at the level of funding as set out in this report, with the LA making the appropriate savings required.
Reasons for Recommendations	LA statutory services support the education system as a whole with savings made to reflect the reduction in funding. The historic commitments are on-going in 2019-20 and future years.

### Background

1. The School Funding Consultation issued in November 2018 included the proposal that the funding through the Central School Services Block is allocated for the related statutory LA services and historic commitments.
2. A national formula was introduced for 2018-19 to determine LA allocations for on-going statutory services for all schools. It is largely based on pupil numbers with an allowance made for relative deprivation across LAs.
3. There is a protection arrangement in place with BCP higher levels of historic funding protected with a maximum reduction of 2.5% per year.
4. The block also includes funding for historic commitments at previous levels but the DfE has signalled these allocations will start to reduce in 2020-21.
5. Services for maintained schools only are not part of this funding block. Proposals to fund these services will come forward in the January meeting.

## Proposed Central Schools Services Budget

6. The budget proposed for 2019-20 is scheduled in the table below. :

**Table 1: Summary of Central School Services 2018-19 and 2019-20**

Central School Services	2018-19 £000's	Savings £000's	2019-20 £000's
<b>On-going Functions:</b>			
School admissions	620	(15)	605
In year fair access	145		145
Servicing Schools Forum	42	(11)	31
Licences purchased by DfE	226		226
DCC support costs	13	(13)	0
Ex ESG services all schools	746	(6)	
- Statutory & Regulatory Duties			360
- Education Welfare			300
- Asset Management			80
<b>Total On-going Functions</b>	<b>1,792</b>	<b>(45)</b>	<b>1,747</b>
<b>Estimated Funding</b>	<b>1,792</b>	<b>(45)</b>	<b>1,747</b>
<b>Commitments:</b>			
Premature retirements (ex DCC)	16		16
Commitments - ASD Base	275		275
<b>Total Budget</b>	<b>291</b>	<b>0</b>	<b>291</b>
<b>Confirmed Funding</b>	<b>291</b>	<b>0</b>	<b>291</b>
<b>Total DSG and Budget</b>	<b>2,083</b>	<b>(45)</b>	<b>2,038</b>

- Funding for on-going LA functions will take into account the numbers on roll at October 2018 census with the protected rate of £38.63 applied (2.5% reduction from baseline 2018-19 agreed with Dorset and the DfE). There will therefore be a small adjustment to the funding above in the final December Settlement with the ex-ESG services contribution to LA costs updated as a result.
- Work is progressing to finalise budget allocations in bringing the 3 LA areas together with much of the service activity focusing on day one delivery. The new staffing structure and activities within teams has not yet been determined. This will follow the appointment of the Director for Children's Services and other senior posts across the services. In consequence, the budgets supporting DSG activities remain at a summary level at this stage with the expectation that there will be changes during the year.
- Funding for commitments of £291k is the same as last year with this now fixed for 2019-20.



### **School Admissions / In-year Fair Access**

10. Some savings are proposed for the school admissions work to reflect efficiencies from LGR. Only part year savings are possible as the admission round for September 2019 will need to continue within 3 separate systems, processes and locations. This is to ensure a safe service transition for this important and highly visible service to the public.
11. The in-year fair access budget for allocation to schools has historically been included here by Bournemouth. A much smaller budget (also at historic level) is included within the high needs budget (support for inclusion). A consistent policy for all schools will be developed by the services for next year.

### **School Forum**

12. The Schools Forum budget supports the cost of the meeting itself and attendance of early years voluntary and private sector members at sub group meetings. There is also an apportionment for officer time working on the Forum business. The budget has been set at the level of the existing Bournemouth budget with the current budgets in Poole and Christchurch (share of Dorset) saved as a direct result of LGR.

### **DfE Licenses**

13. The list of licences negotiated on behalf of all schools by the DfE was included in the funding consultation. However, the LA has no influence over which licenses are included or the level of the DfE change on the DSG. These costs will be updated by the DfE in the December Settlement based on the calculation methods for each license and the numbers on roll at the October 2018 census.

### **Ex ESG Services**

14. These services are LA statutory duties on behalf of all schools, including academies and special schools. The proposed budget allocations have been reduced to reflect saving from LGR. The list of these services was included within appendix 6 of the consultation alongside the different duties for maintained schools only for clarity.
15. High level budgets for planning purposes within statutory and regulatory duties include:
  - Director Services – note that there is to be a dedicated director for Children's Services for BCP (not shared with Adult Services).
  - Facilitation of the BCP Learning Partnership.
  - Planning for the service as a whole - management and administration costs apportioned.
  - Formula and accountancy work related to the DSG – for example, development of the schools and early years formulae, budgeting, accounting, monitoring of the DSG, budget and data returns, liaison with DfE generally, activities of internal audit and the Chief Finance Officer in DSG budgets.
  - Standing Advisory Committee for Religious Education



16. The budget for education welfare services includes support for school attendance and targeted support for vulnerable pupils.
17. Asset management includes activities related to basic need capital projects and general landlord duties for academies.

### **Historic Commitments (DfE fully funding in 2019-20)**

18. The commitment of £275k is to repay prudential borrowing taken out by Bournemouth Council to fund the Springwood scheme. Springwood is an expansion of Linwood Special School on a separate campus that provides Autism Spectral Disorder provision for 54 pre-16 places and 6 post-16 places
19. The £16k for premature retirements is inherited by BCP from Dorset where pensions are still in payment by the LA directly for ex school staff living in Christchurch.

### **Consultation with schools**

20. The consultation paper included an illustration of how activities could reduce if the full funding is not allocated.
  - a. Activity supporting the Learning Partnership would need to be reduced.
  - b. Pupils with poor school attendance could be left unsupported.
  - c. Support to schools with basic need capital projects would reduce, for example existing schemes for Avonbourne Trust schools and the two Grammar schools in Bournemouth, Carter Secondary in Poole and any new projects needed for BCP.
  - d. Central activity is reduced in SEND capital projects forming part of the BCP high needs action plan. This plan includes, for example, expansion or creation of resource bases in mainstream schools (currently at Kingsleigh and Malmesbury Park with projects for other mainstream schools in development) as well as creating additional special school places (for example, currently 5 new places at Tregonwell Special school)
  - e. Potential capital bidding rounds could be left unsupported with lost opportunity of drawing government funds into BCP.
21. A summary of consultation responses is as follows:
  - a. More detail requested on school admissions and servicing of Schools Forum (more information provided in this report).
  - b. View from a small proportion of responses that academies do not see any of the expenditure on 'all schools' of the ex ESG services.
  - c. General view that schools would like to see further savings from these budgets, particularly as a result of LGR.



22. The LA response is as follows:

- a. The relevant service budgets have been reduced by £45k (2.5%) to take account of reduced DSG funding levels.
- b. Work to bring the services together will be undertaken during 2019-20 and this may incur transitional costs to release future savings. These savings will be needed for 2020-21 as funding reduces by a further 2.5%. Funding reductions for historic commitments from 2020-21 has also been signalled by the DfE, and with these costs continuing at relatively fixed levels, savings will need to be greater in other areas in future.
- c. More significantly, £385k of high needs costs have already been transferred to the Council, providing a cumulative loss of DSG funding already of £430k in 2019-20.
- d. Academies are part of these services as these budgets support the system as a whole and pupils across all schools. These budgets do not support activities for maintained schools only, as their activities are different.
- e. Some schools will make greater use of more visible services than others – for example:
  - i. Expansion projects for basic need growth will apply to only a small number of schools each year (these could be academy or maintained). Similarly, other capital grants (for example, to support the high needs action plan) will not be relevant for all schools.
  - ii. The education welfare service will be used by pupils in some schools more than others (note this funding block has a deprivation element in its formula).

## **Recommendation**

23. The budgets for central school services are to be agreed at the level of funding as set out in this report, with the LA making the appropriate savings required.

## **Equalities Impact**

24. The central school services block includes funding to support vulnerable pupils through the education welfare services, which includes activity to ensure pupils attend school.

## **Background Papers**

25. Schools Funding Consultation 2019-20 issued on 23 November 2018

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## **BOURNEMOUTH, CHRISTCHURCH and POOLE (BCP) SHADOW SCHOOLS FORUM**

Subject	Funding Transfer from Mainstream Schools to High Needs
Meeting Date	14 December 2018
Report Author (s)	Vicky Wales Email: <a href="mailto:v.wales@poole.gov.uk">v.wales@poole.gov.uk</a> Phone: 01202 26 2251 Nicola Webb Email: <a href="mailto:nicola.webb@poole.gov.uk">nicola.webb@poole.gov.uk</a> Phone: 01202 63 3296
Contributors	Neil Goddard
Status	Public
Classification	For decision - all members eligible to vote
Executive Summary	<p>This paper considers the need to transfer funding between the Schools and High Needs Blocks of the Dedicated Schools Grant.</p> <p>The rising demand for Education, Health and Care Plans (EHCPs), particularly post 16, and the increase in permanent exclusion from mainstream schools is a national issue. The DfE has provided only low funding growth to provide for demographic changes with the expectation local authorities and schools will work in partnership to manage overall cost pressures.</p> <p>The High Needs Block Financial Strategy Group (HNB FSG) has discussed the current actions to address growth trends. It has been accepted that these will take time to be drawn together across BCP and the impact on the financial strategy will be in the medium to longer term.</p> <p>High needs budgets and potential for savings have continued to be under review. This has reduced the funding gap from the £5.7m reported in November to the current level of £5.4m. Closing this gap would require a 2.8% transfer. Finding further savings by reducing high needs funding for schools or reducing outreach services is not supported by the (HNB FSG) as these would not support the medium term financial strategy. However, possible options to reduce the transfer required are included in this report for consideration.</p>

<b>Recommendations</b>	Based on the detailed information made available, and taking in to account the views expressed by schools, the Shadow Schools Forum is asked to indicate its preferred approach to balancing the High Needs Block budget. This should define the level of transfer between Schools Block to High Needs Block that Shadow Schools Forum believes is appropriate and the further actions to be taken to reduce expenditure to deliver a balanced budget for 2019-20.
Reasons for Recommendations	Further reductions in the high needs budget will impact on special schools, AP providers, and disproportionately for mainstream schools supporting higher proportions of pupils with EHCPs. A full financial strategy for BCP will take time to develop in partnership with schools. In the meantime appropriate support needs to continue for pupils identified with high needs with Schools Forums having an important role in establishing how that is achieved.

## Background

1. The Schools Block provides funding largely for delegation to mainstream schools through the local formula.
2. The High Needs Block funding largely supports individual pupils, through additional funding for mainstream schools, funding for special schools and academies and other specialist providers. It also includes the funding for those pupils unable to attend school due to exclusion or medical needs in Alternative Provision (AP).
3. The BCP School Funding Consultation 2019-20 provided a summary of the national and local context for the growth in demand for EHCPs and permanent exclusion from mainstream schools. The paper identified a funding gap of £5.7 million and this has reduced to £5.4m as work has continued to refine budget assumptions.
4. Further details of the estimated budget requirement for BCP is presented in this paper. The HNB Financial Strategy Group has reviewed these budgets in detail over 3 meetings in November. The work of this group is summarised in a separate report for the meeting agenda.
5. The amount needed for transfer of £5.4m represents 2.8% of the estimated Schools Block funding for 2019-20.
6. The level of transfer needed is above the 0.5% threshold that can be agreed by Schools Forum and the Secretary of State (SoS) would need to make the final decision. In the first instance Schools Forum will need to recommend what level of transfer should be made (if any) and the SoS will take this into account.
7. DfE guidance details the matters to be considered by schools, Schools Forum and the SoS in reaching a decision. This information is provided in the sections below.



8. This paper has been shared with all schools in BCP with a request to indicate which level of transfer (if any) they would be prepared to support. The outcome will be reported at the Shadow Schools Forum as Appendix 5 to this report as soon as it becomes available.

## Previous Movements from Schools Block to High Needs Block

9. The collective BCP 2017-18 transfers between mainstream schools and high needs funding provided circa £3 million of funding (1.5% of the current Schools Block).
10. These previous transfers are now locked into high needs funding levels for the existing LAs in 2018-19 due to the DSG budget rebase on introduction of the NFFs for Schools, High Needs and Central School Services.
11. The High Needs NFF allocations take account of historic budgets up to 2017-18 through protection arrangements in a similar way to the Schools NFF at individual school level. The Schools NFF takes no account of historic local movements between blocks but collective national transfers will have reduced funding for other blocks of the DSG.
12. In 2018-19 the BCP LAs have transferred a further £1.9m (1%) from the Schools NFF to provide central budget support for pupils with high needs. This funding transfer could be agreed for one year only.
13. In the current year demand has continued to grow faster than predicted despite the action plans in place. The £1.9m transferred is not sufficient with each BCP LA predicting high needs deficits in-year for 2018-19, with a collective total in the region of £2m. This means that the projected DSG High Needs Block funding shortfall in 2018-19 (excluding the funding transfer) is £3.9m.

## Summary High Needs Budget Pressures 2019-20

14. The growth in pupils allocated additional funding through the high needs block is continuing through EHCP requirements and the number and age profile of permanent exclusions from mainstream schools.
15. A summary of high needs budgets 2018-19 and the current draft for 2019-20 is included in the table below:

**Table 1: Summary of High Needs Budgets 2018-19 and 2019-20**

	2018-19	2019-20		
	Budget £000's	Growth £000's	Budget £000's	Growth %
EHCP	35,350	3,154	38,504	9%
Exclusions in AP	2,429	1,298	3,727	53%
Early Intervention in AP	170	-170	0	(100%)
Medicals in AP	1,449	0	1,449	0%
<b>Total</b>	<b>39,398</b>	<b>4,282</b>	<b>43,680</b>	<b>11%</b>

The detailed budgets are included in Appendix 1.

16. The above table takes into account the high needs action plans to reduce reliance on independent special schools with more places commissioned in state

funded providers. It also includes a reduction in the current rate of permanent exclusion to reflect the progress being made in the current year. However, the growth in the underlying demand means significant further budget growth is needed.

17. Budget reductions already included:

- £480k reduced top up funding rates for Poole mainstream school EHCPs to reflect the band funding system already implemented by Bournemouth and Dorset LAs. This system is considered in detail in Appendix 2. To restore all funding to previous levels would increase the funding gap by £1.5million.
- £385k removal of LA central costs for SEN assessment teams and SEND transport previously charged to the high needs budget by Bournemouth and Dorset Councils. These costs will instead add to budget pressures in BCP LA so will not be a reduction in services.
- £203k transfer from early years funding to support the high needs costs for this age group. This reduces the amount of funding available for distribution to providers.

## **EHCP Budget**

18. EHCP trends were fully analysed by the ISOS reviews undertaken in 2017 for Bournemouth and Poole. The final reports from the reviews have been shared with the Budget Reference Group (prior to the establishment of the Shadow Schools Forum) and the Shadow Schools Forum (October 2018 meeting). The existing LAs had already shared their own reviews with their individual Schools Forums and schools.

19. The reasons for EHCP growth and related budget pressures has been acknowledged nationally:

- A significant (and still rising) growth in EHCPs from the Children & Families Act 2014. This brought young people in FE colleges and other post 16 provision within scope of the EHCPs, with the age range extended to aged 25.
- The growth has accelerated rapidly since 2016 leading to a shortage of places in special schools with greater reliance on the (more expensive) independent sector.
- Greater complexity and range of need including, increased identification of autism and with mental health needs more apparent.

20. The local growth trends are summarised in the budget table at Appendix 1 with greater detail in the HNB BSG report on the agenda.

21. The ISOS reviews highlighted the following:

- Growing demand for EHCPs across all age ranges with this being dramatic in recent years.
- Profile of placements shows a greater proportion in higher cost provision, with a relatively low proportion in mainstream settings compared with the national picture. This is the case for each BCP LA.
- The need to identify support pathways for mental health and autism.

- Inconsistent SEND support in mainstream settings
- Variable understanding and prioritisation of SEND among school leaders
- Need to develop a core offer of targeted support for SEND and establish clarity on the continuum of support service and provision
- Current insufficient capacity within local specialist provision
- Need to strengthen the transition between children and adult services
- Need to find a way to manage the cost of the rising demand post 16 and establish pathways to adulthood.

22. Action Plans include:

- Commissioning extra places in special schools
- Expansion and opening bases in mainstream
- Introduction of band funding for mainstream
- Increasing FE places
- Re-commissioning outreach services for Bournemouth Schools
- Review of Independent School Places and re-commissioning where possible
- Work with Adult Social Care on preparation for adulthood.

More detail is included in the HNB BSG paper on the agenda.

## **EHCP Benchmarking**

23. The High Needs NFF provides low funding growth to BCP because of relatively high historic budgets compared nationally.

24. The 2018-19 benchmarking for Bournemouth, Dorset and Poole against statistical neighbours is shown in Appendix 3. The trends shown are not new and include that each LA has a lower proportion of pupils with an EHCP overall but for placements types there is:

- Greater proportion in the non-state sector (Independent and non-maintained special schools).
- Lower proportion in:
  - LA special schools
  - Mainstream school classes
  - Mainstream school bases

25. This pattern of provision clearly has implications for the budget with the local strategy including reduced reliance on the highest cost providers. However, it must be acknowledged that the needs of pupils in these placements are generally the most complex. This means they are often residential and include significant levels of individual support, with alternatives not available in the state sector.

26. It also needs to be recognised that a significant number of LAs have DSG deficits with actual high needs expenditure greater than the budget shown in benchmarking information.

## Permanent Exclusion Budget

27. The trend of rising exclusions is a national issue linked in part to accountability systems, including that funding for behaviour support is delegated to schools but the high needs block bears the majority of costs for educating excluded pupils. BCP has recently experienced relatively high exclusion rates with the budget already significant before further growth is included. The BCP budget in 2018-19 is £2.4m representing place funding (£1.2m) plus top up funding (net £1.2m). The current year budgets across BCP are not adequate, and this accounts for the sharper rise (53%) than would otherwise be expected from future trends only. The cost of education in AP is significantly greater than in mainstream and pupils can stay in the provision for several years, depending on age at exclusion.
28. There were 131 excluded pupils in AP in September 2018. The HNB FSG paper provides the details of the age and placement profile. In building the BCP budget for 2019-20, it is assumed in the first instance that current pupils will continue in AP with new exclusions up to March 2019 added at a rate matching the profile over academic year 2017-18 (allowing for year 11 pupils to age out in Sept 2019).
29. If this trend is realised, pupils in AP will reach 244 by the end of March 2020, with BCP requiring budget for an average of 218 (full time equivalent) pupils over the financial year 2019-20 at a cost of over £4 million. The growth estimate is shown in Table 2 below.

**Table 2: Estimated Pupil Growth in AP up to March 2019**

<b>Exclusion Estimate</b>	<b>On roll Sept 18</b>	<b>Autumn 2018</b>	<b>Spring 2019</b>	<b>Summer 2019</b>	<b>Leavers Year 11</b>	<b>Autumn 2019</b>	<b>Spring 2020</b>	<b>Total FTE</b>
Months in provision 19-20		<b>12</b>	<b>12</b>	<b>12</b>	<b>-7</b>	<b>7</b>	<b>3</b>	
Pupils (FTEs)*	131	39	36	17.5	-21.0	11.4	4.5	<b>218.4</b>
Places in 19/20		+39	+36	+35	-72	+39	+36	
<b>Total by Term</b>	<b>131</b>	<b>170</b>	<b>206</b>	<b>241</b>	<b>169</b>	<b>208</b>	<b>244</b>	
Academic year 2018-19 increase for start of 2019-20					<b>38</b>			
*FTE assumes exclusions occur evenly through terms (50%)								

30. Protocols have been established to reintegrate pupils into mainstream provision with additional funding and support provided after normally a period of time in AP. Currently, the number successfully moved back remains small with the main budget impact being in future years when the cost of the AP place can be saved in full. It does however free up places in maintained and academy AP to avoid more expensive alternatives. The budget assumes £460k (20 places in higher cost provision) can be saved through actions taken over the remainder of 2018-19 and throughout 2019-20.
31. Commissioned Places in AP 2019-20

BCP intends to commission the following places at local AP provision:-

<b>Places at £10k each</b>	<b>Number</b>	<b>£000's</b>
Tregonwell	44	440
The Quay School	68	680

Christchurch Learning Centre	28	280
<b>Total</b>	<b>140</b>	<b>1,400</b>

32. The £10k place funding is paid regardless of whether a place is filled and AP providers need to work with schools to make the best use of these places while empty through the development of services supporting schools. Top up funding will be needed from schools for these services. Central funding has previously been provided in a number of schemes over time to support schools and to ensure greater use of the capacity (and achieve better value for money) but this is no longer affordable within the high needs budget.
33. The shortfall in places by the end of the financial year (and into the next) will need to be met by other providers. The full cost of these places is included in top up funding in the table in Appendix 1.

## **Contributions from Health and Social Care**

34. The budget figures are reported net of contributions from the NHS or Social Care. The cost apportionment is based on the support arrangements on a case by case basis. The budgeted contributions for existing cases total £450k per year but the final amount received will depend on the circumstances of any new cases.

## **Strategic Financial Plan**

35. Unless the current trends can be reversed significantly it will be difficult to set a balanced high needs budget in 2020-21 and 2021-22 without continuing a transfer from schools, additional DSG being provided, or changes being made to central government policies.
36. The DfE have a clear desire to improve value for money in high needs budgets and action plans are in place to drive down average costs of support. However, rising demand means that overall costs will continue to rise. It is recognised that some of the measures simply move costs to individual schools and this may need to continue until the national impact of central policy changes are acknowledged.
37. A 3-year plan is included in Appendix 4. This shows a contribution from early years and schools funding each year but also requires the DfE to increase funding in support of their policies.

## **Options for Further Savings**

38. An alternative to a funding transfer is that the High Needs Budget is brought back into balance by cutting services and reducing funding levels to schools. At the current time it is not considered to be possible to fully balance the budget and continue to provide appropriate support for all pupils with high needs.
39. To reduce the budget from that shown in Table 1 there would need to be further reductions in high needs support to mainstream school pupils and reduced funding levels for special schools and AP. The potential possible reductions are scheduled in the Table 3 below.

**Table 3: Potential Further Budget Actions for Consideration**

Action	Description	£000's
	<b>Current shortfall (2.8% transfer)</b>	<b>(5,390)</b>
Mainstream Top-up	Reduce banding top-up rates by half (from current Bournemouth and Dorset levels)	1,040
Outreach	Elements of outreach become buy back services	200
Sensory Impaired	Schools pay for children without EHCPs (part of £6k delegated)	480
Special Schools & Units	Reduce funding by 1.5% (MFG)	330
Alternative Provision	Reduce funding by 1.5% (MFG)	80
Early Years SEN Support	Reduce central SEN support to early years providers	100
		<b>2,230</b>
	<b>Revised Shortfall (1.6% transfer)</b>	<b>(3.160)</b>

40. Not included in the above table is the maximum further increase in transfer from early years funding of £600k (to maximise the central retention of 5%). This would reduce the base rate in the early years funding formula by 15p.
41. The potential savings in Table 3 are not recommended as they do not support the long term strategy and some of these actions would disadvantage further those mainstream schools with higher levels of SEND.
42. These savings could reduce the shortfall to £3.160 million with the transfer needed to balance the high needs budget reducing from 2.8% to 1.6% of the Schools Block funding.

## Consultation with all Schools

43. All schools are being consulted on the contents of this paper and are asked to express a view on the level of transfer to be supported by the Shadow Schools Forum. The related paper from the HNB Financial Strategy Group has also been distributed as part of this consultation.
44. The outcome of this consultation will be included as Appendix 5 and distributed prior to the Shadow Schools Forum meeting.

## Recommendations

45. The Shadow Schools Forum is to decide the level of transfer from the Schools Block to High Needs to take into account the view of schools.

## Legal Implications

- 46. Schools and Schools Forum must be consulted on proposals to transfer funding from mainstreams schools to support pupils with high needs from central budgets.
- 47. Schools Forum can agree a transfer of funding of up to 0.5% of Schools Block funding.
- 48. The Secretary of State must approve a higher level of transfer or to override the Schools Forum.

## **Financial Implications**

- 49. The indicative implications for individual school budgets of varying levels of transfer were detailed in the BCP Schools Funding Consultation issued on 23 November 2018.
- 50. A separate report will contain the outcome of that consultation for consideration by the Shadow Schools Forum also in the December meeting. Final mainstream school formula proposals will come forward at the January 2019 meeting.

## **Equalities Impact**

The High Needs Block budgets directly fund support for some of the most vulnerable children. Reducing funding to this area would result in the need for centrally funded support services to reduce, with larger reductions in mainstream top-up funding and cuts to special school and alternative provision funding. This could impact on the quality of provision for pupils with high needs.

## **Background Papers**

Schools Funding Consultation 2019-20 issued on 23 November

High Needs Block Financial Strategy Group Report to Schools Forum 14 December 2018 (attached)

## Appendix 1

### Draft High Needs Budget 2019-20

	2018/19	Sept 18	2019/20				Assumptions/Risks
	Budget £000's	EHCP	Growth £000s	Budget £000s	Mar 20 EHCPs	Ave. Top up	
Independent Schools	6,116	82	-1,499	4,617	76	£61k	B Independents currently growing at 7% p.a. P has reduced FTEs by 24% in 18/19 (one off from review). Plan to reduce over time. Budget to save 3 placements from review of C provision and a further 1 placement from each B, C and P. Full cost (no + £10k). .
Special Schools (NMSS)	5,645	142	-157	5,488	154	£36k	NMSS is preferred to Independent if need cans be met. B increased by 20%. P has more than doubled in the last year. Reducing this growth to 8% will be challenging.
FE Colleges	812	200	-4	808	264	£3k	18-19 saw circa 50% increase in post 16 as increased numbers of EHCPs age into Post 16. Budget profiled to continue (currently 140 pupils in year 11 with an EHCP), expecting 120 to go on to post-16 education, with 1/3 below the threshold for top-up). Aim to develop the offer so more of these are kept local (bespoke / college, but ISP are likely to continue to rise due to lack of options locally.
Independent Colleges	1,410	40	1,415	2,825	53	£53k	
Academy and Maintained Special Schools	8,174	678	727	8,901	718	£12k	6% growth in places currently and assumed this will continue. Equates to an extra 44 places in special schools. Work to be done with special schools to see if / where this can be delivered. 4 places removed as saving
Mainstream Special Units	429	24	44	473	32	£15k	Aim to increase share of EHCPs in mainstream provision through "mainstream plus". Increased places in existing special units in B and new places in P. Assuming places will gradually fill from September and be full by the new year
Mainstream School	2,655	726	-475	2,180	770	£3k	6% growth for BCP. P saw 25% in 18-19 but this is not expected to be repeated. Budget currently assumes the B and C banding system will be applied to P (saving £480k)
Medical / Therapies	42	7	72	114	7	£16k	Growth to 7 EHCP at September. Growth is full year impact.
Bespoke	612	47	482	1,094	56	£20k	20% growth (as in 18-19) as alternatives to high cost independent.
Pre-School	3	12	209	212	12	£18k	Includes family moved in with 3 EHCPs
Awaiting Placement	231	20	0	231	20	£12k	Pending placements
LAC	130	20	297	427	20	£21k	EHCPs agreed and maintained by other LAs - costs are recharged
Nil Cost EHCPs	0	179	0	0	211	0	Growth is 1/3 of cohort moving to Post-16 (below the £6k threshold),



	2018/19	Sept 18	2019/20				Assumptions/Risks
	Budget £000's	EHCP	Growth £000s	Budget £000s	Mar 20 EHCPs	Ave. Top up	
							NEET, Employed / Apprenticeship
<b>EHCP Top Up Total</b>	<b>26,259</b>	<b>2,178</b>	<b>1,111</b>	<b>27,370</b>	<b>2,394</b>	£11k	Overall increase of 10% in numbers of EHCP from Sept 2018 to March 2019.
<b>EHCP Place Funding</b>	<b>6,814</b>	<b>732</b> (included in above)	<b>1,856</b>	<b>8,670</b>	<b>1,024</b> (included in above)		Includes increase for extra places 18-19 (at £6k or £10k) plus growth.
<b>TOTAL EHCPs</b>	<b>33,073</b>	<b>2,178</b>	<b>2,967</b>	<b>36,040</b>	<b>2,394</b>	<b>£16k</b>	<b>Budget Increase 9% growth</b>
Early Bird, SALT	<b>180</b>		<b>0</b>	180			Commissioned services
SEN Transport	<b>225</b>		<b>-225</b>	0			Moved to LA Budget in 2019/20
0-5 High Needs & Inclusion	<b>801</b>		<b>152</b>	953			Re-alignment of costs. Early Years block to meet higher Inclusion Fund (allocated to providers) of £124k with £326k portage included in high needs, less £50k of savings..
Outreach & Sensory Impaired	<b>1,071</b>		<b>260</b>	1,331			No growth in sensory impaired. Growth is new Bournemouth outreach
<b>TOTAL SEN</b>	<b>35,350</b>		<b>3,154</b>	<b>38,504</b>			<b>Total EHCP Budget Increase 9%</b>
Exclusions AP Top Up	1,229	NOR 131	<b>1,558</b>	2,787	NOR 218		Exclusions continue with current profile. Top-up for non-place funded AP funded at an average of 15 hours per week. (some support is 1:1) Accepted practice but does have consequences.
Reducing Exclusions			<b>-460</b>	-460	NOR -20		Target of 20 fewer (full year equivalent) from action plans.
AP Places state provides	1,200	Places 124	<b>200</b>	1,400	Places 140		Additional exclusion places - 8 in Quay, 8 in Christchurch
Early Intervention	170		<b>-170</b>	0			Poole project funded from reserves ending.
Places (Medical)	1,321		<b>0</b>	1,321			Includes cross border provision within the NHS.
Private Hospitals	128		<b>0</b>	128			Placements by NHS, with Education cost the duty of LA. (resident)
<b>TOTAL AP</b>	<b>4,048</b>		<b>1,128</b>	<b>5,176</b>			<b>Total AP Budget Increase 27%</b>
<b>TOTAL HNB (SEN + AP)</b>	<b>39,398</b>		<b>4,282</b>	<b>43,680</b>			<b>Overall Budget Increase 11%</b>
DSG	<b>(37,543)</b>		<b>(544)</b>	<b>(38,087)</b>			Estimated
Transfer SB	<b>(1,855)</b>		<b>1,855</b>	<b>0</b>			No Transfer from schools included
Transfer E/Years	<b>0</b>		<b>(203)</b>	<b>(203)</b>			1% Transfer from Early Years
<b>Shortfall</b>	<b>0</b>		<b>5,390</b>	<b>5,390</b>			<b>Residual Funding Gap</b>

### **BCP HNB Financial Strategy Group: Mainstream School EHCP Banding System for Top Up Funding**

#### **Summary**

Moving to banding of mainstream school EHCPs payments saved the High Needs Block in Bournemouth c. £874k.

In building the BCP SEND budget for 2019-20, it has been assumed the above banding will be applied to all schools. This saves a further £480k with the main impact of the change being seen in Poole schools.

#### **Banding Detail**

1. Dorset introduced mainstream banding in October 2017 to support children and young people with complex special educational needs or a disability (SEND) and that have an Education, Health and Care Plan (EHCP).
2. Part of the Bournemouth strategy to reduce pressure on the High Needs budget in 2018-19 was to change the way in which EHCP's were funded in mainstream schools. As part of this strategy, the Bournemouth Schools Forum approved a budget recovery plan that reduced EHCP funding in mainstream schools by 20%. This was in-line with a forecast reduction in spend of circa £500,000. An additional £500,000 was initially planned to be saved by changing the method through which the schools' contribution of £6000 towards the total funding was pro-rated.
  - 2.1. The initial proposal was not to pro-rata the schools £6,000 contribution. However following consultations with schools this was changed such that the £6000 was pro-rated according to whether the pupil was present at the school in either the period Apr-Aug, or Sep – Mar within that financial year. For instance, if the pupil was only present at the school for the 2018-19 AY within the 2018-19 FY (i.e. the period Sep 18 – Mar 19), then the school would be expected to contribute £6,000 x number of schooldays within this period/ number of school days within the relevant financial year.
  - 2.2. Banding was introduced to mirror closely the Dorset approach, in anticipation of Local Government Reorganisation to simplify the alignment of policies across Bournemouth, Christchurch and Poole.

### 2.3. Funding bands used:

Funding band	1	2	3	4	5
High Needs Funding (elements 2 & 3) *	£6,000	£7,000	£8,300	£9,600	£11,000
Equivalent Hours	16 hours or less	16.01 – 21.5 hours	21.51 - 27 hours	27.01 – 32.5 hours	32.51 – 37.5 hours
Provision overview	Access to support in targeted lessons	Access to support in all academic lessons	Access to support in all lessons	Access to support in all lessons, breaks and lunch times	Access to support in all lessons, breaks and lunch times for pupils with very complex needs

\*Note: For each band, Schools & Academies will fund the first £6,000 from their Notional SEN Budgets, with the remainder being payable by the LA as the High Needs Top-up.

2.4. These bands correspond with the Dorset Bands of SEN Support (Band 1), Band A Lower (Band 2), Band A Upper (Band 3), Band B Lower (Band 4) and Band B Upper (Band 5).

2.5. Existing EHCPs were assigned to a Band based on the 'equivalent TA hours' stated in the ECHP. E.g. EHCP states 18 hours = Band 2 or 35 hours = Band 5. The funding changed from 1st September but EHCPs will be amended over a period of time.

2.6. Effective from the 1st September, new EHCPs are allocated to a Band based on the evidence provided using the SEND Process Guidance and Banding Descriptors.

2.7. The provision overview is similar for both Bournemouth and Christchurch.

2.8. Banding was introduced with the aims of addressing High Needs Budget pressures, simplifying the system and allowing for flexibility and a creative approach in meeting the needs of pupils with an EHCP.

### **3. Key Benefits of a Banding Model**

3.1. A transparent and simplified approach to top-up funding in mainstream schools

- This reduces administrative burdens
- Easier for parents to understand

3.2. Removes association between EHCP plan and funded TA hours

- Reduces the risk of parental frustration that TA hours of support does not match that named on the EHCP.

3.3. Encourages consistency in the Local Area

- Dorset adopted mainstream banding from Oct 2017, Bournemouth introduced banding from Sep 2018, and it is likely that BCP Council adopts banding from April 2019.

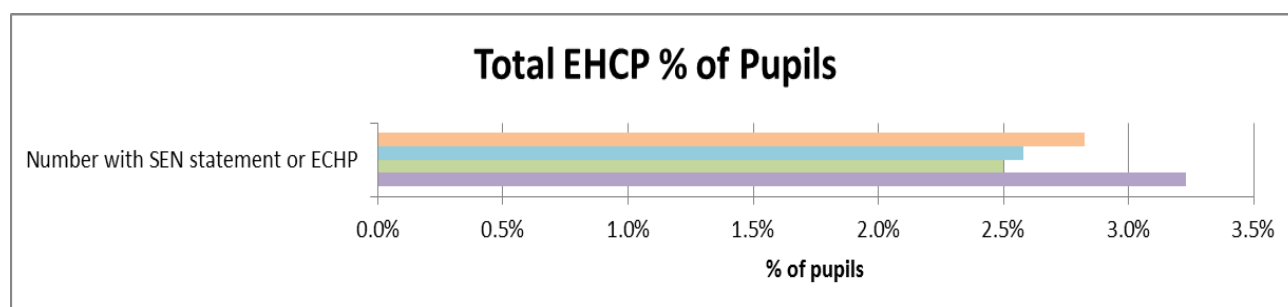
### **4. Financial Impact of Implementing Banding in Poole**

- 4.1 Aligning Poole with Dorset & Bournemouth's current funding (after applying the reductions indicated above and bringing plans into fixed band values) will have initial financial implications for Poole schools.
- 4.2 Impact analysis of applying current banding values to Poole settings indicate that EHCP funding to settings will reduce on average by 44%.
- 4.3 The impact on individual schools' budgets will be made clear in advance of implementation.
- 4.4 Applying the banding system at a reduced funding level does not reduce the cost of high needs provision but transfers the responsibility for resourcing that provision to schools' budgets.
- 4.5 The aim of implementing banding levels (at reduced rates) is to slow the growth in spend while allowing schools to have more control of how budgets are spent.
- 4.6 Schools need to feel able to meet children's needs with resources available to prevent risk of further use of specialist provision and increased exclusions.

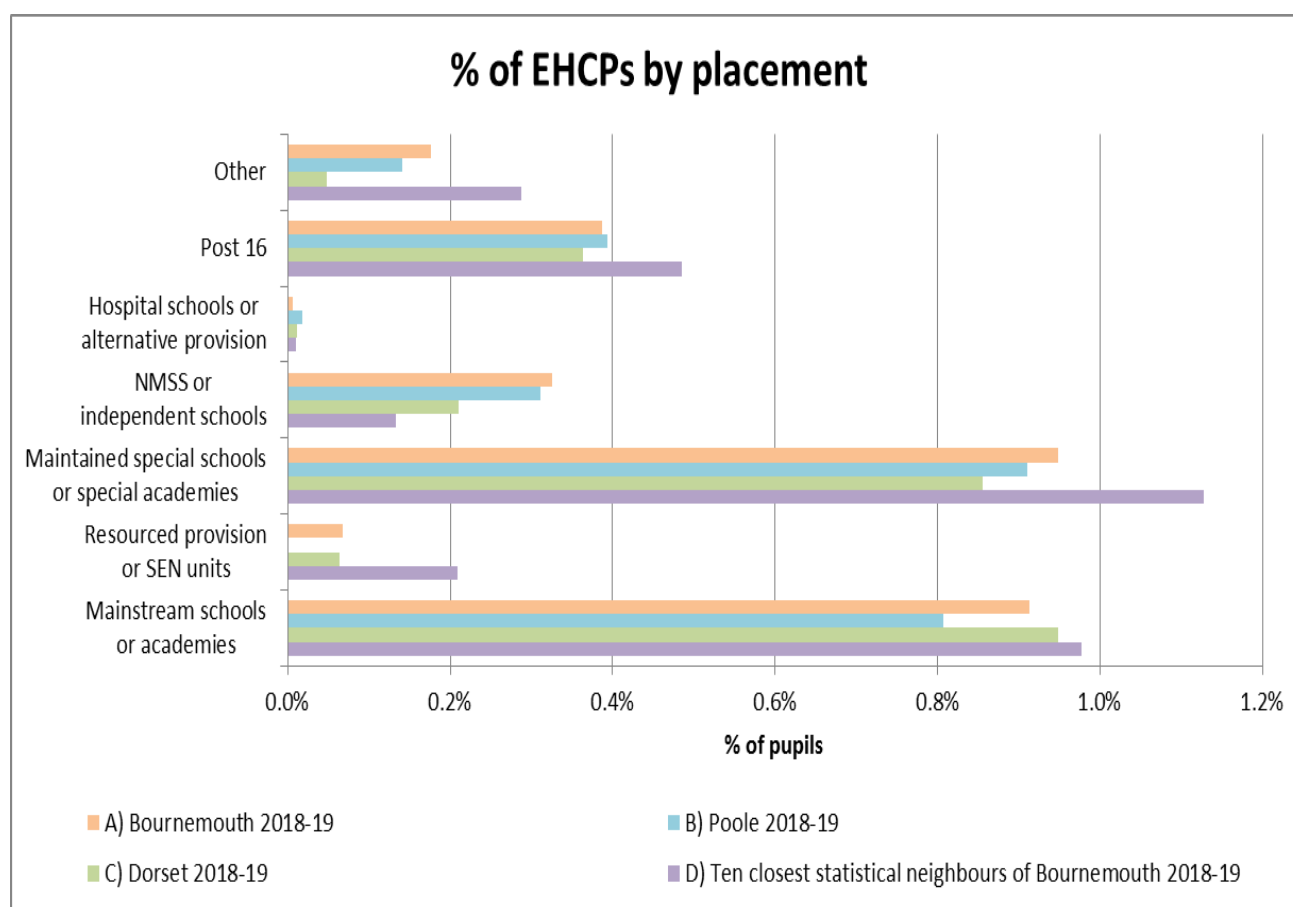
### Benchmarking – SEND Return January 2018

Charts 1 and 2 below show each BCP LA Proportion of EHCP and Placement type compared with Bournemouth's 10 closest statistical neighbours. The picture for Poole's 10 equivalent LAs is similar (some of these LAs are the same).

**Chart 1 - Total EHCP % of Pupils**



**Chart 2 – Placement Type % Pupils**



## Strategic 3 Year Financial Plan

HIGH NEEDS PROVISION	2019-20 DRAFT BUDGET			2020-21			2021-22		
	EHCPs	Forecast	Average	Forecast		Average	Forecast		Average
		Cost	Top-Up	FTE	Cost	Top-Up	FTE	Cost	Top-Up
<b><u>INDEPENDENT &amp; NON-MAINTAINED SPECIAL SCHOOLS</u></b>									
Total Independent current	82	5,054,394	61,639	76	4,616,725	60,746	73	4,434,486	60,746
Saving 3 places in C, 1 further in each B,C & P (6 total)	-6	-437,668	72,945	-3	-182,239	60,746	-3	-182,239	60,746
Total Non-Maintained Special Schools current	142	5,060,623	35,538	154	5,488,167	35,545	160	5,701,437	35,545
Growth 10% less 2 placements	12	427,543	35,629	6	213,271	35,545	3	106,635	35,545
<b>Total Independent &amp; Non-Maintained</b>	<b>230</b>	<b>10,104,892</b>	<b>43,858</b>	<b>233</b>	<b>10,135,924</b>	<b>43,427</b>	<b>233</b>	<b>10,060,320</b>	<b>43,103</b>
<b><u>POST 16</u></b>									
Pre 16	149	485,131	3,256	149	485,131	3,256	149	485,131	3,256
Post 16	50	139,919	2,798	115	276,623	2,405	165	396,893	2,405
Current growth repeated allowing for 1/3 below the threshold	64	182,622	2,853	50	120,271	2,405	40	96,217	2,405
Total Colleges	263	807,672	3,059	314	882,024	2,809	354	978,241	2,763
11-16	4	186,097	46,524	4	186,097	46,524	4	186,097	46,524
16-19	19	1,118,912	58,890	19	1,118,912	58,890	19	1,118,912	58,890
Post-19	17	774,992	45,588	30	1,453,212	48,440	38	1,840,736	48,440
Current growth repeated less 5 placements (2B, 1C, 2P)	13	678,220	52,171	8	387,523	48,440	5	242,202	48,440
Total Independent Colleges	55	2,824,706	51,358	61	3,145,745	51,570	66	3,387,947	51,333
<b>Total Post 16</b>	<b>318</b>	<b>3,632,378</b>	<b>11,387</b>	<b>375</b>	<b>4,027,769</b>	<b>10,741</b>	<b>420</b>	<b>4,366,188</b>	<b>10,396</b>
<b><u>SPECIAL SCHOOLS</u></b>									
Previous Year	678	8,404,620	12,396	718	8,901,288	12,397	750	9,298,623	12,398
Current level of growth repeated less 4 places	40	496,668	12,417	32	397,335	12,417	24	298,001	12,417
<b>Total Special Schools</b>	<b>718</b>	<b>8,901,288</b>	<b>12,397</b>	<b>750</b>	<b>9,298,623</b>	<b>12,398</b>	<b>774</b>	<b>9,596,624</b>	<b>12,399</b>
<b><u>MAINSTREAM &amp; SPECIAL UNITS</u></b>									
Total Mainstream (Poole moved to banding)	726	2,055,993	2,831	770	2,180,312	2,831	814	2,304,858	2,831
Growth 6%	44	124,319	2,825	44	124,546	2,831	44	124,546	2,831
Total Mainstream Bases	24	369,951	15,415	32	472,776	14,813	40	590,044	14,813
Growth - filling all new bases through the autumn term 2019	8	102,825	12,988	8	117,268	14,813	8	117,268	14,813
<b>Total Mainstream and Special Units</b>	<b>802</b>	<b>2,653,088</b>	<b>3,307</b>	<b>854</b>	<b>2,894,902</b>	<b>3,389</b>	<b>906</b>	<b>3,136,717</b>	<b>3,462</b>
<b><u>MEDICAL/THERAPIES</u></b>									
<b>Total Medical / Therapies</b>	<b>7</b>	<b>113,893</b>	<b>16,270</b>	<b>7</b>	<b>113,893</b>	<b>16,270</b>	<b>7</b>	<b>113,893</b>	<b>16,270</b>
<b><u>BESPOKE</u></b>									
Previous Year	47	986,188	20,983	56	1,094,188	19,539	65	1,202,188	18,495
Growth 20% but at reduced ave. cost of 12k	9	108,000	12,000	9	108,000	12,000	9	108,000	12,000
<b>Total Bespoke</b>	<b>56</b>	<b>1,094,188</b>	<b>19,539</b>	<b>65</b>	<b>1,202,188</b>	<b>18,495</b>	<b>74</b>	<b>1,310,188</b>	<b>17,705</b>

HIGH NEEDS PROVISION	2019-20 DRAFT BUDGET			2020-21			2021-22		
	EHCPs	Forecast	Average	FTE	Forecast	Average	FTE	Forecast	Average
		Cost	Top-Up		Cost	Top-Up		Cost	Top-Up
Total Pre-School	12	212,148	17,679	12	212,148	17,679	12	212,148	17,679
TOTAL PLACEMENTS	2,144	26,711,875	12,456	2,297	27,885,446	12,143	2,426	28,796,076	11,868
Total Zero Top-up	179	0	0	204	0	0	224	0	0
Awaiting School Placement / New Arrival in Area	20	230,640	11,532	20	230,640	11,532	20	230,640	11,532
LAC - EHCP agreed by OLA	20	427,487	21,374	20	427,487	21,374	20	427,487	21,374
TOTAL EHCPs	2,363	27,370,002	11,580	2,541	28,543,573	11,235	2,690	29,454,204	10,948
Early Bird		48,000			48,000			48,000	
NHS SALT & other therapies		132,000			132,000			132,000	
Exceptional Circumstances - request to add from HNB FSG		0			0			0	
Outreach		573,000			573,000			573,000	
HVSS		758,000			758,000			758,000	
0-5 High Needs (can teams find any savings for 19-20?)		712,000			662,000			612,000	
Inclusion & Out of School		241,000			241,000			241,000	
PLACES 18/19		9,525,000			11,390,667			11,760,699	
PLACES Growth		1,865,667			370,032			280,024	
TOTAL SEN		41,224,668			42,718,272			43,858,926	
Exclusions		1,229,000			2,326,950			2,326,950	
Exclusions Growth		1,557,950							
Reduced Exclusions		-460,000							
Hospital		128,000			128,000			128,000	
TOTAL AP		2,454,950			2,454,950			2,454,950	
TOTAL HNB		43,679,618			45,173,222			46,313,876	
Funding									
High Needs Block (provisional)		38,086,889			38,686,889			39,286,889	
Department Recognition of HN pressures					5,386,333			5,926,988	
Transfer from Early years (assume 1% then, 0.5%, 0.5%)		203,000			100,000			100,000	
Transfer from Schools Block (balance then 0.5%)		5,389,730			1,000,000			1,000,000	
Total Funding Available		43,679,618			45,173,222			46,313,876	

**Outcome of Consultation with Schools**

**To follow**



# **Bournemouth, Christchurch and Poole Schools Funding Transfer: Schools Block to High Needs Block 2019-2020 Consultation Response Form**



**There is to be only 1 response per school please**

Responders should consider the Shadow Schools Forum 14<sup>th</sup> December 2018  
Agenda Item 7: 'Funding transfer from Mainstream Schools to High Needs' paper  
when answering this form.

**Consultation closes 9:00am Thu 13th December 2018**

## **Funding Transfer into the High Needs Block**

### **QUESTION 1**

Do you agree that it would be preferential to set a budget to meet forecast need under the policies and provision factored into the budget illustrated in Appendix 1?

Yes		No		Not Sure	
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### **QUESTION 2**

If you do not agree, which of the Options for further funding reductions in Table 3 do you support?

		Yes	No	Rational
a	Mainstream Top up			
b	Outreach			
c	Sensory Impaired			
d	Special Schools and Units			
e	Alternative Provision			
f	Early Years SEND support			

**Bournemouth, Christchurch and Poole Schools Funding Transfer:**  
**Schools Block to High Needs Block 2019-2020 Consultation**  
**Response Form**

**QUESTION 3**

Do you have any suggestions on any other area(s) where spend on high needs pupils can be reduced without breaching statutory requirements?

Yes	<input checked="" type="checkbox"/>	No	<input type="checkbox"/>	Not Sure	<input type="checkbox"/>
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If yes, please provide details of this/ these

**QUESTION 4**

Up to what level of transfer from the Schools Block would you support? (please provide a tick against the level you agree). The percentages are the proportion of Schools Block funding. Please provide any rationale behind your decision.

		Yes	Rationale
a	No Transfer	<input type="checkbox"/>	
b	Up to 0.5% - Schools Forum level of approval without need for further consideration by the Secretary of State.	<input type="checkbox"/>	
c	Up to 1% - similar level as 2018-19	<input type="checkbox"/>	
d	Up to 1.6% - equal to taking all savings in Table 3 in the SFF Funding Transfer paper.	<input type="checkbox"/>	
e	Up to 2.8% - potential to meet full projected budget requirement (with no further savings)	<input type="checkbox"/>	
f	Other	<input type="checkbox"/>	

**Bournemouth, Christchurch and Poole Schools Funding Transfer:**  
**Schools Block to High Needs Block 2019-2020 Consultation**  
**Response Form**

**General Comments**

**QUESTION 5**

Any there any further comments you would like to make about any issues in this consultation?

*(We appreciate that the consultation response window is considerably shorter than we would set under normal circumstances)*

**Responder Information:**

Name: \_\_\_\_\_ Position: \_\_\_\_\_

School: \_\_\_\_\_

Please return to [jack.cutler@bournemouth.gov.uk](mailto:jack.cutler@bournemouth.gov.uk)

Or by post to:

Jacqui Phillips  
Schools Commissioning  
Community Learning and Commissioning, E3  
Bournemouth Town Hall  
Bournemouth  
BH2 6EB.

**Consultation closes 9:00am Thu 13th December 2018**

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## **BOURNEMOUTH, CHRISTCHURCH and POOLE SHADOW SCHOOLS FORUM**

**14 DECEMBER 2018**

**FORWARD PLAN 2018-19**

### **January**

- Final Mainstream School Formula Report
- Early Years Formula
- Maintained School Central Retentions
- Growth Fund

### **February**

- LAC – Pupil Premium
- Maintained Schools Scheme of Delegation

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