

Notice of Schools Forum

Date: Friday, 17 January 2020 at 8.00 am

Venue: Main Hall - Bournemouth Learning Centre - BLC



Membership:

Chairman:

Phil Keen

Vice Chairman:

Patrick Earnshaw

Russell Arnold

Mark Avoth

Andy Baker

Cllr D Brown

Kate Carter

Jon Chapple

Geoff Cherrill

Lauren Dean

Ben Doyle

Linda Duly

Phillip Gavin

Brigid Hincks

Jason Holbrook

Sue Johnson

Angela Malanczuk

Cllr S Moore

David Newman

Jacqueline Page

Jeremy Payne

Sean Preston

Michael Reid

Dave Simpson

All Members of the Schools Forum are summoned 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: Jacqui Phillips - 01202 456147 or email Jacqui.phillips@bcpcouncil.gov.uk

Press enquiries should be directed to the Press Office: Tel: 01202 454668 or email press.office@bcpcouncil.gov.uk

This notice and all the papers mentioned within it are available at democracy.bcpCouncil.gov.uk

GRAHAM FARRANT
CHIEF EXECUTIVE

9 January 2020



Available online and
on the Mod.gov app



AGENDA

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

- | | |
|--|---------------|
| 1. Introduction | |
| 2. Apologies for Absence
To receive any apologies for absence. | |
| 3. Declarations of Interest
To receive any declarations of disclosable pecuniary interests from Forum Members/Officers in matters appearing on the agenda. | |
| 4. Minutes of the Previous Meeting
To confirm the minutes of the previous meeting, held on 5 November 2019, as a correct record. | 5 - 14 |
| 5. Introduction from DfE representative | Verbal Report |
| 6. Dedicated Schools Grant (DSG) Budget Monitoring 2019-20
The report considers the projected end of year position for the DSG budget 2019-20 at a net deficit of £1.9m.

There is a predicted overspend of £2.7m resulting from pressures within the High Needs Block, but this is partially offset by funding adjustments relating to prior years (£0.6m) and saving in the Central School Services Block (£0.2m).

The resulting forecast deficit at 31 March 2020 is £5.5m. | 15 - 18 |
| 7. Dedicated Schools Grant (DSG) Settlement and Budget 2020-21
1. The initial DSG Settlement was received on 19 December 2019. It provided:

a. Initial allocations for the Early Years Block based on the January 2019 census incorporating the announced £0.08 per hour increase in funding.

b. Final allocations for the Schools Block based on the October 2019 schools census. The increase in funding through the Schools NFF for 2020-21 totals £11.9 million (6%). Higher funding values account for £9.3 million, as reported in November, with additional pupils at census providing a further £2.6 million. Funding for in-year pupil growth at September 2020, has increased by £52k compared with last year.

c. Final allocations for the Central School Services Block based on the October 2019 census with the increase in pupil numbers providing an additional £18k of funding compared with the | 19 - 24 |

November report. This represents an annual reduction of £84k

- d. Indicative allocations for the High Needs Block have increased by £246k compared with the November report. However, an element of funding remains dependent on the January 2020 census with allocations to be updated again in summer 2020.

2. A draft DSG budget is provided in the Appendix to provide context for decisions on the meeting agenda. The funding gap remains in the scale of £8m as included within the School Funding Consultation issued in December.

8. Statement from Parent Carer Forum	25 - 28
To consider the report.	
9. High Needs Block Financial Strategy Group	29 - 34
To receive a powerpoint presentation.	
10. Schools and Early Years Formula Consultation outcomes and Transfer to High Needs Block	35 - 168
This report sets out the outcome of the Schools and Early Years Funding consultations, and proposals for the BCP funding formulae and growth fund. The report also provides a proposal for reducing the projected High Needs budget gap, and requires approval for the Central School Services Block (CSSB) budgets and services to maintained schools and central budgets supporting the early years free entitlements.	
11. Forward Plan	169 - 170
To consider and note the Forward Plan	
12. Dates of Future Meetings	
<ul style="list-style-type: none">• Friday 19 June 2020• Additional dates are TBC	
13. Any Other Business	
To consider any other business, which, in the opinion of the Chairman, is of sufficient urgency to warrant consideration.	
14. Exclusion of the Public and Press	
To consider passing the following Resolution (if required):	
"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) [INSERT PARAGRAPH NUMBER HERE] 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.

BCP SCHOOLS FORUM

TUESDAY, 5 NOVEMBER, 2019

Present: Phil Keen (Corfe Hills School) - **Chairman**
Patrick Earnshaw (Highcliffe School) - **Vice - Chairman**

Russell Arnold, The Quay School
Mark Avoth, The Bourne Academy
Andy Baker, Poole Grammar School
Kate Carter, TEACH Academy Trust
Jon Chapple, Twynham Primary
Geoff Cherrill, Winchelsea School
Ben Doyle, St Peter's School
Linda Duly, Cuddles Day Nursery
Brigid Hincks, St Joseph's Primary School
Jason Holbrook, Avonbourne Girls Academy
Sue Johnson, Jack in the box Bournemouth
David Newman, Poole High School
Jeremy Payne, St James' CE School
Sean Preston, Hamwic
Andrew Reeks, Bournemouth & Poole College
Michael Reid, Ambitions Academy Trust (substituted by Sian Thomas)
Dave Simpson, The Epiphany School

Also in attendance: Councillor David Brown, BCP Council
Councillor Sandra Moore, BCP Council

Officers in attendance: Jack Cutler – Planning and Statistics Officer – BCP Council
Julian Radcliffe – Service Director – Inclusion & Family Services- BCP Council
Nicola Webb – Assistant Chief Finance Officer – BCP Council

25. Introduction

The Chair opened the meeting and welcomed all present.

26. Apologies for Absence

None.

27. Declarations of Interest

There were no declarations of disclosable pecuniary interests

28. Minutes of the Previous Meeting

RESOLVED that the Minutes of the Meeting held on 25 September 2019, having been previously circulated, be taken as read, signed and confirmed by the Chairman as a correct record.

It was noted that all other matters arising are covered in the agenda.

29. Dedicated Schools Grant (DSG) Funding Announcements for Bournemouth, Christchurch and Poole (BCP) 2020-21

Nicola Webb, Assistant Chief Finance Officer, BCP Council, presented the report.

Since the paper was written the early years announcements had been made and these gave an increase for 2, 3 and 4 yr. olds. The department have increased the rate by 8p per hour. It was noted that the pre-school Learning Alliance had challenged the Government funding rates and had been successful and the details will be published on 15 November 2019.

The National Funding Formula (NFF) for mainstream schools was close to what was expected and as reported at the September meeting.

There is an increase of 8.8% to High Needs which is slightly higher than expected. This was due to the higher demographic growth that the department uses for their calculations.

There will be a 2.5% reduction to the Central Services block for on-going LA duties. The reduction for historic commitments is 20% which looks like this will be phased out over 5 years (but nothing has yet been indicated by the DfE).

RESOLVED that the report was noted.

30. Mainstream Schools Formula 2020-21 Proposals for Consultation

Jack Cutler, Quality and Commissioning, BCP Council, presented the report.

At the last meeting the data was provisional but there is now more certainty on the figures as detailed information and clarifications have been received.

There has been a significant change to the Minimum Per Pupil Funding Levels (MPPFL). The formula factors have received a significant increase of 4% excluding Free School Meals (FSM). Minimum Funding Guarantee (MFG) has been applied against the 19/20 NFF allocations rather than against the individual school's budget distribution formula. The MFG in the local formula protects against last year's actual funding rates.

As there was transfer between blocks last year this meant that school allocations were slightly below NFF. This and other vagaries in the formula

methodology mean there is £100,000 surplus after all schools have been allocated NFF allocations for 2020/21. This could be transferred to high needs or for distribution to mainstream schools. The Growth Funding has not been announced yet.

It was explained that in 19/20 the NFF had been scaled back of for the transfer to the High Needs Block through various levers – MFG, cap, MPPFL and levels of the Basic Entitlements.

It was noted that the MPPFL is expected to be used as a mandatory factor in 20/21 and set at the level of the NFF. To reduce these a disapplication request will be needed with this linked to affordability as Ministers want these levels to be achieved as a matter of policy.

MFG can be set between +.5 and +1.84% which will see an increase against last years figures. There has been an increase of 4% in the formula rates for most factors. There is no cap in the NFF 20/21 but a cap can apply to the LFF.

In 2019/20 the NFF was adjusted in 4 ways to achieve a funding level for transfer. The MFG could be varied and scaled back. Formula schools funding could be based on a decision to scale all formula factors or only the basic entitlement, the maximum scaling would be when all formula schools can be put onto the MFG. It was noted another option was to set a gains cap all formula schools and this will target those who have the largest gains. The last option was to scale back the MFPPL from the NFF rates but note this requires the DfE to agree.

There have been changes in the formula factors for 2020/21. The data from 3 census details have been used to determine mobility in a new formulaic way. This has allocated more money to BCP. It will be £400,000 compared to £50,000. Mobility funding will be included in the MPPFL not on top.

It was questioned how many schools in BCP would be impacted by the changes to the mobility factor. It was estimated that 10 schools would be impacted. The threshold for mobility has been lowered with more schools now qualifying in the LFF.

Table 3 shows the indication of the NFF allocations when applied through the LFF based on the October 18 census pupil numbers and characteristics which could be subject to change when the October 19 census details are received in December. There will be larger gains in the Primary phase area due to the larger increase in MPPFL.

About 40% of primary and 1/3 secondary schools have protection on the MPPFL. The schools that are on Minimum Funding Guarantee (MFG) have reduced as funding rates have increased by 4%, lifting more schools on to the formula.

It was confirmed that Table 5 showed an indication of the indicative amounts that could be transferred to the HNB. It was noted that Table 6

shows the effect of varying the MPPFLs. A disapplication would need to be applied for to achieve this outcome. Table 7 shows the impact of variable Funding Gains Cap. Some schools could see a gain of 10%.

Table 9 shows the impact of scaling back the basic entitlement factor with the MFG at 1.84%. If this was scaled back to 0.5% table 10 shows the impact and how much funding could be released. Table 11 indicates the different ways to transfer to the HNB similar to last year.

It was clarified that there were 2 options. The Forum to be consulted based on the principles outlined in the report. A sub-group could be established to look at the funding formula in more detail.

It was acknowledged that there was the intention that there will be a school funding consultation based on the report to look at potential transfer. Schools will be consulted on the principles outlined in the report.

It was noted that the requirements for the disapplication vary. There will be MFG protection for one school equal to 20% of its annual budget and this could be reduced through a disapplication request to DfE.

Option 2 would see a lower MFG set. 10% of schools would see a more significant reduction. 0.5% of the amount would go to the HNB. The disapplication requirements would not apply to this option. Growing all through schools (adding primary year groups) require a different MFG calculation to avoid over protection of funding at the higher secondary level. The MFG baseline pro-forma from the DfE is used but it still requires formal approval by the DfE. This has been approved by the Forum previously.

It was confirmed that both options would need a disapplication request. It was noted that the view from Central Government that you must have a strong case to vary funding levels.

A question was asked regarding the expectation that a further transfer would be required for 2020-21. Nationally it was noted that the DfE's position is that they have provided additional funding allocated to the HNB. This could be sufficient for the DfE to block disapplication's. Locally there is significant budget pressure and the amounts are not enough to create a balanced budget. It was considered that there is not sufficient funding and a balance will be required. It was suggested that an affordability issue may be grounds that the DfE may consider.

The Deficit Recovery Plan drawn up in June assumed the DSG could be balanced in-year only with significant extra funding from the DfE and with 0.5% transfers from mainstream schools continuing.

It was noted that there is an alternative to transfer to decrease the need for HNB. It was confirmed that the transfer was not addressing the under lying issue. The DfE are looking to legislate to include that Councils are not responsible for clearing the DSG deficit and should not top up the annual budget without express approval from the Government. A consultation is

currently live with the outcome now after the election. It was questioned that if the LA was not responsible for the deficit and paying it back, who was?

It was put forward that the recovery plan would affect the schools with the largest amounts of SEND the most. It was also suggested that if more of the funding came to the school that the school could help solve the HNB by having the resources in school to deal with it. It was noted that more pupils with EHCP leave mainstream schools as there is a lack of experienced staff to deal with the pupil in school. It was acknowledged that the number of EHCP's have gone up by 50% but there had been cuts to the SEND budget.

It was suggested that the options being put forward were the same as the previous year and that a different approach needed to be considered.

It was agreed that a consultation sub-group be arranged to discuss the options available prior to the consultation. It was confirmed that the LA follows the legislation in the amount that must be transferred.

RESOLVED that disapplication requests be applied for (but could be withdrawn or amended subsequently following further consultation) by unanimous agreement.

31. Permanent Exclusion Financial Adjustment: A Revised Proposal

Jack Cutler, Quality and Commissioning, BCP Council, presented the report.

The report comprised a revised proposal for the permanent exclusion financial adjustment. It is based on the statutory minimum and a half way measure on the original proposal. The principle is that the funding follows the pupil. It was explained that if the funding followed the pupil this would contribute to funding Alternative Provision (AP) or for the pupil in the receiving school. The adjustment would follow either the LA financial year or the academy financial year, whichever was applicable.

It was explained that the original proposal was that if a pupil was excluded after October the full additional funding including Pupil Premium (PP) relating to the next financial year would form part of the exclusion charge. The revised proposal states that if a child was excluded after the October census date the funding would be adjusted through the additional factor and the PP funding only (ie not the basic entitlement) for the next financial year. The element funding would be unique to that pupil (and may not apply to any replacement)

It was confirmed that this proposal only applied to additional factors and PP. The basic entitlement would be adjusted from the relevant date in the current financial year only

It was questioned what would happen if a pupil was excluded from an academy and went to a maintained school. It was confirmed that the

financial year end of the receiving school would be considered, and the amount would be pro-rata to the end of the financial year. It was suggested that this would be a disadvantage for the HNB where the pupil is moving from a LA school to an Academy but would be an advantage if the pupil moved from an Academy to a mainstream school.

It was noted that the principle of the money following the pupil was not the basis of any other financial application. It was confirmed that there was a lot of mobility in the authority.

RESOLVED: Schools Forum voted on the revised proposal. This was passed with 10 votes for, 1 against and 4 abstentions. This would now require a consultation with schools.

32. High Needs Report

Julian Radcliffe, Service Director Inclusion and Family Services BCP Council, presented the report.

Julian Radcliffe introduced himself and clarified his role within BCP. He noted that there were challenges within his area of responsibility in relation to the HNB. It was confirmed that he wanted to secure strong partnership working between the LA and schools.

It was noted that there remains challenge around vulnerability both within BCP, regionally and nationally and the system as a whole will need to work together to address this.

It was suggested that the report details a complex situation and that some, but not all of the current challenges are external to LA control. The demographic challenge was noted and the fact that the age range for High Needs (HN) had been extended through legislation.

It was clarified that there had been significant pupil growth and there were more children with complex needs due to medical advances. There are also increasing numbers of pupils with autism and SEMH which presents a challenge for schools. It was noted that teachers must be supported to include pupils presenting with challenging behaviour and it was suggested that this was greatest in KS3/KS4.

A large number of pupils are being placed in high cost settings. This is placing a significant demand on the HNB and needs to be addressed as a priority

Concerns were raised about the number of exclusions increasing each year at KS 3 and 4. The number of pupils excluded in BCP is twice the national average. This needs to be understood and also addressed as a priority.

It was noted that there remains a lack of sufficiency in mainstream schools in respect of additionally resourced places. A discussion was held on this issue and it was agreed that sufficiency had to be a priority. Concerns were

raised that the costs would continue to increase if this issue was not addressed.

It was suggested that alongside sufficiency the workforce needed to be supported and with the right support (including a strong WFD offer), so they felt confident and enabled to include vulnerable pupils in schools.

It was confirmed that an increase in specialist services for schools, would also promote the confidence and capability of staff to support pupils with more complex needs .

Issues with the 14+ curriculum were raised. It was felt that a more traditional curriculum was not always a good fit for pupils and this can impact on their overall engagement. Some pupils need a different approach and options need to be explored.

The issue of joint commissioning was raised – in relation to Health engagement and contribution. At this time, these arrangements appear under developed and costs associated with more complex pupils (in particular) sit with Education.

The view was expressed that children do not exist in isolation; rather they exist in a series of systems (i.e. home; school; community) and each of these needs to be stable if children are able to thrive. Future service design will need to ensure a holistic perspective that identifies and supports unmet across these 3 systems.

A culture of inclusion was described as central to future success in this area. This perspective needs to be championed and developed across the partnership.

It was suggested that a more detailed report be produced to show how a different approach would impact on the financial position. It was discussed how the potential financial gains could be achieved through a more inclusive and capable workforce.

It was questioned whether Early Years (EY) would be included? It was confirmed that Amanda Gridley is the lead officer in this area and she would be key in ensuring EY are represented in future developments.

It was suggested that this approach had the potential to affect the forecast depending on how quickly the recommended approach could be put in place. It was pointed out that the HNB could be reduced by meeting the needs of the children in school.

After discussion it was agreed that the DfE needed to understand the unique needs of 3 authorities coming together. This would allow the allocation next year to recognise and allow capital investment to support the suggested plan for the HNB.

RESOLVED that the report be noted.

33. Forward Plan

**BOURNEMOUTH, CHRISTCHURCH and POOLE
SCHOOLS FORUM**

Forward Plan

December 2019

- Early Years Formula Consultation Outcome
- Mainstream Schools Formula Consultation Outcome
- High Needs Block Financial Strategy Group
- Central School Services Budget 2020-21
- DSG Budget Monitoring 2019-20

January 2020

- DSG Settlement and Budget 2020-21
- Growth Fund 2020-21
- Funding Transfer from Schools Block 2020-21
- Maintained Schools Central Retention 2020-21
- Looked After Children Pupil Premium Arrangements 2020-21
- Early Years Formula Consultation Outcome
- Visit from ESFA representative

June 2020

- DSG Outturn 2019-20
- High Needs Block Financial Strategy Group
- Scheme of Financing Maintained Schools (if update is required)

34. Dates of Future Meetings

- Wednesday 11 December 2019
- Friday 17 January 2020
- Friday 19 June 2020

35. Any Other Business

Felicity Rise informed the forum about a planet and climate change programme that was being partnered with Bournemouth University. Details would be sent out in due course.

It was noted that there is a meeting on 25 November to discuss SEND and that all Headteachers will be invited.

The Chair thanked all the members for their valued contribution to the discussion.

The meeting ended at 10.00 am

CHAIRMAN

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BOURNEMOUTH, CHRISTCHURCH and POOLE SCHOOLS FORUM

Subject	Dedicated Schools Grant (DSG) Budget Monitoring 2019-20
Meeting Date	17 January 2020
Report Author	Nicola Webb, Assistant Chief Finance Officer e-mail: nicola.webb@bcpcouncil.gov.uk Tel: 01202 63 3296
Contributors	Steve Ellis, Management Accountant – Childrens Services
Status	Public
Classification	For information
Executive Summary	<p>The report considers the projected end of year position for the DSG budget 2019-20 at a net deficit of £1.9m.</p> <p>There is a predicted overspend of £2.7m resulting from pressures within the High Needs Block, but this is partially offset by funding adjustments relating to prior years (£0.6m) and saving in the Central School Services Block (£0.2m).</p> <p>The resulting forecast deficit at 31 March 2020 is £5.5m.</p>
Recommendation	The report is to be noted
Reason for the recommendation	Budget monitoring is an important element of current year financial management and budget planning for future years.

Estimated DSG Income 2019-20

1. There have been no changes to the forecast DSG income since the September report. Early years funding remains estimated and will be finalised with the outcome of the January 2020 census in summer 2020.

Estimated Expenditure 2019-20

2. Estimated expenditure for each block is summarised in Appendix A. An overspend of £2.7m is expected on the High needs block despite actions taken to date. Savings in other areas reduce the in-year deficit to £1.9m. The cumulative deficit is therefore expected to increase from £3.6m to £5.5m at 31 March 2020.

Early Years Block Spend

3. In terms of the average cost per hour, the spend to date remains in line with the budget set. A lower proportion of hours continue to attract the Deprivation supplement than budgeted as reported in September. The increasing cost of the inclusion fund (SEND) is expected to use any surplus generated by lower deprivation allocations and this has been reflected in preparing budget estimates for 2020-21

Schools Block Spend

4. The mainstream schools funding formula is being paid to mainstream schools and recouped by the ESFA for academies as per the formula set in January 2019.
5. The growth fund allocations are being paid out to schools as budgeted.

Central School Services Block Spend

6. The funding is provided for LA duties supporting the DSG system and services for all schools – mainstream and special in both maintained and academy sectors.
7. The saving in school admissions is due to £130k not being allocated within the in-year fair access budget.
8. As reported in September the charge for copyright licences from the DfE for all schools is less than budgeted as the DfE estimate included VAT which the LA can recover, giving a saving of £45k.

High Needs Block

9. The reasons for the growing high needs funding gap were explored in the November Schools' Forum report with further narrative and proposed actions included in the School Funding Consultation paper.
10. The further increase at December reflects rising costs from Independent and non-maintained special schools and mainstream bases filling up more rapidly than previously expected. There has been some offset from a reduced forecast for excluded pupils and those placed in alternative provision (AP) due to a reassessment of activity to date. Capacity freed up in our own AP has a significant impact on the budget as it reduces the need for expensive bespoke arrangements.

Financial Implications

11. The DSG deficit is forecast to grow to £5.5m by 31 March 2020 as a result of the 2019-20 outturn deficit of £1.9m.
12. A sustainable budget position has not yet been achieved for 2020-21 with the deficit expected to grow by a further £8 million by 31 March 2021 without continued transfers between funding blocks, further budget cuts or additional actions to reduce demand.

Legal Implications

13. It is a requirement of the Council to monitor budgets during the financial year and best practice that the Schools Forum is made aware of issues relating to the DSG.

Appendix A

DSG Budget Monitoring 2019-20	Budget					Forecast at 31 December	
	Early Years	Schools	Central Services	High Needs	Total	Outturn	Variance
	£000's	£000's	£000's	£000's	£000's	£000's	£000's
DSG 2 - year olds NFF *	(2,772)				(2,772)	(2,543)	229
DSG 3 - year olds NFF *	(18,920)				(18,920)	(18,058)	862
DSG NFF Other Blocks		(193,712)	(2,062)	(38,885)	(234,659)	(234,659)	0
DSG Import/Export					0	(301)	(301)
DSG Premises		(1,797)			(1,797)	(1,797)	0
DSG Growth Fund		(1,806)			(1,806)	(1,806)	0
DSG Pupil Premium *	(100)				(100)	(89)	11
DSG Disability Access Fund *	(74)				(74)	(74)	0
DSG Transfer to High Needs	203	2,192		(2,395)	0	0	0
DSG Prior Year (final July 19)					0	(662)	(662)
Council Contribution				(2,400)	(2,400)	(2,400)	0
Total Funding	(21,663)	(195,123)	(2,062)	(43,680)	(262,528)	(262,389)	139
Providers – 2-year olds	2,624				2,624	2,395	(229)
Providers – 3 and 4 - year olds	18,172				18,172	17,272	(900)
Providers SEN top up grants	512				512	550	38
Early Years Pupil Premium	100				100	89	(11)
Disability Access Fund	74				74	74	0
Early Years LA duties	181				181	181	0
Mainstream Schools Formula		194,344			194,344	194,344	0
Growth Fund		779			779	779	0
School Admissions			750		750	620	(130)
Licences Purchased by DfE			265		265	220	(45)
Servicing Schools Forum			31		31	18	(13)
Ex ESG Services (all schools)			726		726	726	0
Premature retirements			16		16	16	0
ASD Base / other			275		275	275	0
Place Funding				11,621	11,621	10,479	(1,142)
Top up Funding -Main'd/Academies				11,984	11,984	13,491	1,507
Top up Funding - Independent/NMSS				10,105	10,105	12,220	2,115
Top up Funding - Post Schools				3,633	3,633	3,623	(10)
Top up Funding - Pre schools				212	212	116	(96)
Top up Funding - Excluded Pupils/AP				2,327	2,327	1,917	(410)
Outreach				573	573	778	205
Hospital Education Top up				128	128	128	0
Bespoke SEN /Therapies				1,388	1,388	2,317	929
Support for Inclusion				241	241	241	0
Early Years Central SEN support				712	712	618	(94)
Sensory Impaired Service				758	758	758	(0)
Total Expenditure	21,663	195,123	2,062	43,680	262,528	264,245	1,717
(Surplus) / Deficit	Prior Yr (662k)	0	0	(188)	2,706	0	1,856

*Funding remains estimated until summer 2020

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BOURNEMOUTH, CHRISTCHURCH and POOLE (BCP) SCHOOLS FORUM

Subject	DSG Settlement and Draft Budget for 2020-21
Meeting Date	17 January 2020
Report Author	Nicola Webb – Assistant Chief Finance Officer Email: nicola.webb@bcpcouncil.gov.uk Phone: 01202 63 3296
Classification	For information
Executive Summary	<p>1. The initial DSG Settlement was received on 19 December 2019. It provided:</p> <ul style="list-style-type: none"> a. Initial allocations for the Early Years Block based on the January 2019 census incorporating the announced £0.08 per hour increase in funding. b. Final allocations for the Schools Block based on the October 2019 schools census. The increase in funding through the Schools NFF for 2020-21 totals £11.9 million (6%). Higher funding values account for £9.3 million, as reported in November, with additional pupils at census providing a further £2.6 million. Funding for in-year pupil growth at September 2020, has increased by £52k compared with last year. c. Final allocations for the Central School Services Block based on the October 2019 census with the increase in pupil numbers providing an additional £18k of funding compared with the November report. This represents an annual reduction of £84k d. Indicative allocations for the High Needs Block have increased by £246k compared with the November report. However, an element of funding remains dependent on the January 2020 census with allocations to be updated again in summer 2020. <p>2. A draft DSG budget is provided in the Appendix to provide context for decisions on the meeting agenda. The funding gap remains in the scale of £8m as included within the School Funding Consultation issued in December.</p>
Recommendations	To note the contents of the report.
Reasons for Recommendations	Other papers on the agenda consider the impact of the Settlement and DSG budget in detail.

2020-21 DSG Settlement on 19 December 2019

1. The December Settlement information for 2020-21 compared with the forecast for 2019-20 is included in Table 1 below:

Table 1 – DSG December Settlement 2020-21

Funding Block	Forecast 2019-20	Forecast 2020-21	Annual Change	%
	£000's	£000's	£000's	
Early Years				
2-year olds Entitlement	2,543	2,582	39	1.5%
3-year olds Entitlement	18,058	18,394	336	1.9%
Pupil Premium	89	89	0	0.0%
Disability Access Fund (DAF)	74	78	4	5.4%
Total Early Years	20,764	21,143	379	1.8%
Schools Block				
Primary	102,755	108,304	5,549	5.4%
Secondary	90,957	97,330	6,373	7.0%
Total NFF	193,712	205,634	11,922	6.2%
Premises	1,797	1,658	-139	-7.4%
Growth	1,806	1,858	52	2.9%
Total Schools	197,315	209,150	11,835	6.0%
Central School Services				
NFF	1,771	1,745	-26	-1.5%
Commitments	291	233	-58	-19.9%
Total Central School Services	2,062	1,978	-84	-4.1%
High Needs (estimated gross*)	39,186	42,874	3,688	9.4%
Total DSG Funding	259,327	275,145	15,818	6.1%

*Place funding of £5,152k deducted in net allocation tables

Early Years Block

2. The published information includes indicative allocations only and these will be updated in summer 2020 and 2021 based on future data returns.
3. The early years estimates for both 2019-20 and 2020-21 use the January 2019 early years census data. The growth in funding for 2, 3 and 4-year-olds in table 1 therefore represents the £0.08 per hour increase announced for each age group.
4. The early years funding will be updated from census take up of free entitlement hours in January 2020 and January 2021, with all funding being finalised in summer 2021.

Schools Block

5. School Block allocations are now final for 2020-21 with the mainstream school NFF allocations updated to reflect pupil numbers at the October 2019 census and with Growth Fund allocations determined according to the national approach introduced from 2019-20.
6. Compared with 2019-20 the increase in the NFF total is £11.9 million (6.2%). This comprises £9.3 million (4.8%) from the increase in unit values (as shown in the November report) with a further £2.6 million (1.4%) from rising pupil numbers as shown in Table 2 below.

Table 2: Mainstream Schools Final NFF 2020-21

	November Report (based on October 2018 census)			December Settlement (based on October 2019 census)			Change
	Pupil Numbers	Unit Value £	Funding £000's	Pupil Numbers	Unit Value £	Funding £000's	Funding £000's
Primary	27,669	£3,911.01	108,214.	27,692	£3,911.01	108,304	90
Secondary	18,182	£5,215.68	94,829	18,661	£5,215.68	97,330	2,501
Total NFF			203,043			205,634	2,591

7. The October 2019 census contained an additional 502 pupils (1% increase) compared with the previous year, comprising 23 primary and 479 secondary pupils. Secondary growth is expected to continue in September 2020. The Growth Fund proposals in a separate paper consider how this in-year growth is to be funded. DSG funding for growth is £52k higher than last year.
8. Updated school data from the October 2019 census is not reflected in the NFF primary and secondary units of funding until 2021-22. The school level census data used to calculate individual school budgets arrived on 17 December with options for the formula evaluated and considered further in a separate paper on the agenda.

Central School Services Block (CSSB)

9. The funding rates for the CSSB are as provided in the November report.
10. The rise in pupil numbers at census has dampened the reduction in funding to £84k (compared with the decrease of £102k in November before pupil growth is taken in to account).

High Needs Block

11. The High Needs Block allocations were announced in October with changes made in December to reflect the autumn place return. This has resulted in an additional £246k estimated by the DfE. The final adjustment to reflect the cross-border flow of pupils based on the January 2020 census will be made in summer 2020.

Draft DSG Budget 2020-21

12. The Appendix includes an illustrative draft budget for 2020-21 with the projected outturn for 2019-20 shown for comparison. Note that the high needs DSG funding shortfall for 2019-20 is currently estimated at £6.7m. (block transfers of £2.4m, Council contribution of £2.4m plus estimated over spend of £1.9m).
13. The assumptions in the draft budget for 2020-21 include:
 - a. the growth fund is shown using the lowest cost option within the school funding consultation. If an alternative is agreed, then the amount available for the mainstream school formula would change by an equivalent amount.
 - b. service savings in high needs will be achieved of £1.5m as included in the school funding consultation

- c. the high needs adjustment in summer 2020 will not change the funding gap (funding could increase or decrease dependent on high needs placements at January 2020).
 - d. the overall high needs budget requirement is the same as presented in the November report with a change to reflect the projected 2019-20 outturn for below budget AP costs and further increased costs of Independent/non-maintained special schools.
 - e. currently no funding transfer has been included.
 - f. the Central Schools Services Block is set at the level of funding.
 - g. the early years block continues a central retention at the same 1% level as last year (£210k) for illustrative purposes with this not yet allocated to reduce the high needs funding gap
14. The above assumptions provide an annual funding gap of £8 million without:
- a. transfers of funding from Early Years or Schools
 - b. further cuts to high needs services (for example, outreach) which may become necessary
 - c. further activities to reduce the budget requirement.

Central School Services Block

15. The proposed budget for this Block was included within the School Funding Consultation. Service restructuring has been on-going with continued refinement of activity and costs.
16. The latest budget proposal included in the Appendix differs from that in the Consultation. Table 1 below provides the latest position compared with 2019-20 and as included in the consultation for 2020-21.

Table 3: Central School Services 2020-21

2020-21 at (consultation)	Central School Services	2019-20 £000's	Changes £000's	2020-21 £000's
291	Statutory and Regulatory Duties	346	99	445
414	Education Welfare	300	114	414
80	Asset Management	80	68	148
785	Total Ex ESG Services	726	281	1,007
632	School admissions	750	(327)	423
230	Licences purchased by DfE	265	(30)	235
18	Servicing Schools Forum	30	(12)	18
20	Premature retirements (ex DCC)	16	4	20
275	Commitments - ASD Base / other	275	0	275
1960	Total CSSB Expenditure	2,062	(84)	1,978

Funding has been reallocated between budget areas to better align to the emerging plans for supporting pupils and schools in 2020-21. The budgets for school admission had included staff undertaking a range of activity some of which is to be refocussed. This includes planned increase in collaborative work to raise pupil attainment (statutory duties), increase preventative work to reduce

exclusions and improve attendance (education welfare) and support for the high needs capital programme (asset management).

Financial Implications and Risks

17. The DfE has recognised that historically there has been insufficient funding in the high needs block to implement the 2014 policy reforms. It is unlikely that the DfE will announce the outcome of the consultation on how DSG deficits are to be managed going forward before the 2020-21 budget must be set. There is no expectation of any further national contributions to this position

18. A mechanism must be put in place to deal with the deficit (in-year and historic). There is currently a projected DSG deficit at the end of March 2021 of £13.5 million as follows:

£3.6 million brought forward

£1.9 million deficit for 2021-20

£8.0 million current gap in high needs for 2020-21

13.5m Total.

19. Advice from the Council's external auditor states that without any national clarification or ownership of this deficit then it would have to be held against the Council's unearmarked reserves on its balance sheet. As at 31 March 2020 these are forecast to be at their lowest recommended amount of £15.4m. Holding the deficit against these reserves will present a real danger to the Council financial health and question its future sustainability. Therefore, the BCP Schools Forum and the Council must act to reduce the projected 2020-21 funding gap.

20. There continues to be a risk that projected costs will rise further with activities to reduce budget demand not delivering outcomes as required.

Legal Implications

21. Schools Forum must be advised of the DSG Settlement for 2020-21 and consider the Budget needed to meet the needs of all pupils.

22. The Council must manage its finances to maintain a sustainable position

Background Papers

November 2019 Schools Forum Papers

School Funding Consultation 2020-21 issued in December 2019

DSG Budget 2020-21	2019-20	Illustrative Draft Budget 2020-21					Change
	Forecast	Early Years	Schools	Central Services	High Needs	Total	2019/20 to 2020/21
	£000's	£000's	£000's	£000's	£000's	£000's	
DSG 2 - Year olds NFF	(2,543)	-2,582	0	0	0	-2,582	-39
DSG 3 - Year olds NFF	(18,058)	-18,394	0	0	0	-18,394	-336
DSG NFF Other Blocks (final)	(234,659)	0	-205,634	-1,978	-42,874	-250,486	-15,827
DSG Import/Export (final in July)	(301)	0	0	0	0	0	301
DSG Premises (final)	(1,797)	0	-1,658	0	0	-1,658	139
DSG Growth Fund NFF (final)	(1,806)	0	-1,858	0	0	-1,858	-52
DSG Early Years Pupil Premium	(89)	-89	0	0	0	-89	0
DSG Disability Access Fund	(74)	-78	0	0	0	-78	-4
DSG Prior Year (final July 19)	(662)	0	0	0	0	0	662
Council Contribution	(2,400)	0	0	0	0	0	2,400
Total Funding	(262,389)	(21,143)	(209,150)	(1,978)	(42,874)	(275,145)	(12,756)
Providers - 2 -Year olds	2,395	2,431	0	0	0	2,431	36
Providers - 3 and 4 - Year olds	17,272	17,593	0	0	0	17,593	321
Providers SEN top up grants	550	557	0	0	0	557	7
Additional Central Retention	0	210	0	0	0	210	210
Early Years Pupil Premium	89	89	0	0	0	89	0
Disability Access Fund	74	78	0	0	0	78	4
Early Years LA duties	181	185	0	0	0	185	4
Mainstream Schools Formula	194,344	0	208,531	0	0	208,531	14,187
Growth Fund	779	0	619	0	0	619	-160
School Admissions	750	0	0	423		423	-197
Licences Purchased by DfE	220	0	0	235		235	15
Servicing Schools Forum	31	0	0	18		18	0
Ex ESG Services (all schools)	726	0	0	1,007		1,007	281
Premature retirements	16	0	0	20		20	4
ASD Base	275	0	0	275		275	0
Place Funding	10,479	0	0	0	10,468	10,468	-11
Savings Strategy	0	0	0	0	-1,500	-1,500	-1,500
Top up Funding – State sector	13,491	0	0	0	14,057	14,057	566
Top up Funding - Independent/NMSS	12,220	0	0	0	15,145	15,145	2,925
Top up Funding - Post Schools	3,623	0	0	0	3,897	3,897	274
Top up Funding - Pre schools	116	0	0	0	140	140	24
Top up Funding - Excluded Pupils/AP	1,917	0	0	0	2,157	2,157	240
Outreach	778	0	0	0	1,091	1,091	313
Hospital Education Top up	128	0	0	0	128	128	0
Bespoke SEN /Therapies	2,317	0	0	0	3,680	3,680	1,363
Support for Inclusion	241	0	0	0	241	241	0
Early Years Central SEN support	618	0	0	0	612	612	-6
Sensory Impaired Service	758	0	0	0	750	750	-8
Total Expenditure	264,245	21,143	209,150	1,978	50,866	283,137	18,892
Funding Gap	1,856	0	0	0	7,992	7,992	

*Illustrative transfer for early years of 1% included

We will briefly introduce ourselves and what Parent Carers Together forum is and why we exist.

Followed by this statement:

Parent Carers Together are concerned that there is no parental representation within the high needs funding process. While we acknowledge that most parents will neither understand the funding formula you are using, nor care where the funding to support their children comes from we do hear from parents that they are worried and concerned about the lack of funding on the school's ability to meet the needs of their child(ren) and others in the school.

We believe there is a lack of clarity and transparency within the system. It can be difficult to understand why children with similar needs often get different levels of funding or in some cases none at all and differences in the length of time that funding is allocated for. There also appears to be no accountability - it appears that schools do not have to justify how they spend any funding they receive.

As parents of children with SEND we want our children to have their educational needs met whether or not they have a diagnosis, are receiving SEN Support or they have an EHCP. Whatever the funding arrangements are, what's important is that children and young people's needs are a) recognised and b) supported with appropriate expertise.

Parent Carers Together would also like to highlight the importance of the need for early intervention and support. The 2014 (updated in 2015) SEND Code of Practice puts emphasis on the importance of early identification and schools' role within this: 'All schools should have a clear approach to identifying and responding to SEN. The benefits of early identification are widely recognised – identifying need at the earliest point and then making effective provision improve long-term outcomes for the child or young person.' (section 6.14 of the Code). Early identification isn't just about the early years though, and it's vitally important that children's needs are identified as early as possible and the more children that can be identified before starting school, the better. However, many children can and do slip through the net.

Please ask yourselves the following questions:

1. Are your students central to decisions made about their education?

The SEND Code of Practice puts the child or young person at the heart of decision making around their education. They need to be involved in target setting and evaluations and to identify what is important to them now and in the future.

2. Do you use the expertise and knowledge of parents?

How strong is the parental/school relationship and how well do you engage your parents? Parents and carers are the experts on their children - the code recommends schools work in partnership with them and involve them in decisions and make use of their knowledge.

3. Are you really using the graduated approach?

SEND support should arise from this constant four part cycle of assess, plan, do and

review, and actions should be revisited, refined and revised. But for parents and their children the 'do' part is particularly important here. Please ensure you are actually doing what's been planned and allowing enough time for it to have an impact.

4. Do you really understand the shift from BESD to SEMH?

The 2015 SEND Code of Practice changed the way young people who struggle to manage their behaviour and emotions are referred to. Before students were referred to as having 'behavioural, emotional, social difficulties' - (BESD). In the new Code this became social, emotional and mental health needs (SEMH). The change in wording asks everyone to remember that all behaviour is communication - look past the behaviour and find the underlying causes and focus on resolving that. Sending children to isolation and detentions without looking into the underlying reasons for their behaviours resolves nothing and they are missing their education.

5. Do you recognise the need to go beyond labels?

When identifying special needs the code sets out four broad areas of need that a student may come under. But the code also states that "the purpose of identification is to work out what action the school needs to take, not fit a pupil in a category". Schools should therefore consider **all** of the pupils needs, not just those with which they have been labelled, alongside their strengths. Please target support wherever it is needed at any one time remembering that students' needs may cut across more than one area and may change with time and give it time to work before stopping it or reviewing it.

We understand that there will always be budget constraints, but at the end of the day our children have the right to an education that meets their needs as enshrined in law. This support should cover ALL needs, including supply of necessary equipment, therapies and reasonable adjustments to allow access to a full curriculum.

While we believe that schools are best placed to decide how funding should be allocated to meet the needs of all their students this should not perpetuate the myth that responsibility for delivering provision in EHCPs rests with the schools rather than the local authorities (contrary to Section 42 of The Children and Families Act 2014). We would like to see accountability for how funding is spent and whether outcomes for children have improved. To ensure accountability and transparency Parent Carers Together would like to nominate representatives to be partners with the local authority in this monitoring.

We anticipate that the expectations of parents for SEND support will continue to increase. Parents are becoming more empowered and more aware of their children's statutory rights. The demand for SEND funding will continue to rise, and cannot be solved simply by rearranging the funding arrangements. It would be much better to proactively organise resources (both in schools and in the LA) so that the available funding is used as effectively as possible for providing services to the children with needs. Bureaucracy should be minimised to avoid spending time and funding on complaints and tribunal appeals. We would like to see an increasingly cooperative system of SEND support that recognises that parents are the best experts on their children's needs.

Schools and the local authority have a duty to ensure that all school staff are

adequately trained to meet the needs of all their students, as all too often students with mental health issues, behavioural issues and/or SEND do not have their needs met as there is a lack of training for staff. This results in students being sent to isolation, excluded from school and in some cases off-rolled by schools, which has a detrimental effect on their long term prospects and quality of life. We call on the local authority and schools to work with parents and students to re-evaluate behaviour policies which do not allow for reasonable adjustments.

We would welcome the opportunity to work with schools, local authorities, health and social care organisations and young people to look at the impact this has on young people as recent studies show that a high proportion of people in prison and youth offending institutions have undiagnosed SEND.

There is also a massive impact on parents and carers in terms of their mental health and wellbeing and their finances as the efforts of not only caring for our SEND children and young people but having to 'fight' to get their needs met results in many parents suffering stress and anxiety, being diagnosed with long term medical conditions and poor mental health. Many parents are also forced to give up their jobs. This has a long-term financial impact not only on the family but on local services too. The knock on effect is huge so please look at the big picture and commit to early intervention and support because it will save thousands long-term.

In summary we believe that the system:

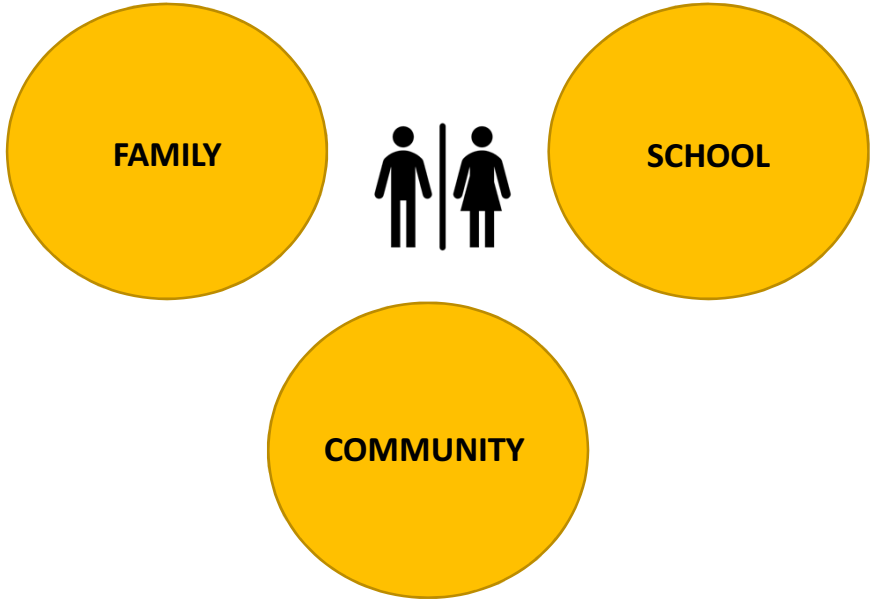
- Excludes parents, which is against the spirit of Section 19 of the Children and Families Act 2014.
- Creates a barrier to inclusion for children with high needs in mainstream schools.
- Is overly complex and bureaucratic
- Is not transparent and lacks a consistent decision-making process
- Has insufficient accountability

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The Schools' Forum

(17.01.20)

Foundations & Infrastructure to Support Change



Foundations: school facing

- SEND Transformation and Development Board (Dec. '19)
- SEND & Inclusion: strategy and delivery plan (Dec. '19)
- Joint Commissioning (SEND) strategy (Dec. '19) and arrangements with Health/ CCG
- SEND: Sufficiency Strategy and response (Jan. '21)
- SEND: service restructure (Dec. '19)
- In house decision-making and accountability (EHCPs; high placements etc.)
- **Agreed on 10.01:**
 - specialist services
 - workforce development
 - inclusion(Sept. 20 and ongoing)
- The Health and Well-being Board and SEND (Oct. '19)
- SEND: LGA Peer Challenge (Jan. '20)

Foundations: CiC

- Virtual School: Restructure (June '19)
- Virtual School: Strategic Board (Oct. '19)
- Virtual School: Development Plan (Nov. '19)
- Virtual School: CMOE and IYFAP (or equivalent) Panel for CiC
- Virtual School: Peer Review (Feb. '20)

Foundations: family and community facing

- *Early Help, Family Support and Young People's Strategy (2020 – 2023)* and following this full service restructure to support community based working:

Early Years; Parenting Services; Family Support;
Inclusion Services; Adolescent Services; Youth Offer;

- Early Help Partnership Board to be established (multi-agency governance and delivery)
- *BCP Child Exploitation (CE) Strategy* and Delivery Plan via the Community Safety Partnership (14.01)
- CE Partnership Board to be established (multi-agency governance and delivery)

Projected and more immediate savings

Currently, the projected level of savings that has been identified as being potentially deliverable is estimated at £2.5m as follows:

- | | |
|--|--------|
| • Joint Commissioning with health | £0.5m |
| • Review of EHCP processes | £0.5m |
| • Early Help | £0.25m |
| • Review of High Cost Placements | £0.25m |
| • Impact of creating additional capacity | £1.0m |



BOURNEMOUTH, CHRISTCHURCH and POOLE SCHOOLS FORUM

Subject	SCHOOL AND EARLY YEARS FUNDING CONSULTATION OUTCOMES AND TRANSFER TO HIGH NEEDS BLOCK
Meeting Date	17 th January 2020
Report Author (s)	Jack Cutler, Quality and Commissioning
Contributors	Neil Goddard, Director, Quality and Commissioning Nicola Webb, Assistant Chief Finance Officer, Finance
Status	Public
Classification	For consultation and decision
Executive Summary	This report sets out the outcome of the Schools and Early Years Funding consultations, and proposals for the BCP funding formulae and growth fund. The report also provides a proposal for reducing the projected High Needs budget gap, and requires approval for the Central School Services Block (CSSB) budgets and services to maintained schools and central budgets supporting the early years free entitlements.
Recommendations	<p>The Schools Forum are recommended to take decisions on the following proposals:</p> <p>School Members:</p> <p>PROPOSAL 1: Recommendation to Council for the local formula</p> <p>PROPOSAL 2: Fund growth through policy Option 1</p> <p>PROPOSAL 3: Fund growth that does not materialise at half the full growth funding</p> <p>PROPOSAL 4: The budget for an extrinsic growth fund</p> <p>All Members</p> <p>PROPOSAL 5: Support a £4M (1.91% Schools Block) transfer from the Schools Block to the High Needs Block</p> <p>School Members</p>

	<p>PROPOSAL 6a: Recommend to Council the proposed Early Years funding formula</p> <p>All Members</p> <p>PROPOSAL 6b. Agree the Council budgets supporting the free entitlements</p> <p>PROPOSAL 7: Agree the Central School Services Block budgets</p> <p>Maintained School members only:</p> <p>PROPOSAL 8: Agree the retention rates per pupil and budgets for LA duties supporting maintained schools</p>
Reasons for Recommendations	<p>The LA must consult Schools Forum on the Local Funding Formulae for schools and early years, agree the central budgets proposed above and consult on budgets within the high needs block.</p>

Background

1. Mainstream schools and Early Years funding continues to be delivered in most part through the Schools Block and Early Years Blocks of the Dedicated Schools Grant (DSG). As for 2019-20, each Local Authority (LA) area allocation will be determined using a National Funding Formula (NFF). The LA are responsible for distributing this funding between schools through a Local Funding Formula, (LFF). This is known as a 'soft' NFF.
2. In 2019-20 the LA transferred £2.2m and £0.2M from the Schools and Early Years Blocks respectively to the High Needs Block within the Dedicated Schools Grant (DSG). The council also moved a one off £2.4m from general council reserves in to the High Needs Block. This limited high needs budgets cuts to those considered manageable and not counter-productive to the budget system overall. In 2018-19 the 3 legacy Councils collectively transferred £1.9m from mainstream school funding to high needs for the BCP area. These transfers were for one year only (not cumulative). Transfers prior to 2018-19 have been locked in to DSG high needs funding and restored to mainstream schools through the Schools Block NFF.
3. A transfer is required again for 2020-21 to contribute towards the growing high needs funding gap identified. The School Funding Consultation Paper and accompanying Financial Settlement 2020-21 report on the agenda note a projected High Needs funding gap of over £8 million for 2020-21.
4. The reasons for the funding gap have been considered at length both nationally and locally with reporting at regular intervals through Schools Forum.

Schools Consultation

5. Schools were consulted between 13th December and 10th January on the mainstream schools funding formula and illustrative levels of transfer into the HN budget.
6. The funding formula proposal considered setting all schools at NFF; the consultation then requested views regarding:
 - how a shortfall or surplus in funding following this should be managed,
 - how any transfer of funding into the HN Block should be undertaken,
 - the size of any transfer schools could support,
 - growth funding allocations
 - Central retention from maintained schools for education functions
 - the Central Schools Services Block supporting all schools.
7. It is a requirement that all mainstream state – funded schools within the LA are consulted on the local formula, and special schools should also be consulted on any proposal and any movement of funding between blocks. The school's forum should then consider the outcome of the consultation when taking a view on the funding formula, and whether to support a level of transfer between blocks.

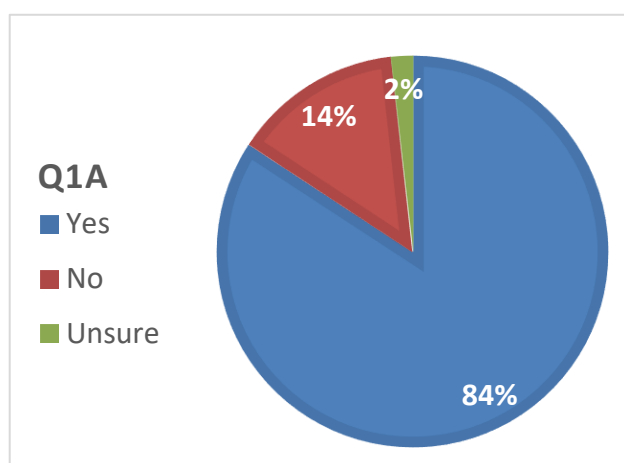
Consultation Outcomes

Question 1a

*Do you agree with the disapplication request to adjust the MFG baseline for all-through schools adding primary year groups represents a fair adjustment to the local formula?
If no, what do you consider an appropriate adjustment and why?*

Total responses: 57

There was a view from schools impacted that All-through schools do not receive an enhanced lump sum above the Secondary level for having Primary provision, and perhaps not making this adjustment would provide some compensation for this.



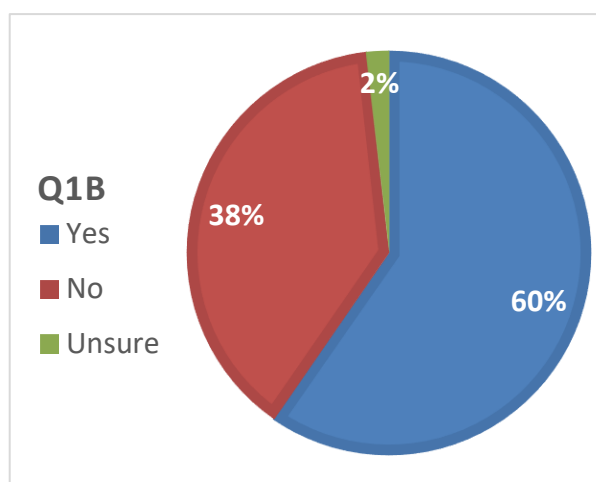
Question 1b

Do you agree with the disapplication request to set the MPPFLs below NFF for all schools protected through these levels, should this be necessary to allow all schools to contribute to any transfer to the High Needs Block (HNB), represents a fair adjustment to the local formula?

If no, could you propose an approach that would allow MPPFL schools to contribute towards any transfer to the HNB, should this be necessary

Total responses: 57

There was a view that all schools should receive their full entitlement of funding in return for the Local Authority developing a framework in partnership with schools to voluntarily target a proportion of their funding towards HNB issues. Also, that the MPPFL is to ensure all schools receive a level of funding to ensure they have the capacity to deliver adequate provision.

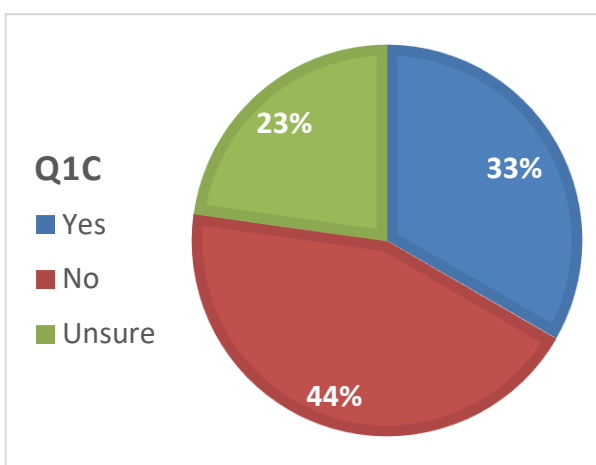


Question 1c

Do you agree with the disapplication request to enable an exceptional MFG rate to apply where school are being protected at significantly high levels of protection through the MFG factor. The variation will request the option to set MFG for some schools below +0.5% If no, could you propose an approach that would allow MPPFL schools to contribute towards any transfer to the HNB, should this be necessary?

Total responses: 57

There was a view the full range of MFG above 0.5% should be explored before an adjustment to MPPFLs is considered. Also, a view that MFG should be set at NFF (+1.84%), and a view that schools already funded more generously than other schools should gain less.



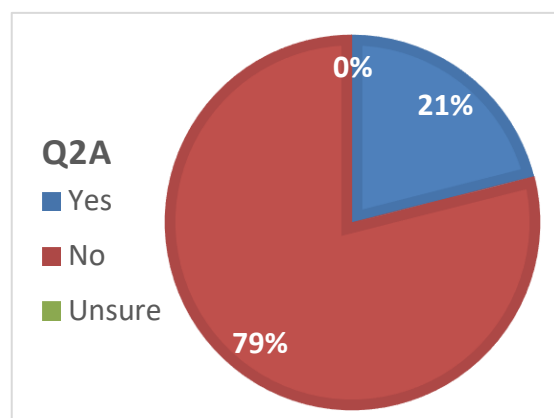
Question 2

Do you support the savings indicated in Table 6? If you do not support the full savings, please indicate the level of savings you would support, and provide information on alternative

a: Cease HN Top-up payments to mainstream schools with balances >10% of annual revenue budget

Total responses: 57

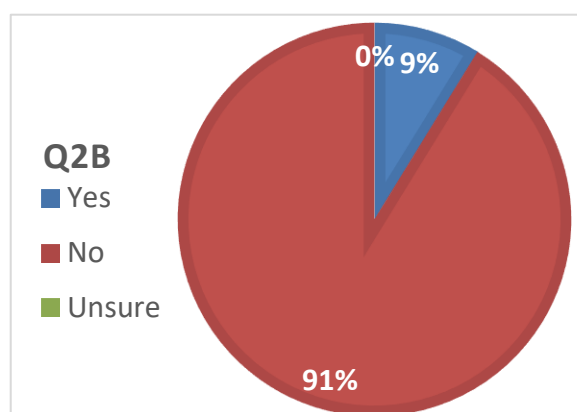
There was a view that this could have an adverse impact on HN budget, particularly in future years, by making schools less able to meet pupils needs in mainstream schools. It was also felt that a three-year picture could be considered, incorporating school balances, before ceasing top-up payments. The impact of this would be disproportionate since schools have differing numbers of HN pupils. Schools may be saving for capital projects, hence high balances. There was a call on the LA to appeal to the DfE to make-up the deficit; schools should not be penalised for building reserves to protect unexpected decreases in pupil numbers. Academies in trusts may not be able to call on the reserves identified to that school.



b: Cease all mainstream school top payments (further saving on the above line)

Total responses: 57

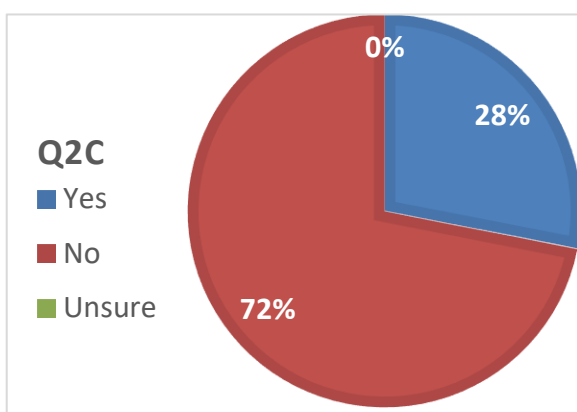
Savings should be sought from Independent and bespoke provision; there could be adverse impact on the HNB as per the comments to 2a.



c: The LA no longer funds any SALT therapies – rather schools fund this

Total responses: 57

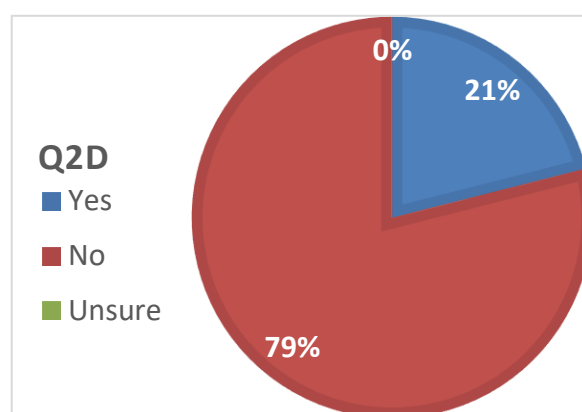
There was a view the LA should liaise with neighbouring LA's to ensure a traded service is available, and that if schools had to buy in the service there would be reduced access for families, since schools could not maintain this. Further support that reducing this spend could put further pressure on the overall HNB, while another school felt schools could choose to fund these services from their budgets on a needs-led basis.



d: Outreach Services are ceased

Total responses: 57

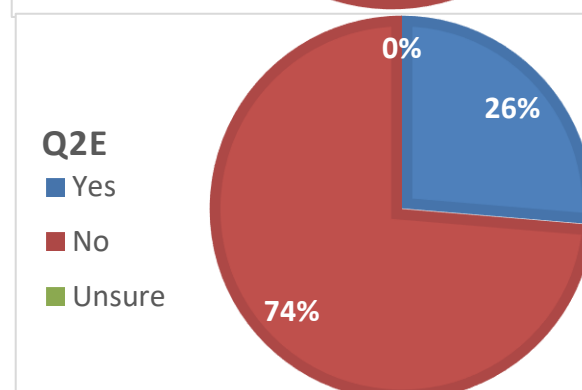
It was felt this could drive up the need for external placements, thus driving up HNB costs, whilst other schools supported funding these services from schools on a needs-led basis



e: The LA no longer pays for centrally funded Hearing and Vision Support Service (HVSS) and Sensory Service

Total responses: 57

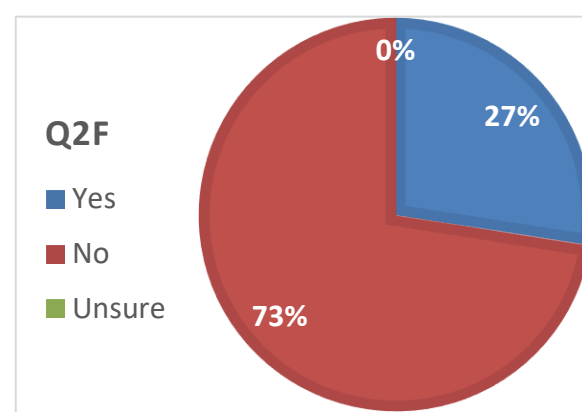
Similar views were expressed as to those above.



*f: Set Special Schools MFG at -1.5% (a **disapplication of regulations** is required)*

Total responses: 51

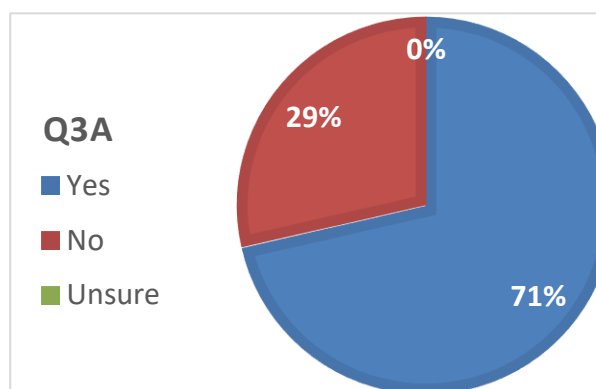
There is a view that special schools have not been subject to the same funding cuts as mainstream schools; however, it was generally deemed more information was needed to take a view. There was a view that reducing funding could reduce the ability for special schools to meet needs locally.



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? If no, please suggest an alternative

Total responses: 56

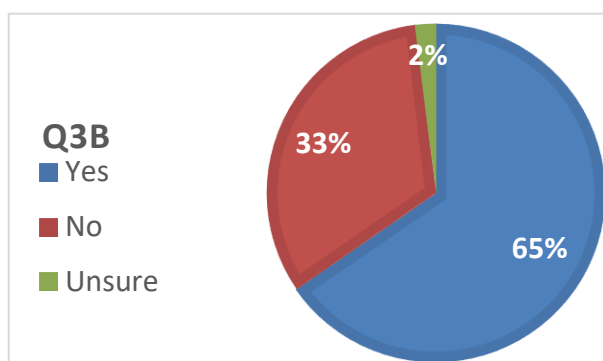


There was a view that such an approach ignores the fact that budgets have been adjusted to make up for historic underfunding.

Question 3b

If you agree that all schools should make a contribution, do you agree with the approach outlined in Table 13 and Table 14 for varying levels of transfer? If no, what do you consider an appropriate adjustment and why?

Total responses: 52



There was a view that changes to MFG (possibly to below +0.5%) should be considered before any proposal to reduce MPPFLs. It was felt MPPFLs should only be adjusted on affordability grounds, i.e. once an MFG of 0% had been set. There was a view Secondary Schools should contribute greater towards a transfer due to exceptionally high exclusion rates.

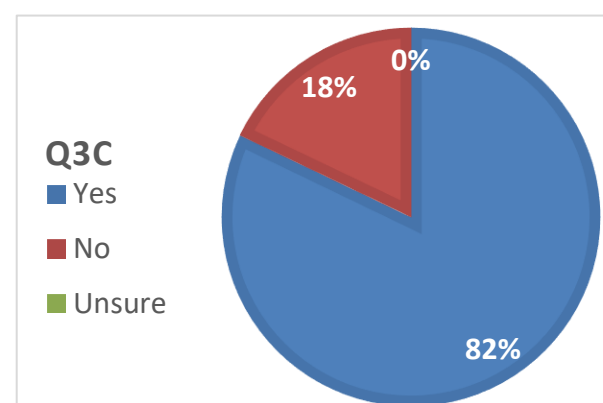
Question 3c

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

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

Total responses: 56

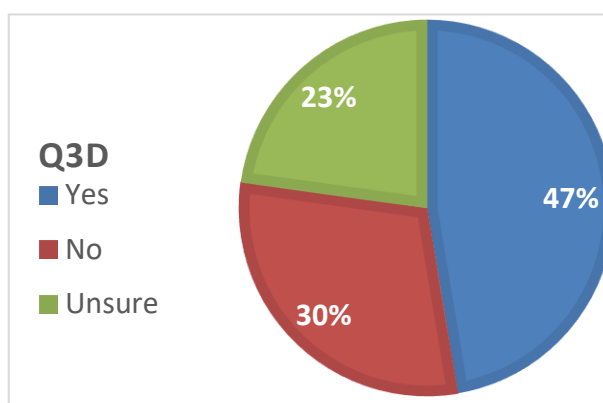
A view was expressed that this should only be adjusted alongside NFF MPPFLs.



Question 3d

Do you support both a gains cap and reduction of the basic entitlement factor proportionately as a mechanism for releasing funding from formula schools? If no, what would you support instead?

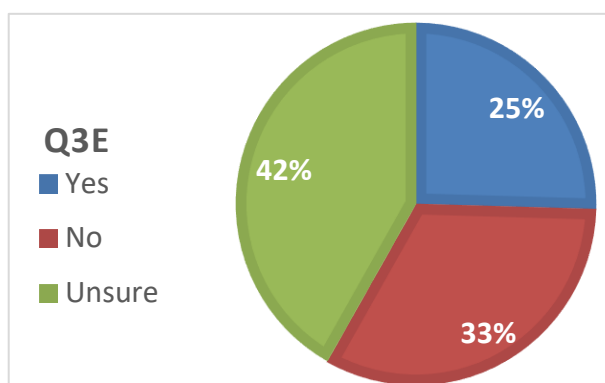
Total responses: 57



Question 3e

Regardless of whether you agree with any reduction to MPPFLs, do you support a flat reduction to the MPPFLs of equal cash amounts to all phases? If no, would you prefer to see a proportional scaling back of gains under Primary and Secondary phase MPPFLs by adjusting the MPPFLs accordingly?

Total responses: 57

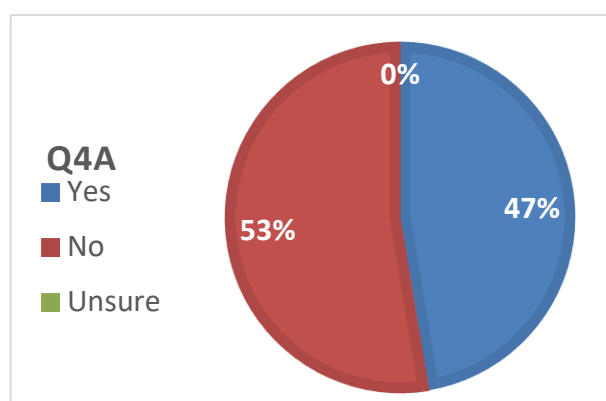


There was a view that Secondary MPPFLs should be scaled back more than primary, since secondary schools have larger budgets, and exclude more children. Others took a view that proportional scaling would be best.

Question 4a

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

Total responses: 57

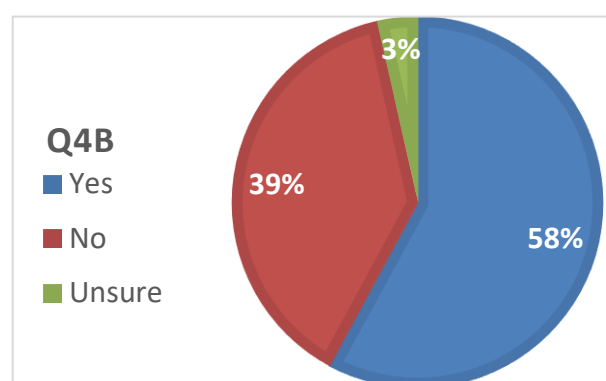


There was a view that Secondary BE rates should be adjusted more than Primary

Question 4b

Do you support any surplus funding after the agreed level of transfer out of the local NFF being added to the High Needs Block transfer? If no, should surplus be held as a contingency or reallocated through the formula, and if so, how?

Total responses: 57

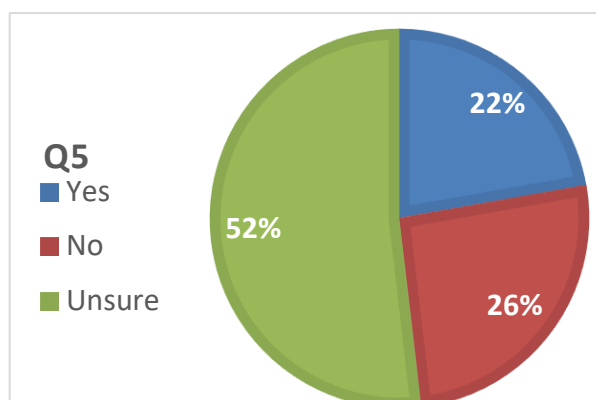


There was support for reallocation through the formula, particularly to MFG and Formula schools if NFF MPPFLs are set. It was felt surplus could be ringfenced to create more Specialist provision, and another view than surplus could be held as a contingency.

Question 5

Is it fairer to adequately resource the High Needs budget as per Appendix 6?

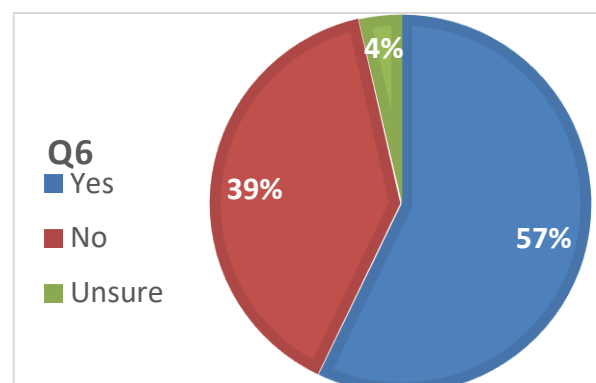
Total responses: 54



Question 6

Do you have any suggestions on any other area(s) where spend on high needs pupils can be reduced without breaching statutory requirements? If yes, please provide details of this/ these

Total responses: 56



There were many views expressed on this. These include:

- I. reducing reliance on out of area placements by increasing satellite provision and resource bases within mainstream schools,
- II. increasing mainstream plus arrangements,
- III. improving therapeutic services available to local special schools to rival provision available at independent special schools,
- IV. ensure greater partnership working with Early Help/ social care to prevent escalation,
- V. clear strategic planning with local stakeholders to meet needs locally.
- VI. support for reviewing Secondary PX's to establish any trends so that there can be a planned approach to reduce pupils falling out of mainstream.
- VII. Under mainstream plus provision, solutions should be found to mitigate concerns over the impact of HN pupils on progress 8 outcomes for the school.
- VIII. The authority should seek a reduced charge from independent providers.
- IX. The LA should work with schools to reduce exclusions and provide for students with SEN in a mainstream setting.
- X. Should the LA pass on NFF, all schools should be able to meet the needs of almost all children, whilst the LA should build additional provision for SEMH children who cannot be managed in normal mainstream school.
- XI. A lack of AP provision has resulted in exploring OOB / independent options; parental requests have not been challenged by the LA, so places offered at special schools have been turned down. There was support for the LA reviewing AP and considering how schools could be better supported to meet the needs of their pupils, before specialist placements/ PEX's become an issue.
- XII. Tribunals and appeals should be more robustly contested, and placement in specialist provision challenged when maintained schools with support could meet the pupils needs.

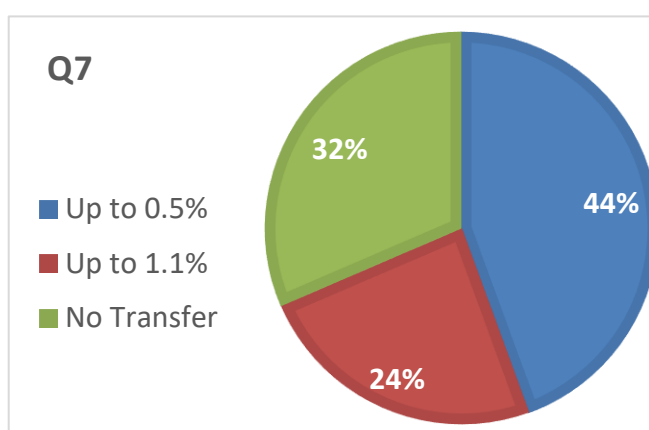
- XIII. The balance of parental choice, with what is affordable, should be redressed.
- XIV. The cost of AP due to exclusions needs to be addressed. There was a view that the LA should use powers to tackle immoral practise of excluding/ off-rolling pupils for minor offences, (although please note this power does not lie with the local authority)
- XV. LA's should stop investing in personalised support programmes.
- XVI. Investment in LA specialist provision has been too slow, and not significant enough to address the growing need.
- XVII. The LA should seek to increase council tax to mitigate pressure (this is not possible unless government allow for this), transfer profits from other BCP departments such as the seafront, and to lobby government for better funding.

Question 7

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.

Total responses: 54

The following views were expressed:



- I. whilst schools understand the need to support the HNB, schools should see more funding in order to keep more pupils in mainstream settings – particularly those schools that have higher than national % of SEND/ EHCP/ PP/ LAC, so the schools can make different decisions/ offer alternative curriculum to meet the needs of those that struggle with the current model available.
- II. Previous fund transfers between block have not resolved the funding gap, and that growth in HN costs is a result of government policy, rather than the actions of individual schools. Schools should not continue to support a misguided policy by making a transfer each year, making it harder for mainstream school to meet the needs of HN pupils.
- III. Funding for HN pupils should not be to the detriment of school funding for all pupils.
- IV. the LA should whistle-blow the issue – top-slicing school budgets does not create an inclusive education where all children can succeed, and society is failing our most vulnerable children.

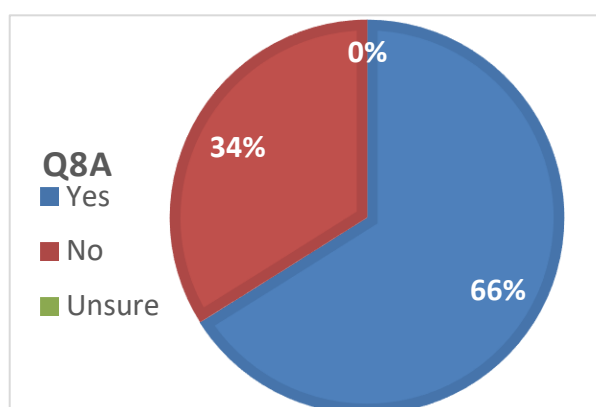
The **cumulative** support for a transfer “up to” was as follows:

Transfer Level from NFF	Cumulative support (%)
3.9% (£8.1M)	0%
2.2% (£4.6M)	0%
1.1% (£2.2M)	24%
0.5% (£1M)	68%

Question 8a

If you do not support a transfer that would provide a balanced budget under Table 17, do you agree that it is reasonable to expect schools to implement initiatives to support closing the High Needs Funding gap?

If yes, please provide details of these initiatives, and how they could be monitored. Such initiatives would be expected to result in movement towards the national EHCP profile as per Tables 19a and b, and to reduce permanent exclusions towards the National average.



Total responses: 56

The following views were expressed:

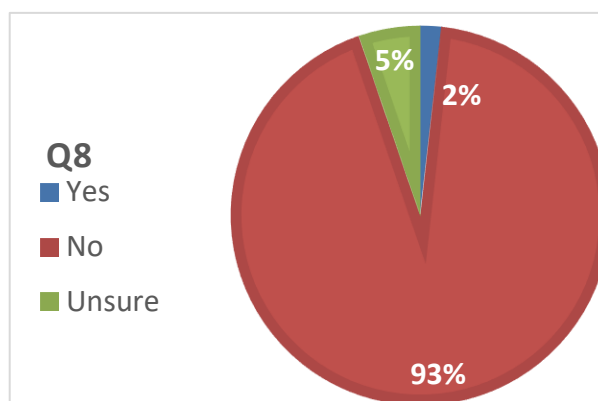
- I. Employ the necessary specialist staff to meet the needs of the children, and host specialist units.
- II. A monitoring group could be set up for PEx's at Secondary,
- III. All schools should be inclusive and open to a range of needs and prior attainment in their schools. They should partner more with Early Help and Social Care, and work with the LA to ensure there is sufficient local specialist provision.
- IV. Schools should improve the way they handle PEx's.
- V. The government should do more, rather than schools, such as addressing the conflict of interest around retaining EHCP children whilst being accountable under Progress 8 performance for these pupils.
- VI. The LA should lead in best practise and schools will follow; this best practise is felt to exist in other authorities.
- VII. Schools could establish their own mainstream plus initiatives.
- VIII. Schools could provide alternative pathways on their own sites for pupils.
- IX. Schools could continue to work with the LA to develop strategies to reduce exclusions, improve attendance, better meet the needs of SEND pupils in mainstream settings and improve student engagement at KS4 through alternative curricula (to improve behaviour, reduce exclusions, and improve outcomes for vulnerable groups).
- X. A school responded with everything they are already doing: creating their own 'AP' type groups, using all support staff in 1:1/ group situations, working with external services/ outreach, managing EHA & TAF meetings to support families etc.
- XI. Capital funding to schools for a new building on site could help create specialist/ AP type 'hubs'. Schools could look at upskilling their existing staff, and accessing counselling/ play therapy within mainstream schools to support those children in need of CAMHS – type work, but who do not meet the CAMHS threshold/ are awaiting assessment.
- XII. A local enquiry was sought into why BCP have a higher secondary exclusion rate than the national average.
- XIII. A school indicated that under no transfer, they would be able to accommodate 1:1 support for children without additional funding.

Question 8b

Do you agree that should funding remain with schools rather than be transferred to the HN block for 2020-21, and there is no clear evidence the High Needs funding gap is closing is a result, the LA should consider a greater transfer to HN in 2021-22, and that you would support such a transfer?

If No, please provide further details

Total responses: 57



The following views were expressed:

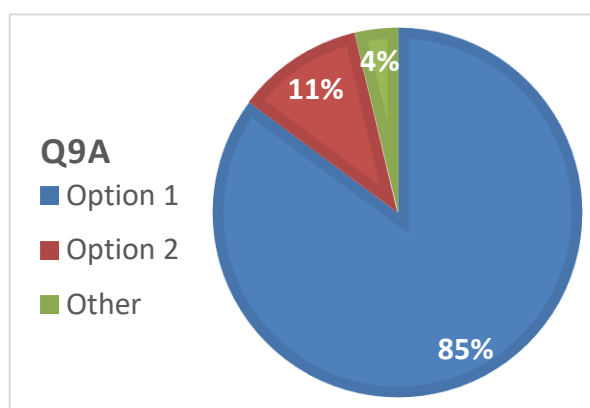
- I. A 1-year deadline was felt to be unreasonable to solve an issue that has accumulated over a number of years- it may be more reasonable to give schools a 2 or 3-year time period.
- II. There should be an agreed set of KPI's so that schools were clear on what the expectations would be for them receiving extra funding; the LA would need to transparently monitor progress towards these metrics, and give schools the opportunity to make a real difference.
- III. Any transfer of funding masks the issue of an ill-thought and inappropriately funded government strategy.
- IV. This may impact unfairly across schools.
- V. This approach blames schools for the HNB funding crisis, rather than previous LA strategic planning for AP provision.
- VI. This would only defer the impact on schools for a year – better to take a smaller impact each year, which is more manageable for budget and planning purposes, than to have a significant impact in a future year.
- VII. Any additional funding transfers should be made from those schools that are disproportionately excluding pupils thus providing an incentive for schools to retain children in mainstream.

Question 9a

Do you support funding growth under Option 1 or 2 in 9.4?

If Other, please provide further details below

Total responses: 54



Question 9b

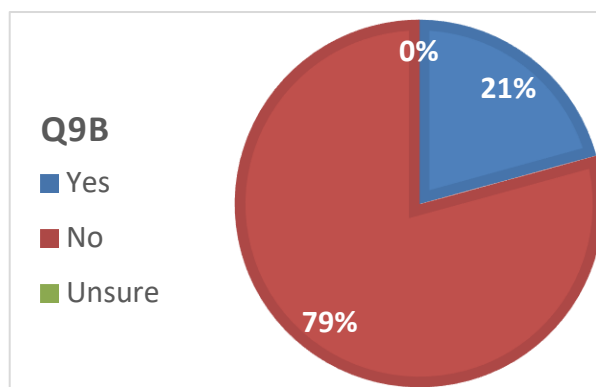
Do you support funding growth that has been requested by the LA but that does not materialise in a school?

Please provide your reasons/ provide further details for your choice below:

Total responses: 53

The following views were expressed:

- I. Funding should follow the child, if it does not appear where expected,
- II. Objections to funding growth where it does not materialise as a result of schools admitting over their Published Admission Number.
- III. Opposing the above, schools bear the cost of providing additional places therefore should receive appropriate funding.
- IV. Funding should be provided for one year only, but not for the full extent



Question 10

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

Total responses: 12

There were requests for whether any impact analysis could be shared. There was also a view this question was not applicable to Trusts.

Question 11

Do you have any comments about the proposals for Maintained Schools only?

There was a view that schools do not benefit from any ex ESG services, and already pay through SLAs for HR and Legal support. A 'pay as you go' approach was requested. Further clarity on the services provided was sought. A couple of Schools supported a move to chargeable services through SLA's.

Question 12

Any there any further comments you would like to make about any issues within the scope of this consultation?

There was a view that we should not keep doing what we are doing, but that a different approach is required.

NFF with actual October 2019 Census data

8. The LA have listened to feedback from the consultation and also considered the response analysis. Alongside this, the LA recognise a necessity to close the gap as far as possible in the projected High Needs budget 2020-21.
9. Table 1 shows the NFF applied locally updated with the latest Oct-2019 data – both pupil characteristics and pupil numbers. The impact is provided at school level in Appendix 1.

Table 1 – Impact of updated NFF using Oct-19 census.

Dataset	Oct-18	Oct-18	Oct-19		
Formula Factors	BCP Formula £000's 2019-20	National Formula £000's 2020-21	National Formula £000's 2020-21	Change from 2019/20	
				£000's	%
Primary Basic Entitlement	75,498	79,342	79,408	3,909	5.2%
Secondary Basic Entitlement	73,201	76,931	78,887	5,686	7.8%
Deprivation Primary	7,141	7,398	7,564	423	5.9%
Deprivation Secondary	6,296	6,521	6,663	367	5.8%
Low Prior Attainment Primary	8,713	9,080	8,079	-634	-7.3%
Low Prior Attainment Secondary	5,700	5,921	5,967	267	4.7%
EAL Primary	1,331	1,382	1,347	16	1.2%
EAL Secondary	539	560	519	-20	-3.7%
Primary Mobility	30	237	261	231	776.4%
Secondary Mobility	8	112	121	113	1445.3%
Looked After Children	0	0	0	0	
Lump Sum	9,790	10,182	10,182	392	4.0%
Sparsity	59	68	56	-3	-5.2%
Floor Factor Primary (MPPFL)	1,064	2,385	2,703	1,639	154.1%
Floor Factor Secondary (MPPFL)	2,090	2,148	2,160	70	3.4%
MFG	1,834	1,020	1,166	-668	-36.4%
Cap	-643	0	0	643	-100.0%
Total Local/ National Formula	192,650	203,286	205,082	12,432	6.5%
Total Premises Factors	1,659	1,659	1,698	40	2.4%
Total Primary Phase	98,643	104,474	103,612	4,969	5.0%
Total Secondary Phase	95,666	100,471	103,168	7,503	7.8%
Base NOR	45,953	45,953	46,456	503	1.1%
Per pupil funding	4.23	4.46	4.45	0.22	5.3%

10. The formula factor rates under NFF are given in the Consultation paper in Appendix 3.

11. It should be noted that there is considerably less funding (£1M) allocated through the Primary Low Prior Attainment factor compared to 2020-21 NFF based on October 2018 census. This is a result of the eligible proportion of pupils (pupils who did not reach the expected level of development at foundation stage through this factor) reducing from 30.7% to 27.3% (-3.4%) between the Oct-18 and Oct-19 censuses. The higher proportion has been locked into the per pupil funding rates that determine the government BCP NFF Schools Block funding.

12. The impact by phase of school and formula type is shown in Table 2 and 3.

Table 2 – Impact of updated NFF using Oct-19 census by phase

Dataset	Oct-18	Oct-18	Oct-19		
Per pupil funding	BCP Formula £ 2019-20	National Formula £ 2020-21	National Formula £ 2020-21	Change from 2019/20	
				£	%
Infant/ First Total	3,673	3,898	3,910	237	6.45%
Junior Total	3,681	3,908	3,877	196	5.32%
Primary Total	3,759	3,976	3,964	205	5.46%
PRIMARY PHASE	3,728	3,949	3,937	209	5.61%
Middle/ Secondary Total	4,991	5,236	5,217	226	4.54%
All- through Total	4,478	4,730	4,653	175	3.91%
SECONDARY TOTAL	4,907	5,154	5,122	215	4.39%

Table 3 – Impact of updated NFF using Oct-19 census by school formula type

Dataset	Oct-18	Oct-18	Oct-19		
Per pupil funding	BCP Formula £ 2019-20	National Formula £ 2020-21	National Formula £ 2020-21	Change from 2019/20	
				£	%
Primary Formula	3,835	4,020	4,013	178	4.63%
Primary MPPFL	3,516	3,773	3,777	261	7.41%
Primary MFG	4,406	4,551	4,469	63	1.43%
Secondary Formula	4,896	5,214	5,120	225	4.59%
Secondary MPPFL	4,751	4,981	4,977	227	4.77%
Secondary MFG	5,597	6,099	5,655	59	1.05%
Formula	4,439	4,694	4,654	215	4.85%
MPPFL	3,892	4,155	4,149	257	6.60%
MFG	4,811	4,723	4,903	92	1.91%

PROPOSAL 1: Regardless of any transfer of funding to the HN Block, the Schools Forum should indicate whether they support mirroring NFF through the Local Formula. Further, any surplus in NFF, if not transferred to the HN Block, should be allocated to a contingency fund, ringfenced within the Schools Block.

Growth Fund

13. There was a very strong response from the consultation to fund growth through Option 1 (85% support). This Option is as follows:

“Fund existing growth according to the 2019-20 growth fund policy that is provided in Appendix 9. New growth is funded under the proposed 2020-21 policy that is also provided in Appendix 9. The cost to the growth fund under this option for 2020-21 is forecast to be £670k”

14. The growth fund under Option 1 presented to the Forum in Sep 2019 is indicated in Table 4. An adjustment has been made for proposed 2020-21 Basic Entitlement rates. The difference against Option 2 is as follows:

- Permanent expansion growth is funded at Basic Entitlement per pupil funding only under option 1, whilst is funded at an average of the pupil-led funding through the formula under Option 2.
- Option 2 costs the growth fund approximately £100K more than Option 1.

15. This proposal funds existing growth at Highcliffe St. Marks through the formula, such that the average formula funding per pupil is applied to the additional pupils – such funding is referred to as implicit growth. Funding through the established growth fund is referred to as explicit growth.

Table 4 – Growth Funding under original Option 1

School Name	Description	Cost to both Explicit and Implicit Growth				
		2019-20 ACT.	2020-21 EST.	2021-22 EST.	2022-23 EST.	2023-24 EST.
		£	£	£	£	£
Avonbourne Girls (Primary)	All through expansion from Sep 14	48,380	24,818	6,250	-	-
Jewell	Growing academy from Sep 13	6,250	-	-	-	-
Kingsleigh	Increased FE	47,576	-	-	-	-
St Peters	All through expansion from Sep 14	48,380	24,818	6,250	-	-
Avonbourne Girls (Secondary)	Increase 3FE Yr7 from Sep 2019	200,693	207,480	-	-	-
Avonbourne Boys	Increase 2FE Yr7 from Sep 2019	133,796	138,320	-	-	-
Bournemouth School	Increase 1FE Yr7 from Sep 2019	66,898	69,160	69,160	69,160	69,160
BSG	Increase 0.5FE Yr7 from Sep 2019	31,219	32,275	32,275	32,275	32,275
Carter	Increase 2FE Yr7 from Sep 2019	133,796	138,320	138,320	138,320	138,320
Twynham Prim	Set Up for new school YrR Sep 2013	4,600	-	-	-	-
Highcliffe St. Marks	Set Up for 1FE expansion YrR Sep 2014	2,800	2,800	-	-	-
Avonwood (Primary)	Bulge Sep 19	47,576	-	-	-	-
Highcliffe St. Marks [Implicit]	1FE expansion YrR Sep 2014	51,000	53,871	-	-	-
Year 7 Bulges	2FE* (schools not yet identified)	-	-	-	133,796	133,796
Total		822,961	691,862	252,255	373,551	373,551

PROPOSAL 2: Fund growth through Option 1, rather than Option 2.

16. The consultation responses were clear that there is little support for funding growth in schools where the growth does not subsequently materialise. To continue to engage with schools to take growth where requested by the LA, the LA must continue to recognise and financially compensate schools that have

agreed to take bulge classes. A mid-way position is proposed that is between the legacy Poole and Legacy Bournemouth approach. Where growth has been requested by the LA, for every pupil that does not materialise, the LA will only fund half the per pupil growth funding, for each empty space.

17. Example:

A secondary school is requested to open 2 bulge classes, i.e. expand their PAN by 60, for Sep 2020. This increases the school PAN from 180 to 240.

Only 220 pupils appear on the school census, Oct 2020. As a result the LA funds

- $(220 - 180) = 40$ places at the KS3 Basic Entitlement
- $(240 - 220) = 20$ places at $0.5 \times$ the KS3 Basic Entitlement.
- The funding is provided for the period Sep – Mar, 7/12 of the year.
- The school would therefore receive $(40 + 20 \times 0.5) \times 7/12 = £115,266.67$

PROPOSAL 3: Fund growth that does not materialise at half the full growth funding, as per the example above.

18. The forecast impact for 2020-21 under Proposal 3 is shown in Table 5.

Table 5 – Change to growth funded projected under Proposal 3

School	Description	Original funding	Estimated Funding under new proposal	Saving
Avonbourne Girls (Secondary)	3 FE Bulge Sep 2020	£207,480	£172,900	£34,580
Avonbourne Boys	2 FE Bulge Sep 2020	138,320	£103,740	£34,580
Total		£345,800	£276,640	£69,160

19. Should Proposals 2 and 3 be agreed, the required explicit growth fund will be £568,830, whilst £53,871 in growth funding will be provided to Highcliffe St. Marks Primary through 'optional' implicit growth funding.

20. There is an option to request a lower level of growth into Year 7 at two Bournemouth Secondary Planning area Schools. This will result in a shortfall of places (against a 2% planned surplus) by 0.5FE in the Bournemouth Secondary Planning Area. The implication is reduced availability of places in this area, and a risk of greater pupil school transportation costs to the LA. Taking this into consideration, the LA plan to reduce requested growth for Sep 2020 accordingly. The impact of this lower growth against Proposal 3 is provided in Table 6.

Table 6 – Reduce requested growth compared with Proposal 3

School	Proposal 3 projected growth	Reduced growth proposal	Funding under new proposal	Saving
School A	3 FE Bulge Sep 2020	2 FE Bulge Sep 2020	£138,320	£34,580
School B	2 FE Bulge Sep 2020	1 FE Bulge Sep 2020	£69,160	£34,580
Total			£207,480	£69,160
GRAND TOTAL FOR ALL GROWTH 2020-21 (implicit + explicit)			£553,541	£69,160

21. The Schools Forum must agree a growth fund, for which 2 proposals have already been considered. Under proposals 2, 3, and the reduction to requested growth in Table 6, the cost to the growth fund 2020-21 is as follows:
- Explicit: £499,670
 - Implicit: £53,871

PROPOSAL 4: The Schools Forum should agree an extrinsic growth fund. It is recommended that the explicit growth fund should be set at £499,670 whilst £53,871 should be provided through implicit growth.

Considerations for Transfer

22. The LA have listened to feedback from the consultation and also considered the response analysis. Alongside this, the LA recognise a necessity to close the gap as far as possible in the projected High Needs budget 2020-21.
23. It must be recognised that the LA currently hold a £3.6M deficit in the DSG, which is currently forecast to grow by £1.9M by the end of 2019-20. This combined with a projected budget gap of £8M would result in a cumulative deficit 2020-21 of £13.5M with further growth in future years. This is clearly not a sustainable financial position for the Council.
24. As set out within the consultation document, that is provided in Appendix 3, the council have identified a number of cost saving measures to implement for 2020-21, some of which are already under way. Since the Consultation Paper was issued, work has been underway to consider how special places capacity can be increased further. This work could release £1 million of budget and reduce the gap to £7 million. The council are requesting that alongside this, Schools Forum support a transfer of £4.0M from the schools Block to the HN Block, which represents a 1.91% transfer, to support the growing pressures within the HN Block.
25. Schools need to support BCP move our pattern of provision towards the national averages as this will have a significant impact on the ability to achieve budget savings. This level of transfer is less than the impact on costs resulting from the difference between the proportion of pupils within mainstream schools in BCP compared to the National average, added to the impact of pressure from permanent exclusions from secondary schools above the National average. Table 7 shows a breakdown of the impact of this.

Table 7 – Financial impact of BCP mainstream schools EHCP profile, and permanent exclusions, at National Average

	PEx	EHCPs
Cost to HN budget per pupil in mainstream	£0	£3,000
Cost to HN budget per pupil in specialist provision	£19,000	£43,000*
Cost saving per place	£19,000	£40,000
Secondary Exclusions budgeted for 2020-21	140	
Exclusions rate/ 1000 2017/18 BCP	43.5	
Exclusions rate/ 1000 2017/18 National	20	
Reprofile exclusions to National	64	
Reduction in Permanent exclusions	76	
BCP proportion of EHCPs in mainstream		49.73%
National proportion of EHCPs in mainstream		54.22%
Reprofile to National Average – fewer pupils in INMSS		122^
Total cost saving	£1.4M	£4.9M

**This is the average annual cost to the HN Block per Independent/ Non -maintained Special School (INMSS) Full Time Equivalent (FTE) placement.*

^This figure assumes that for every BCP EHCP pupil not in a mainstream school that corresponds to the difference in proportion of EHCPs in mainstream compared to the National average a pupil would not be required to be placed in INMSS.

26. It should be recognised in Table 7 that the actual annual cost of AP provision for permanently excluded (PEx) pupils is likely to be above the estimated figure, since this assumes the PEx pupil is only in AP provision for one year after the exclusion. The reality is often that a PEx from, for instance, Year 9, may well remain in AP until the end of Year 11, at least 2 years. The cumulative impact of 2 years -worth of exclusions above the national average, would therefore double the cost of exclusions, if the average duration in AP is considered to be two years. It is also recognised that a greater retention of EHCP pupils in mainstream provision is likely also to result in an average mainstream EHCP cost above £3,000, and so the estimated figure associated with reprofiling EHCPs is likely to be lower than that reported.

27. The proposal to close the DSG budget gap is set- out in Table 8.

Table 8 – Proposal for reducing the projected 2020-21 DSG deficit.

	Cost saving/ avoidance	Gap
November Schools Forum		£9.8M
Joint commissioning agreements with Health	£0.5M	
Review of EHCP processes	£0.5M	
Early Help	£0.25M	
Review of High Cost placements	£0.25M	
Additional Special places capacity	£1.0M	
Total actions already planned to reduce shortfall 2020-21	£2.5M	
Additional funding at settlement		(£0.3M)
Residual Gap		£7.0M
Enhance budget through Block Transfers		
EY Contribution to High Needs Budget	£0.2M	
Surplus in Schools Block (SB) (i.e. Above NFF) (assumes extrinsic growth set at £500K and £70K contingency for final formula updates) (0.8% SB)	£1.8M	
Schools Contribution to HN Budget from NFF (scale back NFF by 1.1% cash terms)	£2.2M	
Total reductions to HN Budget	£4.2M	
Residual Gap		£2.8M
Additional Further Actions (where deliverable)		
Agree enhanced Permanent Exclusion funding adjustment from April 2020 with all schools (following Schools Forum Support)	£0.2M	
Outreach Services are reduced	£0.5M	
The LA no longer funds any SALT therapies – rather schools fund this	£0.5M	
The LA no longer pays for centrally funded Hearing and Vision Support Service (HVSS) and Sensory Service	£0.75M	
Reduce mainstream school top payments by approx. 30%	£0.85M	
Total reductions to HN Budget	£2.8M	
Residual Gap		£0

28. Such an approach allows the average per pupil funding increase to remain greater than 4.0%, which is the average inflation applied to formula factors (with the exception of MPPFLs and FSM).

29. Table 9 shows how the local formula factor rates would change from NFF.

Table 9 – Proposed changes of formula rates from NFF.

Factor	2019-20	2020-21	Change from 2019-20
MFG	-0.50%	1.50%	2.00%
Absolute gains gap	2.5%	No Cap	Removed
Reduction to all NFF MPPFLs	£28.00	£56.00	£28.00
Primary MPPFL	£3,472.00	£3,694.00	£222.00
KS3 MPPFL	£4,572.00	£4,744.00	£172.00
KS4 MPPFL	£5,072.00	£5,244.00	£172.00
Secondary MPPFL	£4,772.00	£4,944.00	£172.00
Scale all BE by this factor	98.97%	98.61%	-0.36%
Primary BE	£2,718.60	£2,817.29	£98.69
KS3 BE	£3,822.73	£3,962.15	£139.42
KS4 BE	£4,340.48	£4,497.60	£157.12

PROPOSAL 5: Support a £4M (1.91% Schools Block) transfer from the Schools Block to the High Needs Block

30. At this stage, the council is not planning to implement the additional further actions of £2.8M, other than the enhanced PEx funding adjustment of £0.2M. Should the contribution from the Schools Block be approved, as set out above, the Council will bear the risk of the higher DSG deficit on its balance sheet. However, difficult decisions would be required should such approval not be received, and the council may have to find savings in areas such as these, where it is possible to do so.
31. Schools Forum can agree a transfer up to 0.5% of Schools Block, above which Secretary of State approval is required. The Secretary of State will consider, as part of the process, whether the Schools Forum, and schools through the consultation, have supported the transfer level requested.
32. Regulations must be adhered to when any decisions are made: The SEND Code of Practise, Sep 2015 states:
- “Schools are not expected to meet the full costs of more expensive special educational provision from their core funding. They are expected to provide additional support which costs up to a nationally prescribed threshold per pupil per year. The responsible local authority, usually the authority where the child or young person lives, should provide additional top-up funding where the cost of the special educational provision required to meet the needs of an individual pupil exceeds the nationally prescribed threshold.”*
33. The impact of PROPOSAL 5 is set out in Table 10 below.
34. A breakdown of the impact by school is provided in Appendix 2.

Table 10 – Impact of PROPOSAL 5 based Oct-19 census data

Dataset	Oct-18	Oct-19	Oct-19		
Formula Factors	BCP Formula £000's 2019-20	National Formula £000's 2020-21	Proposed BCP Formula £000's 2020-21	Change from 2019/20	
				£000's	%
Primary Basic Entitlement	75,498	79,408	78,304	2,805	3.7%
Secondary Basic Entitlement	73,201	78,887	77,790	4,590	6.3%
Deprivation Primary	7,141	7,564	7,564	423	5.9%
Deprivation Secondary	6,296	6,663	6,663	367	5.8%
Low Prior Attainment Primary	8,713	8,079	8,079	-634	-7.3%
Low Prior Attainment Secondary	5,700	5,967	5,967	267	4.7%
EAL Primary	1,331	1,347	1,347	16	1.2%
EAL Secondary	539	519	519	-20	-3.7%
Primary Mobility	30	261	261	231	776.4%
Secondary Mobility	8	121	121	113	1445.3%
Looked After Children	0	0	0	0	
Lump Sum	9,790	10,182	10,182	392	4.0%
Sparsity	59	56	56	-3	-5.2%
Floor Factor Primary (MPPFL)	1,064	2,703	2,463	1,399	131.5%
Floor Factor Secondary (MPPFL)	2,090	2,160	2,175	85	4.1%
MFG	1,834	1,166	1,395	-439	-23.9%
Cap	-643	0	0	643	-100.0%
Total Local/ National Formula	192,650	205,082	202,885	10,235	5.3%
Total Premises Factors	1,659	1,698	1,698	39.91	2.4%
0					
Total Primary Phase	98,643	103,612	102,436	3,793	3.8%
Total Secondary Phase	95,666	103,168	102,148	6,482	6.8%
Base NOR	45,953	46,456	46,456	503	1.1%
Per pupil funding	4.23	4.45	4.40	0	4.1%

School Formula Positions - Per Pupil Funding Levels

35. The impact of PROPOSAL 5 by phase of school and formula type is shown in Tables 11 and 12 below.

Table 11 – Impact of PROPOSAL 5 per pupil funding by phase

Dataset	Oct-18	Oct-19	Oct-19		
Per pupil funding	BCP Formula £ 2019-20	National Formula £ 2020-21	Proposed BCP Formula £ 2020-21	Change from 2019/20	
				£	%
Infant/ First Total	3,673	3,910	3,861	188	5.12%
Junior Total	3,681	3,877	3,833	152	4.12%
Primary Total	3,759	3,964	3,921	162	4.30%
PRIMARY PHASE	3,728	3,937	3,893	165	4.42%
Middle/ Secondary Total	4,991	5,217	5,164	173	3.47%
All- through Total	4,478	4,653	4,615	137	3.07%
SECONDARY TOTAL	4,907	5,122	5,072	165	3.36%

Table 12 – Impact of PROPOSAL 5 per pupil funding by school formula type

Dataset	Oct-18	Oct-18	Oct-19		
Per pupil funding	BCP Formula £ 2019-20	National Formula £ 2020-21	Proposed BCP Formula £ 2020-21	Change from 2019/20	
				£	%
Primary Formula	3,807	4,007	3,967	160	4.21%
Primary MPPFL	3,516	3,777	3,721	205	5.83%
Primary MFG	4,261	4,326	4,308	46	1.08%
Secondary Formula	4,946	5,194	5,136	190	3.85%
Secondary MPPFL	4,751	4,977	4,921	171	3.59%
Secondary MFG	5,117	5,188	5,171	54	1.06%
Formula	4,478	4,718	4,668	190	4.24%
MPPFL	3,892	4,149	4,093	201	5.17%
MFG	4,585	4,671	4,653	69	1.50%

Early Years Funding 2020-21

Consultation outcomes

36. This section summarises the response to the early years funding consultation. Each question asked is supported here with the total number of responses, a chart to show the proportion of responses per question and a selection of feedback received per question. The consultation document is included in Appendix 4. 102 responses were received, representing a 30.4% response rate from the sector.

Question 1:

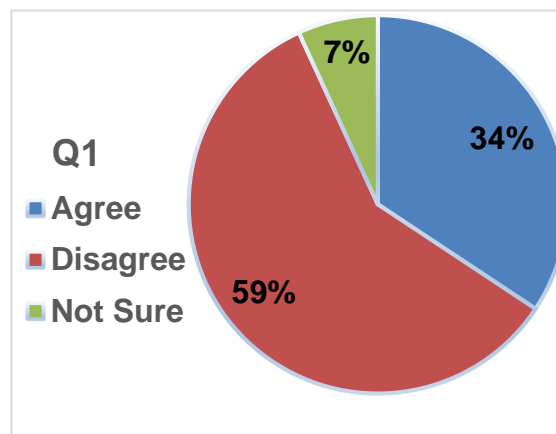
Do you agree with these priorities?

- 1) Minimise the amount retained centrally, maximising funding to providers.**
- 2) Using a supplement to support children with a background of deprivation, to narrow the attainment gap between the most disadvantaged children and their peers, at a level that will improve their outcomes.*

- 3) Set a formula which allows providers to better forecast funding and business plan.
- 4) SEND funding for every hour the child attends a setting at a level to support improvements in their outcomes.
- 5) Ensure appropriate resourcing is provided for children with High Needs between the ages of 0 – 25

Total responses: **102**

Most providers disagreed with the priorities and principles used to set a new formula as they did not agree with all five combined. Of those that commented, the main disagreement was regarding early years funding being used to fund children and young people 0-25 years with High Needs. Many providers felt the deprivation supplement and SEN Inclusion fund should be lower to increase the base rate paid to all.



Example of comments:

“Disagree with point 5 - When considering the currently allocation of funding to EY settings from the HNB is already disproportionate (1.7 million of 42 Million) we cannot agree to addition funding being taken from the central government allocation. Therefore, the monies allocated by Central Government for children aged 0-5 years should remain allocated to this age group and NOT siphoned off to put towards the HNB.”

“The base rate should be the priority for funding rates for Early Years. Since the merge with Christchurch and Poole councils our base rate has been reduced from £4.20 to £4 per hour but staff costs have increased on average by 5% and pension contributions by 1%. From April 2020 staff wages will be increasing again as will pension contributions which will more than wipe out even the largest increases proposed by this consultation. Deprivation rates are not a stable form of income and cannot be used in planning budgets for the future. Our preschool is part of the school and can only be run if it is not losing money. The Governors will need to assess this year if we can keep the preschool open as the current base funding rates are not enough and have caused the preschool to be in deficit - only supported through fundraising and other income raised through lettings in the school.”

“The base rate should be priority. The deprivation supplement and SEN rates should be reduced and there should be no High Needs Block transfer - this will give providers a higher base rate. We need a higher base rate to remain sustainable.”

Question 2a:

Do you agree that should a transfer be made to High Needs, an element of both 2, and 3 & 4 year-old funding should be retained for this transfer?

Total responses: **102**

Most providers disagreed with this question as they do not feel they benefit from any High Needs funding and explain that they are doing lots of work preparing children for EHCP's on behalf of schools, who then receive the funding attached.

Example of comments:

"The sector actively pursues a policy of early intervention meaning children with additional needs are identified early, that referrals to other agencies are made and additional support is put in place. All this is done without any financial support which results in longer term savings and there is strong evidence to suggest that early intervention prevents children from escalating through the SEN "system" to the point that they add to the financial drain on the high needs block. This is therefore already a significant but unseen financial contribution to the HNB. The early years sector receives very little financial support from the High Needs Block. The borough should be making a much more concerted effort that Health contribute a more proportionate share towards High Needs block expenditure rather than raiding the Early Years block which is already significantly underfunded by central government."

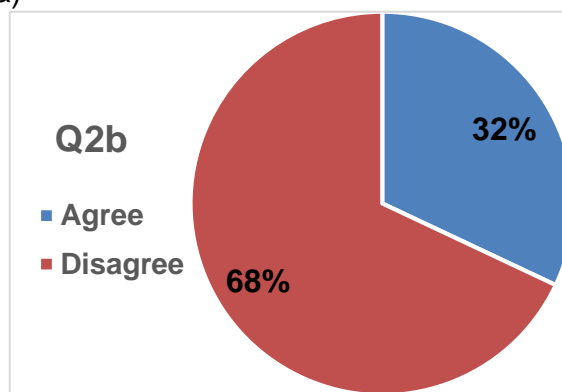
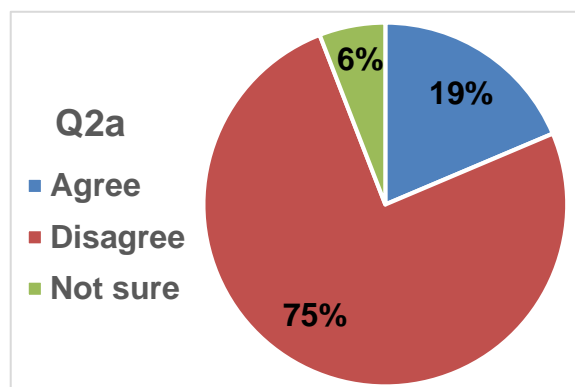
"Schools have had more substantial increases in funding than EY in recent years and therefore have more capacity to absorb the high needs block. Ultimately, it is schools who will benefit from the work put in by EY providers in supporting children with high needs. Further a FTE EY worker will receive a much smaller salary than a FTE teacher, so surely EY providers would be able to increase salaries to recruit and retain the best staff for our youngest, and most vulnerable children."

Question 2b:

If you agree with Question 2a, do you agree that the cash change to the 3&4 year-old base rate should be mirrored in 2 year old funding. For example if an 8p reduction is applied to the 3&4 year old base rate, an 8p reduction is also applied to the 2 year old base rate?

Total responses: **50** (49% of responses to 2a)

Most providers disagreed that any reductions should equally apply to 2-year old funding. Providers were concerned that removing funding from one disadvantaged group to fund another in High Needs was not in keeping with the purpose of 2-year old funding and that the current funding rate is challenging with the requirements for staff ratios at this age group.



Example of comments:

“We did not agree with question 2a but would like to make the point that it is extremely challenging to take 2 year-old funded children at a setting when funding is not realistic in meeting the needs of disadvantaged children and financing staff to child ratios for two year olds. We already have to limit the number of funded two-year olds in our setting in order to remain viable as a business which in turn supports our three and four year olds. Any future reduction in funding would make us consider if we take funded two year olds at all.”

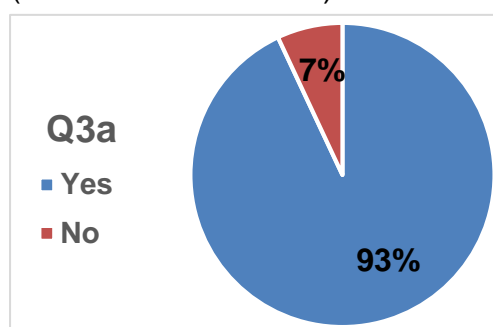
“If a transfer from the 2 year-old funding were made to the HNB this would be reducing the funding for the most disadvantaged 2 year-olds. When considering the cost of provision (care and education only) for 2 year-olds there is already as shortfall, therefore transfer of any funding would be detrimental not only to the quality of education but also to the ongoing viability of the setting. When considering the legislated ratios, mandatory staffing qualification and national minimum wage increases, to remain viable, we will have no option than to introduce a consumable charge.”

“There should be an increase, not a reduction.”

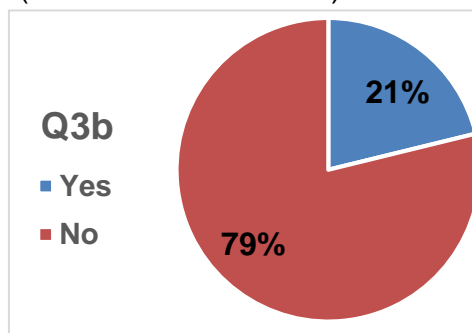
Question 3:

Please indicate your support for the various options considered in this consultation that allow for the various levels of transfer to the High Needs budgets as illustrated in section 6.

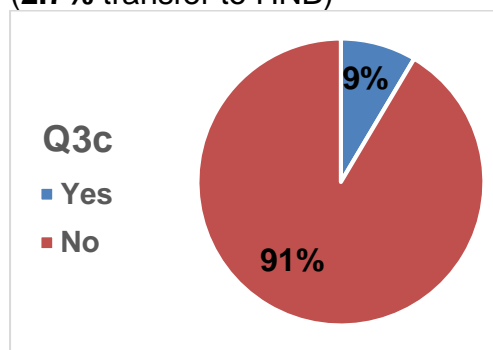
Option 1 No Transfer
(0.0% transfer to HNB)



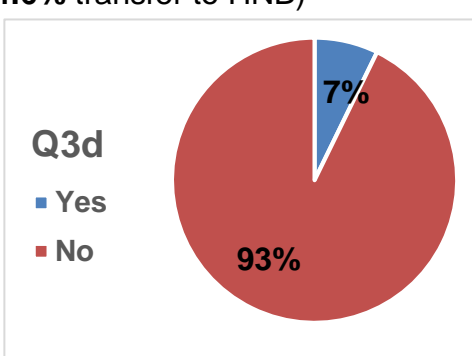
Option 2a 1.4% 3&4yo central retention
(0.9% transfer to HNB)



Option 2b 3.2% 3&4yo central retention
(2.7% transfer to HNB)



Option 2c 5.0% 3&4yo central retention:
(4.6% transfer to HNB)



The options considered for 3 & 4 year-old funding were alongside a cash-equivalent corresponding change to the 2 year-old funding rate.

Total responses: **86**

Providers were able to show their support to one or more of the options put before them. The overwhelming majority were in favour of no transfer to High Needs, with some support for the current 1.4% central retention arrangement and very little support for bigger percentage central retention rates.

Example of comments:

Option 1 **No Transfer**:

"Providers need the highest possible base rate in order to remain sustainable. This is especially true given that the 1.86% increase to the funding floor rate will be completely wiped out by the recently announced 6.2% increase in the living wage rate."

"I think it is still too low especially thinking about what service we offer. Everything is going up and I personally struggle to survive with this kind of rates."

"This is the fairest outcome for EY providers who are already under financial strain."

Option 2a **1.4% Central Retention**:

"As a childminder in Christchurch, we already suffered a big loss under BCP. As we are less likely to receive supplements in this area, we could not remain sustainable if the base rate dropped further."

"Only because this is the next possible option but would like to see more guarantees that a higher percentage of the HNB is re-invested in EY."

"This nursery receives nearly all its income from funded hours so this option would be just about acceptable, but we would have to look very closely at our sustainability for the remainder of the year."

Option 2b **3.2% Central Retention**:

"This option creates sufficiency issues and it will affect our nursery to remain viable due to the increases to wage bills, pensions, employer national insurance contributions, general rising costs in day to day running costs."

"Totally unsustainable for providers in view of business rate increases, further statutory wage increases, etc"

"As mentioned above, all other costs involved in running a childcare business have gone up so this option is essentially the same as a reduction and would render many businesses unsustainable."

Option 2c **5.0% Central Retention**:

“Catastrophic for the whole sector - will lead to several closures and sufficiency issues.”

“We cannot afford to go to this low level of funding.”

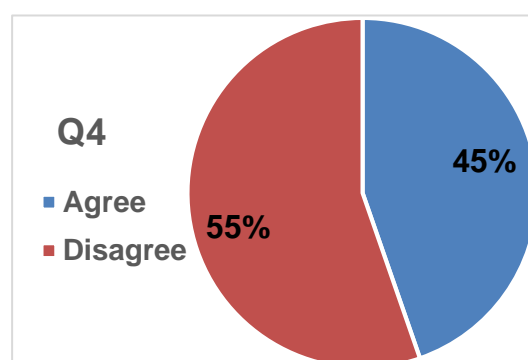
“This will result in our closure.”

Question 4:

Do you agree that any changes to the formula should be applied to the base rate only, such that deprivation supplement and SEND inclusion funding are kept at 2019-20 rates?

Total responses: **94**

This question drew the closest result in terms of agreement and disagreement. Most providers felt there was an opportunity to review the current rates applied to the two mandatory supplements, Deprivation and the SEND inclusion fund.



Examples of comments:

“We must maximise the base rate without any adjustments to the deprivation or SEND supplements. For providers that do not have children who receive the deprivation funding we can see how this may look like a solution in adding to the base rate, the reality of this to settings in areas of deprivation would be catastrophic. This supplement is absolutely essential in ensuring the most vulnerable children are supported in the best possible way, it enables us to reduce addition service charges for families and is an important factor in our sustainability plan. The most recent foundation stage profile results demonstrate the excellent work BCC reach providers are doing with children receiving deprivation and PP supplements, our setting exceeded National and BCP results. The most valuable resource we can offer to these families are dedication, highly qualified practitioners, having already noted our concerns regarding staff retention it is clearly inevitable that quality and outcomes will be effected if we cannot continue to retain, train or keep practitioners at the setting or in the sector.”

“The base rate needs to be made higher but the deprivation & send are kept the same. All children need a good start.”

“Providers who have exceptionally high number of children entitled to deprivation supplement need highest rate possible to maintain high staffing levels enabling them to provide a high standard of care and learning for these children. These children generally have higher levels of needs and higher staffing levels are paramount to their learning and development. A cut in deprivation supplement would result in inadequate supervision impacting on what could be quality time spent in a stable environment. • Many hours of liaising with other professionals are spent ensuring the

best possible start for these children. This is an additional cost for providers and is crucial to understanding what needs to be provided and put in place.”

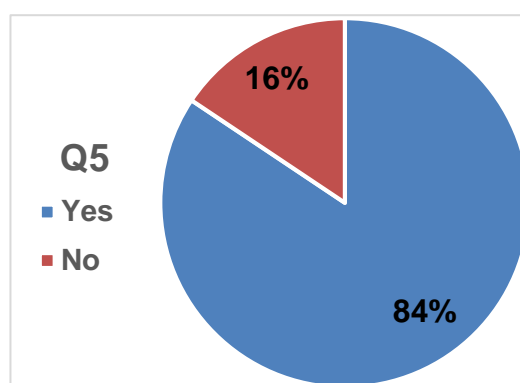
“Deprivation and SEN need reviewing urgently as not working – unreliable and does not allow effective planning. Children mobility between settings makes planning impossible.”

Question 5:

Do you have any operational concerns, in particular that could result in sufficiency and/ or quality issues arising should the central retention be increased from 1.6% to 5.3% across all 2 and 3&4 year old funding?

Total responses: **96**

Many providers commented the low funding currently impacts the quality staffing of their provision, the number of places they can afford to offer their community. The common thread was the current and impending risk to sustainability of their business and their ability to support their staff and their communities.



Example comments:

“Increasing central retention to such levels would be catastrophic for providers in the borough. Current funding levels already do not meet the cost of delivery. As a result: Providers are already reducing the number of “free” places they can offer which could have a significant impact on sufficiency. Historic underfunding has meant that for many providers outgoings have already been cut wherever possible e.g., Staffing levels have been reduced; Training opportunities other than statutory training has all but disappeared; Pay rate differentiation has been eroded meaning that there is little to no financial incentive for practitioners to take on extra responsibilities; Pay and conditions are so poor that recruitment is now a significant issue and has an impact on sufficiency. All of the above have significant repercussions for the quality of childcare and education that providers can offer Given that the borough relies on its PVI sector, should central retention be increased to 5.3%, the borough should produce and share their business plan with providers showing how they can provide sufficient childcare places without making significant losses”

“I understand that the government provide the council with a small pot of money to cover the 2, 3&4 year old funding but it doesn't cover my hourly fee & therefore parents have to make up the shortfall in my fees or I will no longer provide funded childcare places.”

“Operational concerns the list is endless increase in staff wages of 6.2% in April. We will find it hard to maintain this % across all staff levels therefore leading to demoralised staff and keeping experienced highly motivated and skilled staff Practitioners could decide to give up and leave Early Years sector all together

Increase in overheads, maintaining reserves for repairs i.e. new roof Staff moral due to the issues facing the Early years Sector especially funding, Increased staff stress levels due to the uncertainty of the sector. With the new Ofsted Inspection staff wellbeing is a key element and this may affect our Outstanding grading. Limiting training to only statutory training due to lack of funds Limiting experiences offered to children due to the cost and lack of finance i.e. Zoolab Making a profit to reinvest in staffing, training and high quality resources 77% of nurseries struggle to recruit Level 3 qualified staff (NDNA workforce survey 2018) 54% of private nurseries and 74% of voluntary nurseries expect to make a loss or break even (DfE Providers' Finances march 2019) Early Years provision closures increased by 153% since 30 hours funded childcare began (Sept 2017) 28% of closures were in the 20% of deprived communities (NDNA investigation into closures 2016-2019) Nearly half of the closures (46%) were in areas with the lowest government funding rate (£4.30 per hour .. BCP current rate is £4.00!!!!) Limiting the number of funded only places for 2 3 & 4 year olds. Explaining the funding to parents is not always straight forward can be very time consuming. Parents don't understand that they can not just come and go with the funded hours to suit them. Explaining the different number of hours and why it changes per term. New problem arising is explaining to parents of children who are 4 why they won't be getting as much funding as they thought in the summer term because the school will be taking it. Why should the school take the hours especially when the children don't attend the full 30 hours from week one of the Autumn term (a question a parents has asked already)."

"We are already struggling financially with costs increasing in all regards and funding remaining the same or being reduced!!! We will no longer be a viable operation and therefore child care places will be lost."

"childminders are getting fewer, we need to make it worth our while and to support our training and support parents and children the best we can."

"To me this is just bad business. We need to make a profit we are not charities. We as EY providers pride ourselves on the care we offer, we are passionate educators of the youngest children in the sector. To remain at this level we need to keep updated with ongoing training, replenish our resources etc to provide the best play opportunities and to do this we need to be at least able to cover our hourly rate of pay!"

Question 6

Additional comments from providers:

Total responses: **63**

"Childminders are leaving the industry, nurseries are closing. if something is not done funding and sustainability, we will end up with insufficient places to provide for our EYFS children."

“How many providers do you feel would be able to absorb an effective 5% (4.12 vs 3.92) reduction in funding when faced with rising costs of employment of 7-8% a year, compounded for the past 4 years on frozen and static funding?”

“I think that the BCP Council should try and help EY providers as much as possible due to the NLW/NMW, increased pension contributions and all the other costs are going up. We need all the help we can get to remain sustainable. The BCP Council should also look at Business Rates as this will help those providers who don't get small business relief.”

“Joining councils has had a big effect on our Bournemouth group. This with a drop in the birth rate has made it very difficult from April 2019 and during the Autumn term my staff have had to lose some wages and not work some sessions to help us get through to January. This has never happened in the 29 years I have been at the group and with minimum wages due to go up in April our long-term survival looks very bleak. Last April only the staff on the min wages had the 38p rise and the rest 5p. This cannot go on as the gap between staff responsibilities is not reflected in their wages. The base rate needs to continue to rise as our costs increase and the government who want more women to work will have a shortfall of places for children to go. The only answer I can see is more monies from central government.”

“I feel as a self-employed professional, BCP are trying to control my business and taking my choices away of how I wish to run my setting financially. I request the hourly rate increases in line with inflation.”

“I am having to charge and increase consumables fees to parents to remain sustainable, which is impacting upon the amount of sessions parent use for their children. I have many parents with very low income who struggle to pay consumables fees and reduce hours to be able to afford for their child to attend the setting. Families on a higher income are in a better position to afford the quality child care service I provide, whilst lower income families are unable to access my service as much as they would like to or as much as their child needs.”

“Without an increase in the base rate I will be forced to shut my doors to funding. I already make a loss by offering funded places even though additional work is required. I am not prepared to lower the level of service I provide, and I can only hope that the funding rates change to reflect the increased cost of living so that I don't have to close to funding.”

Proposal for BCP Single Funding Formula 2020-21

37. Having considered the outcome of the consultation with providers, whilst the majority supported no central retention to contribute towards the High Needs Budget, over a fifth indicated support for a similar contribution from the Early Years Block to High Needs as was undertaken in 2019-20 (Option 2a). There was limited support for a transfer above this level.

38. There was slightly greater support for changing the deprivation or SEND inclusion funding rates, accompanied by a change in base rate, compared with no change. However, the LA continues to support stability for the sector through retaining

funding supplement funding at the 2019-20 rates. Following a period of funding for which the single BCP formula introduced in April 2019 may have impacted the performance outcomes of children, the formula will be reviewed with particular emphasis on whether the deprivation or SEND inclusion supplements should be varied, and whether any other supplements should be considered. This will also provide a sufficient period of time to review any sufficiency impact of the single BCP formula.

39. The government have provided an additional 8p for 2 and 3&4 year old rates, a 1.8% and 1.5% increase respectively, and it is proposed that these increases should be passed on to providers in full. This proposal should be considered alongside the funding pressures providers may face as a result of the increase to the National Minimum and Living wages from April 2020, which is as high as 6.5% for ages 21- 24.

PROPOSAL 6a: Support the funding formula set out in Table 13. This is Option 2a from the consultation

PROPOSAL 6b: Support for the central retention elements for a High Needs contribution and Central Functions.

Table 13 – Proposal for Early Years Funding Formula

3 and 4 year olds			
	Government Rate	Provider Rate	
	£4.38		
Base Rate	£4.08	£4.08	Every child
Deprivation Supplement	£0.13	£0.53	Per eligible child
SEN/D Inclusion Fund	£0.11	£2.00 or £6.30	Per Eligible Child
HNB Contribution	£0.04		
Central Functions	£0.02		

2 year olds			
	Government Rate	Provider Rate	
	£5.31		
Base Rate	£5.03	£5.03	Every eligible 2yo
SEN/D Inclusion Fund	£0.07	£2.00 or £6.30	Per eligible child
HNB Contribution	£0.05		
Central Functions	£0.16		

Central Services Block

40. School Forum must decide the amount to spend on the various retained Central Services functions for all schools, funded from within the Central Schools Services Block.

Funding and Draft Budget 2020-21

41. 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 decreases by 20% in 2020-21. Services for maintained schools only are not included in the Central Schools Services Block as described in the following section. Central School Services are statutory duties of the LA but the allocation to budgets is decided by Schools Forum. The draft budget for these services has been provided in the financial settlement and draft budget report: Agenda Item 7.

School Admissions and Servicing of the Schools Forum

42. Any further reduction would require schools to consider how individually they manage the Schools Admissions Forum or school admissions process in the absence of coordinated arrangements. The budget for pupil placement panel (operated by legacy Bournemouth for hard to place pupils) is not continuing with funding instead redirected to the ex ESG services, including to increase the education welfare service and support for excluded pupils as part of the high needs budget financial strategy.

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.

DfE Licenses

43. The list of licences negotiated on behalf of all schools by the DfE is to be included in the budget 2020-21 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)

Ex ESG Services

44. These services are LA statutory duties on behalf of all schools, including academies and special schools. The proposed budget allocations have been increased as noted above. The list of these services was included alongside the different duties for maintained schools only for clarity as part of the School Funding Consultation Paper. The draft budget for these services has been provided in the financial settlement and draft budget report: Agenda Item 7.

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.
- Support for pupils with poor school attendance could be reduced.
- Support to schools with basic need capital projects would reduce.
- Central activity is reduced in SEND capital projects forming part of the BCP high needs action plan.
- 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.

Historic Commitments

45. The historic commitment of £275k is only funded by the DfE in 2020-21 at 80%, and is funding to repay prudential borrowing taken out by the legacy 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.
46. There was little comment regarding Central Services in the consultation responses, and no objections raised.

PROPOSAL 7: Schools Forum are recommended to agree the draft Central School Services Block budgets presented in the Draft Budget within the papers for the meeting.

Central Retention for LA Duties for Maintained Schools

47. 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. These duties are those that pass to academies on conversion or have moved to the ESFA (for example, the revaluation of school premises on a rolling programme and consolidation of academy accounts with those of the DfE). This decision is to be made collectively by maintained school members of the SF only with it not impacting on budgets for academies or other DSG areas.
48. The consultation included the details of how the funding mechanisms are to work with a comparison of these maintained school services and those supplied to all

schools funded from the Central School Services Block considered in the previous section.

Proposed Maintained School Central Retentions for the year April 2020 to March 2021

49. The proposed per pupil (mainstream) and per place (specialist) rates for central retentions are unchanged from 2019-20. These derived a total allocation of £200k. An allocation for each service for the 12- month period from April 2020 is scheduled in Table 14.

Table 14: LA Budget for Maintained School Statutory Duties April 2019 to March 2020

Service	Budget Retained £000's
Statutory & Regulatory Duties:	
Education and Service Planning - including appointment of governors, government data returns, functions under the equality act, legal services advice, handling complaints, academy conversion support.	75
Finance & Audit - Production of budget schedules and payment of funding allocations and DfE grants, consolidation of annual accounts and quarterly returns. CFR advice, best value and procurement advice, scheme of financing maintained schools, Internal audit, banking and treasury, financial regulations adaptation for schools (e.g. delegation of some CFO approvals to school governors).	40
Human Resources - Employee investigations, pension administration, pay scales and conditions of service, TU negotiations for local government employees, support for school improvement activities.	20
Total Statutory & Regulatory	135
Asset Management - premises management support, including condition surveys and liaison with dioceses for VA schools, asbestos risk management, general health & safety duty as an employer. DfE bids for condition grants and LA staff support relating to condition works.	52
Monitoring National Curriculum Assessments	13
Total All Duties to be agreed	£200k

50. The proposed rates per pupil and per place are given in Table 15.

Table 15: Proposed Maintained School Central Retention rates

	2019/20 Rates	Change	Proposed Rate 2020/21
Mainstream School rate per pupil	22.89	£0	22.89
Specialist Provider rate per place	97.27	£0	97.27

The multiplier for specialist provider places is 4.25 as used by the DfE in the previous funding mechanism.

Amounts for the 12-month period 2020-21

51. The amounts for each maintained school for the 12-month period (should they remain maintained throughout) would be as set out on Table 16:

**Table 16: Proposed Maintained School Central Retentions
(based on actual Oct- 19 2019-20 pupils and estimated place numbers)**

Maintained Mainstream	NOR	Retention £
Burton Church of England Primary School	326	£7,462
Christchurch Infant School	355	£8,126
Corpus Christi Catholic Primary School	426	£9,751
Highcliffe St Mark Primary School	659.6	£15,098
Hillbourne Primary School	249	£5,700
Mudeford Community Infants' School	176	£4,029
Mudeford Junior School	264	£6,043
Poole High School	1623	£37,150
Somerford Primary School	277	£6,341
St Edward's Roman Catholic/Church of England School, Poole	888	£20,326
St Joseph's Catholic Primary School, Christchurch	216	£4,944
St Katharine's Church of England Primary School	500	£11,445
St Walburga's Catholic Primary School	450	£10,301
The Priory Church of England Primary School	212	£4,853
	6,622	151,568
Maintained Specialist Places	Places	Retention £
Winchelsea Special	130	12,645
Christchurch Learning Centre	48	4,669
Linwood Special	318	30,932
	496	48,246
Proposed Contribution BCP		£199,814

52. If the retention is not supported in full, maintained schools could see some services move to a fully chargeable basis where possible. For example, the revenue costs of support for capital projects would need to be paid for by schools individually as they benefit from the grant available to the LA. This could impact on an individual school's ability to access capital funding to resolve premises issues. Some services are behind the scenes and the LA has no ability not to provide (such as to comply with accounting regulations, paying budget shares, and completing data returns) and individual charging would be an inefficient use of time for both school staff and the LA. Other charges could need to apply to support a school facing a crisis with this not in the best interest of either party.

53. There was limited comment regarding Maintained Schools Services in the consultation responses, although a couple of schools supported a move to chargeable services through SLA's.

PROPOSAL 8: Maintained Schools only Representatives are recommended to agree the retention rates per pupil/ place shown in Table 15.

Recommendations

The Schools Forum should consider the contents of this report and to indicate support for the proposals.

Legal Implications

54. Schools Forum must be consulted by the LA on the Local Funding Formula. The local authority must also consult all mainstream schools on the formula. The recommendation to the LA is to be made by School Members only (includes early years representatives)
55. School Members of the Schools Forum must agree a Growth Fund
56. The Schools Forum must agree any transfer from Schools Block to High Needs Block up to 0.5% without Secretary of State approval; if no agreement, or greater than 0.5%, Secretary of State approval is required.
57. The Schools Forum must agree budgets for CSSB Services
58. Maintained School Members only of The Schools Forum must agree the Central Retention for Educations Functions rate for mainstream schools

Financial Implications

59. Proposals in this report allow for the DSG projected in year deficit for 2020-21 to be limited to £2.8M with Council continuing to bear the risk of a cumulative deficit of £8.3M on its balance sheet at 31 March 2021.
60. Also proposed is an appropriate retention from Mainstream schools to support core educational functions.

Background Papers

61. Schools Forum Report 5th November - Mainstream Schools Formula 2020-21
Proposals for Consultation
<https://democracy.bcpccouncil.gov.uk/documents/g4061/Public%20reports%20package%2005th-Nov-2019%2008.00%20Schools%20Forum.pdf?T=10>

Appendix 1 – Updated NFF using October 2019 census data

NFF	2019-20 Post MFG per pupil Budget	2019-20 Post MFG Budget	20-21 Post MFG per pupil Budget	Per Pupil change against 2019/20	2020-21 Post MFG Budget	NFF Post MFG per pupil Budget	Per Pupil change against NFF	2020-21 NFF Post MFG Budget	Formula Type Sch. Classificati on
BCP TOTAL	4,228	194,308,435	4,451	5.3%	206,780,568	4,451	0.00%	206,780,568	
Queen's Park Infant Academy	3,602	1,282,253	3,771	4.7%	1,353,732	3,771	0.0%	1,353,732	MPPFL
St Clement's and St John's Church of England Infant School	4,562	1,199,932	4,632	1.5%	1,236,681	4,632	0.0%	1,236,681	Floor/MFG
Stourfield Infant School	3,487	1,248,268	3,765	8.0%	1,329,168	3,765	0.0%	1,329,168	MPPFL
Christchurch Infant School	3,594	1,282,954	3,885	8.1%	1,379,241	3,885	0.0%	1,379,241	MPPFL
Mudeford Community Infants' School	3,885	695,483	4,224	8.7%	743,366	4,224	0.0%	743,366	Formula
Ad Astra Infant School	3,663	985,230	3,875	5.8%	1,038,457	3,875	0.0%	1,038,457	Formula
Broadstone First School	3,488	1,042,893	3,766	8.0%	1,129,928	3,766	0.0%	1,129,928	MPPFL
Canford Heath Infant School	3,487	1,252,010	3,767	8.0%	1,344,684	3,767	0.0%	1,344,684	MPPFL
Courthill Infant School	3,484	1,215,845	3,762	8.0%	1,305,507	3,762	0.0%	1,305,507	MPPFL
Lilliput Church of England Infant School	3,492	1,253,576	3,769	7.9%	1,345,458	3,769	0.0%	1,345,458	MPPFL
Merley First School	3,491	1,054,179	3,770	8.0%	1,138,589	3,770	0.0%	1,138,589	MPPFL
Old Town Infant School and Nursery	4,410	714,354	4,738	7.5%	706,033	4,738	0.0%	706,033	Formula
Springdale First School	3,488	1,039,372	3,766	8.0%	1,114,876	3,766	0.0%	1,114,876	MPPFL
Stanley Green Infant Academy	3,637	876,449	3,850	5.9%	870,131	3,850	0.0%	870,131	Formula
Livingstone Road Infant School	4,052	1,073,723	4,270	5.4%	981,994	4,270	0.0%	981,994	Formula
Twin Sails Infant and Nursery School	3,678	1,224,801	3,783	2.8%	1,214,276	3,783	0.0%	1,214,276	MPPFL
Infant/ First Total	3,673	17,441,321	3,910	6.5%	18,232,122	3,910	0.0%	18,232,122	
Christ The King Catholic Primary School	4,411	1,424,771	4,465	1.2%	1,527,084	4,465	0.0%	1,527,084	Floor/MFG
Corpus Christi Catholic Primary School	3,740	1,600,608	3,885	3.9%	1,654,810	3,885	0.0%	1,654,810	Formula
Elm Academy	4,761	2,142,573	4,869	2.3%	2,001,352	4,869	0.0%	2,001,352	Floor/MFG
Heathlands Primary Academy	5,420	1,132,829	5,563	2.6%	1,056,931	5,563	0.0%	1,056,931	Floor/MFG
Hill View Primary School	3,486	2,220,736	3,764	8.0%	2,439,288	3,764	0.0%	2,439,288	MPPFL
Jewell Academy Bournemouth	4,493	1,797,247	4,567	1.6%	1,849,579	4,567	0.0%	1,849,579	Floor/MFG
Kings Park Academy	4,133	2,587,222	4,200	1.6%	2,683,593	4,200	0.0%	2,683,593	Floor/MFG
Kingsleigh Primary School	3,880	2,812,744	3,963	2.1%	3,051,158	3,963	0.0%	3,051,158	Formula
Kinson Academy	4,266	1,168,986	4,409	3.3%	1,040,433	4,409	0.0%	1,040,433	Floor/MFG
Malmesbury Park Primary School	3,647	2,272,100	3,817	4.7%	2,343,720	3,817	0.0%	2,343,720	Formula
Moordown St John's Church of England Primary School	3,489	1,472,240	3,767	8.0%	1,578,474	3,767	0.0%	1,578,474	MPPFL
Muscliff Primary School	3,499	2,158,958	3,778	8.0%	2,334,567	3,778	0.0%	2,334,567	MPPFL
Pokesdown Community Primary School	3,634	1,591,664	3,860	6.2%	1,586,525	3,860	0.0%	1,586,525	Formula
St James' Church of England Primary Academy	3,486	1,460,614	3,764	8.0%	1,565,986	3,764	0.0%	1,565,986	MPPFL
St Katharine's Church of England Primary School	3,489	1,744,518	3,767	8.0%	1,883,720	3,767	0.0%	1,883,720	MPPFL
St Luke's Church of England Primary School	3,642	1,580,448	3,921	7.7%	1,690,040	3,921	0.0%	1,690,040	MPPFL
St Mark's Church of England Primary School	3,491	1,455,636	3,769	8.0%	1,564,248	3,769	0.0%	1,564,248	MPPFL
St Michael's Church of England Primary School	3,487	2,280,466	3,811	9.3%	2,500,147	3,811	0.0%	2,500,147	Formula
St Walburga's Catholic Primary School	3,484	1,668,934	3,763	8.0%	1,693,486	3,763	0.0%	1,693,486	MPPFL
The Epiphany Church of England Primary School	3,490	1,472,593	3,768	8.0%	1,590,085	3,768	0.0%	1,590,085	MPPFL
Winton Primary School	3,491	2,845,089	3,769	8.0%	3,079,507	3,769	0.0%	3,079,507	MPPFL
Burton Church of England Primary School	3,656	1,242,932	3,915	7.1%	1,276,134	3,915	0.0%	1,276,134	Formula
Highcliffe St Mark Primary School	3,486	2,180,601	3,764	8.0%	2,482,546	3,764	0.0%	2,482,546	MPPFL
Somerford Primary School	4,222	1,312,931	4,410	4.5%	1,221,482	4,410	0.0%	1,221,482	Formula
St Joseph's Catholic Primary School, Christchurch	3,788	787,886	4,076	7.6%	880,343	4,076	0.0%	880,343	Formula
The Priory Church of England Primary School	3,677	775,860	3,795	3.2%	804,445	3,795	0.0%	804,445	Formula
Twynham Primary School	3,733	744,762	3,774	1.1%	811,456	3,774	0.0%	811,456	Formula
Bayside Academy	4,360	1,277,353	4,566	4.7%	1,342,401	4,566	0.0%	1,342,401	Formula
Bearwood Primary and Nursery School	3,940	799,746	4,060	3.1%	787,723	4,060	0.0%	787,723	Formula
Bishop Aldhelm's Church of England Voluntary Aided Primary School	3,493	2,088,525	3,771	8.0%	2,254,781	3,771	0.0%	2,254,781	MPPFL
Heatherlands Primary School	3,553	2,202,998	3,765	6.0%	2,334,546	3,765	0.0%	2,334,546	MPPFL
Hillbourne Primary School	3,875	1,061,640	4,114	6.2%	1,024,360	4,114	0.0%	1,024,360	Formula
Longfleet Church of England Primary School	3,490	2,202,409	3,769	8.0%	2,370,721	3,769	0.0%	2,370,721	MPPFL
Manorside Academy	4,258	1,277,278	4,278	0.5%	1,471,588	4,278	0.0%	1,471,588	Floor/MFG
St Joseph's Catholic Primary School, Poole	3,839	1,558,642	4,010	4.5%	1,559,942	4,010	0.0%	1,559,942	Formula
St Mary's Catholic Primary School, Poole	3,575	1,429,833	3,773	5.5%	1,452,522	3,773	0.0%	1,452,522	MPPFL
Talbot Primary School	3,862	2,147,047	4,000	3.6%	2,244,096	4,000	0.0%	2,244,096	Formula

NFF	2019-20 Post MFG per pupil Budget	2019-20 Post MFG Budget	20-21 Post MFG per pupil Budget	Per Pupil change against 2019/20	2020-21 Post MFG Budget	NFF Post MFG per pupil Budget	Per Pupil change against NFF	2020-21 NFF Post MFG Budget	Formula Type Sch. Classificati on
Bethany Church of England Junior School	4,294	1,571,555	4,388	2.2%	1,566,485	4,388	0.0%	1,566,485	Formula
Queen's Park Academy	3,625	1,834,077	3,773	4.1%	1,916,455	3,773	0.0%	1,916,455	MPPFL
Stourfield Junior School	3,491	1,682,778	3,770	8.0%	1,809,494	3,770	0.0%	1,809,494	MPPFL
Christchurch Junior School	3,422	1,714,649	3,785	10.6%	1,899,941	3,785	0.0%	1,899,941	MPPFL
Mudeford Junior School	3,626	960,786	3,891	7.3%	1,027,102	3,891	0.0%	1,027,102	Formula
Baden-Powell and St Peter's Church of England Junior School	3,496	2,552,104	3,770	7.8%	2,748,508	3,770	0.0%	2,748,508	MPPFL
Livingstone Road Junior School	4,226	1,043,928	4,392	3.9%	1,071,717	4,392	0.0%	1,071,717	Formula
Canford Heath Junior School	3,492	1,661,998	3,767	7.9%	1,778,204	3,767	0.0%	1,778,204	MPPFL
Hamworthy Park Junior School	3,838	1,784,732	3,899	1.6%	1,812,899	3,899	0.0%	1,812,899	Formula
Haymoor Junior School	3,843	1,333,589	3,901	1.5%	1,381,026	3,901	0.0%	1,381,026	Floor/MFG
Oakdale Junior School	3,637	1,742,172	3,776	3.8%	1,963,416	3,776	0.0%	1,963,416	MPPFL
Ocean Academy Poole	3,747	1,337,715	3,884	3.7%	1,371,034	3,884	0.0%	1,371,034	Formula
Junior Total	3,681	19,220,084	3,877	5.3%	20,346,282	3,877	0.0%	20,346,282	
Bournemouth School	4,822	3,626,092	5,049	4.7%	3,948,442	5,049	0.0%	3,948,442	MPPFL
Bournemouth School for Girls	4,808	4,096,740	5,036	4.7%	4,421,734	5,036	0.0%	4,421,734	MPPFL
Glenmoor Academy	4,819	3,792,191	5,053	4.9%	4,391,369	5,053	0.0%	4,391,369	Formula
Avonbourne Boys Academy	5,379	2,818,634	5,660	5.2%	2,790,494	5,660	0.0%	2,790,494	Formula
LeAF Studio	5,407	1,227,465	5,712	5.6%	1,347,996	5,712	0.0%	1,347,996	Formula
Oak Academy	5,764	2,582,427	6,084	5.5%	2,518,656	6,084	0.0%	2,518,656	Formula
The Bishop of Winchester Academy	4,870	4,908,913	5,252	7.9%	5,415,277	5,252	0.0%	5,415,277	Formula
The Bourne Academy	5,301	4,569,232	5,574	5.2%	4,788,065	5,574	0.0%	4,788,065	Formula
Winton Academy	4,810	4,035,207	5,035	4.7%	4,682,900	5,035	0.0%	4,682,900	Formula
Highcliffe School	4,801	5,636,042	5,029	4.8%	6,160,862	5,029	0.0%	6,160,862	MPPFL
The Grange School	5,508	2,307,893	5,995	8.8%	2,218,049	5,995	0.0%	2,218,049	Formula
Twynham School	4,797	6,279,292	5,026	4.8%	6,739,830	5,026	0.0%	6,739,830	MPPFL
Broadstone Middle School	4,050	1,935,886	4,301	6.2%	2,219,419	4,301	0.0%	2,219,419	MPPFL
Carter Community School	5,995	2,134,292	6,057	1.0%	2,453,201	6,057	0.0%	2,453,201	Floor/MFG
Corfe Hills School	4,948	3,503,366	5,196	5.0%	3,372,347	5,196	0.0%	3,372,347	Formula
Magna Academy	5,160	4,236,187	5,218	1.1%	4,482,278	5,218	0.0%	4,482,278	Floor/MFG
Parkstone Grammar School	4,817	4,416,840	5,040	4.6%	4,596,120	5,040	0.0%	4,596,120	MPPFL
Poole Grammar School	4,809	4,308,896	5,038	4.8%	4,529,314	5,038	0.0%	4,529,314	MPPFL
Poole High School	4,986	7,802,698	5,152	3.3%	8,361,984	5,152	0.0%	8,361,984	Formula
St Aldhelm's Academy	6,063	2,819,313	6,028	-0.6%	3,442,225	6,028	0.0%	3,442,225	Floor/MFG
St Edward's Roman Catholic/Church of England School, Poole	4,834	4,350,642	5,080	5.1%	4,511,222	5,080	0.0%	4,511,222	Formula
Middle/ Secondary Total	4,991	81,388,248	5,217	4.5%	87,391,784	5,217	0.0%	87,391,784	
Avonbourne Girls Academy	4,481	5,556,947	4,554	1.6%	6,159,327	4,554	0.0%	6,159,327	Formula
St Peter's Catholic Comprehensive School	4,525	6,959,504	4,692	3.7%	7,497,750	4,692	0.0%	7,497,750	Formula
Parkfield School	4,295	1,760,911	4,817	12.2%	2,119,485	4,817	0.0%	2,119,485	Formula
All- through Total	4,478	14,277,362	4,653	3.9%	15,776,562	4,653	0.0%	15,776,562	
Infant/ First Total	3,673	17,441,321	3,910	6.46%	18,232,122	3,910	0.00%	18,232,122	
Junior Total	3,681	19,220,084	3,877	5.31%	20,346,282	3,877	0.00%	20,346,282	
Primary Total	3,759	61,981,419	3,964	5.46%	65,033,818	3,964	0.00%	65,033,818	
PRIMARY PHASE	3,728	98,642,824	3,937	5.61%	103,612,222	3,937	0.00%	103,612,222	
Middle/ Secondary Total	4,991	81,388,248	5,217	4.54%	87,391,784	5,217	0.00%	87,391,784	
All- through Total	4,478	14,277,362	4,653	3.90%	15,776,562	4,653	0.00%	15,776,562	
SECONDARY TOTAL	4,907	95,665,610	5,122	4.39%	103,168,346	5,122	0.00%	103,168,346	
Count of schools by type	Floor	Formula	Cap	MPPFL	Cap<MPPFL	MFG	Total		
Infant/ First Total	-	5	-	10	-	1	16		
Junior Total	-	5	-	6	-	1	12		
Primary Total	-	15	-	15	-	7	37		
PRIMARY PHASE	-	25	-	31	-	9	65		
Primary %	0%	38%	0%	48%	0%	14%	100%		
Middle/ Secondary Total	-	11	-	7	-	3	21		
All- through Total	-	3	-	-	-	-	3		
SECONDARY TOTAL	-	14	-	7	-	3	24		
Secondary %	0%	58%	0%	29%	0%	13%	100%		

Appendix 2 – Proposal to release £2.2M from NFF under Oct-19 Census data

2.2M release from NFF	2019-20 Post MFG per pupil Budget	2019-20 Post MFG Budget	20-21 Post MFG per pupil Budget	Per Pupil change against 2019/20	2020-21 Post MFG Budget	NFF Post MFG per pupil Budget	Per Pupil change against NFF	2020-21 NFF Post MFG Budget	Formula Type Sch. Classificati on
BCP TOTAL	4,228	194,308,435	4,404	4.1%	204,583,816	4,451	-1.06%	206,780,568	
Queen's Park Infant Academy	3,602	1,282,253	3,715	3.1%	1,333,628	3,771	-1.5%	1,353,732	MPPFL
St Clement's and St John's Church of England Infant School	4,562	1,199,932	4,618	1.2%	1,232,948	4,632	-0.3%	1,236,681	Floor/MFG
Stourfield Infant School	3,487	1,248,268	3,709	6.4%	1,309,400	3,765	-1.5%	1,329,168	MPPFL
Christchurch Infant School	3,594	1,282,954	3,829	6.6%	1,359,361	3,885	-1.4%	1,379,241	MPPFL
Mudeford Community Infants' School	3,885	695,483	4,184	7.7%	736,377	4,224	-0.9%	743,366	Formula
Ad Astra Infant School	3,663	985,230	3,835	4.7%	1,027,814	3,875	-1.0%	1,038,457	Formula
Broadstone First School	3,488	1,042,893	3,710	6.4%	1,113,128	3,766	-1.5%	1,129,928	MPPFL
Canford Heath Infant School	3,487	1,252,010	3,711	6.4%	1,324,692	3,767	-1.5%	1,344,684	MPPFL
Courthill Infant School	3,484	1,215,845	3,706	6.4%	1,286,075	3,762	-1.5%	1,305,507	MPPFL
Lilliput Church of England Infant School	3,492	1,253,576	3,713	6.3%	1,325,466	3,769	-1.5%	1,345,458	MPPFL
Merley First School	3,491	1,054,179	3,714	6.4%	1,121,677	3,770	-1.5%	1,138,589	MPPFL
Old Town Infant School and Nursery	4,410	714,354	4,699	6.6%	700,116	4,738	-0.8%	706,033	Formula
Springdale First School	3,488	1,039,372	3,710	6.4%	1,098,300	3,766	-1.5%	1,114,876	MPPFL
Stanley Green Infant Academy	3,637	876,449	3,810	4.8%	861,156	3,850	-1.0%	870,131	Formula
Livingstone Road Infant School	4,052	1,073,723	4,230	4.4%	972,860	4,270	-0.9%	981,994	Formula
Twin Sails Infant and Nursery School	3,678	1,224,801	3,742	1.7%	1,201,158	3,783	-1.1%	1,214,276	MPPFL
Infant/ First Total	3,673	17,441,321	3,861	5.1%	18,004,156	3,910	-1.3%	18,232,122	
Christ The King Catholic Primary School	4,411	1,424,771	4,451	0.9%	1,522,386	4,465	-0.3%	1,527,084	Floor/MFG
Corpus Christi Catholic Primary School	3,740	1,600,608	3,845	2.8%	1,637,892	3,885	-1.0%	1,654,810	Formula
Elm Academy	4,761	2,142,573	4,854	2.0%	1,995,069	4,869	-0.3%	2,001,352	Floor/MFG
Heathlands Primary Academy	5,420	1,132,829	5,546	2.3%	1,053,804	5,563	-0.3%	1,056,931	Floor/MFG
Hill View Primary School	3,486	2,220,736	3,708	6.4%	2,403,000	3,764	-1.5%	2,439,288	MPPFL
Jewell Academy Bournemouth	4,493	1,797,247	4,553	1.3%	1,843,812	4,567	-0.3%	1,849,579	Floor/MFG
Kings Park Academy	4,133	2,587,222	4,186	1.3%	2,675,043	4,200	-0.3%	2,683,593	Floor/MFG
Kingsleigh Primary School	3,880	2,812,744	3,925	1.2%	3,022,047	3,963	-1.0%	3,051,158	Floor/MFG
Kinson Academy	4,266	1,168,986	4,396	3.0%	1,037,365	4,409	-0.3%	1,040,433	Floor/MFG
Malmesbury Park Primary School	3,647	2,272,100	3,777	3.6%	2,319,337	3,817	-1.0%	2,343,720	Formula
Moordown St John's Church of England Primary School	3,489	1,472,240	3,711	6.4%	1,555,010	3,767	-1.5%	1,578,474	MPPFL
Muscliff Primary School	3,499	2,158,958	3,722	6.4%	2,299,959	3,778	-1.5%	2,334,567	MPPFL
Pokesdown Community Primary School	3,634	1,591,664	3,820	5.1%	1,570,203	3,860	-1.0%	1,586,525	Formula
St James' Church of England Primary Academy	3,486	1,460,614	3,708	6.4%	1,542,690	3,764	-1.5%	1,565,986	MPPFL
St Katharine's Church of England Primary School	3,489	1,744,518	3,711	6.4%	1,855,720	3,767	-1.5%	1,883,720	MPPFL
St Luke's Church of England Primary School	3,642	1,580,448	3,865	6.1%	1,665,904	3,921	-1.4%	1,690,040	MPPFL
St Mark's Church of England Primary School	3,491	1,455,636	3,713	6.4%	1,541,008	3,769	-1.5%	1,564,248	MPPFL
St Michael's Church of England Primary School	3,487	2,280,466	3,771	8.2%	2,474,095	3,811	-1.0%	2,500,147	Formula
St Walburga's Catholic Primary School	3,484	1,668,934	3,707	6.4%	1,668,286	3,763	-1.5%	1,693,486	MPPFL
The Epiphany Church of England Primary School	3,490	1,472,593	3,712	6.4%	1,566,453	3,768	-1.5%	1,590,085	MPPFL
Winton Primary School	3,491	2,845,089	3,713	6.4%	3,033,755	3,769	-1.5%	3,079,507	MPPFL
Burton Church of England Primary School	3,656	1,242,932	3,875	6.0%	1,263,188	3,915	-1.0%	1,276,134	Formula
Highcliffe St Mark Primary School	3,486	2,180,601	3,708	6.4%	2,445,609	3,764	-1.5%	2,482,546	MPPFL
Somerford Primary School	4,222	1,312,931	4,370	3.5%	1,210,482	4,410	-0.9%	1,221,482	Formula
St Joseph's Catholic Primary School, Christchurch	3,788	787,886	4,036	6.5%	871,765	4,076	-1.0%	880,343	Formula
The Priory Church of England Primary School	3,677	775,860	3,755	2.1%	796,026	3,795	-1.0%	804,445	Formula
Twynham Primary School	3,733	744,762	3,735	0.0%	802,918	3,774	-1.1%	811,456	Formula
Bayside Academy	4,360	1,277,353	4,526	3.8%	1,330,725	4,566	-0.9%	1,342,401	Formula
Bearwood Primary and Nursery School	3,940	799,746	4,021	2.1%	780,019	4,060	-1.0%	787,723	Formula
Bishop Aldhelm's Church of England Voluntary Aided Primary School	3,493	2,088,525	3,715	6.4%	2,221,293	3,771	-1.5%	2,254,781	MPPFL
Heatherlands Primary School	3,553	2,202,998	3,709	4.4%	2,299,826	3,765	-1.5%	2,334,546	MPPFL
Hillbourne Primary School	3,875	1,061,640	4,074	5.2%	1,014,472	4,114	-1.0%	1,024,360	Formula
Longfleet Church of England Primary School	3,490	2,202,409	3,713	6.4%	2,335,497	3,769	-1.5%	2,370,721	MPPFL
Manorside Academy	4,258	1,277,278	4,265	0.2%	1,467,077	4,278	-0.3%	1,471,588	Floor/MFG
St Joseph's Catholic Primary School, Poole	3,839	1,558,642	3,970	3.4%	1,544,493	4,010	-1.0%	1,559,942	Formula
St Mary's Catholic Primary School, Poole	3,575	1,429,833	3,717	4.0%	1,430,962	3,773	-1.5%	1,452,522	MPPFL
Talbot Primary School	3,862	2,147,047	3,960	2.6%	2,221,817	4,000	-1.0%	2,244,096	Formula
Primary Total	3,759	61,981,419	3,921	4.3%	64,319,008	3,964	-1.1%	65,033,818	

2.2M release from NFF	2019-20 Post MFG per pupil Budget	2019-20 Post MFG Budget	20-21 Post MFG per pupil Budget	Per Pupil change against 2019/20	2020-21 Post MFG Budget	NFF Post MFG per pupil Budget	Per Pupil change against NFF	2020-21 NFF Post MFG Budget	Formula Type Sch. Classificati on
Bethany Church of England Junior School	4,294	1,571,555	4,362	1.6%	1,557,285	4,388	-0.6%	1,566,485	Floor/MFG
Queen's Park Academy	3,625	1,834,077	3,717	2.5%	1,888,007	3,773	-1.5%	1,916,455	MPPFL
Stourfield Junior School	3,491	1,682,778	3,714	6.4%	1,782,614	3,770	-1.5%	1,809,494	MPPFL
Christchurch Junior School	3,422	1,714,649	3,729	8.9%	1,871,829	3,785	-1.5%	1,899,941	MPPFL
Mudeford Junior School	3,626	960,786	3,851	6.2%	1,016,618	3,891	-1.0%	1,027,102	Formula
Baden-Powell and St Peter's Church of England Junior School	3,496	2,552,104	3,714	6.2%	2,707,684	3,770	-1.5%	2,748,508	MPPFL
Livingstone Road Junior School	4,226	1,043,928	4,353	3.0%	1,062,027	4,392	-0.9%	1,071,717	Formula
Canford Heath Junior School	3,492	1,661,998	3,711	6.3%	1,751,772	3,767	-1.5%	1,778,204	MPPFL
Hamworthy Park Junior School	3,838	1,784,732	3,886	1.3%	1,807,076	3,899	-0.3%	1,812,899	Floor/MFG
Haymoor Junior School	3,843	1,333,589	3,889	1.2%	1,376,828	3,901	-0.3%	1,381,026	Floor/MFG
Oakdale Junior School	3,637	1,742,172	3,720	2.3%	1,934,296	3,776	-1.5%	1,963,416	MPPFL
Ocean Academy Poole	3,747	1,337,715	3,844	2.6%	1,357,016	3,884	-1.0%	1,371,034	Formula
Junior Total	3,681	19,220,084	3,833	4.1%	20,113,052	3,877	-1.1%	20,346,282	
Bournemouth School	4,822	3,626,092	4,993	3.6%	3,904,650	5,049	-1.1%	3,948,442	MPPFL
Bournemouth School for Girls	4,808	4,096,740	4,980	3.6%	4,372,566	5,036	-1.1%	4,421,734	MPPFL
Glenmoor Academy	4,819	3,792,191	4,995	3.7%	4,340,465	5,053	-1.2%	4,391,369	Formula
Avonbourne Boys Academy	5,379	2,818,634	5,602	4.1%	2,761,918	5,660	-1.0%	2,790,494	Formula
LeAF Studio	5,407	1,227,465	5,651	4.5%	1,333,646	5,712	-1.1%	1,347,996	Formula
Oak Academy	5,764	2,582,427	6,025	4.5%	2,494,326	6,084	-1.0%	2,518,656	Formula
The Bishop of Winchester Academy	4,870	4,908,913	5,194	6.6%	5,354,706	5,252	-1.1%	5,415,277	Formula
The Bourne Academy	5,301	4,569,232	5,515	4.0%	4,737,568	5,574	-1.1%	4,788,065	Formula
Winton Academy	4,810	4,035,207	4,977	3.5%	4,628,499	5,035	-1.2%	4,682,900	Formula
Highcliffe School	4,801	5,636,042	4,973	3.6%	6,092,262	5,029	-1.1%	6,160,862	MPPFL
The Grange School	5,508	2,307,893	5,936	7.8%	2,196,155	5,995	-1.0%	2,218,049	Formula
Twynham School	4,797	6,279,292	4,970	3.6%	6,664,734	5,026	-1.1%	6,739,830	MPPFL
Broadstone Middle School	4,050	1,935,886	4,245	4.8%	2,190,523	4,301	-1.3%	2,219,419	MPPFL
Carter Community School	5,995	2,134,292	6,038	0.7%	2,445,431	6,057	-0.3%	2,453,201	Floor/MFG
Corfe Hills School	4,948	3,503,366	5,135	3.8%	3,332,644	5,196	-1.2%	3,372,347	Formula
Magna Academy	5,160	4,236,187	5,201	0.8%	4,467,797	5,218	-0.3%	4,482,278	Floor/MFG
Parkstone Grammar School	4,817	4,416,840	4,984	3.5%	4,545,048	5,040	-1.1%	4,596,120	MPPFL
Poole Grammar School	4,809	4,308,896	4,982	3.6%	4,478,970	5,038	-1.1%	4,529,314	MPPFL
Poole High School	4,986	7,802,698	5,093	2.2%	8,266,690	5,152	-1.1%	8,361,984	Formula
St Aldhelm's Academy	6,063	2,819,313	6,009	-0.9%	3,431,187	6,028	-0.3%	3,442,225	Floor/MFG
St Edward's Roman Catholic/Church of England School, Poole	4,834	4,350,642	5,021	3.9%	4,459,030	5,080	-1.2%	4,511,222	Formula
Middle/ Secondary Total	4,991	81,388,248	5,164	3.5%	86,498,816	5,217	-1.0%	87,391,784	
Avonbourne Girls Academy	4,481	5,556,947	4,539	1.3%	6,139,075	4,554	-0.3%	6,159,327	Floor/MFG
St Peter's Catholic Comprehensive School	4,525	6,959,504	4,638	2.5%	7,411,275	4,692	-1.2%	7,497,750	Formula
Parkfield School	4,295	1,760,911	4,769	11.0%	2,098,435	4,817	-1.0%	2,119,485	Formula
All- through Total	4,478	14,277,362	4,615	3.1%	15,648,785	4,653	-0.8%	15,776,562	
Phase Summaries									
Infant/ First Total	3,673	17,441,321	3,861	5.13%	18,004,156	3,910	-1.25%	18,232,122	
Junior Total	3,681	19,220,084	3,833	4.11%	20,113,052	3,877	-1.15%	20,346,282	
Primary Total	3,759	61,981,419	3,921	4.30%	64,319,008	3,964	-1.10%	65,033,818	
PRIMARY PHASE	3,728	98,642,824	3,893	4.41%	102,436,216	3,937	-1.14%	103,612,222	
Middle/ Secondary Total	4,991	81,388,248	5,164	3.47%	86,498,816	5,217	-1.02%	87,391,784	
All- through Total	4,478	14,277,362	4,615	3.06%	15,648,785	4,653	-0.81%	15,776,562	
SECONDARY TOTAL	4,907	95,665,610	5,072	3.35%	102,147,600	5,122	-0.99%	103,168,346	
Count of schools by type	Floor	Formula	Cap	MPPFL	Cap<MPPFL	MFG	Total		
Infant/ First Total	-	5	-	10	-	1	16		
Junior Total	-	3	-	6	-	3	12		
Primary Total	-	14	-	15	-	8	37		
PRIMARY PHASE	-	22	-	31	-	12	65		
Primary %	0%	34%	0%	48%	0%	18%	100%		
Middle/ Secondary Total	-	11	-	7	-	3	21		
All- through Total	-	2	-	-	-	1	3		
SECONDARY TOTAL	-	13	-	7	-	4	24		
Secondary %	0%	54%	0%	29%	0%	17%	100%		

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Appendix 3 – Schools Funding Consultation 2020-21



Bournemouth, Christchurch and Poole

School Funding 2020-21 Consultation

Friday 13th December 2019

Consultation closes Friday 10th January 2020.

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1. Introduction

This consultation concerns DSG funding allocations for the financial year 2020-21 only. It contains the detail of the DfE national school funding system throughout the DSG and options for implementing locally by the Bournemouth, Christchurch and Poole (BCP) authority.

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 the financial year 2020-21 are similar to last year, but with some differences.

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. There is a separate consultation underway with the sector, including where there are nursery classes in mainstream schools, that will run alongside this mainstream schools consultation.

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.

1.1. Schools National Funding Formula (NFF) 2020-21

The most significant decision for BCP Council and the Schools Forum 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 BCP formula set for 2020-21 will be effective for maintained schools from April 2020 and for academies from September 2020.

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.

The updated 2020-21 NFF for mainstream schools is described in Section 3. The starting point before any other options are considered is to look at the impact of the 2020-21 NFF calculated for each school. This is considered in Section 4 as Option 1. The school level allocations through the local formula differ from those announced by the government through the NFF predominantly as a result of the NFF protecting schools against 2019-20 NFF baselines, whilst application through the local formula protects schools against their actual 2019-20 local allocations.

It is important to note in considering Option 1 that the NFF uses data from the October 2018 school census (lagged) to provide the total funding to the LA but the local formula must use the equivalent data at October 2019. 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.

1.2. 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 2020-21. Details of the national and local picture are provided in Section 5.

The Schools Forum received a report in November considering the high needs budgets across BCP. The link to the report is included in Section 5.

Policies and tools have been developed and action plans are in place within the 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 the High Needs Block Financial Strategy Group of the Schools Forum.

1.3. Funding Transfer to High Needs 2020-21

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 2020-21 only with a fresh decision needed next year for 2021-22 if that remains an option.

A funding transfer can be agreed by the Schools Forum of up to 0.5% of Schools Block funding. A higher level would require the approval of the Secretary of State. 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 Schools Forum (SF) 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 3. Final decisions on the local formula for BCP will be made at the Council meeting on 18 February 2020, after taking into account the views of schools and decisions made by the Schools Forum.

During December 2019 the ESFA will provide the October 2019 mainstream school data to enable final mainstream budgets to be calculated and overall affordability of planned unit values to be assessed.

1.4. Growth Fund

As in previous years, the SF 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 Schools

Forum in January 2020. However, as plans are already in place for September 2020, and there is already existing growth working through the system, the impact of any changes will need to be carefully considered. The options for consideration are to:

- A. continue to fund existing growth under the existing legacy policies- the 2019-20 growth policy, and any new growth under a newly proposed policy.
- B. Fund all growth under a newly proposed policy.

This is covered in more detail in Section 9 of this consultation.

1.5. 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 SF will be that the budget overall is to be set at the level of funding received. The allocation to individual LA central budgets will be considered and agreed by the SF in January 2020.

This is covered in more detail in section 10 of this consultation.

1.6. Next Steps

A consultation event to consider this document has been arranged as follows:

- 5:00 – 6:30pm, 6th January 2020 at Bournemouth Learning Centre

In order to book on to the event in click [here](#). The links will take you to the relevant pages within <https://www.pooleworkforcedevelopment.co.uk>. If you have any difficulty booking onto an event please contact:

Jacqui Phillips | Business Support Officer
Schools Access and Commissioning | Quality and Commissioning
T. 01202 456147
Email to: jacqui.phillips@bcpcouncil.gov.uk

The SF on 17th January 2020 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 Council meeting on 18th February 2020 is scheduled to consider the outcome of this consultation with all schools and the recommendations of the Schools Forum. The mainstream schools' formula for 2020-21 will be agreed at this meeting.

The unit values in the proposed formula will be tested for affordability following receipt of the October 2019 school census data from the ESFA in December 2019, 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 21st January 2020.

1.7. Budget Timetable

Consultation Issued	13 th December 2019
Consultation Event	6 th January 2020
Consultation Closes	10 th January 2020
SF recommendations and decisions	17 th January 2020
SF updated on final formula (updated data applied)	17 th January 2020
Mainstream school budgets sent to ESFA	21 st January 2020
Council agree local formula	18 th February 2020

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

2. Schools Funding 2020-21

2.1. DSG Summary

A summary of the indicative funding provided by the DfE for 2020-21, excluding early years, is detailed in Table 1 below:

Table 1: Indicative DSG Funding 2020-21

DSG Funding Block	2019-20 £000's	2020-21 £000's	Change £000's	Change %
Schools Formula	195,510	204,701	9,191	4.7%
Growth Funding – not yet announced	1,806	NA	NA	NA
High Needs	39,186	42,628	3,442	8.8%
Central School Services	2,062	1,960	(102)	(4.9%)
Total	238,564	NA	NA	NA

Some elements of funding are now fixed but final funding for BCP will be updated to reflect the October 19 school census, final growth fund allocation, high needs place return, and January 2020 census to account for change in the cross-border flow of high needs pupils.

The allocation of the DSG for 2020-21 includes some elements of historic funding according to the local budgets in either 2017-18 (high needs and central services) or 2019-20 (amounts outside the NFF in the schools' block, and minimum funding guarantee protection). 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 NFF from 2018-19. In the budget strategy for 2020-21 we should be mindful that the baseline could be reset again for 2021-22 to reflect the most recent local budgets, given the scale of the national high needs funding gap.

2.2. Schools Block Funding for Mainstream Schools

The Schools Block comprises 3 funding elements:

- i. **Schools National Formula (NFF)** with separate primary and secondary per pupil funding levels. The NFF has been applied to the 2019-20 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. Pupil mobility allocations are now derived through the formula, a change from 2019-20 when they were allocated on a historic basis.

- ii. **Local formula elements outside of the national formula.** This is provided at the historic (now 2019-20) budgeted level. This includes business rates (funded at cost to all schools) and exceptional premises factor (joint use agreements for 2 schools, split site factor for 2 schools).
- iii. **Growth Fund allocations for basic need pupil growth.** In 2019-20 the DfE changed the previous historic allocation basis to one using demographic data. This continues for 2020-21, with final allocations being notified in December.

Table 2 below summarises the detail of BCP Schools Block Funding for 2020-21, with the still estimated amounts shaded.

Table 2: BCP Estimated Schools Block Funding 2020-21

Funding Stream	NOR 2019-20 Number	Budget Baseline 2019-20 £000's	Funding Rates 2020-21	Equivalent Funding 2020-21 £000's
Primary	27,669	102,755	£3,911	108,214
	18182	90,957	£5,216	94,829
National Formula	45,851	£193,712	Updated NFF	203,043
Business Rates		1,435		1,328
Joint Use Factor		101		101
Split Site Factor		230		230
Mobility		32	Now included in formula (£340k)	
Total Formula		195,510		204,701

Growth Funding	1,806	Estimated	N/A
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In Table 2, the 2019-20 and 2020-21 funding totals for the NFF both use 2019-20 pupil numbers and data from the October 2018 census. The October 2019 census pupil numbers will be applied to the above funding rates to calculate final funding.

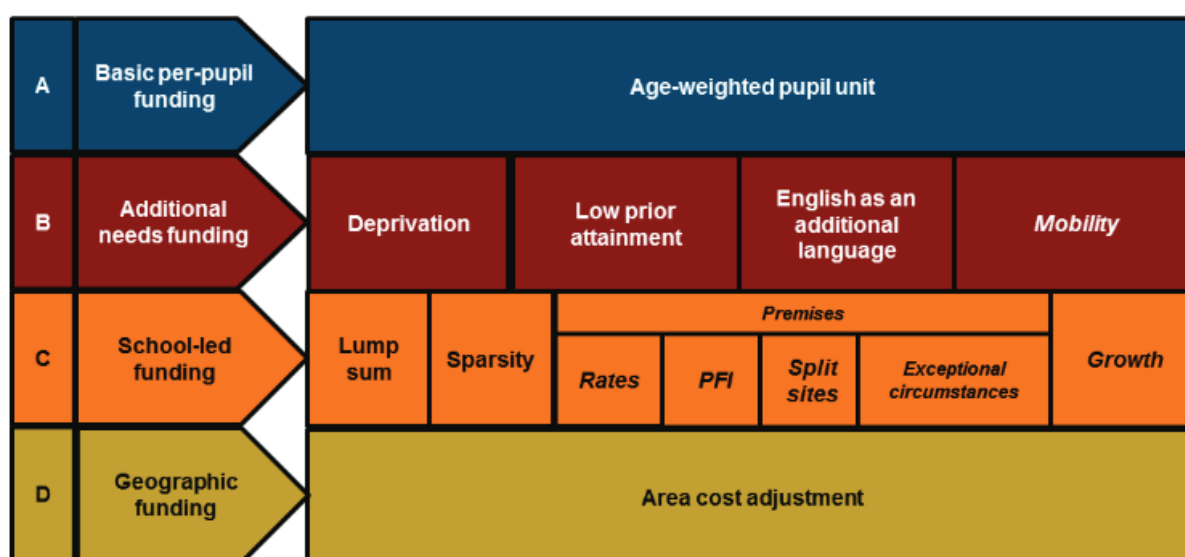
3. Mainstream Schools National Formula

3.1. Summary of Formula

The NFF was set as a formula to apply from 2018-19 onwards, with the first 2 years. 2018-19 and 2019-20, being a transition period to the NFF, with capping on gains for formula schools for national affordability. Such transition is complete for 2020-21, with capping removed and funding values increased for all formula elements.

Figure 1 below shows the formula elements that constitute the NFF. The associated factors and unit funding rates for 2020-21 are provided for reference in Appendix 1. In addition to these factors, the formula includes protection arrangements for individual schools to provide a **minimum increase per pupil** (against the 2019/20 NFF baseline), and an absolute minimum per pupil funding level, considering the age range of the schools.

Figure 1: The building blocks and factors in the national funding formula for schools



Note that the area cost adjustment in Figure 1 is not relevant for BCP as a low-cost area. The PFI factor is also not relevant.

3.2. National Implementation of the Schools NFF 2019-20

The 2020-21 announcements from the DfE in July 2019 included the national context of how LAs had responded to the continuation of the mainstream school NFF in 2019-20 (total of 151 LAs). Summary of the national progress, with BCP as a comparator is as follows:

- Across all LA's, 90.52% of funding was allocated through pupil-led factors, compared with 90.57% in 2018-19, and 90.7% in the 2019-20 NFF. BCP was 92.41%, above the National average.
- 48 LAs mirrored the NFF Primary lump sum rate (including BCP), and 55 for the secondary lump sum (including BCP). This is an increase in both phases from 2018-19.
- 100 (62%) set Minimum Funding Guarantee (MFG) at least +0.0% (excludes BCP). 46 (30.2%) set a threshold at +0.5% mirroring the funding floor protection in the NFF. 34 used the funding floor factor, of which 10 also used a +0.5% MFG (excludes BCP).
- 121 LAs used a minimum per pupil for each phase (includes BCP), of which 94 used the NFF primary rate, and 92 used the secondary rate. However, only 93 authorities actually allocated funding through this factor. Only 15 authorities allocated more than 1% of their funding through this factor, including BCP, which allocated over 1.5%.
- The National Primary to Secondary funding ratio was 1:1.297, compared with 1:1.37 in BCP, which was considerably higher than National.

There is an expectation that local formulae will continue in 2021-22 but they should continue to make progress towards the NFF.

3.3. Summary of NFF Changes 2020-21

The estimated 4.7% NFF growth shown in Table 1 is the net impact of:

Bournemouth, Christchurch & Poole School Funding Consultation 2020-21

- An increase to the Primary and Secondary minimum per pupil funding levels (MPPFLs) of £250 (7.1%) and £200 (5.2%) respectively, where additional funding is provided to a school when for all other formula elements, the outcome of the NFF is below nationally set 2020-21 phase levels (DfE now refer to as floor schools).
- A 4% increase to all formula rates with the exception of current free school meals that has a 1.84% increase in line with inflation, with no cap applied to any gains through the formula, compared with a 6.1% cap in 2019-20 against a 2017-18 baseline (3% annually).
- A minimum funding guarantee of 1.84% set against 2019-20 NFF funding levels for schools where additional funding is provided when the outcome of the NFF is below the schools' historic funding level (DfE now refer to this top up funding as floor funding). This is compared with a 1% uplift compared with 2017-18 in 2019-20.

3.4. Detail of NFF for 2020-21

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 2020-21 compared with the local formula for 2019-20 are shown below in Table 3a, based on the 2019-20 local formula pupil base (the 2018 October census plus funded pupil growth).

Table 3a: Impact by factor of the National Formula for 2020-21

Formula Factors	BCP Formulae £000's 2019-20	National Formula £000's 2020-21	Growth / (Reduction)	
			£000's	%
Primary Basic Entitlement	75,498	79,342	3,844	5.1%
Secondary Basic Entitlement	73,201	76,931	3,731	5.1%
Deprivation Primary	7,141	7,398	257	3.6%
Deprivation Secondary	6,296	6,521	225	3.6%
Low Prior Attainment Primary	8,713	9,080	367	4.2%
Low Prior Attainment Secondary	5,700	5,921	221	3.9%
EAL Primary	1,331	1,382	52	3.9%
EAL Secondary	539	560	21	4.0%
Primary Mobility	30	237	207	695.9%
Secondary Mobility	8	112	104	1325.1%
Looked After Children	0	0	0	0%
Lump Sum	9,790	10,182	392	4.0%
Sparsity	59	68	9	14.7%
Floor Factor Primary (MPPFL)	1,064	2,385	1,321	124.1%
Floor Factor Secondary (MPPFL)	2,090	2,148	59	2.8%
MFG	1,834	1,020	(814)	(44.4%)
Cap	-643	0	643	(100.0%)
Total Local/ National Formula	192,650	203,287	10,636	5.5%
Total Premises Factors	1,659	1,659	0	0.0%

Total Primary Phase	98,643	104,474	5,831	5.9%
Total Secondary Phase	95,666	100,471	4,805	5.0%

Table 3 above shows how the NFF for 2020-21 compares with the distributed BCP total in 2019-20. This difference therefore includes the transfer to high needs in 2019-20 that was not passed on to BCP schools.

The higher MPPFLs in 2020-21 apply to potentially 29 primary schools, 1 middle school and 6 secondary schools.

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 continuing to be developed for 2021-22 for factors currently funded outside the NFF. It is possible for 2020-21 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. This continues to restrict per pupil funding changes in 2020-21 compared with the 2019-20 local formula allocations rather than referencing the 2019-20 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 underlying principle in considering options is to adopt in the first instance the NFF methodology in full. There is no guarantee that the current formula elements will remain unchanged for 2021-22 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).

The mobility factor has been allocated via a formulaic approach for 2020-21 in the NFF, which as a result has allocated more funding than was distributed in 2019-20 as previously this was based on historic use of the mobility factor, which not all BCP legacy authorities had utilised in their local formulae.

Whilst the sparsity factor only affects 1 school, this is planned to continue in BCP as calculated by the NFF.

All proposals have been drawn up using data from 2019-20 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 2020-21 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 2019, particularly where there is a change in pupil numbers, and schools should bear this in mind when estimating final funding for 2020-21.

4.2. Comparison BCP 2019-20 and NFF 2020-21

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.

Table 3b below compares each BCP local formula for 2019-20 with the NFF 2020-21 (option 1).

Table 3b: Comparison of Local Formula 2019-20 and BCP NFF 2020-21

(a) Factors within the NFF

Factor	BCP formula 2019-20		Option 1 NFF 2020-21	
	Rate	Description	Rate	Description
Basic Entitlement - Primary	£2,719	NFF scaled back to 98.97%	£2,857	NFF
Basic Entitlement - Secondaries	KS3 £3,823 KS4 £4,340		KS3 £4,018 KS4 £4,561	
Deprivation - FSM data	£440 FSM £540 Primary FSMe6 £785 Secondary FSMe6	NFF	£450 FSM £560 Primary FSMe6 £815 Secondary FSMe6	NFF
Deprivation* - IDACI bands	Range £200 to £600	NFF	Range £210 to £625	NFF
Prior Attainment Primary	£1,022	NFF	£1,065	NFF
Prior Attainment Secondary	£1,550	NFF	£1,610	NFF
LAC	£0	NFF (Not used)	£0	NFF (Not used)
EAL Primary	£515	NFF	£535	NFF
EAL Secondary	£1,385	NFF	£1,440	NFF
Lump Sum Primary	£110,000	NFF	£114,400	NFF
Lump Sum Secondary	£110,000	NFF	£114,400	NFF
Sparsity		NFF		NFF
Mobility	£85 Primary £149 Secondary	NFF - based on historic spend	£875 Primary £1,250 Secondary	NFF - formulaic
Minimum per pupil funding levels (MPPFL)	Primary £3,472 KS3 £4,572 KS4 £5,072	NFF minus £28	Primary £3,750 KS3 £4,800 KS4 £5,300	NFF
Capping & Scaling **	2.50%	0.5% below NFF	None	NFF
Minimum increase per pupil (floor)	MFG at -0.5%	No floor, all through MFG	MFG at +1.84%	NFF

* 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

Factor	BCP formula 2019-20	Option 1 NFF 2020-21
Business Rates	At Cost	At Cost
Exceptional Premises	£101,017 (2 Schools)	£101,017 (2 Schools)
Split sites	£230,288 (2 schools)	£230,288 (2 schools)
MFG (annual per pupil change)	minus 0.5%	plus 1.84%

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.

The NFF applied locally to BCP schools is provided at a school level comparison against 2019-20 funding in Appendix 2.

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 (split site) and 2 different schools (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 factor is now included within the NFF and the proposal under option 1 is to fund as per NFF.

The measure counts pupils who entered a school during the previous 3 academic years but did not start in September (this excludes reception pupils starting in January). A 6% threshold (a change from 10% in 2019-20 partly resulting from a methodology change) is applied and funding allocated based on the proportion of pupils above the threshold (for example, a school with 9% mobility will attract mobility funding for 3% of pupils).

4.5. MFG – budget change per pupil compared with 2019-20

The MFG is important as it provides funding stability between years. It must be set between plus 0.5% and plus 1.84% per pupil (compared with minus 1.5% and plus 0.5% 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. However, it must be set at least 0%, an increase from minus 1.5% last year.

Funding changes for mainstream schools in 2020-21 will be due to differences between the NFF formula against the 2019-20 BCP formula as well as data changes from the October 2019 census. A lower 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 MFG in the NFF protects against the

NFF LA allocations, while MFG in the local formula protects against 2019-20 BCP formula school allocations, which were slightly reduced from NFF.

If there is to be no transfer to High Needs then it is proposed that the MFG factor is set at plus 1.84%, in line with the NFF rate, even though this factor in the local formula will protect against the 2019-20 local formula, rather than the 2019-20 NFF, as in the NFF allocations.

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.

4.6. Disapplication Requests to ESFA - applicable for all options

4.6.1. 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 deadlines of 20th and 28th November 2019, disapplication requests to adjust the formula have 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 the Schools Forum has been taken into account.

4.6.2. 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 all-through schools (St Peters RC School and Avonbourne Girls Academy) 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 2019-20 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 both BCP and legacy Bournemouth LAs in previous years.

QUESTION 1a:

Do you agree with 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?

4.6.3. Disapplication to set the MPPFLs below NFF

It is expected that NFF MPPFLs will be mandatory for use in the local formula; this disapplication request would allow BCP the flexibility to set MPPFLs below the NFF levels to allow schools on the MPPFL to contribute to any transfer to the High Needs Block should this be necessary.

QUESTION 1b:

Do you agree with the disapplication request to set the MPPFLs below NFF for all schools protected through these levels, should this be necessary to allow all schools to contribute to any transfer to the High Needs Block (HNB), represents a fair adjustment to the local formula?

- ☐ Yes
- ☐ No
- ☐ Unsure

If no, could you propose an approach that would allow MPPFL schools to contribute towards any transfer to the HNB, should this be necessary?

4.6.4. Disapplication to set a variable MFG rate

Should such protection be reduced where an MFG allocation represents, say, more than 10% of the total formula allocation, this level would release £187k from the NFF for 2 schools. Reducing the threshold further to 5% would impact 6 schools, all primary, and

release £497k from the NFF. Table 4 below shows the funding protection and the formula allocation schools receive through the MFG factor at 1.84% under NFF.

Table 4: A comparison of schools protected at various pc funding changes against the formula through the compulsory MFG factor, set at 1.84% for NFF.

Funding Increase %	Count of schools	MFG adjustment £
Above 15%	1	344,741
Range 10% to 15%	2	313,520
Range 5% to 10%	3	245,015
Range 1.84% to 5%	1	67,383
Range 0% to 1.84%	82	49,608
Total Mainstream Schools	89	1,020,266

QUESTION 1c:

Do you agree with the disapplication request to enable an exceptional MFG rate to apply where school are being protected at significantly high levels of protection through the MFG factor. The variation will request the option to set MFG for some schools below +0.5%

- ☐ Yes
- ☐ No
- ☐ Unsure

Please could you explain the rationale behind your response.

5. The 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.

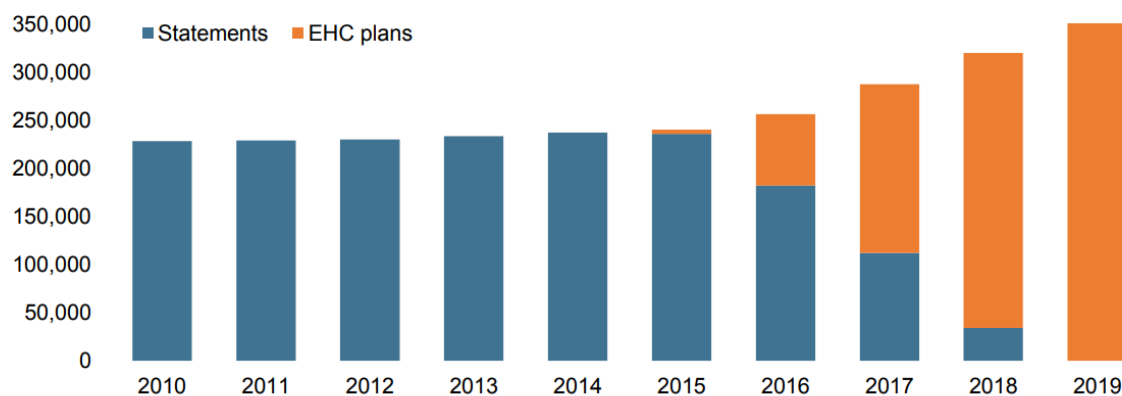
HNB pressures are now recognised as a national issue linked to a number of drivers, including government policy changes. The introduction of a new Code of Practice for Special Educational Needs and Disabilities (SEND) from age 0 to 25 (previously age 0 to 19) has seen an increase in pupils requiring 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 0-5's 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 of children and Young people with Statements or EHC plans

Years: January 2010 - 2019
Coverage: England



Source: SEN2 2010-2019

Figure 3: National Picture of High Needs Placements

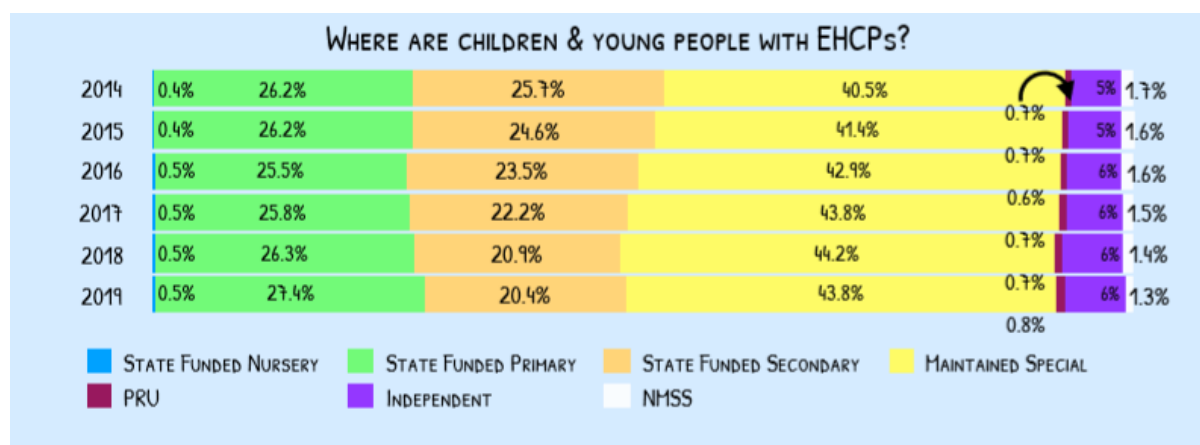
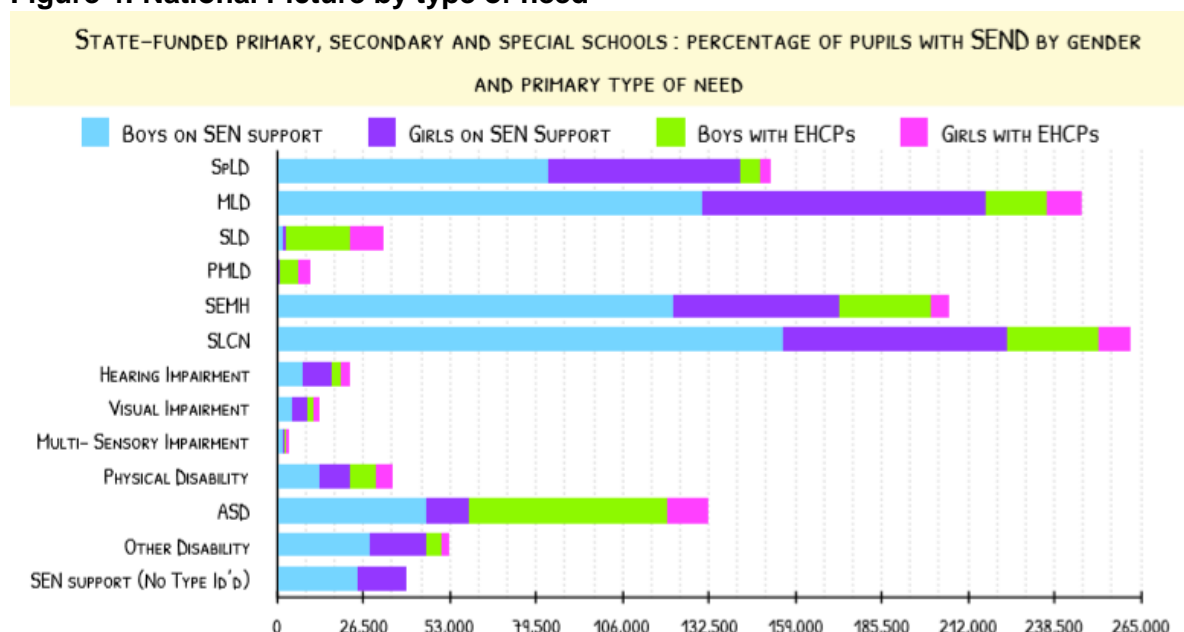


Figure 4: National Picture by type of need



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.

In the Schools NFF the largest impact on overall funding (and costs) is in most cases from changing numbers on roll. In contrast, 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 £9.8 million currently identified in-year for 2020-21 unless planned initiatives are successful.

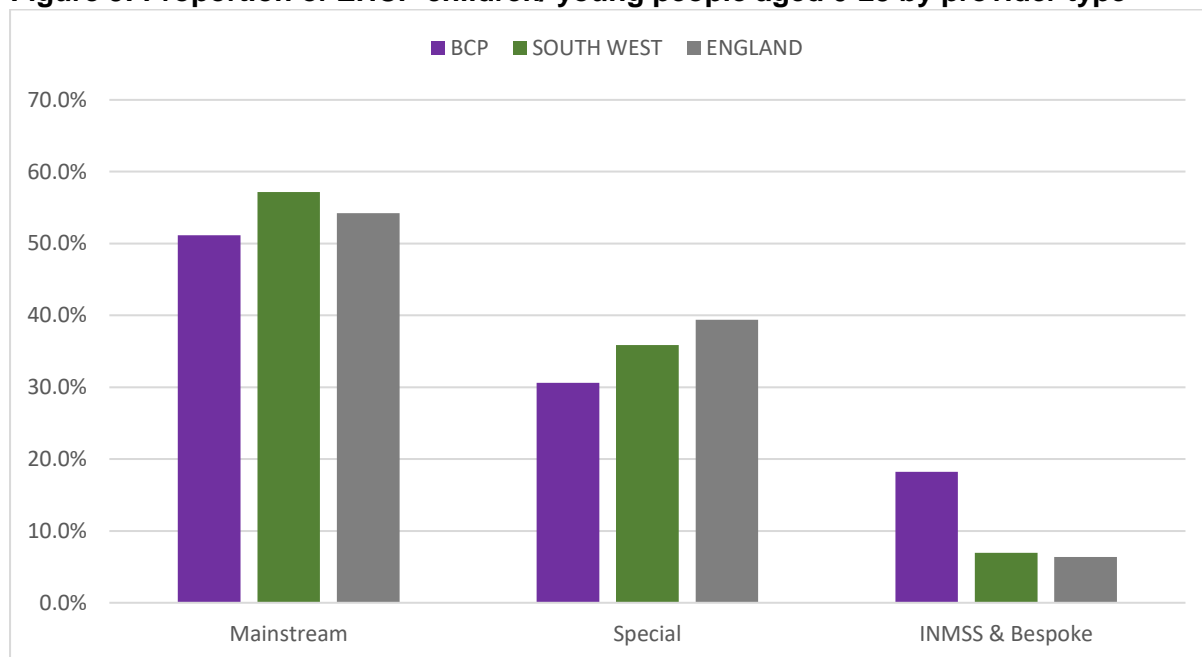
BCP funding growth in the High Needs block is expected to grow at similar levels to that between 2019-20 to 2020-21 (8%) for 2021-22 and 2022-23 based on recent current government announcements of schools funding totals, although these are still subject to change.

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 2019-20.
- Increasing numbers of pupils with EHCPs.
- Increasing complexity of needs inflating the average cost of an EHCP.
- Local specialist provision becoming full, with greater use of higher cost Independent and Non-Maintained Special School (INMSS), and Bespoke providers.

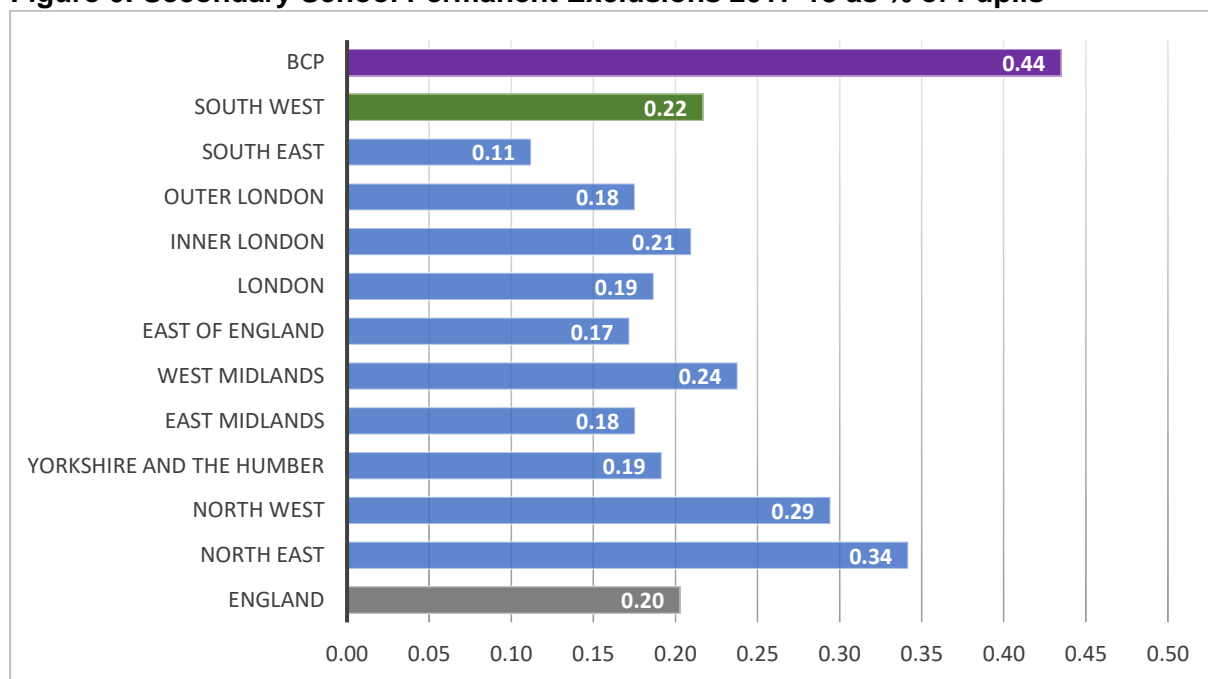
Figure 5 below provides an indication of the greater reliance on INMSSs and Bespoke providers across BCP compared with Regional and National Averages, coupled with a lower proportion of EHCPs within mainstream provision across BCP.

Figure 5: Proportion of EHCP children/ young people aged 0-25 by provider type



Another significant issue BCP faces is its high permanent exclusion rate from Secondary Schools across BCP. The LA must provide education in alternative provision for these pupils in which is often expensive, particularly when Alternative Provision Academies/ Pupil Referral Units are full and the LA must rely on more costly Bespoke provision. Figure 6 compares Permanent exclusions across BCP schools to National and regional averages in 2017-18.

Figure 6: Secondary School Permanent Exclusions 2017-18 as % of Pupils



5.3. BCP Budget Position 2019-20

The high needs budget for BCP in 2019-20 is forecast to be overspent by approximately £2 million. Action plans are in place to dampen funding demands, but further budget growth will be needed with current trends continuing in 2020-21.

5.4. Budget Progress 2020-21

The November SF report provided some detail of the 2020-21 high needs budget shortfall at £9.8m. Included in the shortfall is further budget growth for pupils with EHCPs a reduction in the trend for permanently excluded pupils from mainstreams schools from 2019-20, continued trend in the increased reliance of INMSSs and bespoke packages, and an increase of pupils in special school and academies of 147 over the next three years. The high needs budget is detailed in Appendix 6 as reported to the SF in November. The shortfall of £9.8M identified would require a 4.7% funding transfer from mainstream schools to balance the DSG (this is based on the provisional DSG Schools Block with an assumption for growth factor funding).

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; however, the prevalence of EHCPs in the school population in BCP has recently exceeded that of national. LA historic expenditure is protected in the new National High Needs Formula through a funding floor mechanism in a similar way to MFG for mainstream school funding. This funding floor has been updated over 2018-19 and 2019-20 has been updated from planned spend in 2017-18 by 0.5% (plus small allowances for demographic child population growth in both years) to include the additional £125M nationally that was announced in December 2018 (allocated based on the local proportion of the national funding floor total). The funding floor has been increased for 2020-21 by 8% (per head of 2-18 population).

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

[BCP Schools Forum Meeting November 2019](#)

Further, the [High Needs Budget Strategies Report](#) from the BCP Shadow Schools Forum Meeting October 2018 contains detailed appendices included 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 now 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 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 6 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

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.

The 2019-20 budget, additional places and top up funding were allowed for pupils permanently excluded from a mainstream school; the budget for 2020-21 does not provide for further growth as a result of the BCP on-going Alternative Provision review for which an

objective is to reduce the number of permanent exclusions from BCP schools. 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.

The following is already accounted for in the draft budget:

- An increase of 147 EHCP pupils in special school places, which assumes there will be increased sufficiency of such places.
- £337k increase in SALT provision expected for 2020-21
- £0.203M transfer from early years funding to support the high needs costs for this age group.
- No further growth in AP beyond that figures already forecast for 2019-20.
- Growth in bespoke packages is reduced to 75% (to give an overall growth in EHCPs of 13%)
- Inflation on independent provider fees of 2% p.a.

A funding transfer from schools of 1% would generate circa £2M, a similar level of transfer for the BCP area in 2018-19. In 2019-20 the High Needs Block was supported by:

- a £2.2M transfer from the Schools Block
- a £0.2M from the Early Years Block
- a matched one- off council contribution of £2.4M

5.5. 2020-23 Forecast

The following forecast is based on current trends for each placement type, where more growth is seen in high cost placements than in mainstream provision. The above bullets taken into account in the draft budget are projected forwards, along with a with a continued £3M p.a. increase in High Needs Block funding.

Table 5: Growth in EHCPs 2019-20 to 2022-23

	Budget 19-20	Forecast 19-20	Forecast 20-21	Forecast 21-22	Forecast 22-23
Independent	-7%	35%	35%	35%	35%
Non-Maintained Special Schools	9%	5%	5%	5%	5%
Independent & Non-Maintained	3%	17%	17%	17%	17%
Colleges	32%	20%	20%	20%	20%
Independent Colleges	33%				
Post 16	32%	16%	16%	16%	16%
Special Schools	6%	6%	6%	6%	6%
Mainstream	6%	9%	9%	9%	9%
Special Units / Mainstream Plus / Bases	33%	3%	3%	3%	3%
Mainstream and Special Units	7%	9%	9%	9%	9%
Medical / Therapies		11%	11%	11%	11%
Bespoke	60%	151%	75%	60%	30%
PLACEMENTS BY BCP	11%	14%	14%	14%	14%
Zero Top-up	22%	-3%	-3%	-3%	-3%
TOTAL EHCPs	11%	13%	13%	13%	13%

	Budget 19-20	Forecast 19-20	Forecast 20-21	Forecast 21-22	Forecast 22-23
Forecast Spend	£43.7m	£46.2m	£52.4m	£57.4m	£65.5m
High Needs Block Funding	£38.9m	£39.2m	£42.6m	£45.6m	£48.6m
Shortfall	£4.8m*	£7.0m	£9.8m	£11.8m	£16.9m

5.6. 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 SF 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.

5.6.1. 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 in 2018-19 the group was tasked to explore short and medium term measures to reduce the current pressure on the high needs budgets. The group continued its work in 2019-20; the work specifically considers:

1. Financial pressures on the high needs block.
2. Implications of the introduction of a banding system for mainstream EHCPs for BCP.
3. Impact of outreach services and funding for 2020-21.
4. Special school place numbers for 2020-21 and budget impact.
5. Preparation of a detailed report to the SF for January 2020.
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

5.6.2. 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 necessary 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 SF 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.

5.6.3. High Needs Budget savings under Option 1.

Should Schools Forum not support any transfer, and no transfer is made into the High Needs Block, a combination of the following savings, to the degree required, could be made to the High Needs Budget, as per Table 6.

Table 6 – Savings to the High Needs budget under option 1 (no transfer)

Description of saving	Projected annual saving
Cease HN Top-up payments to mainstream schools with balances >10% of annual revenue budget	£500K
Cease all mainstream school top payments (further saving on the above line)	£2,100K
The LA no longer funds any SALT therapies – rather schools fund this	£500K
Outreach Services are ceased	£487K
The LA no longer pays for centrally funded Hearing and Vision Support Service (HVSS) and Sensory Service	£758K
Set Special Schools MFG at -1.5% (a disapplication of regulations is required)	£290K
Total	£4,635K

QUESTION 2:

Do you support the savings indicated in Table 6? If you do not support the full savings, please indicate the level of savings you would support, and provide information on alternative.

Saving	Support Yes/ No	Rationale/ Further information on the level you would support
Cease HN Top-up payments to mainstream schools with reserves >10% of annual revenue budget		
Reduce that paid through all mainstream top up to £0		
The LA no longer funds any SALT therapies – rather schools fund this		
Outreach Services are ceased		
The LA no longer pays for centrally funded Hearing and Vision Support Service (HVSS) and Sensory Service		
Set Special Schools MFG at -1.5% (a disapplication of regulations is required)		

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 SF. 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 2020-21 only and will be needed at the January SF meeting so that work can progress to finalise the mainstream school formula.

6.2. Summary of Approach

The rationale adopted last year was that we should always aim to mirror the NFF as closely as possible with the BCP formula seeking to move all schools towards it as affordable. This approach is planned to be taken for 2020-21.

The current funding shortfall on the high needs budget for 2020-21 is projected to be £8.1m, after further initiatives have been developed to manage demand, as set out later in this document in Table 17. This includes savings identified from strategies that will be implemented for 2020-21 along with an illustrative transfer from Early Years of £0.2m. This consultation considers how varying levels of transfer could be found using four illustrative examples of releasing funding from the NFF as per Table 7 below

Table 7 – Transfer level out of the Schools Block (SB) into High Needs

Transfer from SB Description	% of Schools Block	Cash amount	Remaining gap
(a) Maximum Schools Forum can approve	0.5%	Circa £1m	£7.1M
(b) SB transfer 2019-20 in terms of equivalent SB %	1.1%	£2.3m	£5.8M
(c) SB transfer plus 2019-20 one-off council contribution	2.2%	£4.6m	£3.5M
(d) Total projected HN budget gap	3.9%	8.1m	£0

6.3. Principles

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

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 SF 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. The level of funding for pupil growth remains uncertain but a level of surplus funding is still expected.

Approximately half of all schools across BCP in 2020-21 would potentially receive NFF allocations according to the funding factors only. Other schools have formula allocations uplifted through MPPFLs or MFG, 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:

LEVER 1. Funding Protection – MFG rate to use. Level of the MFG between + 0.5% and plus 1.84%

LEVER 2. Level of the gains cap between 0.5% (MFG gains only allowed for this group) and a ceiling level

LEVER 3. Reduce a formula unit value. A sensible value to adjust would be the phase appropriate Basic Entitlement rate.

LEVER 4. Reduce the MPPFL for each phase. This requires a disapplication request

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. This is in line with the approach taken locally for 2019-20.

The paragraphs below illustrate how funding can be released from the NFF through adjusting each lever. The adjustments considered below are considered in isolation of any other levers; applying levers simultaneously results in compound effects.

6.5. Lever 1 – Reducing MFG from the NFF

The impact of varying MFG from 1.84% NFF is shown in Table 8. Setting the MFG at its lowest level of plus 0.5% releases the maximum possible of £290k. Setting the MFG at plus 0.5% allows schools that would see reduced funding compared with 2019-20 and potentially also under the NFF stay closer to their funding allocations determined according to their most recent data.

Table 8 – impact of variable Minimum Funding Guarantee

MFG	Funding released from 2020-21 NFF	% Schools Block	Pupils impacted
1.5%	£153,513	0.1%	3,201
1.0%	£222,382	0.1%	3,201
0.5%	£289,872	0.1%	3,201

6.6. Lever 2 –Applying a gains cap

Setting an absolute gains cap at 1.84%, essentially reduced all formula schools to NFF MFG. This would release £2.8m. Various absolute cap levels are illustrated in Table 9. It is also an option to release funding through a gains cap by providing a scaled cap, that scales back proportionally any gains above a certain level. This scaling method is not illustrated for simplicity, with only legacy Dorset County Council using this method within BCP schools previously.

Table 9 – impact of variable Funding Gains Caps

Gains Cap	Funding released from 2020-21 NFF	% Schools Block	Pupils impacted
8.0%	£113,495	0.1%	2,056
6.0%	£503,325	0.2%	5,706
4.0%	£1,530,458	0.7%	19,997
2.5%	£2,429,764	1.2%	22,141
1.84%	£2,832,733	1.4%	22,606

6.7. Lever 3 - Scaling back Basic Entitlement

This lever can be used as an alternative to, or in conjunction with lever 2 above, to release funding from formula schools, as per Table 10. The maximum funding released under this approach would be to scale back all funding gains through the formula at any level by varying amounts, and all formula schools are on MFG, (illustrated using MFG at 1.84%.

Table 10 – impact of scaling back Basic Entitlement factor values. MFG at 1.84%

Basic Entitlement % of NFF	Funding released from 2020-21 NFF	% Schools Block	Pupils impacted
99.0%	£844,796	0.4%	22,606
98.0%	£1,481,959	0.7%	22,606
97.0%	£2,007,395	1.0%	22,606
96.0%	£2,415,060	1.2%	22,606
95.0%	£2,630,700	1.3%	22,606
MAX	£2,832,733	1.4%	22,606

6.8. Lever 4 – Reducing MPPFL below the NFF (requires a disapplication of regulations)

A disapplication request is expected to be required to set MPPFLs below NFF (subject to DfE confirmation expected January 2020). Following a successful disapplication, MPPFLs could be set at any level, or not applied at all. Table 11 shows the impact of reducing MPPFLs down to 2019-20 NFF rates (a disapplication to reduce rates below these levels is not expected to be proposed and so is not modelled below).

Table 11 – impact of variable MPPFL rates

MPPFLs	Funding released from 2020-21 NFF	% Schools Block	Pupils impacted
NFF 2020-21 - £50	£954,653	0.5%	20,147
NFF 2020-21 - £100	£1,804,457	0.9%	20,147
NFF 2019-20	£2,939,636	1.4%	20,147

6.9. Maximum release from NFF (with / without disapplication of regulations)

An indication of the maximum funding to be released from NFF from MFG, Formula and MPPL schools, in that order, is provided in Table 12. The effects of the various formula changes are compounded in this table.

Table 12: Illustrative extremes for transfer to High Needs considerations

Description	MFG @0.5%	All schools on MFG @1.84% or MPPFL	All schools on MFG @0.5% or MPPFL	All schools on MFG @0.5%
MFG	0.5%	1.84%	0.5%	0.5%
Basic Entitlement	100%	Max released	Max released	Max released
MPPFLs	NFF	NFF	NFF	2019-20 formula + 0.5%
% Transfer	0.14%	1.37%	1.84%	4.79%
Maximum funding that could be released from NFF formula £'000s	273	2,726	3,700	9,785
Disapplication required?	No	No	No	Yes – to vary MPPFL

6.10 Varying Levels of Funding Transfer

Table 13: Transfer Options – Proposals to Release Funding from the NFF

Transfer Level				
Formula Changes (implemented in this order)	MFG	Gains Cap %	MPPFLs changed against 2020-21 NFF £	Basic Entitlement all phases %
2020-21 NFF	+1.84%	None	0	100.0%
(a) 0.5%	+1.62%	None	-22	99.4%
(b) 1.1%	+1.55%	None	-52	98.6%
(c) 2.2%	+1.00%	None	-110	97.3%
(d) 3.9%	+0.75%	None	-210	94.8%
4.7% Max Possible with No MPPFLs	+0.5%	None	No MPPFLs	100.0%
1.84% Max Possible with NFF MPPFLs	+0.5%	+0.5% (MFG)	0	100.0%

Table 14: Comparison of Option Unit Values / Mechanisms for 2019-20

Factor	Option 1 NFF	Option 2 a 0.5%	Option 2 b 1.1%	Option 2 c 2.2%	Option 2 d 4.7%
Basic Entitlement Primary	£2,857	£2,841	£2,817	£2,778	£2,709
Basic Entitlement KS3	£4,018	£3,995	£3,961	£3,908	£3,810
Basic Entitlement KS4	£4,561	£4,535	£4,497	£4,436	£4,325
Minimum per Pupil Funding Level Primary	£3,750	£3,728	£3,698	£3,640	£3,540
Minimum per Pupil Funding Level KS3	£4,800	£4,778	£4,748	£4,690	£4,590
Minimum per Pupil Funding Level KS4	£5,300	£5,278	£5,248	£5,190	£5,090
Gains Cap	None	None	None	None	None
MFG	1.84%	1.62%	1.55%	1.00%	0.75%

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 13 and Table 14 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?

QUESTION 3d:

Do you support both a gains cap and reduction of the basic entitlement factor proportionately as a mechanism for releasing funding from formula schools?

- ☐ Yes
- ☐ No
- ☐ Unsure

If no, what would you support instead?

QUESTION 3e:

Regardless of whether you agree with any reduction to MPPFLs, do you support a flat reduction to the MPPFLs of equal cash amounts to all phases?

- ☐ Yes
- ☐ No
- ☐ Unsure

If no, would you prefer to see a proportional scaling back of gains under Primary and Secondary phase MPPFLs by adjusting the MPPFLs accordingly?

7. Formula affordability

Final school budgets will be calculated following receipt of the October 2019 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. Should the proxy data for additional needs reduce (increase) between Oct 18 to Oct 19 censuses, the SUFs and PUFs based on Oct 18 proxy data will allocate more (less) funding to the Schools Block than required to distribute locally through NFF. There is no indication either will be the case; in particular, levels of deprivation across the borough have remained fairly consistent overall.

These final formula adjustments could involve:

- i. 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 0.5% is initially planned) the gap with formula funding levels for schools with protected historic funding.
 - Reduction in formula unit values.
 - Reducing the MPPFLs (subject to the disapplication required being approved).
 - A combination of the above.
- ii. 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 +1.84%) 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.
 - Include any surplus within any funding transfer to the High Needs Block.

In addition to the above, there may be some surplus funding in the NFF that relates to the following:

7.1.1. Provisional allocations (excluding growth)

Current modelling suggests there may be circa £100k remaining in the Schools Block after NFF is applied in full to the local formula. This is due to

- the difference between MFG applied to NFF LA allocations protecting against 2019-20 NFF funding levels, and MFG applied in the local formula protecting against 2019-20 local formula school allocations.
- The reduction to growing all-through school baselines applied locally in 2019-20 but not applied to the NFF.

7.1.2. Growing all-through school 2020-21 disapplication

Whilst this will not impact either of the affected two schools on NFF, when scaling to Basic Entitlement is applied, along with any gains capping, additional funding will be released from NFF following the disapplication's.

7.1.3. Funding through the growth factor.

The growth factor through the NFF for BCP has not yet been announced by the DfE. However, pending the Schools Forum decision on the growth fund policy for 2020-21, projections of the growth factor suggest there may be surplus in the growth factor, after both implicit growth in the formula and the explicit growth fund are taken in to consideration.

7.1.4. Proposal

It is proposed to manage any shortfall in funding by adjusting the values of the Basic Entitlement factor for each phase by the same proportion. Any surplus in funding is added to the High Needs Block transfer.

QUESTION 4a

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.

QUESTION 4b

Do you support any surplus funding after the agreed level of transfer out of the local NFF being added to the High Needs Block transfer?

- ☐ Yes
- ☐ No
- ☐ Unsure

If no, should surplus be held as a contingency or reallocated through the formula, and if so, how?

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 15 and Table 16 below:

Table 15: Summary Final Formula Positions (based on 2019-20 data)

Number of schools	NFF	Levels of Transfer to High Needs			
	Option1	Option 2a	Option 2b	Option 2c	Option 2d
Transfer Level	0%	0.50%	1.1%	2.20%	3.90%
MFG from 19/20 level	9	9	10	10	24
MPPFL	36	35	36	34	31
Capped Funding	0	0	0	0	0
Fully formula funded	44	45	43	45	34
Total Schools	89	89	89	89	89

Table 16: Comparison of NFF (no Transfer) and Option 2 Transfer levels per pupil funding % changes against schools 2019-20 per pupil funding baseline

Table 16a: NFF (option 1 no Transfer)

Funding Increase %	MFG	Capped	MPPFL Schools	Formula Schools	Total
Above 6%	0	0	25	12	37
Range 3% to 6%	0	0	11	29	40
Range 1.84% to 3%	0	0	0	2	2
Range 1% to 1.84%	9	0	0	0	9
Range 0.5% to 1%	0	0	0	1	1
Total Schools	9	0	36	44	89

Table 16b: Option 2a illustration – 0.5% Transfer)

Funding Increase %	MFG	Capped	MPPFL Schools	Formula Schools	Total
Above 6%	0	0	24	10	34
Range 3% to 6%	0	0	11	27	38
Range 1.84% to 3%	0	0	0	6	6
Range 1% to 1.84%	9	0	0	1	10
Range 0.5% to 1%	0	0	0	1	1
Total Schools	9	0	35	45	89

Table 16c: Option 2b illustration – 1.1% Transfer)

Funding Increase %	MFG	Capped	MPPFL Schools	Formula Schools	Total
Above 6%	0	0	24	7	31
Range 3% to 6%	0	0	12	28	40
Range 1.84% to 3%	0	0	0	6	6
Range 1% to 1.84%	10	0	0	1	11
Range 0.5% to 1%	0	0	0	1	1
Total Schools	10	0	36	43	89

Table 16d: Option 2c illustration – 2.2% Transfer)

Funding Increase %	MFG	Capped	MPPFL Schools	Formula Schools	Total
Above 6%	0	0	0	2	2
Range 3% to 6%	0	0	25	15	40
Range 1.84% to 3%	0	0	9	19	28
Range 1% to 1.84%	0	0	0	6	6
Range 0.5% to 1%	10	0	0	3	13
Total Schools	10	0	34	45	89

Table 16e: Option 2d illustration – 3.9% Transfer)

Funding Increase %	MFG	Capped	MPPFL Schools	Formula Schools	Total
Above 6%	0	0	0	1	1
Range 3% to 6%	0	0	0	6	6
Range 1.84% to 3%	0	0	22	6	28
Range 1% to 1.84%	0	0	1	8	9
Range 0.5% to 1%	24	0	8	13	45
Total Schools	24	0	31	34	89

Appendix 3 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 2019-20 local formula. This removes the impact of changing pupil numbers and pupil data and enables a direct comparison to be made with 2019-20 funding levels.

8.2. Financial Strategy for 2020-21

The 5 November Schools Forum Report estimated the funding gap for high needs at £9.8m for 2020-21. Further work to identify activity to reduce budget demand during November has reduced this to £8.1 million.

Table 17: High Needs Block projected shortfall and contributions to this shortfall -

High Needs Shortfall		£9.8M
Joint commissioning agreements – increased contribution to EHCPs from Health	£0.5M	
Review of current EHCP processes to reduce demand	£0.5M	
Early Help	£0.25M	
Review of high cost placements to reduce costs	£0.25M	
Total actions to reduce shortfall for 2020-21	£1.5M	
Remaining gap		£8.3M
Minimum transfer from Early Years	£0.2M	
Residual Funding Gap 2020-21		£8.1M

8.3. Joint Commissioning

Joint commissioning is a strategic approach to planning and delivering services in a holistic, joined-up way (education; health; care) for children and young people with SEND. It ensures children, young people and families can access the right help at the right time.

Currently, local joint commissioning arrangements are under developed and do not maximise whole system benefits.

- a. Work is already under way with key partners to develop a joint commissioning strategy and delivery plan. These will be in place for January 2020.
- b. In addition to other current multi agency panels a multi-agency complex needs panel (CNP) will be introduced to review all high cost decisions (typically placement). As part of these arrangements, to develop an agreed protocol between education, social care and health to ensure responsible, tripartite funding solutions are achieved. Forecast savings of £0.5M each year (this will reduce as placements in INMSS reduce over time). An initial meeting has been held to review current arrangements. A working protocol and panel will be in place for January 2020.

Strategic actions to further close the gap

Whilst it is not possible to place an annual budget saving against many of these strategic actions, the following combined actions are intended to close the gap in the High Needs budget long term.

8.4. Reprofile placements closer to the national average (i.e. mainstream retain a higher proportion of EHCPs and new placements into INMSS reduced).

This will only be successful if a whole system approach is taken and the Council works in partnership with schools and other agencies. Parental preference and the availability of INMSS will remain a challenge. The average cost of special school is £24k compared to £55k for INMSS, which gives an indication of the scale of cost avoidance.

Analysis of the current position highlights the following key issues

- i. The proportion of INMSS places in BCP is considerably higher than the National Average. Below is a table that shows the split of place capacity by type of school, that includes post-16 places. The 'availability' of INMSS places, coupled with parental preference, has in part led to an over reliance on INMSS compared to national average. The profile of BCP school/ provider places available to National is included in Table 18a below:

Table 18a: profile of BCP EHCPs to National by placement provider type

Area	Mainstream	Special	INMSS	% Rank
National	98.4%	1.2%	0.39%	-
BCP	98.0%	1.4%	0.66%	87% (100% highest prevalence INMSS)
<i>Difference</i>	-0.5%	0.2%	0.3%	-

Partly as a result of this, BCP has the following profile of EHC placements by provider group compared with National:

Table 18b: profile of BCP EHCPs to National by placement provider type

	National Ave.	Forecast 19-20	Forecast 20-21	Forecast 21-22	Forecast 22-23
EHCPs in Mainstream settings	54.22%	51.17%	49.73%	47.57%	46.62%
EHCPs in Special Schools + Bases	39.40%	30.63%	28.91%	27.22%	25.63%
EHCPs in INMSS & Bespoke	6.38%	18.21%	21.36%	25.21%	27.75%

- ii. In recent years, similar to national, the prevalence of Autistic Spectrum Disorders (ASD)/speech, language and communication needs (SLCN) and Social, emotional and mental health needs (SEMH) has been increasing and continues across BCP. In more recent years SEMH prevalence has also been growing and continues across BCP. While these are the most significant area of pressure there is also an emerging pressure in Moderate Learning Difficulties (MLD).
- iii. Nationally 5% of pupils with an EHCP are in INMSS providers (and therefore a corresponding higher proportion are in mainstream and special schools), whilst in BCP this is 10.8% (with correspondingly lower proportion in maintained and special schools).
- iv. Tables 19a and b below indicates the scale of change required. It shows the number of BCP pupils with EHCP by type of provision forecast for 2019/20 and notional placement based on national average. This would require 285 fewer pupils in INMSS or 74 more in mainstream and 211 more in special schools.

Table 19a – Notional placement numbers if reprofiled to National 2019/20

Provision type	EHCP placements (forecast 2019/20)	Notional placement based on national average	Change against current profile
INMSS	439	154	-285
Special schools	738	949	211
Mainstream	1232	1306	74

Table 19b – Notional placement numbers if reprofiled to National 2020/21

Provision type	EHCP placements (forecast 2019/20)	Notional placement based on national average	Change against current profile
INMSS	579	173	-406
Special schools	784	1068	285
Mainstream	1348	1470	122

8.5. Increase Sufficiency in mainstream and special schools/ academies

Since the SEND reforms (2014), 241 extra special school places have been created across BCP (see Table 19c below). Of those 38 are not yet available (10 will be available in a Linwood Special School satellite at Somerford Primary, Jan 2020 and 10 Sep 2020; and 4 at Kingsleigh Primary School Sep 2020 with discussions to grow to 16). Bournemouth and Poole also worked with Dorset Council and supported a bid for the new Harbour Special Free School in Bovington, Dorset, providing access to places for BCP pupils.

Table 19c: SEND places added across BCP since 2015

Provider Type	Total Places added since 2015
Primary Resource Provision	24
Secondary Resource Provision	6
Special Schools / Academies*	211
AP	0
Total	241

The Council is undertaking a sufficiency review of all educational provision. Full data is available for forecast mainstream school places and ongoing discussions are being held with mainstream schools as to how to meet demand. Alongside this, data on SEND demand and capacity will be brought together into an overall sufficiency plan. This will provide a detailed holistic view of all education provision and enable full advantage to be taken of existing facilities across BCP to best meet need cost effectively through schools. This will be in place by the end of December.

Whilst the detailed sufficiency statement for SEND provision is still in preparation initial indications and previous analysis are that the focus for additional provision and strategies will be on the areas of need of ASD SEMH and Complex Learning Difficulties.

The short to medium term focus is on increasing the number of additionally resourced places in mainstream schools.

Issue to note: there are a number of options for primary, including using surplus capacity, however all secondary school capacity will be full by 2022/23 and would require additional capacity to be built which is much more costly and time consuming. Costs can vary but as an illustrative example a secondary resource base with capacity for 16 places is £700k (building additional places), while at primary it could be £50k for 16 places (refurbishment of existing capacity). Timescales are approx. 2 years from decision being made by the SEND Capital Board (through to BCP Capital Board, DfE, planning, procurement, build work) to be available to place. There is currently £1M unallocated SEND capital funding.

Options to fund additional places through: use of Base Needs Capital funding (alongside consideration for mainstream places) or capital funding from BCP.

In the medium to long term, this will consider the need to develop additional capacity (a school) across BCP for pupils requiring either more specialist support or a more flexible, skills-based approach and offer (14 plus) approach. A new special free school would require no capital funding from BCP; timescales of approx. 3 – 5 years depending on the complexity of the project; DfE expectation that BCP identify sites requiring joint working cross BCP council (Children's, Regen & Economy, and Environment & Community) to take forward a free school.

8.6. Reduce reliance on INMSS

Growth in Independent school placements is currently running at 35%. By reducing the growth to 5% there would be a requirement to place 36 plans elsewhere (assuming overall EHCP growth of 13%). By placing these EHCP pupils in a resource base or special school at an average cost of £24k (including £10k place funding), the following savings could be made.

Table 20a – Savings if Growth in Independent School Placements limited

Growth limited to	No. Placements *	Saving ^ 2020-21	Cumulative Saving ^ 2020-22	Cumulative Saving ^ 2020-23
0%	41	1.3m	3.0m	5.4m
5%	36	1.1m	2.7m	4.8m
10%	30	0.9m	2.3m	4.2m
15%	24	0.7m	1.9m	3.5m
20%	18	0.6m	1.4m	2.7m
25%	12	0.4m	1.0m	1.9m

* Placements in resource bases / special schools will reduce demand for placements in independent settings.

^ based on independent placement at average of £55k compared with average special / resource base placement at £24k (including place funding)

The current forecast already assumes increased capacity in local special schools of 147 places over the three years 2020-21 to 2022-23 to meet growth of continuing current trends. However mainstream plus could be used to meet some of this demand.

Longer term, the LA will:

- develop a profile of pupils with SEND by category, complexity and incidence across the age range and across BCP;
- develop a profile of pupils with SEND and other vulnerable pupils where it is evident that the system has not provided for them as it should as reflected by (for e.g.): placements in independent and non-maintained settings, special schools and alternative provision; EHCPs; exclusions; school non - attendance; children missing out on education;
- map and identify gaps in provision across BCP

Based on information gained above and any identified gaps:

- develop an extended offer of provision that ensures sufficiency of places across BCP:

In the short to medium term this will focus on increasing the number of additionally resourced places in mainstream schools.

In the medium to long term, this will consider the need to develop additional capacity (a school) across BCP for pupils requiring either more specialist support or a more flexible, skills based approach and offer (14 plus) approach.

8.7. Decision making & accountability

A greater level of scrutiny is required in relation to key decision points that exist across the pre, peri and post statutory assessment process, with the potential for significant financial costs. This includes the nature of information, advice and guidance provided to parents/ carers as they navigate the SEND system.

As a result, a review of decision making is needed/ underway to consider practice within and across the statutory SEND process in relation to EHCPs; annual reviews; placement decision (specialist; additionally resourced; INMMS; other) and tribunals. This will lead to stronger decision making and accountability.

This work has been initiated through the redesign of the Statutory SEND Service in November 2019 and will continue through to implementation in April 2020.

In addition, there is a need to better understand the information, advice and guidance and associated discourses available to parents/carers as they navigate the SEND systems and how/when this influences choices about provision and how to effectively promote local, community provision.

To reduce the growth in EHCPs from 12.5% currently would generate the following savings (assuming the same profile of growth across types of provision).

Table 20b – Savings if Growth in EHCPs limited

Reduction in growth	No. fewer EHCPs	Saving 2020-21
Growth reduced by 0.5% to 12%	13	0.2m
Growth reduced by 2.5% to 10%	61	0.8m
Growth reduced by 4.5% to 8%	110	1.5m
Growth reduced by 6.5% to 6%	158	2.1m

8.8. High Cost Placements

BCP has a number of pupils placed in high cost placements both in authority and out of authority. Where possible and appropriate, pupils should be placed within the continuum of local, community provision.

It is important to note that pupils cannot simply be moved from high cost INMSS placement, in part due to parental preference, and the need for a local placement to be available.

We will review the arrangements of those pupils in high cost placements and consider the feasibility of returning these pupils to local, community schools, where this is felt to be appropriate.

Greater oversight from the Service Director (Inclusion and Family Services) and the introduction of a complex needs panel (as above) will strengthen decision making and accountability in this area and prevent inappropriate use of high cost placements.

8.8.1. The Council's response to appeals to Tribunal

Parents, carers have the option to appeal Local Authority decisions if they are unhappy with an assessment or outcome of an EHCP. The national trend for appeals to the SEND Tribunal shows a year on year increase as follows:

2016 – 4725

2017 – 5640

2018 – 8000

90% of appeals are found in favour of the parent, leading to significant costs for LAs.

Arrangements for appeals across BCP are inconsistent and under developed. Poole has had an Appeals and Resolution Officer in post since December 2017. This Officer prepared cases for and represented the LA at hearings for the majority of cases. For the more complex cases, and where parents are legally represented, Legal Services procure the services of a barrister for the hearing. Legal Services also provided generic advice/support for some cases.

Bournemouth uses a specialist SEN legal firm, Browne Jacobson, for all appeals. This included preparation of the case and barrister representation for the hearing.

Obtaining information across BCP is difficult at this time, however:

- i. formal mediation uptake across BCP is low (by comparison) with more parents proceeding straight to lodging an appeal. There is also an increase in parents having legal representation.
- ii. For those appeals concluded 2018/19 there were overall savings to the Borough of Poole of approximately £190,900 by virtue of either the Tribunal Direction, or split of costs with Social Care or another LA etc. These savings could be replicated across BCP as a whole.
- iii. Of 20 concluded appeals in the Borough of Poole in 2018/19, 15 were conceded by the LA. However, a number of these were for Refusal to Undertake an Education, Health, and Care Assessment, and, nationally, 9 out of 10 of this type of appeal are found in favour of the parent. Of these, two of the appeals that were conceded achieved agreement for split costs. 3 appeals were upheld by the Tribunal i.e. found in favour of the parent, and 2 were dismissed i.e. found in favour of the LA.

This is evidence that where the LA can demonstrate a robust approach in response to appeals, savings (cost avoidance) can be achieved. However, current arrangements across BCP need to be reviewed, further developed and a BCP approach established. Options being considered at this time include:

To address this, the post of assistant appeals caseworker has been built in the proposed structure (subject to consultation). This would allow a more proactive approach to resolution work with families and schools at a much earlier stage. This would help to resolve issues and secure provision parents are happy with. This would reduce the amount of appeals lodged in BCP and increase opportunities for mediation with families.

In addition, it is essential the LA can access specialist SEND legal advice (which is not currently available) and representation when required. A single route for this would ensure that the LA is receiving the best and most current advice available when considering the likelihood of a case being successfully defended. This would enable a robust approach to make the requisite funding decisions. Initial/ early discussion to progress this have been held.

8.9. Workforce Development (WFD)

Any actions taken to improve the capacity / ability of mainstream schools to retain the support for children with EHCPs would help move BCP towards the national average of 54.2% of plans in mainstream schools. Whilst it would be a combined impact of several actions, the saving from moving to the national average split of plans (at existing average costs for BCP) would be circa £10m in 2020-21.

Schools and EY settings need the confidence and skills to support and effectively include vulnerable pupils and pupils with SEND. There are a number of 'offers' available to schools but it is unclear whether they provide what is needed and/ or are 'fit for purpose'.

A review of the current WFD offer to schools will be undertaken. This will consider (but is not limited to): the schools' WFD needs; the WFD offer currently available (and to whom); the

quality of delivery and evidence of impact. The review will also consider how to maximise the delivery of and access to WFD activity, drawing on economies of scale across BCP.

Based on the review (above), a high quality, children's workforce development offer for schools will be established, with a clear and specific focus on supporting and including vulnerable learners and pupils with complex SEND in schools.

8.10. Services and Support for Schools and Early Years Settings

As universal settings, schools and early years providers are required to support and include children with the full range and complexity of need. These needs are characterised by SEND and/or wider vulnerabilities and often challenge staff, who lack appropriate experience and expertise in these areas. It is essential that schools and early years settings can access and draw on suitably qualified professionals for advice, guidance and support if pupils are to be included in mainstream schools

An audit will be undertaken to consider the breadth and impact of specialist services and support available to schools with a view to developing an overarching offer of specialist services to schools and EY settings across the full range of SEND and vulnerable learners. This should include a focus on how these services are organised/delivered (and by whom) to maximise timely impact. Any such developments should maintain a focus on capacity building, identifying and reducing barriers to learning, supporting inclusion and enabling schools to be as good as they can be in this area of school improvement. This will be undertaken in March/April 2020.

It is anticipated there are insufficient specialist services available across BCP to support schools and with this a need to invest (spend to save) in areas creating challenge and pressure across the system. These would be in the areas of social and emotional mental health; autism spectrum condition and complex learning difficulties.

There is a clear and stated expectation that extending this offer to schools will reduce the number of pupils requiring more costly/specialist arrangements.

A number of LAs have successfully developed fully / part traded service delivery models. An options appraisal will help to determine how the required level of service delivery can best be achieved.

8.11. Curriculum Offer

A pupil's experience of school is closely linked to the nature of the curriculum they are offered and the way it is developed and delivered. This is particularly true for pupils with SEND and vulnerable learners and has the potential to either support or destabilise school placements.

Action: Work with partners and stakeholders to review curriculum options across the age range in response to the challenges experienced both by vulnerable learners and pupils with SEND. As part of this to identify opportunities to introduce:

- differentiated curriculum options for pupils with more complex needs to support mainstream learning opportunities;
- broad and flexible 14+ curriculum and college options for pupils at KS4 (in particular) who find it difficult to engage with and participate in 'traditional' curriculum/ teaching and learning.

Options and the benefits arising from this piece of work would be realised with effect from September 2020.

8.12. Inclusion – Culture, Values, Approach

There is a need to achieve consensus across the system (schools; EY settings; parents; wider professional groups; the VCS; politically etc.) that supporting and including pupils in their local community schools - where this is both possible and proportionate in response - is the right thing to do. There is some tension in respect of this view and this sits on a continuum often shaped by personal, professional and organisational culture and values.

However (and in addition), where a school wide system is supported to provide high quality early intervention and support, it can in turn bring financial benefits, as the need to escalate concerns and/or secure high cost placements can be reduced. In progressing the following are proposed and/or in progress:

- i. Develop partnerships with schools that enable 2-way support and challenge and with this shared responsibility for key areas of inclusion. The use of shared KPIs would support this. A school led conference on 25/11/19 will start this joint work.
- ii. Explore opportunities for schools to review and develop their approach to inclusion as part of broader school improvement activity.
- iii. Build on established BCP networks (SENCOs, middle leaders etc.) and extend development and support that focuses on promoting inclusive attitudes, practice and pedagogy.
- iv. Look to introduce restorative based approaches. This whole school approach will support schools in adopting more inclusive approaches both for pupils and parents/carers.

Areas for development (a-h above) will be captured within the Area SEND Improvement Plan (in development) and delivered through a series of task and finish groups. Progress will be monitored through the multi-agency SEND Transformation Board.

In recent years some schools, particularly those protected through the MPPFLs, have seen significant increases in their per pupil funding. However, the HN data does not show a noticeable impact of this on both the growth in EHCP prevalence, as well as increased inclusivity of EHCP pupils within a mainstream setting. The inclusions strategy would aim for outcomes that slow, or even reduce the growth in EHCP prevalence, as well as resulting a greater proportion of EHCP pupils remaining in mainstream schools, particularly where schools see per pupil increases through the local funding formula.

8.13. Alternative Provision

The AP budget has grown significantly in recent years mostly as a result of growth in permanently excluded pupils. Table 21 below shows the relevance rate of permanent exclusions across BCP compared to national. Secondary prevalence has doubled between 2015/16 to 2018/19 and is now over two times the National average, which has itself grown by 33% in the same time period.

Table 21 – Permanent exclusions across BCP schools since 2014/15

Key Stage	Measure	2014/15	2015/16	2016/17	2017/18	2018/19
Primary	Count	6	8	3	7	7
	Prevalence/ 10,000	2.4	3.1	0.8	2.6	2.6
Secondary (Years 7-14)	Count	53	53	70	95	109
	Prevalence/ 10,000	24.2	23.6	30.4	43.5	47.4
	National Prevalence/ 10,000	15	17	20	20	NA

Table 21 shows how the prevalence rate (expressed as a rate per 10,000 of the relevant school phase pupil population in BCP schools) of permanent exclusions from secondary schools across BCP has doubled between 2015/16 to 2018/19.

The budget forecast assumes circa 225 pupils in AP over 2020-21, which is minimal growth from 2019-20. The average cost of a place in AP is c £20k. i.e. a reduction in 10 pupils in AP would be an annual saving of £0.2m. BCP will be consulting with schools in early 2020 concerning an enhancement to the financial adjustment to a schools budget share following the permanent exclusion of a pupil, will would result in increased funding following the pupil according to the pupil specific circumstances and whether the pupil was excluded before or after the October (funding reference) census of that financial year.

QUESTION 5

Is it fairer to adequately resource the High Needs budget as per Appendix 6?

- ☐ Yes
- ☐ No
- ☐ Unsure

please provide further comments here

QUESTION 6

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

- ☐ Yes
- ☐ No
- ☐ Unsure

If yes, please provide details of this/ these

QUESTION 7

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/ No	Rationale
a	No Transfer		
b	Up to 0.5% - Schools Forum level of approval without need for further consideration by the Secretary of State.		
c	Up to 1.1% - same level as 2019-20		
d	Up to 2.2% - equal to the combined Schools Block transfer plus the one- off council contribution		
e	Up to 3.9% - potential to meet full projected budget requirement (with no further savings)		
f	Other		

QUESTION 8a

If you do not support a transfer that would provide a balanced budget under Table 17, do you agree that it is reasonable to expect schools to implement initiatives to support closing the High Needs Funding gap?

- ☐ Yes
☐ No
☐ Unsure

If yes, please provide details of these initiatives, and how they could be monitored. Such initiatives would be expected to result in movement towards the national EHCP profile as per Tables 19a and b, and to reduce permanent exclusions towards the National average.

QUESTION 8b

Do you agree that should funding remain with schools rather than be transferred to the HN block for 2020-21, and there is no clear evidence the High Needs funding gap is closing as a result, the LA should consider a greater transfer to HN in 2021-22, and that you would support such a transfer?

- ☐ Yes
☐ No
☐ Unsure

If No, please provide further details

9. Growth Fund

9.1. The local authority is required to produce criteria through which growth funding is allocated, that must be agreed by the Schools Forum. Growth funding can be allocated for the following:

- support growth in pre-16 pupil numbers to meet basic need
- support additional classes needed to meet the infant class size regulation

9.2. Growth funding is within the LAs schools block (SB) NFF allocation. Since 2019-20, this funding is allocated to the LA using a formulaic method based on lagged growth data. The amount allocated in 2019-20 was £1.806m. The allocation for 2020-21 is not yet known, although provisional estimates suggest this may be as high as £2.48M.

9.3. Growth funding is provided to schools under local optional and national statutory arrangements. It is statutory to provide growth through the all funding formula factors for new and growing schools, where the school is either new or has changes its age range, and does not yet have all year groups open. There are two schools in BCP that qualify for this. This funding is not considered in the growth fund options below, since the LA are required to fund this growth in a specific way. The cost to BCP of implicit growth is expected to be approximately £320k.

9.4. Two options are proposed for local optional Growth Funding in 2020-21 as follows:

OPTION 1

Fund existing growth according to the 2019-20 growth fund policy that is provided in Appendix 9. New growth is funded under the proposed 2020-21 policy that is also provided in Appendix 9. The cost to the growth fund under this option for 2020-21 is forecast to be £670k

OPTION 2

Fund existing and new growth according to the proposed new growth fund policy. The cost to the growth fund under this option for 2020-21 is forecast to be £766k.

9.5. Difference between the two options

There is a single difference between the two options, and that is a change from

- funding permanent expansion additional pupils at the relevant Basic Entitlement rate, to
- funding them at the relevant basic entitlement rate plus an average of the additional factors attracted by pupils already at the school.

9.6. The difference is a cost reduction of £97k under option 1. This funding could be made available elsewhere in the formula, or to support any agreed transfer to High Needs.

9.7. Whilst there is no requirement to set a growth fund, there is an expectation that a growth fund is established to support at the least, in some way, pupil growth requested by the LA to meet basic need. It would also be disingenuous to stop paying, or significantly reduce the payments, for existing growth that is working its way through the school.

9.8. For 2019-20, considerable growth funding is being paid for Secondary growth that was requested in Sep 2019 at schools for which the growth did not materialise. Rather, the pupil growth appeared in schools that admitted pupils over their Published Admission Number. The legacy Poole growth funding policy did not fund growth where this did not ultimately materialise.

QUESTION 9a

Do you support funding growth under Option 1 or 2 in 9.4?

- ☐ Option 1
- ☐ Option 2
- ☐ Other

If Other, please provide further details below:

QUESTION 9b

Do you support funding growth that has been requested by the LA but that does not materialise in a school?

- ☐ Yes
- ☐ No

Please provide your reasons/ provide further details for your choice below:

10. Central Schools Services Block

10.1. Funding and Draft Budget 2020-21

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 decreases by 20% 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. The draft budget for these services is as follows.

Table 22: Central School Services 2020-21

Central School Services	2019-20 £000's	Savings £000's	2020-21 £000's
School admissions	750	(118)	632
Licences purchased by DfE	265	(35)	230
Servicing Schools Forum	30	(12)	18
Ex ESG services all schools	726	59	785
Premature retirements (ex DCC)	16	4	20
Commitments - ASD Base / other	275	0	275
Total Expenditure	2,062	(102)	1,960
Estimated Funding	2,062 (Actual)	(102)	1,960 (Estimated)

10.2. School Admissions and Servicing of the Schools Forum

Any further reduction would require schools to consider how individually they manage the Schools Admissions Forum or school admissions process in the absence of coordinated arrangements. The budget for pupil placement panel (operated by legacy Bournemouth) for hard to place pupils) is not continuing with funding instead redirected to the ex ESG services to increase the education welfare service and support for excluded pupils as part of the high needs budget financial strategy.

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.

10.3. DfE Licenses

The list of licences negotiated on behalf of all schools by the DfE is to be included in the budget 2020-21 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)

10.4. 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 increased as noted above. The list of these services is included in Appendix 5 alongside the different duties for maintained schools only for clarity.

Ex ESG Services	2019-20 £000's	Savings £000's	2020-21 £000's
Statutory and Regulatory Duties	346	(55)	291
Education Welfare	300	114	414
Asset Management	80	0	80
Total Ex ESG services all schools	726	59	785

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.
- Support for pupils with poor school attendance could be reduced.
- Support to schools with basic need capital projects would reduce.
- Central activity is reduced in SEND capital projects forming part of the BCP high needs action plan.
- 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.

10.5. Historic Commitments

The historic commitment of £275k is only funded by the DfE in 2020-21 at 80%, and is funding to repay prudential borrowing taken out by the legacy 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 10

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

11. Section for Maintained Schools Only - LA Funding for Services for Maintained Schools

11.1. LA Duties for Maintained Schools

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. These duties are those that pass to academies on conversion. This decision is to be made collectively by maintained school members of the SF only with it not impacting on budgets for academies or other DSG areas.

Appendix 4 provides the details of how the funding mechanisms are to work with a comparison of these maintained school services and those supplied to all schools funded from the Central School Services Block considered in Section 10).

11.1.1. Proposed Maintained School Central Retentions for the year April 2020 to March 2021

The proposed per pupil (mainstream) and per place (specialist) rates for central retentions are unchanged from 2019-20. These derived a total allocation of £200k. An allocation for each service for the 12- month period from April 2020 is scheduled in Table 23 below:

Table 23: LA Budget for Maintained School Statutory Duties April 2019 to March 2020

Service	Budget Retained £000's
Statutory & Regulatory Duties:	
Education and Service Planning - including appointment of governors, government data returns, functions under the equality act, legal services advice, handling complaints, academy conversion support.	75
Finance & Audit - Production of budget schedules and payment of funding allocations and DfE grants, consolidation of annual accounts and quarterly returns. CFR advice, best value and procurement advice, scheme of financing maintained schools, Internal audit, banking and treasury, financial regulations adaptation for schools (e.g. delegation of some CFO approvals to school governors).	40
Human Resources - Employee investigations, pension administration, pay scales and conditions of service, TU negotiations for local government employees, support for school improvement activities.	20
Total Statutory & Regulatory	135
Asset Management - premises management support, including condition surveys and liaison with dioceses for VA schools, asbestos risk management, general health & safety duty as an employer. DfE bids for condition grants and LA staff support relating to condition works.	52
Monitoring National Curriculum Assessments	13
Total All Duties to be agreed	£200k

11.1.2. Proposed Rates per Pupil and Per Place 2020-21

The proposed rates per pupil and per place are as follows:

	Proposed Rate 2020/21
Mainstream School rate per pupil	22.89
Specialist Provider rate per place	97.27

The multiplier for specialist provider places is 4.25 as used by the DfE in the previous funding mechanism.

11.1.3. Estimated Amounts for the 12-month period 2020-21

The amounts for each maintained school for the 12 month period (should they remain maintained throughout) would be as set out on Table 24:

**Table 24: Indicative Proposed Maintained School Central Retentions
(based on 2019-20 pupils and place numbers which will be updated in final allocations)**

Maintained Mainstream	NOR	Retention £
Hillbourne Primary School	274	6,272
Poole High School	1,565	35,823
St Edward's RC / C of E School	900	20,601
Corpus Christi Catholic Primary School	428	9,797
St Katharine's Church of England Primary School	500	11,445
St Walburga's Catholic Primary School	479	10,964
Mudeford Community Infant School	179	4,097
Christchurch Infant School	357	8,172
Burton Church of England Primary School	340	7,783
St Joseph's Catholic Primary School, Christchurch	208	4,761
Mudeford Junior School	265	6,066
The Priory Church of England Primary School	211	4,830
Highcliffe St Mark Primary School *	611	13,986
Somerford Primary School	311	7,119
	6,628	151,715
Maintained Specialist Places	Places	Retention £
Winchelsea Special	130	12,645
Christchurch Learning Centre	48	4,669
Linwood Special	318	30,932
	496	48,246
Proposed Contribution BCP		£199,961

If the retention is not supported in full maintained schools could see some services move to a fully chargeable basis where possible. For example, the revenue costs of support for capital projects would need to be paid for by schools individually as they benefit from the grant available to the LA. This could impact on an individual school's ability to access capital funding to resolve premises issues. Some services are behind the scenes and the LA has

no ability not to provide (such as to comply with accounting regulations, paying budget shares, and completing data returns) and individual charging would be an inefficient use of time for both school staff and the LA. Other charges could need to apply to support a school facing a crisis with this not in the best interest of either party.

11.1.4. Conversion to Academy Status

As schools convert to academy status the central retention works as follows:

School Conversion Period	Funding for statutory services
On or before 1 April 2020	<ul style="list-style-type: none"> LA does not retain from school budget share
2 April 2019 to 31 March 2021	<ul style="list-style-type: none"> LA retains agreed school budget up to conversion date (e.g. conversion on 1 January 2021 LA retains 9/12ths) Academy keeps the budget after conversion date, to provide its own new statutory functions or contribute to those of its Multi Academy Trust.

11.2. 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 SF for each phase separately.

De-delegation does not apply for special schools or alternative provision. The shadow BCP council did not propose de-delegation for 2019-20 and no proposals are being brought forward for 2020-21.

Where it can be efficient to provide centrally for all schools (maintained and academy, both mainstream and specialist) traded services can be established for consideration by all schools individually. BCP currently offer a service level agreement for checking free school meal eligibility.

QUESTION 11

Do you have any comments about the proposals for Maintained Schools only?

11.3. Traded Services

As in the current year a number of services may be offered only to maintained schools as provision centrally complements our statutory duties summarised in Table 23. This includes, for example, the being within the Council's group banking arrangements.

It is also expected that all maintained schools will continue in the central insurance arrangements although this funding is delegated to schools. Exceptionally it may depend

on historic claims history, but in this event the Council will support a separate procurement as the LA has a duty to ensure school arrangements are satisfactory. Insurance costs are charged to schools, largely according to pupil numbers.

A brochure of the BCP offer for other services will be available later in the year.

QUESTION 12

Any there any further comments you would like to make about any issues within the scope of this consultation?

12. Next Steps

A summary of consultation questions is included at Appendix 8. The consultation closes on 10th January 2020 but earlier responses are welcomed.

Please respond either using

- the online survey link which has been provided separately in an email sent on Monday 15th December.
- or using the Consultation Response Form that can be provided on request, as follows:

E-mail return to consultation@bcpcouncil.gov.uk

Or Post to:

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

Responses will be collated and considered at the Schools Forum meeting on 17th January 2020 where the level of any transfer to high needs will be decided and recommendations made for the mainstream school's formula. The Schools Forum will also make final decisions on the level of the Growth Fund and Central Services supporting schools at this meeting.

Schools Forum recommendations and comments from schools will be taken into account by full Council BCP on 18th February 2020. Schools Forum will receive a report at the January 2019 meeting detailing the outcome of the agreed mainstream formula for 2020-21 and final schools budget calculations to be sent to the ESFA taking into account the October 2019 census.

NFF Factor Values and total National spend in 2020-21

	Unit Values	Total Funding (including ACA)	Proportion of core total
Basic per pupil Funding		£25,922m	73.5%
AWPU		£25,656m	72.8%
Primary AWPU	£2,857	£13,263m	37.6%
KS3 AWPU	£4,018	£7,268m	20.6%
KS4 AWPU	£4,561	£5,125m	14.5%
Minimum per pupil		£266m	0.8%
Primary Minimum Per Pupil funding	£3,750	£123m	0.3%
Secondary Minimum Per Pupil funding	£5,000	£143m	0.4%
Additional Needs Funding		£6,307m	17.9%
Deprivation		£3,188m	9.0%
Primary FSM	£450	£322m	0.9%
Secondary FSM	£450	£193m	0.5%
Primary FSM6	£560	£613m	1.7%
Secondary FSM6	£815	£677m	1.9%
Primary IDACI A	£600	£93m	0.3%
Primary IDACI B	£435	£173m	0.5%
Primary IDACI C	£405	£128m	0.4%
Primary IDACI D	£375	£136m	0.4%
Primary IDACI E	£250	£107m	0.3%
Primary IDACI F	£210	£100m	0.3%
Secondary IDACI A	£840	£76m	0.2%
Secondary IDACI B	£625	£149m	0.4%
Secondary IDACI C	£580	£111m	0.3%
Secondary IDACI D	£535	£118m	0.3%
Secondary IDACI E	£405	£105m	0.3%
Secondary IDACI F	£300	£88m	0.2%
Low Prior Attainment		£2,653m	7.5%
Primary LPA	£1,065	£1,680m	4.8%
Secondary LPA	£1,610	£973m	2.8%
English as an Additional Language		£415m	1.2%
Primary EAL	£535	£308m	0.9%
Secondary EAL	£1,440	£107m	0.3%
Mobility		£51m	0.1%
Primary mobility	£875	£41m	0.1%
Secondary mobility	£1,250	£10m	0.0%
School Led Funding		£3,026m	8.6%
Lump Sum		£2,359m	6.7%
Primary lump sum	£114,400	£1,973m	5.6%
Secondary lump sum	£114,400	£386m	1.1%
Sparsity		£26m	0.1%
Primary sparsity	£26,000	£22m	0.1%
Secondary sparsity	£67,600	£4m	0.0%
Premises		£641m	1.8%
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)		£883m	
Core total (excluding funding floor)		£35,255m	
Protections			
Floor		£464m	
Primary floor funding		£277m	
Secondary floor funding		£187m	
Total		£35,719m	

Bournemouth, Christchurch & Poole School Funding Consultation 2020-21

NFF applied to BCP schools

Appendix 2

Model Description	Rates Included: Yes; NOR Base: Local Formula 2019-20					Consultation Option 1			
NFF	2019-20 Post MFG per pupil Budget	2019-20 Post MFG Budget	20-21 Post MFG per pupil Budget	Per Pupil change against 2019/20	2020-21 Post MFG Budget	NFF Post MFG per pupil Budget	Per Pupil change against NFF	2020-21 NFF Post MFG Budget	Formula Type Sch. Classificati on
BCP TOTAL	4,228	194,308,435	4,460	5.5%	204,944,934	4,452	0.17%	204,594,548	
Queen's Park Infant Academy	3,602	1,282,253	3,768	4.6%	1,341,498	3,768	0.0%	1,341,498	MPPFL
St Clement's and St John's Church of England Infant School	4,562	1,199,932	4,638	1.7%	1,219,836	4,638	0.0%	1,219,836	Floor/MFG
Stourfield Infant School	3,487	1,248,268	3,765	8.0%	1,347,792	3,765	0.0%	1,347,792	MPPFL
Christchurch Infant School	3,594	1,282,954	3,872	7.7%	1,382,200	3,872	0.0%	1,382,200	MPPFL
Mudeford Community Infants' School	3,885	695,483	4,157	7.0%	744,181	4,157	0.0%	744,181	Formula
Ad Astra Infant School	3,663	985,230	3,833	4.7%	1,031,151	3,833	0.0%	1,031,151	Formula
Broadstone First School	3,488	1,042,893	3,766	8.0%	1,126,015	3,766	0.0%	1,126,015	MPPFL
Canford Heath Infant School	3,487	1,252,010	3,765	8.0%	1,351,812	3,765	0.0%	1,351,812	MPPFL
Courthill Infant School	3,484	1,215,845	3,762	8.0%	1,312,867	3,762	0.0%	1,312,867	MPPFL
Lilliput Church of England Infant School	3,492	1,253,576	3,770	8.0%	1,353,378	3,770	0.0%	1,353,378	MPPFL
Merley First School	3,491	1,054,179	3,769	8.0%	1,138,135	3,769	0.0%	1,138,135	MPPFL
Old Town Infant School and Nursery	4,410	714,354	4,613	4.6%	747,325	4,613	0.0%	747,325	Formula
Springdale First School	3,488	1,039,372	3,766	8.0%	1,122,216	3,766	0.0%	1,122,216	MPPFL
Stanley Green Infant Academy	3,637	876,449	3,810	4.8%	918,322	3,810	0.0%	918,322	Formula
Livingstone Road Infant School	4,052	1,073,723	4,188	3.4%	1,109,794	4,188	0.0%	1,109,794	Formula
Twin Sails Infant and Nursery School	3,678	1,224,801	3,799	3.3%	1,265,090	3,799	0.0%	1,265,090	Formula
Infant/ First Total	3,673	17,441,321	3,898	6.1%	18,511,611	3,898	0.0%	18,511,611	
Christ The King Catholic Primary School	4,411	1,424,771	4,485	1.7%	1,448,782	4,485	0.0%	1,448,782	Floor/MFG
Corpus Christi Catholic Primary School	3,740	1,600,608	3,918	4.8%	1,677,008	3,918	0.0%	1,677,008	Formula
Elm Academy	4,761	2,142,573	4,844	1.7%	2,179,799	4,844	0.0%	2,179,799	Floor/MFG
Heathlands Primary Academy	5,420	1,132,829	5,509	1.6%	1,151,445	5,509	0.0%	1,151,445	Floor/MFG
Hill View Primary School	3,486	2,220,736	3,764	8.0%	2,397,822	3,764	0.0%	2,397,822	MPPFL
Jewell Academy Bournemouth	4,493	1,797,247	4,570	1.7%	1,828,072	4,570	0.0%	1,828,072	Floor/MFG
Kings Park Academy	4,133	2,587,222	4,205	1.8%	2,632,548	4,205	0.0%	2,632,548	Floor/MFG
Kingsleigh Primary School	3,880	2,812,744	4,000	3.1%	2,899,843	4,000	0.0%	2,899,843	Formula
Kinson Academy	4,266	1,168,986	4,337	1.6%	1,188,266	4,337	0.0%	1,188,266	Floor/MFG
Malmesbury Park Primary School	3,647	2,272,100	3,835	5.2%	2,389,443	3,835	0.0%	2,389,443	Formula
Moordown St John's Church of England Primary School	3,489	1,472,240	3,767	8.0%	1,589,556	3,767	0.0%	1,589,556	MPPFL
Muscliff Primary School	3,499	2,158,958	3,777	7.9%	2,330,484	3,777	0.0%	2,330,484	MPPFL
Pokesdown Community Primary School	3,634	1,591,664	3,870	6.5%	1,694,890	3,870	0.0%	1,694,890	Formula
St James' Church of England Primary Academy	3,486	1,460,614	3,764	8.0%	1,577,096	3,764	0.0%	1,577,096	MPPFL
St Katharine's Church of England Primary School	3,489	1,744,518	3,767	8.0%	1,883,518	3,767	0.0%	1,883,518	MPPFL
St Luke's Church of England Primary School	3,642	1,580,448	3,920	7.6%	1,701,100	3,920	0.0%	1,701,100	MPPFL
St Mark's Church of England Primary School	3,491	1,455,636	3,769	8.0%	1,571,562	3,769	0.0%	1,571,562	MPPFL
St Michael's Church of England Primary School	3,487	2,280,466	3,811	9.3%	2,492,661	3,811	0.0%	2,492,661	Formula
St Walburga's Catholic Primary School	3,484	1,668,934	3,762	8.0%	1,802,096	3,762	0.0%	1,802,096	MPPFL
The Epiphany Church of England Primary School	3,490	1,472,593	3,768	8.0%	1,589,909	3,768	0.0%	1,589,909	MPPFL
Winton Primary School	3,491	2,845,089	3,769	8.0%	3,071,659	3,769	0.0%	3,071,659	MPPFL
Burton Church of England Primary School	3,656	1,242,932	3,948	8.0%	1,342,477	3,948	0.0%	1,342,477	Formula
Highcliffe St Mark Primary School	3,486	2,180,601	3,764	8.0%	2,354,513	3,764	2.4%	2,299,825	MPPFL
Somerford Primary School	4,222	1,312,931	4,409	4.4%	1,371,161	4,409	0.0%	1,371,161	Formula
St Joseph's Catholic Primary School, Christchurch	3,788	787,886	4,070	7.5%	846,631	4,070	0.0%	846,631	Formula
The Priory Church of England Primary School	3,677	775,860	3,853	4.8%	813,027	3,853	0.0%	813,027	Formula
Twynham Primary School	3,733	744,762	3,891	4.2%	776,305	3,891	8.0%	719,101	Formula
Bayside Academy	4,360	1,277,353	4,597	5.4%	1,346,852	4,597	0.7%	1,338,039	Formula
Bearwood Primary and Nursery School	3,940	799,746	4,126	4.7%	837,546	4,126	0.0%	837,546	Formula
Bishop Aldhelm's Church of England Voluntary Aided Primary School	3,493	2,088,525	3,771	8.0%	2,254,769	3,771	0.0%	2,254,769	MPPFL
Heatherlands Primary School	3,553	2,202,998	3,765	6.0%	2,334,330	3,765	0.0%	2,334,330	MPPFL
Hillbourne Primary School	3,875	1,061,640	4,033	4.1%	1,105,052	4,033	0.0%	1,105,052	Formula
Longfleet Church of England Primary School	3,490	2,202,409	3,768	8.0%	2,377,827	3,768	0.0%	2,377,827	MPPFL
Manorside Academy	4,258	1,277,278	4,329	1.7%	1,298,568	4,329	0.0%	1,298,568	Floor/MFG
St Joseph's Catholic Primary School, Poole	3,839	1,558,642	4,021	4.7%	1,632,637	4,021	0.0%	1,632,637	Formula
St Mary's Catholic Primary School, Poole	3,575	1,429,833	3,771	5.5%	1,508,483	3,771	0.0%	1,508,483	MPPFL
Talbot Primary School	3,862	2,147,047	4,065	5.3%	2,260,013	4,065	0.0%	2,260,013	Formula
Primary Total	3,759	61,981,419	3,976	5.8%	65,557,749	3,969	0.2%	65,437,046	

Bournemouth, Christchurch & Poole School Funding Consultation 2020-21

NFF	2019-20 Post MFG per pupil Budget	2019-20 Post MFG Budget	20-21 Post MFG per pupil Budget	Per Pupil change against 2019/20	2020-21 Post MFG Budget	NFF Post MFG per pupil Budget	Per Pupil change against NFF	2020-21 NFF Post MFG Budget	Formula Type Sch. Classificati on
Bethany Church of England Junior School	4,294	1,571,555	4,491	4.6%	1,643,745	4,491	0.0%	1,643,745	Formula
Queen's Park Academy	3,625	1,834,077	3,772	4.1%	1,908,689	3,772	0.0%	1,908,689	MPPFL
Stourfield Junior School	3,491	1,682,778	3,769	8.0%	1,816,774	3,769	0.0%	1,816,774	MPPFL
Christchurch Junior School	3,422	1,714,649	3,700	8.1%	1,853,927	3,700	0.0%	1,853,927	MPPFL
Mudford Junior School	3,626	960,786	3,889	7.3%	1,030,697	3,889	0.0%	1,030,697	Formula
Baden-Powell and St Peter's Church of England Junior School	3,496	2,552,104	3,774	8.0%	2,755,044	3,774	0.0%	2,755,044	MPPFL
Livingstone Road Junior School	4,226	1,043,928	4,486	6.1%	1,108,031	4,486	0.0%	1,108,031	Formula
Canford Heath Junior School	3,492	1,661,998	3,767	7.9%	1,792,934	3,767	0.0%	1,792,934	MPPFL
Hamworthy Park Junior School	3,838	1,784,732	4,020	4.8%	1,869,518	4,020	0.0%	1,869,518	Formula
Haymoor Junior School	3,843	1,333,589	4,026	4.7%	1,396,882	4,026	0.0%	1,396,882	Formula
Oakdale Junior School	3,637	1,742,172	3,810	4.8%	1,825,120	3,810	0.0%	1,825,120	Formula
Ocean Academy Poole	3,747	1,337,715	3,931	4.9%	1,403,540	3,931	0.0%	1,403,540	Formula
Junior Total	3,681	19,220,084	3,908	6.2%	20,404,901	3,908	0.0%	20,404,901	
Bournemouth School	4,822	3,626,092	5,050	4.7%	3,797,548	5,050	0.0%	3,797,548	MPPFL
Bournemouth School for Girls	4,808	4,096,740	5,036	4.7%	4,290,996	5,036	0.0%	4,290,996	MPPFL
Glenmoor Academy	4,819	3,792,191	5,122	6.3%	4,031,269	5,122	0.0%	4,031,269	Formula
Avonbourne Boys Academy	5,379	2,818,634	5,741	6.7%	3,008,390	5,741	0.0%	3,008,390	Formula
LeAF Studio	5,407	1,227,465	5,714	5.7%	1,297,010	5,714	0.0%	1,297,010	Formula
Oak Academy	5,764	2,582,427	6,069	5.3%	2,718,998	6,069	0.0%	2,718,998	Formula
The Bishop of Winchester Academy	4,870	4,908,913	5,224	7.3%	5,265,489	5,224	0.0%	5,265,489	Formula
The Bourne Academy	5,301	4,569,232	5,552	4.7%	4,786,248	5,552	0.0%	4,786,248	Formula
Winton Academy	4,810	4,035,207	5,071	5.4%	4,254,324	5,071	0.0%	4,254,324	Formula
Highcliffe School	4,801	5,636,042	5,029	4.7%	5,903,714	5,029	0.0%	5,903,714	MPPFL
The Grange School	5,508	2,307,893	5,922	7.5%	2,481,462	5,922	0.0%	2,481,462	Formula
Twynham School	4,797	6,279,292	5,025	4.8%	6,577,744	5,025	0.0%	6,577,744	MPPFL
Broadstone Middle School	4,050	1,935,886	4,303	6.2%	2,056,820	4,303	0.0%	2,056,820	MPPFL
Carter Community School	5,995	2,134,292	6,099	1.7%	2,171,253	6,099	0.0%	2,171,253	Floor/MFG
Corfe Hills School	4,948	3,503,366	5,189	4.9%	3,673,483	5,189	0.0%	3,673,483	Formula
Magna Academy	5,160	4,236,187	5,327	3.2%	4,373,260	5,327	0.0%	4,373,260	Formula
Parkstone Grammar School	4,817	4,416,840	5,045	4.7%	4,625,916	5,045	0.0%	4,625,916	MPPFL
Poole Grammar School	4,809	4,308,896	5,037	4.7%	4,513,184	5,037	0.0%	4,513,184	MPPFL
Poole High School	4,986	7,802,698	5,199	4.3%	8,136,121	5,199	0.0%	8,136,121	Formula
St Aldhelm's Academy	6,063	2,819,313	6,192	2.1%	2,879,058	6,192	0.0%	2,879,058	Formula
St Edward's Roman Catholic/Church of England School, Poole	4,834	4,350,642	5,053	4.5%	4,547,689	5,053	0.0%	4,547,689	Formula
Middle/ Secondary Total	4,991	81,388,248	5,236	4.9%	85,389,975	5,236	0.0%	85,389,975	
Avonbourne Girls Academy	4,481	5,556,947	4,697	4.8%	5,824,570	4,604	2.0%	5,709,183	Formula
St Peter's Catholic Comprehensive School	4,525	6,959,504	4,754	5.1%	7,311,588	4,680	1.6%	7,197,292	Formula
Parkfield School	4,295	1,760,911	4,743	10.4%	1,944,540	4,743	0.0%	1,944,540	Formula
All-through Total	4,478	14,277,362	4,730	5.6%	15,080,698	4,658	1.5%	14,851,015	
Phase Summaries									
Infant/ First Total	3,673	17,441,321	3,898	6.14%	18,511,611	3,898	0.00%	18,511,611	
Junior Total	3,681	19,220,084	3,908	6.16%	20,404,901	3,908	0.00%	20,404,901	
Primary Total	3,759	61,981,419	3,976	5.77%	65,557,749	3,969	0.18%	65,437,046	
PRIMARY PHASE	3,728	98,642,824	3,949	5.91%	104,474,262	3,944	0.12%	104,353,558	
Middle/ Secondary Total	4,991	81,388,248	5,236	4.92%	85,389,975	5,236	0.00%	85,389,975	
All-through Total	4,478	14,277,362	4,730	5.63%	15,080,698	4,658	1.55%	14,851,015	
SECONDARY TOTAL	4,907	95,665,610	5,154	5.02%	100,470,673	5,142	0.23%	100,240,990	
Count of schools by type	Floor	Formula	Cap	MPPFL	Cap<MPPFL	MFG	Total		
Infant/ First Total	-	6	-	9	-	1	16		
Junior Total	-	7	-	5	-	-	12		
Primary Total	-	15	-	15	-	7	37		
PRIMARY PHASE	-	28	-	29	-	8	65		
Primary %	0%	43%	0%	45%	0%	12%	100%		
Middle/ Secondary Total	-	13	-	7	-	1	21		
All-through Total	-	3	-	-	-	-	3		
SECONDARY TOTAL	-	16	-	7	-	1	24		
Secondary %	0%	67%	0%	29%	0%	4%	100%		
School Type									# of schools
Primary Formula	3,820	37,610,899	4,020	5.23%	39,578,943	4,015	0.1%	36,613,083	28
Primary MPPFL	3,508	48,301,087	3,773	7.55%	51,948,004	3,769	0.1%	51,893,316	29
Primary Floor/MFG	4,475	12,730,839	4,551	1.70%	12,947,316	4,439	2.5%	15,847,159	8
Secondary Formula	4,955	63,231,531	5,214	5.22%	66,533,499	5,196	0.3%	66,303,816	16
Secondary MPPFL	4,751	30,299,787	4,981	4.84%	31,765,921	4,981	0.0%	31,765,921	7
Secondary Floor/MFG	5,995	2,134,292	6,099	1.73%	2,171,253	6,099	0.0%	2,171,253	1
Formula	4,461	100,842,430	4,694	5.23%	106,112,442	4,704	-0.2%	102,916,899	44
MPPFL	3,901	78,600,873	4,155	6.51%	83,713,925	4,153	0.1%	83,659,237	36
Floor/MFG	4,644	14,865,131	4,729	1.70%	15,118,568	4,590	2.9%	18,018,412	9

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School Level Impact of Transfer Options

Appendix 3

Model Description	Rates Included: Yes; NOR Base: Local Formula 2019-20					Consultation Option 2a			
0.5% Transfer	2019-20 Post MFG per pupil Budget	2019-20 Post MFG Budget	20-21 Post MFG per pupil Budget	Per Pupil change against 2019/20	2020-21 Post MFG Budget	NFF Post MFG per pupil Budget	Per Pupil change against NFF	2020-21 NFF Post MFG Budget	Formula Type Sch. Classificati on
BCP TOTAL	4,228	194,308,435	4,440	5.0%	204,026,642	4,452	-0.28%	204,594,548	
Queen's Park Infant Academy	3,602	1,282,253	3,747	4.0%	1,333,817	3,768	-0.6%	1,341,498	MPPFL
St Clement's and St John's Church of England Infant School	4,562	1,199,932	4,629	1.5%	1,217,453	4,638	-0.2%	1,219,836	Floor/MFG
Stourfield Infant School	3,487	1,248,268	3,743	7.4%	1,340,068	3,765	-0.6%	1,347,792	MPPFL
Christchurch Infant School	3,594	1,282,954	3,850	7.1%	1,374,497	3,872	-0.6%	1,382,200	MPPFL
Mudeford Community Infants' School	3,885	695,483	4,141	6.6%	741,308	4,157	-0.4%	744,181	Formula
Ad Astra Infant School	3,663	985,230	3,817	4.2%	1,026,834	3,833	-0.4%	1,031,151	Formula
Broadstone First School	3,488	1,042,893	3,744	7.4%	1,119,564	3,766	-0.6%	1,126,015	MPPFL
Canford Heath Infant School	3,487	1,252,010	3,744	7.4%	1,344,066	3,765	-0.6%	1,351,812	MPPFL
Courthill Infant School	3,484	1,215,845	3,740	7.4%	1,305,337	3,762	-0.6%	1,312,867	MPPFL
Lilliput Church of England Infant School	3,492	1,253,576	3,748	7.3%	1,345,632	3,770	-0.6%	1,353,378	MPPFL
Merley First School	3,491	1,054,179	3,747	7.3%	1,131,619	3,769	-0.6%	1,138,135	MPPFL
Old Town Infant School and Nursery	4,410	714,354	4,597	4.3%	744,725	4,613	-0.3%	747,325	Formula
Springdale First School	3,488	1,039,372	3,744	7.4%	1,115,786	3,766	-0.6%	1,122,216	MPPFL
Stanley Green Infant Academy	3,637	876,449	3,794	4.3%	914,455	3,810	-0.4%	918,322	Formula
Livingstone Road Infant School	4,052	1,073,723	4,172	3.0%	1,105,541	4,188	-0.4%	1,109,794	Formula
Twin Sails Infant and Nursery School	3,678	1,224,801	3,783	2.9%	1,259,746	3,799	-0.4%	1,265,090	Formula
Infant/ First Total	3,673	17,441,321	3,879	5.6%	18,420,449	3,898	-0.5%	18,511,611	
Christ The King Catholic Primary School	4,411	1,424,771	4,476	1.5%	1,445,907	4,485	-0.2%	1,448,782	Floor/MFG
Corpus Christi Catholic Primary School	3,740	1,600,608	3,902	4.3%	1,670,140	3,918	-0.4%	1,677,008	Formula
Elm Academy	4,761	2,142,573	4,834	1.5%	2,175,342	4,844	-0.2%	2,179,799	Floor/MFG
Heathlands Primary Academy	5,420	1,132,829	5,499	1.4%	1,149,216	5,509	-0.2%	1,151,445	Floor/MFG
Hill View Primary School	3,486	2,220,736	3,743	7.4%	2,384,078	3,764	-0.6%	2,397,822	MPPFL
Jewell Academy Bournemouth	4,493	1,797,247	4,561	1.5%	1,824,382	4,570	-0.2%	1,828,072	Floor/MFG
Kings Park Academy	4,133	2,587,222	4,197	1.5%	2,627,121	4,205	-0.2%	2,632,548	Floor/MFG
Kingsleigh Primary School	3,880	2,812,744	3,984	2.7%	2,888,209	4,000	-0.4%	2,899,843	Formula
Kinson Academy	4,266	1,168,986	4,328	1.5%	1,185,958	4,337	-0.2%	1,188,266	Floor/MFG
Malmesbury Park Primary School	3,647	2,272,100	3,819	4.7%	2,379,445	3,835	-0.4%	2,389,443	Formula
Moordown St John's Church of England Primary School	3,489	1,472,240	3,745	7.4%	1,580,451	3,767	-0.6%	1,589,556	MPPFL
Muscliff Primary School	3,499	2,158,958	3,756	7.3%	2,317,172	3,777	-0.6%	2,330,484	MPPFL
Pokesdown Community Primary School	3,634	1,591,664	3,854	6.0%	1,687,861	3,870	-0.4%	1,694,890	Formula
St James' Church of England Primary Academy	3,486	1,460,614	3,742	7.4%	1,568,056	3,764	-0.6%	1,577,096	MPPFL
St Katharine's Church of England Primary School	3,489	1,744,518	3,745	7.3%	1,872,730	3,767	-0.6%	1,883,518	MPPFL
St Luke's Church of England Primary School	3,642	1,580,448	3,898	7.0%	1,691,736	3,920	-0.6%	1,701,100	MPPFL
St Mark's Church of England Primary School	3,491	1,455,636	3,747	7.3%	1,562,565	3,769	-0.6%	1,571,562	MPPFL
St Michael's Church of England Primary School	3,487	2,280,466	3,795	8.8%	2,482,165	3,811	-0.4%	2,492,661	Formula
St Walburga's Catholic Primary School	3,484	1,668,934	3,741	7.4%	1,791,762	3,762	-0.6%	1,802,096	MPPFL
The Epiphany Church of England Primary School	3,490	1,472,593	3,746	7.3%	1,580,804	3,768	-0.6%	1,589,909	MPPFL
Winton Primary School	3,491	2,845,089	3,747	7.3%	3,054,074	3,769	-0.6%	3,071,659	MPPFL
Burton Church of England Primary School	3,656	1,242,932	3,932	7.6%	1,337,021	3,948	-0.4%	1,342,477	Formula
Highcliffe St Mark Primary School	3,486	2,180,601	3,742	7.4%	2,341,015	3,766	1.8%	2,299,825	MPPFL
Somerford Primary School	4,222	1,312,931	4,393	4.1%	1,366,170	4,409	-0.4%	1,371,161	Formula
St Joseph's Catholic Primary School, Christchurch	3,788	787,886	4,054	7.0%	843,293	4,070	-0.4%	846,631	Formula
The Priory Church of England Primary School	3,677	775,860	3,837	4.4%	809,641	3,853	-0.4%	813,027	Formula
Twynham Primary School	3,733	744,762	3,875	3.8%	773,103	3,605	7.5%	719,101	Formula
Bayside Academy	4,360	1,277,353	4,581	5.1%	1,342,150	4,567	0.3%	1,338,039	Formula
Bearwood Primary and Nursery School	3,940	799,746	4,110	4.3%	834,288	4,126	-0.4%	837,546	Formula
Bishop Aldhelm's Church of England Voluntary Aided Primary School	3,493	2,088,525	3,749	7.3%	2,241,866	3,771	-0.6%	2,254,769	MPPFL
Heatherlands Primary School	3,553	2,202,998	3,743	5.4%	2,320,953	3,765	-0.6%	2,334,330	MPPFL
Hillbourne Primary School	3,875	1,061,640	4,017	3.7%	1,100,655	4,033	-0.4%	1,105,052	Formula
Longfleet Church of England Primary School	3,490	2,202,409	3,747	7.3%	2,364,212	3,768	-0.6%	2,377,827	MPPFL
Manorside Academy	4,258	1,277,278	4,320	1.5%	1,296,019	4,329	-0.2%	1,298,568	Floor/MFG
St Joseph's Catholic Primary School, Poole	3,839	1,558,642	4,005	4.3%	1,626,121	4,021	-0.4%	1,632,637	Formula
St Mary's Catholic Primary School, Poole	3,575	1,429,833	3,750	4.9%	1,499,853	3,771	-0.6%	1,508,483	MPPFL
Talbot Primary School	3,862	2,147,047	4,049	4.8%	2,251,090	4,065	-0.4%	2,260,013	Formula
Primary Total	3,759	61,981,419	3,958	5.3%	65,266,624	3,969	-0.3%	65,437,046	

Bournemouth, Christchurch & Poole School Funding Consultation 2020-21

0.5% Transfer	2019-20 Post MFG per pupil Budget	2019-20 Post MFG Budget	20-21 Post MFG per pupil Budget	Per Pupil change against 2019/20	2020-21 Post MFG Budget	NFF Post MFG per pupil Budget	Per Pupil change against NFF	2020-21 NFF Post MFG Budget	Formula Type Sch. Classificati on
Bethany Church of England Junior School	4,294	1,571,555	4,475	4.2%	1,637,872	4,491	-0.4%	1,643,745	Formula
Queen's Park Academy	3,625	1,834,077	3,751	3.5%	1,897,965	3,772	-0.6%	1,908,689	Formula
Stourfield Junior School	3,491	1,682,778	3,748	7.3%	1,806,374	3,769	-0.6%	1,816,774	MPPFL
Christchurch Junior School	3,422	1,714,649	3,679	7.5%	1,843,118	3,700	-0.6%	1,853,927	MPPFL
Mudeford Junior School	3,626	960,786	3,873	6.8%	1,026,445	3,889	-0.4%	1,030,697	Formula
Baden-Powell and St Peter's Church of England Junior School	3,496	2,552,104	3,752	7.3%	2,739,294	3,774	-0.6%	2,755,044	MPPFL
Livingstone Road Junior School	4,226	1,043,928	4,470	5.8%	1,104,067	4,486	-0.4%	1,108,031	Formula
Canford Heath Junior School	3,492	1,661,998	3,745	7.3%	1,782,664	3,767	-0.6%	1,792,934	MPPFL
Hamworthy Park Junior School	3,838	1,784,732	4,004	4.3%	1,862,055	4,020	-0.4%	1,869,518	Formula
Haymoor Junior School	3,843	1,333,589	4,010	4.3%	1,391,313	4,026	-0.4%	1,396,882	Formula
Oakdale Junior School	3,637	1,742,172	3,794	4.3%	1,817,433	3,810	-0.4%	1,825,120	Formula
Ocean Academy Poole	3,747	1,337,715	3,915	4.5%	1,397,811	3,931	-0.4%	1,403,540	Formula
Junior Total	3,681	19,220,084	3,889	5.7%	20,306,411	3,908	-0.5%	20,404,901	
Bournemouth School	4,822	3,626,092	5,028	4.3%	3,781,323	5,050	-0.4%	3,797,548	MPPFL
Bournemouth School for Girls	4,808	4,096,740	5,015	4.3%	4,272,613	5,036	-0.4%	4,290,996	MPPFL
Glenmoor Academy	4,819	3,792,191	5,099	5.8%	4,012,735	5,122	-0.5%	4,031,269	Formula
Avonbourne Boys Academy	5,379	2,818,634	5,717	6.3%	2,995,957	5,741	-0.4%	3,008,390	Formula
LeAF Studio	5,407	1,227,465	5,689	5.2%	1,291,414	5,714	-0.4%	1,297,010	Formula
Oak Academy	5,764	2,582,427	6,045	4.9%	2,708,374	6,069	-0.4%	2,718,998	Formula
The Bishop of Winchester Academy	4,870	4,908,913	5,200	6.8%	5,241,531	5,224	-0.5%	5,265,489	Formula
The Bourne Academy	5,301	4,569,232	5,529	4.3%	4,765,786	5,552	-0.4%	4,786,248	Formula
Winton Academy	4,810	4,035,207	5,047	4.9%	4,234,580	5,071	-0.5%	4,254,324	Formula
Highcliffe School	4,801	5,636,042	5,007	4.3%	5,878,384	5,029	-0.4%	5,903,714	MPPFL
The Grange School	5,508	2,307,893	5,898	7.1%	2,471,447	5,922	-0.4%	2,481,462	Formula
Twynham School	4,797	6,279,292	5,003	4.3%	6,549,501	5,025	-0.4%	6,577,744	MPPFL
Broadstone Middle School	4,050	1,935,886	4,281	5.7%	2,046,506	4,303	-0.5%	2,056,820	MPPFL
Carter Community School	5,995	2,134,292	6,087	1.5%	2,166,827	6,099	-0.2%	2,171,253	Floor/MFG
Corfe Hills School	4,948	3,503,366	5,164	4.4%	3,656,018	5,189	-0.5%	3,673,483	Formula
Magna Academy	5,160	4,236,187	5,303	2.8%	4,353,837	5,327	-0.4%	4,373,260	Formula
Parkstone Grammar School	4,817	4,416,840	5,023	4.3%	4,606,131	5,045	-0.4%	4,625,916	MPPFL
Poole Grammar School	4,809	4,308,896	5,015	4.3%	4,493,852	5,037	-0.4%	4,513,184	MPPFL
Poole High School	4,986	7,802,698	5,175	3.8%	8,098,961	5,199	-0.5%	8,136,121	Formula
St Aldhelm's Academy	6,063	2,819,313	6,168	1.7%	2,868,175	6,192	-0.4%	2,879,058	Formula
St Edward's Roman Catholic/Church of England School, Poole	4,834	4,350,642	5,029	4.0%	4,526,282	5,053	-0.5%	4,547,689	Formula
Middle/ Secondary Total	4,991	81,388,248	5,214	4.5%	85,020,236	5,236	-0.4%	85,389,975	
Avonbourne Girls Academy	4,481	5,556,947	4,676	4.3%	5,798,479	4,604	1.6%	5,709,183	Formula
St Peter's Catholic Comprehensive School	4,525	6,959,504	4,732	4.6%	7,277,603	4,680	1.1%	7,197,292	Formula
Parkfield School	4,295	1,760,911	4,724	10.0%	1,936,840	4,743	-0.4%	1,944,540	Formula
All-through Total	4,478	14,277,362	4,709	5.2%	15,012,922	4,658	1.1%	14,851,015	
Phase Summaries									
Infant/ First Total	3,673	17,441,321	3,879	5.61%	18,420,449	3,898	-0.49%	18,511,611	
Junior Total	3,681	19,220,084	3,889	5.65%	20,306,411	3,908	-0.48%	20,404,901	
Primary Total	3,759	61,981,419	3,958	5.30%	65,266,624	3,969	-0.26%	65,437,046	
PRIMARY PHASE	3,728	98,642,824	3,930	5.42%	103,993,484	3,944	-0.35%	104,353,558	
Middle/ Secondary Total	4,991	81,388,248	5,214	4.46%	85,020,236	5,236	-0.43%	85,389,975	
All-through Total	4,478	14,277,362	4,709	5.15%	15,012,922	4,658	1.09%	14,851,015	
SECONDARY TOTAL	4,907	95,665,610	5,131	4.57%	100,033,159	5,142	-0.21%	100,240,990	
Count of schools by type	Floor	Formula	Cap	MPPFL	Cap<MPPFL	MFG	Total		
Infant/ First Total	-	6	-	9	-	1	16		
Junior Total	-	8	-	4	-	-	12		
Primary Total	-	15	-	15	-	7	37		
PRIMARY PHASE	-	29	-	28	-	8	65		
Primary %	0%	45%	0%	43%	0%	12%	100%		
Middle/ Secondary Total	-	13	-	7	-	1	21		
All-through Total	-	3	-	-	-	-	3		
SECONDARY TOTAL	-	16	-	7	-	1	24		
Secondary %	0%	67%	0%	29%	0%	4%	100%		
School Type									
Primary Formula	3,811	39,444,977	3,992	4.75%	41,318,923	4,015	-0.6%	36,613,083	# of schools 29
Primary MPPFL	3,504	46,467,009	3,751	7.07%	49,753,164	3,769	-0.5%	51,893,316	28
Primary Floor/MFG	4,475	12,730,839	4,542	1.50%	12,921,396	4,439	2.3%	15,847,159	8
Secondary Formula	4,955	63,231,531	5,191	4.75%	66,238,021	5,196	-0.1%	66,303,816	16
Secondary MPPFL	4,751	30,299,787	4,959	4.38%	31,628,311	4,981	-0.4%	31,765,921	7
Secondary Floor/MFG	5,995	2,134,292	6,087	1.52%	2,166,827	6,099	-0.2%	2,171,253	1
Formula	4,443	102,676,508	4,654	4.75%	107,556,944	4,704	-1.1%	102,916,899	45
MPPFL	3,909	76,766,796	4,144	6.01%	81,381,475	4,153	-0.2%	83,659,237	35
Floor/MFG	4,644	14,865,131	4,714	1.50%	15,088,224	4,590	2.7%	18,018,412	9

Bournemouth, Christchurch & Poole School Funding Consultation 2020-21

Model Description	Rates Included: Yes; NOR Base: Local Formula 2019-20					Consultation Option 2b			
1.1% Transfer	2019-20 Post MFG per pupil Budget	2019-20 Post MFG Budget	20-21 Post MFG per pupil Budget	Per Pupil change against 2019/20	2020-21 Post MFG Budget	NFF Post MFG per pupil Budget	Per Pupil change against NFF	2020-21 NFF Post MFG Budget	Formula Type Sch. Classificati on
BCP TOTAL	4,228	194,308,435	4,412	4.3%	202,742,544	4,452	-0.91%	204,594,548	
Queen's Park Infant Academy	3,602	1,282,253	3,716	3.2%	1,322,986	3,768	-1.4%	1,341,498	MPPFL
St Clement's and St John's Church of England Infant School	4,562	1,199,932	4,626	1.4%	1,216,699	4,638	-0.3%	1,219,836	Floor/MFG
Stourfield Infant School	3,487	1,248,268	3,713	6.5%	1,329,176	3,765	-1.4%	1,347,792	MPPFL
Christchurch Infant School	3,594	1,282,954	3,820	6.3%	1,363,636	3,872	-1.3%	1,382,200	MPPFL
Mudeford Community Infants' School	3,885	695,483	4,117	6.0%	737,021	4,157	-1.0%	744,181	Formula
Ad Astra Infant School	3,663	985,230	3,793	3.6%	1,020,392	3,833	-1.0%	1,031,151	Formula
Broadstone First School	3,488	1,042,893	3,714	6.5%	1,110,467	3,766	-1.4%	1,126,015	MPPFL
Canford Heath Infant School	3,487	1,252,010	3,713	6.5%	1,333,144	3,765	-1.4%	1,351,812	MPPFL
Courthill Infant School	3,484	1,215,845	3,710	6.5%	1,294,719	3,762	-1.4%	1,312,867	MPPFL
Lilliput Church of England Infant School	3,492	1,253,576	3,718	6.5%	1,334,710	3,770	-1.4%	1,353,378	MPPFL
Merley First School	3,491	1,054,179	3,717	6.5%	1,122,431	3,769	-1.4%	1,138,135	MPPFL
Old Town Infant School and Nursery	4,410	714,354	4,573	3.7%	740,845	4,613	-0.9%	747,325	Formula
Springdale First School	3,488	1,039,372	3,714	6.5%	1,106,720	3,766	-1.4%	1,122,216	MPPFL
Stanley Green Infant Academy	3,637	876,449	3,770	3.7%	908,683	3,810	-1.0%	918,322	Formula
Livingstone Road Infant School	4,052	1,073,723	4,148	2.4%	1,099,194	4,188	-1.0%	1,109,794	Formula
Twin Sails Infant and Nursery School	3,678	1,224,801	3,759	2.2%	1,251,770	3,799	-1.1%	1,265,090	Formula
Infant/ First Total	3,673	17,441,321	3,852	4.9%	18,292,593	3,898	-1.2%	18,511,611	
Christ The King Catholic Primary School	4,411	1,424,771	4,474	1.4%	1,444,997	4,485	-0.3%	1,448,782	Floor/MFG
Corpus Christi Catholic Primary School	3,740	1,600,608	3,878	3.7%	1,659,889	3,918	-1.0%	1,677,008	Formula
Elm Academy	4,761	2,142,573	4,831	1.5%	2,173,932	4,844	-0.3%	2,179,799	Floor/MFG
Heathlands Primary Academy	5,420	1,132,829	5,495	1.4%	1,148,511	5,509	-0.3%	1,151,445	Floor/MFG
Hill View Primary School	3,486	2,220,736	3,712	6.5%	2,364,698	3,764	-1.4%	2,397,822	MPPFL
Jewell Academy Bournemouth	4,493	1,797,247	4,558	1.4%	1,823,214	4,570	-0.3%	1,828,072	Floor/MFG
Kings Park Academy	4,133	2,587,222	4,194	1.5%	2,625,405	4,205	-0.3%	2,632,548	Floor/MFG
Kingsleigh Primary School	3,880	2,812,744	3,960	2.1%	2,870,845	4,000	-1.0%	2,899,843	Formula
Kinson Academy	4,266	1,168,986	4,326	1.4%	1,185,227	4,337	-0.3%	1,188,266	Floor/MFG
Malmesbury Park Primary School	3,647	2,272,100	3,795	4.1%	2,364,524	3,835	-1.0%	2,389,443	Formula
Moordown St John's Church of England Primary School	3,489	1,472,240	3,715	6.5%	1,567,612	3,767	-1.4%	1,589,556	MPPFL
Muscliff Primary School	3,499	2,158,958	3,725	6.5%	2,298,400	3,777	-1.4%	2,330,484	MPPFL
Pokesdown Community Primary School	3,634	1,591,664	3,830	5.4%	1,677,371	3,870	-1.0%	1,694,890	Formula
St James' Church of England Primary Academy	3,486	1,460,614	3,712	6.5%	1,555,308	3,764	-1.4%	1,577,096	MPPFL
St Katharine's Church of England Primary School	3,489	1,744,518	3,715	6.5%	1,857,518	3,767	-1.4%	1,883,518	MPPFL
St Luke's Church of England Primary School	3,642	1,580,448	3,868	6.2%	1,678,532	3,920	-1.3%	1,701,100	MPPFL
St Mark's Church of England Primary School	3,491	1,455,636	3,717	6.5%	1,549,878	3,769	-1.4%	1,571,562	MPPFL
St Michael's Church of England Primary School	3,487	2,280,466	3,771	8.2%	2,466,502	3,811	-1.0%	2,492,661	Formula
St Walburga's Catholic Primary School	3,484	1,668,934	3,710	6.5%	1,777,188	3,762	-1.4%	1,802,096	MPPFL
The Epiphany Church of England Primary School	3,490	1,472,593	3,716	6.5%	1,567,965	3,768	-1.4%	1,589,909	MPPFL
Winton Primary School	3,491	2,845,089	3,717	6.5%	3,029,279	3,769	-1.4%	3,071,659	MPPFL
Burton Church of England Primary School	3,656	1,242,932	3,908	6.9%	1,328,878	3,948	-1.0%	1,342,477	Formula
Highcliffe St Mark Primary School	3,486	2,180,601	3,712	6.5%	2,321,982	3,766	1.0%	2,299,825	MPPFL
Somerford Primary School	4,222	1,312,931	4,369	3.5%	1,358,722	4,409	-0.9%	1,371,161	Formula
St Joseph's Catholic Primary School, Christchurch	3,788	787,886	4,030	6.4%	838,311	4,070	-1.0%	846,631	Formula
The Priory Church of England Primary School	3,677	775,860	3,813	3.7%	804,588	3,853	-1.0%	813,027	Formula
Twynham Primary School	3,733	744,762	3,851	3.2%	768,325	3,605	6.8%	719,101	Formula
Bayside Academy	4,360	1,277,353	4,557	4.5%	1,335,133	4,567	-0.2%	1,338,039	Formula
Bearwood Primary and Nursery School	3,940	799,746	4,086	3.7%	829,427	4,126	-1.0%	837,546	Formula
Bishop Aldhelm's Church of England Voluntary Aided Primary School	3,493	2,088,525	3,719	6.5%	2,223,673	3,771	-1.4%	2,254,769	MPPFL
Heatherlands Primary School	3,553	2,202,998	3,713	4.5%	2,302,090	3,765	-1.4%	2,334,330	MPPFL
Hillbourne Primary School	3,875	1,061,640	3,993	3.1%	1,094,092	4,033	-1.0%	1,105,052	Formula
Longfleet Church of England Primary School	3,490	2,202,409	3,716	6.5%	2,345,015	3,768	-1.4%	2,377,827	MPPFL
Manorside Academy	4,258	1,277,278	4,317	1.4%	1,295,212	4,329	-0.3%	1,298,568	Floor/MFG
St Joseph's Catholic Primary School, Poole	3,839	1,558,642	3,981	3.7%	1,616,397	4,021	-1.0%	1,632,637	Formula
St Mary's Catholic Primary School, Poole	3,575	1,429,833	3,719	4.0%	1,487,683	3,771	-1.4%	1,508,483	MPPFL
Talbot Primary School	3,862	2,147,047	4,025	4.2%	2,237,774	4,065	-1.0%	2,260,013	Formula
Primary Total	3,759	61,981,419	3,935	4.7%	64,874,097	3,969	-0.9%	65,437,046	

Bournemouth, Christchurch & Poole School Funding Consultation 2020-21

1.1% Transfer	2019-20 Post MFG per pupil Budget	2019-20 Post MFG Budget	20-21 Post MFG per pupil Budget	Per Pupil change against 2019/20	2020-21 Post MFG Budget	NFF Post MFG per pupil Budget	Per Pupil change against NFF	2020-21 NFF Post MFG Budget	Formula Type Sch. Classificati on
Bethany Church of England Junior School	4,294	1,571,555	4,451	3.7%	1,629,106	4,491	-0.9%	1,643,745	Formula
Queen's Park Academy	3,625	1,834,077	3,727	2.8%	1,885,846	3,772	-1.2%	1,908,689	Formula
Stourfield Junior School	3,491	1,682,778	3,717	6.5%	1,791,710	3,769	-1.4%	1,816,774	MPPFL
Christchurch Junior School	3,422	1,714,649	3,648	6.6%	1,827,875	3,700	-1.4%	1,853,927	MPPFL
Mudford Junior School	3,626	960,786	3,849	6.2%	1,020,098	3,889	-1.0%	1,030,697	Formula
Baden-Powell and St Peter's Church of England Junior School	3,496	2,552,104	3,722	6.5%	2,717,084	3,774	-1.4%	2,755,044	MPPFL
Livingstone Road Junior School	4,226	1,043,928	4,446	5.2%	1,098,151	4,486	-0.9%	1,108,031	Formula
Canford Heath Junior School	3,492	1,661,998	3,715	6.4%	1,768,182	3,767	-1.4%	1,792,934	MPPFL
Hamworthy Park Junior School	3,838	1,784,732	3,980	3.7%	1,850,919	4,020	-1.0%	1,869,518	Formula
Haymoor Junior School	3,843	1,333,589	3,986	3.7%	1,383,002	4,026	-1.0%	1,396,882	Formula
Oakdale Junior School	3,637	1,742,172	3,770	3.7%	1,805,961	3,810	-1.0%	1,825,120	Formula
Ocean Academy Poole	3,747	1,337,715	3,891	3.9%	1,389,261	3,931	-1.0%	1,403,540	Formula
Junior Total	3,681	19,220,084	3,863	4.9%	20,167,196	3,908	-1.2%	20,404,901	
Bournemouth School	4,822	3,626,092	4,998	3.6%	3,758,444	5,050	-1.0%	3,797,548	MPPFL
Bournemouth School for Girls	4,808	4,096,740	4,984	3.7%	4,246,692	5,036	-1.0%	4,290,996	MPPFL
Glenmoor Academy	4,819	3,792,191	5,064	5.1%	3,985,076	5,122	-1.1%	4,031,269	Formula
Avonbourne Boys Academy	5,379	2,818,634	5,682	5.6%	2,977,401	5,741	-1.0%	3,008,390	Formula
LeAF Studio	5,407	1,227,465	5,652	4.5%	1,283,063	5,714	-1.1%	1,297,010	Formula
Oak Academy	5,764	2,582,427	6,010	4.3%	2,692,520	6,069	-1.0%	2,718,998	Formula
The Bishop of Winchester Academy	4,870	4,908,913	5,164	6.0%	5,205,776	5,224	-1.1%	5,265,489	Formula
The Bourne Academy	5,301	4,569,232	5,493	3.6%	4,735,250	5,552	-1.1%	4,786,248	Formula
Winton Academy	4,810	4,035,207	5,012	4.2%	4,205,114	5,071	-1.2%	4,254,324	Formula
Highcliffe School	4,801	5,636,042	4,977	3.7%	5,842,666	5,029	-1.0%	5,903,714	MPPFL
The Grange School	5,508	2,307,893	5,863	6.4%	2,456,501	5,922	-1.0%	2,481,462	Formula
Twynham School	4,797	6,279,292	4,973	3.7%	6,509,676	5,025	-1.0%	6,577,744	MPPFL
Broadstone Middle School	4,050	1,935,886	4,251	5.0%	2,031,964	4,303	-1.2%	2,056,820	MPPFL
Carter Community School	5,995	2,134,292	6,083	1.5%	2,165,427	6,099	-0.3%	2,171,253	Floor/MFG
Corfe Hills School	4,948	3,503,366	5,132	3.7%	3,633,512	5,189	-1.1%	3,673,483	MPPFL
Magna Academy	5,160	4,236,187	5,268	2.1%	4,324,850	5,327	-1.1%	4,373,260	Formula
Parkstone Grammar School	4,817	4,416,840	4,993	3.7%	4,578,232	5,045	-1.0%	4,625,916	MPPFL
Poole Grammar School	4,809	4,308,896	4,985	3.7%	4,466,592	5,037	-1.0%	4,513,184	MPPFL
Poole High School	4,986	7,802,698	5,140	3.1%	8,043,503	5,199	-1.1%	8,136,121	Formula
St Aldhelm's Academy	6,063	2,819,313	6,151	1.5%	2,860,293	6,192	-0.7%	2,879,058	Floor/MFG
St Edward's Roman Catholic/Church of England School, Poole	4,834	4,350,642	4,994	3.3%	4,494,333	5,053	-1.2%	4,547,689	Formula
Middle/ Secondary Total	4,991	81,388,248	5,182	3.8%	84,496,884	5,236	-1.0%	85,389,975	
Avonbourne Girls Academy	4,481	5,556,947	4,645	3.6%	5,759,541	4,604	0.9%	5,709,183	Formula
St Peter's Catholic Comprehensive School	4,525	6,959,504	4,699	3.8%	7,226,885	4,680	0.4%	7,197,292	Formula
Parkfield School	4,295	1,760,911	4,696	9.3%	1,925,349	4,743	-1.0%	1,944,540	Formula
All- through Total	4,478	14,277,362	4,677	4.4%	14,911,774	4,658	0.4%	14,851,015	
Phase Summaries									
Infant/ First Total	3,673	17,441,321	3,852	4.88%	18,292,593	3,898	-1.18%	18,511,611	
Junior Total	3,681	19,220,084	3,863	4.93%	20,167,196	3,908	-1.16%	20,404,901	
Primary Total	3,759	61,981,419	3,935	4.67%	64,874,097	3,969	-0.86%	65,437,046	
PRIMARY PHASE	3,728	98,642,824	3,906	4.76%	103,333,886	3,944	-0.98%	104,353,558	
Middle/ Secondary Total	4,991	81,388,248	5,182	3.82%	84,496,884	5,236	-1.05%	85,389,975	
All- through Total	4,478	14,277,362	4,677	4.44%	14,911,774	4,658	0.41%	14,851,015	
SECONDARY TOTAL	4,907	95,665,610	5,099	3.91%	99,408,658	5,142	-0.83%	100,240,990	
Count of schools by type	Floor	Formula	Cap	MPPFL	Cap<MPPFL	MFG	Total		
Infant/ First Total	-	6	-	9	-	1	16		
Junior Total	-	8	-	4	-	-	12		
Primary Total	-	15	-	15	-	7	37		
PRIMARY PHASE	-	29	-	28	-	8	65		
Primary %	0%	45%	0%	43%	0%	12%	100%		
Middle/ Secondary Total	-	11	-	8	-	2	21		
All- through Total	-	3	-	-	-	-	3		
SECONDARY TOTAL	-	14	-	8	-	2	24		
Secondary %	0%	58%	0%	33%	0%	8%	100%		
School Type									# of schools
Primary Formula	3,811	39,444,977	3,968	4.12%	41,071,029	4,015	-1.2%	36,613,083	29
Primary MPPFL	3,504	46,467,009	3,721	6.20%	49,349,661	3,769	-1.3%	51,893,316	28
Primary Floor/MFG	4,475	12,730,839	4,539	1.43%	12,913,197	4,439	2.3%	15,847,159	8
Secondary Formula	4,911	56,908,852	5,119	4.23%	59,315,161	5,196	-1.5%	66,303,816	14
Secondary MPPFL	4,770	33,803,153	4,949	3.74%	35,067,777	4,981	-0.6%	31,765,921	8
Secondary Floor/MFG	6,034	4,953,606	6,121	1.46%	5,025,720	6,099	0.4%	2,171,253	2
Formula	4,392	96,353,828	4,576	4.18%	100,386,190	4,704	-2.7%	102,916,899	43
MPPFL	3,945	80,270,162	4,149	5.17%	84,417,437	4,153	-0.1%	83,659,237	36
Floor/MFG	4,824	17,684,444	4,893	1.44%	17,938,917	4,590	6.6%	18,018,412	10

Bournemouth, Christchurch & Poole School Funding Consultation 2020-21

Model Description	Rates Included: Yes; NOR Base: Local Formula 2019-20					Consultation Option 2c			
2.2% Transfer	2019-20 Post MFG per pupil Budget	2019-20 Post MFG Budget	20-21 Post MFG per pupil Budget	Per Pupil change against 2019/20	2020-21 Post MFG Budget	NFF Post MFG per pupil Budget	Per Pupil change against NFF	2020-21 NFF Post MFG Budget	Formula Type Sch. Classificati on
BCP TOTAL	4,228	194,308,435	4,362	3.2%	200,433,778	4,452	-2.03%	204,594,548	
Queen's Park Infant Academy	3,602	1,282,253	3,659	1.6%	1,302,590	3,768	-2.9%	1,341,498	Formula
St Clement's and St John's Church of England Infant School	4,562	1,199,932	4,604	0.9%	1,210,750	4,638	-0.7%	1,219,836	Floor/MFG
Stourfield Infant School	3,487	1,248,268	3,655	4.8%	1,308,412	3,765	-2.9%	1,347,792	MPPFL
Christchurch Infant School	3,594	1,282,954	3,762	4.7%	1,342,930	3,872	-2.8%	1,382,200	MPPFL
Mudeford Community Infants' School	3,885	695,483	4,079	5.0%	730,117	4,157	-1.9%	744,181	Formula
Ad Astra Infant School	3,663	985,230	3,755	2.5%	1,010,017	3,833	-2.0%	1,031,151	Formula
Broadstone First School	3,488	1,042,893	3,656	4.8%	1,093,125	3,766	-2.9%	1,126,015	MPPFL
Canford Heath Infant School	3,487	1,252,010	3,655	4.8%	1,312,322	3,765	-2.9%	1,351,812	MPPFL
Courthill Infant School	3,484	1,215,845	3,652	4.8%	1,274,477	3,762	-2.9%	1,312,867	MPPFL
Lilliput Church of England Infant School	3,492	1,253,576	3,660	4.8%	1,313,888	3,770	-2.9%	1,353,378	MPPFL
Merley First School	3,491	1,054,179	3,659	4.8%	1,104,915	3,769	-2.9%	1,138,135	MPPFL
Old Town Infant School and Nursery	4,410	714,354	4,535	2.8%	734,597	4,613	-1.7%	747,325	Formula
Springdale First School	3,488	1,039,372	3,656	4.8%	1,089,436	3,766	-2.9%	1,122,216	MPPFL
Stanley Green Infant Academy	3,637	876,449	3,732	2.6%	899,388	3,810	-2.1%	918,322	Formula
Livingstone Road Infant School	4,052	1,073,723	4,109	1.4%	1,088,973	4,188	-1.9%	1,109,794	Formula
Twin Sails Infant and Nursery School	3,678	1,224,801	3,721	1.2%	1,238,927	3,799	-2.1%	1,265,090	Formula
Infant/ First Total	3,673	17,441,321	3,802	3.5%	18,054,863	3,898	-2.5%	18,511,611	
Christ The King Catholic Primary School	4,411	1,424,771	4,451	0.9%	1,437,820	4,485	-0.8%	1,448,782	Floor/MFG
Corpus Christi Catholic Primary School	3,740	1,600,608	3,840	2.7%	1,643,381	3,918	-2.0%	1,677,008	Formula
Elm Academy	4,761	2,142,573	4,806	0.9%	2,162,805	4,844	-0.8%	2,179,799	Floor/MFG
Heathlands Primary Academy	5,420	1,132,829	5,469	0.9%	1,142,946	5,509	-0.7%	1,151,445	Floor/MFG
Hill View Primary School	3,486	2,220,736	3,654	4.8%	2,327,752	3,764	-2.9%	2,397,822	MPPFL
Jewell Academy Bournemouth	4,493	1,797,247	4,535	0.9%	1,814,000	4,570	-0.8%	1,828,072	Floor/MFG
Kings Park Academy	4,133	2,587,222	4,172	1.0%	2,611,856	4,205	-0.8%	2,632,548	Floor/MFG
Kingsleigh Primary School	3,880	2,812,744	3,921	1.1%	2,842,882	4,002	-2.0%	2,899,843	Formula
Kinson Academy	4,266	1,168,986	4,305	0.9%	1,179,464	4,337	-0.7%	1,188,266	Floor/MFG
Malmesbury Park Primary School	3,647	2,272,100	3,757	3.0%	2,340,496	3,835	-2.0%	2,389,443	Formula
Moordown St John's Church of England Primary School	3,489	1,472,240	3,657	4.8%	1,543,136	3,767	-2.9%	1,589,556	MPPFL
Muscliff Primary School	3,499	2,158,958	3,667	4.8%	2,262,614	3,777	-2.9%	2,330,484	MPPFL
Pokesdown Community Primary School	3,634	1,591,664	3,791	4.3%	1,660,478	3,870	-2.0%	1,694,890	Formula
St James' Church of England Primary Academy	3,486	1,460,614	3,654	4.8%	1,531,006	3,764	-2.9%	1,577,096	MPPFL
St Katharine's Church of England Primary School	3,489	1,744,518	3,657	4.8%	1,828,518	3,767	-2.9%	1,883,518	MPPFL
St Luke's Church of England Primary School	3,642	1,580,448	3,810	4.6%	1,653,360	3,920	-2.8%	1,701,100	MPPFL
St Mark's Church of England Primary School	3,491	1,455,636	3,659	4.8%	1,525,692	3,769	-2.9%	1,571,562	MPPFL
St Michael's Church of England Primary School	3,487	2,280,466	3,733	7.1%	2,441,278	3,811	-2.1%	2,492,661	Formula
St Walburga's Catholic Primary School	3,484	1,668,934	3,652	4.8%	1,749,406	3,762	-2.9%	1,802,096	MPPFL
The Epiphany Church of England Primary School	3,490	1,472,593	3,658	4.8%	1,543,489	3,768	-2.9%	1,589,909	MPPFL
Winton Primary School	3,491	2,845,089	3,659	4.8%	2,982,009	3,769	-2.9%	3,071,659	MPPFL
Burton Church of England Primary School	3,656	1,242,932	3,870	5.9%	1,315,764	3,948	-2.0%	1,342,477	Formula
Highcliffe St Mark Primary School	3,486	2,180,601	3,654	4.8%	2,285,699	3,676	-0.6%	2,299,825	MPPFL
Somerford Primary School	4,222	1,312,931	4,330	2.6%	1,346,727	4,409	-1.8%	1,371,161	Formula
St Joseph's Catholic Primary School, Christchurch	3,788	787,886	3,992	5.4%	830,289	4,070	-1.9%	846,631	Formula
The Priory Church of England Primary School	3,677	775,860	3,775	2.7%	796,450	3,853	-2.0%	813,027	Formula
Twynham Primary School	3,733	744,762	3,813	2.1%	760,631	3,605	5.8%	719,101	Formula
Bayside Academy	4,360	1,277,353	4,518	3.6%	1,323,832	4,567	-1.1%	1,338,039	Formula
Bearwood Primary and Nursery School	3,940	799,746	4,047	2.7%	821,597	4,126	-1.9%	837,546	Formula
Bishop Aldhelm's Church of England Voluntary Aided Primary School	3,493	2,088,525	3,661	4.8%	2,188,989	3,771	-2.9%	2,254,769	MPPFL
Heatherlands Primary School	3,553	2,202,998	3,655	2.9%	2,266,130	3,765	-2.9%	2,334,330	MPPFL
Hillbourne Primary School	3,875	1,061,640	3,954	2.1%	1,083,524	4,033	-1.9%	1,105,052	Formula
Longfleet Church of England Primary School	3,490	2,202,409	3,658	4.8%	2,308,417	3,768	-2.9%	2,377,827	MPPFL
Manorside Academy	4,258	1,277,278	4,296	0.9%	1,288,848	4,329	-0.7%	1,298,568	Floor/MFG
St Joseph's Catholic Primary School, Poole	3,839	1,558,642	3,943	2.7%	1,600,738	4,021	-2.0%	1,632,637	Formula
St Mary's Catholic Primary School, Poole	3,575	1,429,833	3,668	2.6%	1,467,212	3,771	-2.7%	1,508,483	Formula
Talbot Primary School	3,862	2,147,047	3,986	3.2%	2,216,329	4,065	-1.9%	2,260,013	Formula
Primary Total	3,759	61,981,419	3,889	3.5%	64,125,562	3,969	-2.0%	65,437,046	

Bournemouth, Christchurch & Poole School Funding Consultation 2020-21

2.2% Transfer	2019-20 Post MFG per pupil Budget	2019-20 Post MFG Budget	20-21 Post MFG per pupil Budget	Per Pupil change against 2019/20	2020-21 Post MFG Budget	NFF Post MFG per pupil Budget	Per Pupil change against NFF	2020-21 NFF Post MFG Budget	Formula Type Sch. Classificati on
Bethany Church of England Junior School	4,294	1,571,555	4,413	2.8%	1,614,990	4,491	-1.7%	1,643,745	Formula
Queen's Park Academy	3,625	1,834,077	3,688	1.8%	1,866,330	3,772	-2.2%	1,908,689	Formula
Stourfield Junior School	3,491	1,682,778	3,659	4.8%	1,763,754	3,769	-2.9%	1,816,774	MPPFL
Christchurch Junior School	3,422	1,714,649	3,590	4.9%	1,798,817	3,700	-3.0%	1,853,927	MPPFL
Mudeford Junior School	3,626	960,786	3,811	5.1%	1,009,877	3,889	-2.0%	1,030,697	Formula
Baden-Powell and St Peter's Church of England Junior School	3,496	2,552,104	3,664	4.8%	2,674,744	3,774	-2.9%	2,755,044	MPPFL
Livingstone Road Junior School	4,226	1,043,928	4,407	4.3%	1,088,625	4,486	-1.8%	1,108,031	Formula
Canford Heath Junior School	3,492	1,661,998	3,657	4.7%	1,740,574	3,767	-2.9%	1,792,934	MPPFL
Hamworthy Park Junior School	3,838	1,784,732	3,942	2.7%	1,832,984	4,020	-2.0%	1,869,518	Formula
Haymoor Junior School	3,843	1,333,589	3,947	2.7%	1,369,619	4,026	-2.0%	1,396,882	Formula
Oakdale Junior School	3,637	1,742,172	3,732	2.6%	1,787,486	3,810	-2.1%	1,825,120	Formula
Ocean Academy Poole	3,747	1,337,715	3,853	2.8%	1,375,491	3,931	-2.0%	1,403,540	Formula
Junior Total	3,681	19,220,084	3,816	3.7%	19,923,291	3,908	-2.4%	20,404,901	
Bournemouth School	4,822	3,626,092	4,940	2.4%	3,714,828	5,050	-2.2%	3,797,548	MPPFL
Bournemouth School for Girls	4,808	4,096,740	4,926	2.5%	4,197,276	5,036	-2.2%	4,290,996	MPPFL
Glenmoor Academy	4,819	3,792,191	5,007	3.9%	3,940,532	5,122	-2.3%	4,031,269	Formula
Avonbourne Boys Academy	5,379	2,818,634	5,625	4.6%	2,947,519	5,741	-2.0%	3,008,390	Formula
LeAF Studio	5,407	1,227,465	5,593	3.4%	1,269,613	5,714	-2.1%	1,297,010	Formula
Oak Academy	5,764	2,582,427	5,953	3.3%	2,666,987	6,069	-1.9%	2,718,998	Formula
The Bishop of Winchester Academy	4,870	4,908,913	5,107	4.9%	5,148,196	5,224	-2.2%	5,265,489	Formula
The Bourne Academy	5,301	4,569,232	5,436	2.6%	4,686,073	5,552	-2.1%	4,786,248	Formula
Winton Academy	4,810	4,035,207	4,955	3.0%	4,157,662	5,071	-2.3%	4,254,324	Formula
Highcliffe School	4,801	5,636,042	4,919	2.5%	5,774,574	5,029	-2.2%	5,903,714	MPPFL
The Grange School	5,508	2,307,893	5,805	5.4%	2,432,432	5,922	-2.0%	2,481,462	Formula
Twynham School	4,797	6,279,292	4,915	2.5%	6,433,754	5,025	-2.2%	6,577,744	MPPFL
Broadstone Middle School	4,050	1,935,886	4,193	3.5%	2,004,240	4,303	-2.6%	2,056,820	MPPFL
Carter Community School	5,995	2,134,292	6,052	0.9%	2,154,380	6,099	-0.8%	2,171,253	Floor/MFG
Corfe Hills School	4,948	3,503,366	5,074	2.5%	3,592,448	5,189	-2.2%	3,673,483	MPPFL
Magna Academy	5,160	4,236,187	5,211	1.0%	4,278,168	5,327	-2.2%	4,373,260	Formula
Parkstone Grammar School	4,817	4,416,840	4,935	2.4%	4,525,046	5,045	-2.2%	4,625,916	MPPFL
Poole Grammar School	4,809	4,308,896	4,927	2.5%	4,414,624	5,037	-2.2%	4,513,184	MPPFL
Poole High School	4,986	7,802,698	5,083	1.9%	7,954,192	5,199	-2.2%	8,136,121	Formula
St Aldhelm's Academy	6,063	2,819,313	6,120	0.9%	2,845,752	6,192	-1.2%	2,879,058	Floor/MFG
St Edward's Roman Catholic/Church of England School, Poole	4,834	4,350,642	4,937	2.1%	4,442,883	5,053	-2.3%	4,547,689	Formula
Middle/ Secondary Total	4,991	81,388,248	5,125	2.7%	83,581,179	5,236	-2.1%	85,389,975	
Avonbourne Girls Academy	4,481	5,556,947	4,594	2.5%	5,696,834	4,604	-0.2%	5,709,183	Formula
St Peter's Catholic Comprehensive School	4,525	6,959,504	4,646	2.7%	7,145,207	4,680	-0.7%	7,197,292	Formula
Parkfield School	4,295	1,760,911	4,651	8.3%	1,906,843	4,743	-1.9%	1,944,540	Formula
All- through Total	4,478	14,277,362	4,626	3.3%	14,748,883	4,658	-0.7%	14,851,015	
Phase Summaries									
Infant/ First Total	3,673	17,441,321	3,802	3.52%	18,054,863	3,898	-2.47%	18,511,611	
Junior Total	3,681	19,220,084	3,816	3.66%	19,923,291	3,908	-2.36%	20,404,901	
Primary Total	3,759	61,981,419	3,889	3.46%	64,125,562	3,969	-2.00%	65,437,046	
PRIMARY PHASE	3,728	98,642,824	3,859	3.51%	102,103,716	3,944	-2.16%	104,353,558	
Middle/ Secondary Total	4,991	81,388,248	5,125	2.69%	83,581,179	5,236	-2.12%	85,389,975	
All- through Total	4,478	14,277,362	4,626	3.30%	14,748,883	4,658	-0.69%	14,851,015	
SECONDARY TOTAL	4,907	95,665,610	5,044	2.79%	98,330,062	5,142	-1.91%	100,240,990	
Count of schools by type	Floor	Formula	Cap	MPPFL	Cap<MPPFL	MFG	Total		
Infant/ First Total	-	7	-	8	-	1	16		
Junior Total	-	8	-	4	-	-	12		
Primary Total	-	16	-	14	-	7	37		
PRIMARY PHASE	-	31	-	26	-	8	65		
Primary %	0%	48%	0%	40%	0%	12%	100%		
Middle/ Secondary Total	-	11	-	8	-	2	21		
All- through Total	-	3	-	-	-	-	3		
SECONDARY TOTAL	-	14	-	8	-	2	24		
Secondary %	0%	58%	0%	33%	0%	8%	100%		
School Type									# of schools
Primary Formula	3,796	42,157,062	3,911	3.05%	43,441,617	4,015	-2.6%	36,613,083	31
Primary MPPFL	3,499	43,754,923	3,663	4.71%	45,813,609	3,769	-2.8%	51,893,316	26
Primary Floor/MFG	4,475	12,730,839	4,516	0.92%	12,848,489	4,439	1.7%	15,847,159	8
Secondary Formula	4,911	56,908,852	5,063	3.10%	58,673,142	5,196	-2.6%	66,303,816	14
Secondary MPPFL	4,770	33,803,153	4,891	2.53%	34,656,789	4,981	-1.8%	31,765,921	8
Secondary Floor/MFG	6,034	4,953,606	6,090	0.94%	5,000,131	6,099	-0.1%	2,171,253	2
Formula	4,365	99,065,914	4,500	3.08%	102,114,759	4,704	-4.3%	102,916,899	45
MPPFL	3,959	77,558,076	4,107	3.76%	80,470,398	4,153	-1.1%	83,659,237	34
Floor/MFG	4,824	17,684,444	4,869	0.93%	17,848,620	4,590	6.1%	18,018,412	10

Bournemouth, Christchurch & Poole School Funding Consultation 2020-21

Model Description	Rates Included: Yes; NOR Base: Local Formula 2019-20					Consultation Option 2d			
3.9% Transfer	2019-20 Post MFG per pupil Budget	2019-20 Post MFG Budget	20-21 Post MFG per pupil Budget	Per Pupil change against 2019/20	2020-21 Post MFG Budget	NFF Post MFG per pupil Budget	Per Pupil change against NFF	2020-21 NFF Post MFG Budget	Formula Type Sch. Classificati on
BCP TOTAL	4,228	194,308,435	4,286	1.4%	196,959,855	4,452	-3.73%	204,594,548	
Queen's Park Infant Academy	3,602	1,282,253	3,626	0.7%	1,290,963	3,768	-3.8%	1,341,498	Floor/MFG
St Clement's and St John's Church of England Infant School	4,562	1,199,932	4,593	0.7%	1,208,045	4,638	-1.0%	1,219,836	Floor/MFG
Stourfield Infant School	3,487	1,248,268	3,555	2.0%	1,272,612	3,765	-5.6%	1,347,792	MPPFL
Christchurch Infant School	3,594	1,282,954	3,662	1.9%	1,307,230	3,872	-5.4%	1,382,200	MPPFL
Mudeford Community Infants' School	3,885	695,483	4,010	3.2%	717,741	4,157	-3.6%	744,181	Formula
Ad Astra Infant School	3,663	985,230	3,687	0.7%	991,716	3,833	-3.8%	1,031,151	Floor/MFG
Broadstone First School	3,488	1,042,893	3,556	1.9%	1,063,225	3,766	-5.6%	1,126,015	MPPFL
Canford Heath Infant School	3,487	1,252,010	3,555	1.9%	1,276,422	3,765	-5.6%	1,351,812	MPPFL
Courthill Infant School	3,484	1,215,845	3,552	2.0%	1,239,577	3,762	-5.6%	1,312,867	MPPFL
Lilliput Church of England Infant School	3,492	1,253,576	3,560	1.9%	1,277,988	3,770	-5.6%	1,353,378	MPPFL
Merley First School	3,491	1,054,179	3,559	1.9%	1,074,715	3,769	-5.6%	1,138,135	MPPFL
Old Town Infant School and Nursery	4,410	714,354	4,465	1.3%	723,397	4,613	-3.2%	747,325	Formula
Springdale First School	3,488	1,039,372	3,556	1.9%	1,059,636	3,766	-5.6%	1,122,216	MPPFL
Stanley Green Infant Academy	3,637	876,449	3,663	0.7%	882,725	3,810	-3.9%	918,322	Formula
Livingstone Road Infant School	4,052	1,073,723	4,079	0.7%	1,080,887	4,188	-2.6%	1,109,794	Floor/MFG
Twin Sails Infant and Nursery School	3,678	1,224,801	3,703	0.7%	1,233,051	3,799	-2.5%	1,265,090	Floor/MFG
Infant/ First Total	3,673	17,441,321	3,727	1.5%	17,699,930	3,898	-4.4%	18,511,611	
Christ The King Catholic Primary School	4,411	1,424,771	4,441	0.7%	1,434,558	4,485	-1.0%	1,448,782	Floor/MFG
Corpus Christi Catholic Primary School	3,740	1,600,608	3,771	0.8%	1,613,790	3,918	-3.8%	1,677,008	Formula
Elm Academy	4,761	2,142,573	4,795	0.7%	2,157,747	4,844	-1.0%	2,179,799	Floor/MFG
Heathlands Primary Academy	5,420	1,132,829	5,457	0.7%	1,140,417	5,509	-1.0%	1,151,445	Floor/MFG
Hill View Primary School	3,486	2,220,736	3,554	2.0%	2,264,052	3,764	-5.6%	2,397,822	MPPFL
Jewell Academy Bournemouth	4,493	1,797,247	4,525	0.7%	1,809,812	4,570	-1.0%	1,828,072	Floor/MFG
Kings Park Academy	4,133	2,587,222	4,162	0.7%	2,605,697	4,205	-1.0%	2,632,548	Floor/MFG
Kingsleigh Primary School	3,880	2,812,744	3,907	0.7%	2,832,836	4,000	-2.3%	2,899,843	Floor/MFG
Kinson Academy	4,266	1,168,986	4,295	0.7%	1,176,845	4,337	-1.0%	1,188,266	Floor/MFG
Malmesbury Park Primary School	3,647	2,272,100	3,688	1.1%	2,297,422	3,835	-3.9%	2,389,443	Formula
Moordown St John's Church of England Primary School	3,489	1,472,240	3,557	1.9%	1,500,936	3,767	-5.6%	1,589,556	MPPFL
Muscliff Primary School	3,499	2,158,958	3,567	1.9%	2,200,914	3,777	-5.6%	2,330,484	MPPFL
Pokesdown Community Primary School	3,634	1,591,664	3,722	2.4%	1,630,195	3,870	-3.8%	1,694,890	Formula
St James' Church of England Primary Academy	3,486	1,460,614	3,554	2.0%	1,489,106	3,764	-5.6%	1,577,096	MPPFL
St Katharine's Church of England Primary School	3,489	1,744,518	3,557	1.9%	1,778,518	3,767	-5.6%	1,883,518	MPPFL
St Luke's Church of England Primary School	3,642	1,580,448	3,729	2.4%	1,618,362	3,920	-4.9%	1,701,100	Formula
St Mark's Church of England Primary School	3,491	1,455,636	3,559	1.9%	1,483,992	3,769	-5.6%	1,571,562	MPPFL
St Michael's Church of England Primary School	3,487	2,280,466	3,664	5.1%	2,396,060	3,811	-3.9%	2,492,661	Formula
St Walburga's Catholic Primary School	3,484	1,668,934	3,552	2.0%	1,701,506	3,762	-5.6%	1,802,096	MPPFL
The Epiphany Church of England Primary School	3,490	1,472,593	3,558	1.9%	1,501,289	3,768	-5.6%	1,589,909	MPPFL
Winton Primary School	3,491	2,845,089	3,575	2.4%	2,914,012	3,769	-5.1%	3,071,659	Formula
Burton Church of England Primary School	3,656	1,242,932	3,801	4.0%	1,292,257	3,948	-3.7%	1,342,477	Formula
Highcliffe St Mark Primary School	3,486	2,180,601	3,554	2.0%	2,223,140	3,676	-3.3%	2,299,825	MPPFL
Somerford Primary School	4,222	1,312,931	4,261	0.9%	1,325,224	4,409	-3.4%	1,371,161	Formula
St Joseph's Catholic Primary School, Christchurch	3,788	787,886	3,923	3.6%	815,908	4,070	-3.6%	846,631	Formula
The Priory Church of England Primary School	3,677	775,860	3,706	0.8%	781,861	3,853	-3.8%	813,027	Formula
Twynham Primary School	3,733	744,762	3,756	0.6%	749,417	3,605	4.2%	719,101	Floor/MFG
Bayside Academy	4,360	1,277,353	4,449	2.1%	1,303,574	4,567	-2.6%	1,338,039	Formula
Bearwood Primary and Nursery School	3,940	799,746	3,978	1.0%	807,562	4,126	-3.6%	837,546	Formula
Bishop Aldhelm's Church of England Voluntary Aided Primary School	3,493	2,088,525	3,561	1.9%	2,129,189	3,771	-5.6%	2,254,769	MPPFL
Heatherlands Primary School	3,553	2,202,998	3,578	0.7%	2,218,593	3,765	-5.0%	2,334,330	Floor/MFG
Hillbourne Primary School	3,875	1,061,640	3,900	0.7%	1,068,577	4,033	-3.3%	1,105,052	Floor/MFG
Longfleet Church of England Primary School	3,490	2,202,409	3,558	1.9%	2,245,317	3,768	-5.6%	2,377,827	MPPFL
Manorside Academy	4,258	1,277,278	4,287	0.7%	1,285,956	4,329	-1.0%	1,298,568	Floor/MFG
St Joseph's Catholic Primary School, Poole	3,839	1,558,642	3,874	0.9%	1,572,668	4,021	-3.7%	1,632,637	Formula
St Mary's Catholic Primary School, Poole	3,575	1,429,833	3,599	0.7%	1,439,635	3,771	-4.6%	1,508,483	Floor/MFG
Talbot Primary School	3,862	2,147,047	3,917	1.4%	2,177,888	4,065	-3.6%	2,260,013	Formula
Primary Total	3,759	61,981,419	3,820	1.6%	62,984,829	3,969	-3.7%	65,437,046	

Bournemouth, Christchurch & Poole School Funding Consultation 2020-21

3.9% Transfer	2019-20 Post MFG per pupil Budget	2019-20 Post MFG Budget	20-21 Post MFG per pupil Budget	Per Pupil change against 2019/20	2020-21 Post MFG Budget	NFF Post MFG per pupil Budget	Per Pupil change against NFF	2020-21 NFF Post MFG Budget	Formula Type Sch. Classificati on
Bethany Church of England Junior School	4,294	1,571,555	4,343	1.2%	1,589,685	4,491	-3.3%	1,643,745	Formula
Queen's Park Academy	3,625	1,834,077	3,650	0.7%	1,846,891	3,772	-3.2%	1,908,689	Floor/MFG
Stourfield Junior School	3,491	1,682,778	3,559	1.9%	1,715,554	3,769	-5.6%	1,816,774	MPPFL
Christchurch Junior School	3,422	1,714,649	3,490	2.0%	1,748,717	3,700	-5.7%	1,853,927	MPPFL
Mudeford Junior School	3,626	960,786	3,742	3.2%	991,555	3,889	-3.8%	1,030,697	Formula
Baden-Powell and St Peter's Church of England Junior School	3,496	2,552,104	3,564	1.9%	2,601,744	3,774	-5.6%	2,755,044	MPPFL
Livingstone Road Junior School	4,226	1,043,928	4,338	2.6%	1,071,547	4,486	-3.3%	1,108,031	Formula
Canford Heath Junior School	3,492	1,661,998	3,557	1.9%	1,692,974	3,767	-5.6%	1,792,934	MPPFL
Hamworthy Park Junior School	3,838	1,784,732	3,873	0.9%	1,800,834	4,020	-3.7%	1,869,518	Formula
Haymoor Junior School	3,843	1,333,589	3,878	0.9%	1,345,627	4,026	-3.7%	1,396,882	Formula
Oakdale Junior School	3,637	1,742,172	3,663	0.7%	1,754,368	3,810	-3.9%	1,825,120	Formula
Ocean Academy Poole	3,747	1,337,715	3,784	1.0%	1,350,809	3,931	-3.8%	1,403,540	Formula
Junior Total	3,681	19,220,084	3,737	1.5%	19,510,306	3,908	-4.4%	20,404,901	
Bournemouth School	4,822	3,626,092	4,857	0.7%	3,652,148	5,050	-3.8%	3,797,548	MPPFL
Bournemouth School for Girls	4,808	4,096,740	4,843	0.7%	4,126,375	5,036	-3.8%	4,290,996	MPPFL
Glenmoor Academy	4,819	3,792,191	4,906	1.8%	3,860,683	5,122	-4.2%	4,031,269	Formula
Avonbourne Boys Academy	5,379	2,818,634	5,523	2.7%	2,893,953	5,741	-3.8%	3,008,390	Formula
LeAF Studio	5,407	1,227,465	5,487	1.5%	1,245,504	5,714	-4.0%	1,297,010	Formula
Oak Academy	5,764	2,582,427	5,851	1.5%	2,621,218	6,069	-3.6%	2,718,998	Formula
The Bishop of Winchester Academy	4,870	4,908,913	5,005	2.8%	5,044,979	5,224	-4.2%	5,265,489	Formula
The Bourne Academy	5,301	4,569,232	5,339	0.7%	4,602,447	5,552	-3.8%	4,786,248	Floor/MFG
Winton Academy	4,810	4,035,207	4,854	0.9%	4,072,599	5,071	-4.3%	4,254,324	Formula
Highcliffe School	4,801	5,636,042	4,836	0.7%	5,677,201	5,029	-3.8%	5,903,714	MPPFL
The Grange School	5,508	2,307,893	5,702	3.5%	2,389,286	5,922	-3.7%	2,481,462	Formula
Twynham School	4,797	6,279,292	4,832	0.7%	6,325,283	5,025	-3.8%	6,577,744	MPPFL
Broadstone Middle School	4,050	1,935,886	4,093	1.1%	1,956,440	4,303	-4.9%	2,056,820	MPPFL
Carter Community School	5,995	2,134,292	6,038	0.7%	2,149,358	6,099	-1.0%	2,171,253	Floor/MFG
Corfe Hills School	4,948	3,503,366	4,984	0.7%	3,528,514	5,189	-3.9%	3,673,483	MPPFL
Magna Academy	5,160	4,236,187	5,197	0.7%	4,266,717	5,327	-2.4%	4,373,260	Floor/MFG
Parkstone Grammar School	4,817	4,416,840	4,851	0.7%	4,448,802	5,045	-3.8%	4,625,916	MPPFL
Poole Grammar School	4,809	4,308,896	4,844	0.7%	4,340,105	5,037	-3.8%	4,513,184	MPPFL
Poole High School	4,986	7,802,698	5,022	0.7%	7,860,047	5,199	-3.4%	8,136,121	Floor/MFG
St Aldhelm's Academy	6,063	2,819,313	6,106	0.7%	2,839,142	6,192	-1.4%	2,879,058	Floor/MFG
St Edward's Roman Catholic/Church of England School, Poole	4,834	4,350,642	4,869	0.7%	4,382,200	5,053	-3.6%	4,547,689	Floor/MFG
Middle/ Secondary Total	4,991	81,388,248	5,046	1.1%	82,283,000	5,236	-3.6%	85,389,975	
Avonbourne Girls Academy	4,481	5,556,947	4,514	0.7%	5,597,558	4,604	-2.0%	5,709,183	Floor/MFG
St Peter's Catholic Comprehensive School	4,525	6,959,504	4,558	0.7%	7,010,563	4,680	-2.6%	7,197,292	Floor/MFG
Parkfield School	4,295	1,760,911	4,570	6.4%	1,873,669	4,743	-3.6%	1,944,540	Formula
All-through Total	4,478	14,277,362	4,543	1.4%	14,481,790	4,658	-2.5%	14,851,015	
Phase Summaries									
Infant/ First Total	3,673	17,441,321	3,727	1.48%	17,699,930	3,898	-4.38%	18,511,611	
Junior Total	3,681	19,220,084	3,737	1.51%	19,510,306	3,908	-4.38%	20,404,901	
Primary Total	3,759	61,981,419	3,820	1.62%	62,984,829	3,969	-3.75%	65,437,046	
PRIMARY PHASE	3,728	98,642,824	3,787	1.57%	100,195,065	3,944	-3.99%	104,353,558	
Middle/ Secondary Total	4,991	81,388,248	5,046	1.10%	82,283,000	5,236	-3.64%	85,389,975	
All-through Total	4,478	14,277,362	4,543	1.43%	14,481,790	4,658	-2.49%	14,851,015	
SECONDARY TOTAL	4,907	95,665,610	4,964	1.15%	96,764,790	5,142	-3.47%	100,240,990	
Count of schools by type	Floor	Formula	Cap	MPPFL	Cap<MPPFL	MFG	Total		
Infant/ First Total	-	3	-	8	-	5	16		
Junior Total	-	7	-	4	-	1	12		
Primary Total	-	14	-	11	-	12	37		
PRIMARY PHASE	-	24	-	23	-	18	65		
Primary %	0%	37%	0%	35%	0%	28%	100%		
Middle/ Secondary Total	-	7	-	8	-	6	21		
All-through Total	-	1	-	-	-	2	3		
SECONDARY TOTAL	-	8	-	8	-	8	24		
Secondary %	0%	33%	0%	33%	0%	33%	100%		
School Type									# of schools
Primary Formula	3,781	34,133,536	3,852	1.88%	34,775,070	4,015	-4.1%	36,613,083	24
Primary MPPFL	3,490	37,126,388	3,558	1.94%	37,848,352	3,769	-5.6%	51,893,316	23
Primary Floor/MFG	4,031	27,382,901	4,059	0.69%	27,571,642	4,439	-8.6%	15,847,159	18
Secondary Formula	5,027	23,433,641	5,148	2.42%	24,001,891	5,196	-0.9%	66,303,816	8
Secondary MPPFL	4,770	33,803,153	4,806	0.74%	34,054,868	4,981	-3.5%	31,765,921	8
Secondary Floor/MFG	4,960	38,428,816	4,997	0.73%	38,708,032	6,099	-18.1%	2,171,253	8
Formula	4,205	57,567,177	4,293	2.10%	58,776,961	4,704	-8.7%	102,916,899	32
MPPFL	4,002	70,929,541	4,057	1.37%	71,903,220	4,153	-2.3%	83,659,237	31
Floor/MFG	4,526	65,811,716	4,559	0.71%	66,279,674	4,590	-0.7%	18,018,412	26

Appendix 4

Funding for Maintained School Education Services

De-delegations and Central Retentions from Maintained School Budget Shares

1. Introduction

It is important to distinguish between different categories of services for schools:

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.

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 will be considered in a separate paper for a later meeting.
4. **Traded Services for all schools** are decided individually by maintained schools and academies that are not statutory duties of the LA and do not form part of the Schools Forum business.

Where Schools Forum make the decision the relevant schools only (by phase or collectively) are able to vote.

This appendix considers only services in paragraphs 1 and 2 for maintained schools only.

2. De-delegated Services for Maintained Schools

2.1. Extract from DfE Guidance:

De-delegated services

De-delegated services are for maintained schools only; funding for de-delegated services must be allocated through the formula but can be passed back, or 'de-delegated', for maintained mainstream primary and secondary schools with schools forum approval.

De-delegation does not apply to special schools, nursery schools, or PRUs.

Where de-delegation has been agreed for maintained primary and secondary schools, our presumption is that the local authority will offer the service on a buy-back basis to those schools and academies in their area which are not covered by the de-delegation.

In the case of special schools and PRUs, the funding to buy such services will be included in any top-up payments.

Any decisions made to de-delegate in 2019-20 related to that year only; new decisions will be required for any service to be de-delegated in 2020-21.

Schools forum members for primary maintained schools and secondary maintained schools must decide separately for each phase whether the service should be provided centrally; the decision will apply to all maintained mainstream schools in that phase.

They must decide on fixed contributions for these services so that funding can then be removed from the formula before school budgets are issued. There may be different decisions for each phase.

The full list of services in this category is in paragraph 167.3 in the guidance. BCP is not proposing to undertake any de-delegation of maintained mainstream school budget shares.

FSM eligibility checking

An SLA is currently available to all maintained schools and academies for FSM eligibility checking and this is planned to continue in 2020-21.

3. Central Retention Services for Maintained Schools

3.1. These services were previously funded by the Education Services Grant (ESG) with academies receiving their own funding for these services. The ESG ended for LAs and new academy conversions from September 2017 with the grant winding out for existing academies through transitional protection.

3.2. Extract from DfE Guidance

Services for maintained schools

Local authorities can fund some services relating to maintained schools only from maintained school budget shares, with the agreement of maintained school members of the schools forum.

The relevant maintained schools members of the schools forum (primary, secondary, special, and pupil referral units (PRUs)) should agree the amount the local authority will retain.

If the local authority and schools forum are unable to reach a consensus on the amount to be retained by the local authority, the matter can be referred to the Secretary of State.

Local authorities should set a single rate per 5 to 16 year old pupil for all mainstream maintained schools, both primary and secondary; in the interests of simplicity, this should be deducted from basic entitlement funding.

We will not allow adjustments to other factors, and the rate will not include early years or post-16 pupils, who are funded through different formula.

Local authorities can choose to establish differential rates for special schools and PRUs if the cost of fulfilling the duty is substantially different for these schools. The rate will be expressed per-place rather than per pupil for special schools and PRUs.

As with de-delegation, the amount to be held by the local authority will be determined after MFG has been applied.

If a school converts to academy status, ESFA will recoup the amount retained for that school from the local authority's DSG for the remaining months of the financial year that the school is an academy.

Local authorities should provide sufficient evidence to their schools forum to enable them to make an informed decision on the amount of funding to be held centrally, including a comparison where relevant between those relating to all schools, and those for maintained schools only. Also to be included:

- consequences for the funding and delivery of each of the services provided, if the request was not approved
- the impact on individual school budgets, and their overall financial position
- the impact on the local authority if the amount was not held centrally
- an equalities impact assessment carried out to assess the impact of the central retention of the funding on children or other people who have one or more of the protected characteristics under the Equality Act 2010

The split of services between responsibilities local authorities hold for all schools, and those that relate to maintained schools only are shown in the appendix.

LA Statutory Education Functions 2020-21

Statutory and regulatory duties

Responsibilities held for all schools	Responsibilities held for maintained schools only
<ul style="list-style-type: none"> • Director of children's services and personal staff for director (Sch 2, 15a) • Planning for the education service as a whole (Sch 2, 15b) • Revenue budget preparation, preparation of information on income and expenditure relating to education, and external audit relating to education (Sch 2, 22) • Authorisation and monitoring of expenditure not met from schools' budget shares (Sch 2, 15c) • Formulation and review of local authority schools funding formula (Sch 2, 15d) • 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) • Consultation costs relating to non-staffing issues (Sch 2, 19) • Plans involving collaboration with other LA services or public or voluntary bodies (Sch 2, 15f) • Standing Advisory Committees for Religious Education (SACREs) (Sch 2, 17) • Provision of information to or at the request of the Crown other than relating specifically to maintained schools (Sch 2, 21) 	<ul style="list-style-type: none"> • Functions of LA related to best value and provision of advice to governing bodies in procuring goods and services (Sch 2, 57) • Budgeting and accounting functions relating to maintained schools (Sch 2, 74) • Authorisation and monitoring of expenditure in respect of schools which do not have delegated budgets, and related financial administration (Sch 2, 58) • 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) • 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) • Functions made under Section 44 of the 2002 Act (Consistent Financial Reporting) (Sch 2, 61) • 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) • 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) • Retrospective membership of pension schemes where it would not be appropriate to expect a school to meet the cost (Sch 2, 76) • HR duties, including: advice to schools on the management of staff, pay alterations, conditions of service and

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

Table a: Central services responsibilities held by local authorities (statutory and regulatory duties)

Education welfare

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

Table b: Central services responsibilities held by local authorities (education welfare)

Asset management

Responsibilities held for all schools	Responsibilities held for maintained schools only
<ul style="list-style-type: none"> • 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) 	<ul style="list-style-type: none"> • General landlord duties for all maintained schools (Sch 2, 77a & b (section 542(2)) Education Act 1996; School Premises Regulations 2012) to ensure that school buildings have:

Responsibilities held for all schools	Responsibilities held for maintained schools only
<ul style="list-style-type: none"> General landlord duties for all buildings owned by the local authority, including those leased to academies (Sch 2, 14b) 	<ul style="list-style-type: none"> appropriate facilities for pupils and staff (including medical and accommodation) the ability to sustain appropriate loads reasonable weather resistance safe escape routes appropriate acoustic levels lighting, heating and ventilation which meets the required standards adequate water supplies and drainage playing fields of the appropriate standards General health and safety duty as an employer for employees and others who may be affected (Health and Safety at Work etc. Act 1974) Management of the risk from asbestos in community school buildings (Control of Asbestos Regulations 2012)

Table c: Central services responsibilities held by local authorities (asset management)

Central support services

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

Table d: Central services responsibilities held by local authorities (central support services)

Premature retirement and redundancy

Responsibilities held for all schools	Responsibilities held for maintained schools only
<ul style="list-style-type: none"> No functions 	<ul style="list-style-type: none"> Dismissal or premature retirement when costs cannot be charged to maintained schools (Sch 2, 78)

Table e: Central services responsibilities held by local authorities (premature retirement and redundancy)

Monitoring national curriculum assessment

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

Table f: Central services responsibilities held by local authorities (monitoring national curriculum assessment)

Bournemouth, Christchurch & Poole School Funding Consultation 2020-21

Appendix 6: HN spend forecast

	2019-20 Budget			2019-20 Forecast			2020-21 Forecast		
	FTE	Cost	Average Top-Up	FTE	Cost	Average Top-Up	FTE	Cost	Average Top-Up
Independent	81.00	4,888,309	60,349	117.64	6,374,908	54,190	159.07	8,792,501	55,273
Non-Maintained Special Schools	155.40	5,533,402	35,607	150.37	5,566,058	37,016	158.12	5,852,924	37,016
Independent & Non-Maintained	236.40	10,421,712	44,085	268.01	11,940,966	44,554	317.19	14,645,426	46,172
Colleges	267.00	807,549	3,025	242.67	1,428,131	5,885	290.08	1,707,191	5,885
Independent Colleges	55.00	2,824,706	51,358	41.50	2,146,642	51,722	41.50	2,189,402	52,752
Post 16	322.00	3,632,255	11,280	284.17	3,574,773	12,580	331.59	3,896,594	11,751
Special Schools	733.00	9,158,158	12,494	736.33	10,173,504	13,816	782.38	10,809,654	13,816
Mainstream	776.27	2,197,512	2,831	798.25	2,428,733	3,043	870.50	2,648,557	3,043
Special Units / Mainstream Plus / Bases	32.00	472,776	14,774	24.71	415,335	16,808	25.44	427,634	16,808
Mainstream and Special Units	808.27	2,670,288	3,304	822.96	2,844,069	3,456	895.21	3,063,892	3,423
Medical / Therapies	7.00	113,893	16,270	7.75	98,558	12,717	8.58	109,118	12,717
Bespoke	77.00	1,345,227	17,470	120.52	2,000,593	16,600	210.90	3,571,059	16,932
Pre-School	3.00	36,000	12,000	21.55	140,431	6,515	21.55	140,431	6,515
PLACEMENTS BY BCP	2,186.67	27,377,533	12,520	2,261.30	30,772,894	13,609	2,567.41	36,236,173	14,114
Zero Top-up	179.00			142.99	11,461	80	139.10	11,461	82
LAC - EHCP agreed by OLA				4.50	171,406	38,090	4.50	171,406	38,090
TOTAL EHCPs	2,365.67	27,377,533	11,573	2,408.79	30,955,761	12,851	2,711.00	36,419,039	13,434
Commissioned Services		1,503,800			1,503,800			1,841,000	
0-5 High Needs		712,000			712,000			612,000	
Inclusion & Out of School		241,000			241,000			241,000	
PLACES 18/19		9,414,768			8,343,110			8,836,873	
TOTAL SEN		39,249,101			41,755,670			47,949,912	
AP - Medical	32.00	345,374	10,793	41.59	463,248	11,139	41.59	463,248	11,139
AP - PEX	189.00	2,221,223	11,753	148.20	2,033,039	13,719	148.20	2,033,039	13,719
AP - Other	9.00	105,777	11,753	9.02	161,200	17,871	9.02	161,200	17,871
Pupil Reintegration Programme					17,500				
Cross Border Hospital	25.00	460,525	18,421		460,525			460,525	
Hospital		128,000			128,000			128,000	
PLACES 18/19		1,170,000			1,170,000			1,170,000	
TOTAL AP		4,430,899			4,433,511			4,416,011	
TOTAL HNB		43,680,000			46,189,181			52,365,923	
Total Funding Available		43,680,000			43,981,000			42,627,761	
Shortfall		0			2,208,181			9,738,162	

Appendix 7

2019-20 BCP growth fund policy, and proposed 2020-21 policy

For 2019-20 growth is funded according to the legacy LA policies. A proposed policy is provided for 2020-21. These can be found in the Schools Forum report linked to [here](#), in agenda item 9: BCP growth funding policy 2020-21

<https://democracy.bcpccouncil.gov.uk/documents/g4076/Public%20reports%20pack%2025th-Sep-2019%2008.00%20Schools%20Forum.pdf?T=10>

New schools to meet basic need

The LA recommend post start-up and diseconomy of scale funding for new/ growing schools as follows:

Part 1: Diseconomy of scale funding

Empty Cohorts	6	5	4	3	2	1	MAX
Primary	£80,500	£67,500	£54,000	£40,500	£27,000	£13,500	£283,000
Secondary			£125,000	£93,500	£62,500	£31,000	£312,000
All through primary	£140,500	£117,811	£94,248	£70,686	£47,124	£23,562	£493,931
All through secondary			£185,000	£138,380	£92,500	£45,880	£461,760

Part 2: Resource Funding: £7,500 per FE added annually.

A summary of the proposed arrangements for new/ existing growth in 2020-21 is provided below:

Temporary Expansions (Bulge Classes)

The LA will provide Basic Entitlement (BE) funding for the relevant phase for any additional places prorated for the period September to March. This is on the basis that an additional FE will be funded at 30 places.

Regarding any retrospective adjustments to the funding, once the bulge has passed through the school:

The proposed policy does not apply any adjustment based on the actual number of pupils that end up on-roll in the class, or any other pupil number measure.

Permanent Expansions

It is not expected in the foreseeable future for a permanently expanding school to reduce their PAN to pre-expansion levels.

Option 1: Provide growth funding by considering Basic Entitlement only. Each FE will be based on 30 pupils, funded for the period Sep – Mar.

Option 2: Provide growth funding by considering all formula factors, not just Basic Entitlement. This is achieved by taking an average prevalence rate across all pupils-led factors by increasing pupil numbers accordingly. Each FE will be based on 30 pupils, funded for the

period Sep – Mar. Such funding will be provided through implicit growth in the formula, rather than the explicit growth fund.

Minor Variation to pupil numbers

The LA could fund growth for:

- Infant class sizes exceeding an agreed threshold due to exempt pupils,
- KS 2 classes exceeding a threshold
- Secondary places required where growth is not able to be contained within PAN.
- Other growth/ pupil number variations that have been requested by the local authority.

The proposal is not to fund minor variations to pupil numbers.

Falling Rolls Fund

The LA are not proposing to implement a falling rolls fund for 2020-21, which is no change from 2019-20.

Funding to meet infant class size legislation

This is funding to support the opening of KS 1 classes where overall pupils numbers exceed a multiple of 30, by a minimum number of pupils. For example, if a school with a PAN of 90 admits 66 pupils and as a result must open a 3th class rather than only 2 classes of 33 in each, funding could be provided to support this.

The proposal is to not provide funding through this route. Previously the LA considered this a significant issue only to small schools, with all relevant BCP schools of sufficient size to be able to manage the issue without needing extra funding.

List of Consultation Questions

Appendix 8

Question 1a

Do you agree with the disapplication request to adjust the MFG baseline for all-through schools adding primary year groups represents a fair adjustment to the local formula?
If no, what do you consider an appropriate adjustment and why?

Question 1b

Do you agree with the disapplication request to set the MPPFLs below NFF for all schools protected through these levels, should this be necessary to allow all schools to contribute to any transfer to the High Needs Block (HNB), represents a fair adjustment to the local formula?
If no, could you propose an approach that would allow MPPFL schools to contribute towards any transfer to the HNB, should this be necessary

Question 1c

Do you agree with the disapplication request to enable an exceptional MFG rate to apply where school are being protected at significantly high levels of protection through the MFG factor. The variation will request the option to set MFG for some schools below +0.5%
If no, could you propose an approach that would allow MPPFL schools to contribute towards any transfer to the HNB, should this be necessary?

Question 2

Do you support the savings indicated in Table 6? If you do not support the full savings, please indicate the level of savings you would support , and provide information on alternative

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?
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 13 and Table 14 for varying levels of transfer?
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?
If no, which unit values should be different from those proposed and why?

Question 3d

Do you support both a gains cap and reduction of the basic entitlement factor proportionately as a mechanism for releasing funding from formula schools?
If no, what would you support instead?

Question 3e

Regardless of whether you agree with any reduction to MPPFLs, do you support a flat reduction to the MPPFLs of equal cash amounts to all phases?
If no, would you prefer to see a proportional scaling back of gains under Primary and Secondary phase MPPFLs by adjusting the MPPFLs accordingly?

Question 4a

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?

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

Question 4b

Do you support any surplus funding after the agreed level of transfer out of the local NFF being added to the High Needs Block transfer?

If no, should surplus be held as a contingency or reallocated through the formula, and if so, how?

Question 5

Is it fairer to adequately resource the High Needs budget as per Appendix 6?

Question 6

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

If yes, please provide details of this/ these

Question 7

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.

Question 8a

If you do not support a transfer that would provide a balanced budget under Table 17, do you agree that it is reasonable to expect schools to implement initiatives to support closing the High Needs Funding gap?

If yes, please provide details of these initiatives, and how they could be monitored. Such initiatives would be expected to result in movement towards the national EHCP profile as per tables 19a and b, and to reduce permanent exclusions towards the National average.

Question 8b

Do you agree that should funding remain with schools rather than be transferred to the HN block for 2020-21, and there is no clear evidence the High Needs funding gap is closing is a result, the LA should consider a greater transfer to HN in 2021-22, and that you would support such a transfer?

If No, please provide further details

Question 9a

Do you support funding growth under Option 1 or 2 in 9.4?

If Other, please provide further details below

Question 9a

Do you support funding growth that has been requested by the LA but that does not materialise in a school?

Please provide your reasons/ provide further details for your choice below:

Question 10

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

Question 11

Any there any further comments you would like to make about any issues within the scope of this consultation?

Appendix 9

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

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"> • Due to permanent exclusion, illness or other reasons, would not otherwise receive a suitable education. • On a fixed period exclusion. • Being directed by schools to off-site provision to improve their behaviour or requiring a different curriculum offer.
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.
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.

ACRONYM	TITLE	DEFINITION
ESG	Education Services Grant	Previously paid by the ESFA on a per pupil basis to: <ul style="list-style-type: none"> Local Authorities for retained duties for all maintained schools and academies. Local Authorities for general duties for maintained schools only. Academies directly for general duties.
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 st April to 31 st 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).
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.

ACRONYM	TITLE	DEFINITION
	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"> • Primary – not achieving the expected level of development within the EYFSP (pre and post 2013). • Secondary – not reaching level 4 in KS2 English or Maths.
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.
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.
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

ACRONYM	TITLE	DEFINITION
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.

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Appendix 4 – Early Years Funding Consultation 2020-21

Bournemouth, Christchurch and Poole

Proposed Changes to the Early Years Single Funding Formula for the Free Early Entitlement for 2, 3 and 4 Year Olds for Apr 2020 – Mar 2021

13 December 2019

Consultation closes on 10 January 2020



1. Introduction

This document outlines the proposed funding formula for the free early entitlement for 2, 3 and 4 year olds, for April 2020 – Mar 2021. It also includes arrangements to funding for children requiring extra support.

2. An Early Years Single Funding Formula (EYSFF) for BCP

The Council are required to operate an annual EYSFF, changes to which will impact the funding rates paid to providers. The Council are required to consult with all providers on the local EYSFF.

The government funding rate paid by the Department for Education (DfE) to the local authority will be £4.38 per hour for 3 and 4 year olds and £5.31 per hour for 2 year olds. These amounts are 8p higher than the 2019-20 rates, as shown in table 1, and higher than those previously paid to the 3 legacy BCP authorities since 2017. The LA propose that any changes to provider rates should be made to the Base Rates for both 2 years olds, and 3 & 4 year olds.

Table 1: comparison between government funding rates for BCP

	2019-20	Change	2020-21
3&4yo Rate	4.30	0.08 (1.8%)	4.38
2yo Rate	5.23	0.08 (1.5%)	5.31

Funding for 2 year olds

Funding for 2 year olds will be at a single basic rate for all providers. There is no requirement for a separate deprivation supplement as all hours delivered under this funding are targeted at disadvantaged children. The £5.31 rate is to cover the basic rate to providers and a contribution to the cost of central functions such as checking the eligibility of children, marketing the early entitlement and providing funding to support children with special educational needs and disability (SEND).

In 2019-20 the local authority allocated 21p of this funding rate for these central functions (this included a 5p contribution to the High Needs Block), leaving £5.02 available for the funding rate for providers and any contribution to an SEND inclusion fund for 2 year olds. Whilst there are no statutory requirements on the pass through rate to providers for 2 year old funding, the illustrative options for central retention use the 2019-20 retention as a baseline, and then apply similar changes to the Base Rate as per those applied to 3&4 year old funding.

Funding for 3 and 4 year olds

The operational guidance places requirements on local authorities, some of which are below:

- A minimum amount of 95% funding to be passed through to providers.
- A universal base rate for all types of provider, to be set by local authorities (required from 2019-20)
- 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.

- Deprivation supplement is a mandatory requirement.
- Establishment of an SEND inclusion fund for allocation to providers.

The hourly funding rate for BCP from central government for the 3 and 4 year old early entitlement is to cover a range of services. The local authority must allocate funding to providers through a base-rate, a mandatory deprivation supplement (other supplements are possible), support for children with SEND as well as contribute towards the cost of central functions. These include checking eligibility for the additional 15 hours for working parents, and central SEN teams and support.

BCP is able to retain up to 5% of 3 and 4 year old funding for central functions supporting the early entitlement, and we are consulting on a range of illustrative levels up to this retention. The illustrative central retention levels release funding from the Base Rate rather than other factors; the rationale behind this is for funding turbulence for providers, as a result of proposed changes, to be as low as possible, to help maintain the sufficiency of places. The amount retained for central functions in 2019-20 was 6p per hour (1.4%) (this included a 4p contribution to the High Needs Block), of the £4.30 funding rate, leaving £4.24 for distribution to providers.

3. Bournemouth, Christchurch and Poole Priorities

Many factors have driven improvement in the childcare sector in BCP including hard work from providers and central support teams. This has been supported by the effective use of funding to improve quality, flexibility and support disadvantaged children through the use of supplements.

The funding allocation received from government beyond the 2020-21 financial year will be determined as part of the next Spending Review. Therefore, this consultation is specifically for 2020-21. However, the over-arching principles set out in this consultation are intended to be carried into the foreseeable future. For this reason, it is important that providers take time to understand the proposals set out in this document and provide feedback so that the local authority can take this into consideration.

Our priorities/principles when setting a new formula are as follows:

- 1) Minimise the amount retained centrally, maximising funding to providers.*
- 2) Using a supplement to support children with a background of deprivation, to narrow the attainment gap between the most disadvantaged children and their peers, at a level that will improve their outcomes.
- 3) Set a formula which allows providers to better forecast funding and business plan.
- 4) SEND funding for every hour the child attends a setting at a level to support improvements in their outcomes.
- 5) Ensure appropriate resourcing is provided for children with High Needs between the ages of 0 – 25

*Please note that Priority 1 concerns central retention for carrying out central functions and duties, rather than for any transfer between funding blocks – however such transfers would not be undertaken unless considered absolutely necessary.

These priorities are similar as for the Shadow BCP authority when setting the 2019-20 EYSFF, with the addition of priority 5 for this year.

QUESTION 1

Do you agree with these priorities?

- ☐ Agree
- ☐ Disagree (please let us know why and what you would prioritise)

4. Current Funding Rates in 2019-20

This table and explanatory notes below show how the funding through the EYSFF is currently distributed by the LA.

Table 2: Current government and provider Hourly Funding Rates across BCP

3 and 4 year olds			
	Government Rate	Provider Rate	
	£4.30		
Base Rate	£4.00	£4.00	Every child
Deprivation Supplement	£0.13	£0.53	Per eligible child
SEN/D Inclusion Fund	£0.11	£2.00 or £6.30	Per Eligible Child
HNB Contribution	£0.04		
Central Functions	£0.02		
2 year olds			
	Government Rate	Provider Rate	
	£5.23		
Base Rate	£4.95	£4.95	Every eligible 2yo
SEN/D Inclusion Fund	£0.07	£2.00 or £6.30	Per eligible child
HNB Contribution	£0.05		
Central Functions	£0.16		

Deprivation Eligibility* is currently determined as follows:

Children who have previously been funded as a 2 year old (at any BCP provider) or are currently eligible for EYPP as a 3 or 4 year old.

5. High Needs budget

The High Needs budget has a forecast pressure of £9.8m for 2020-21, which is expected to reduce to £8.3m as a result of actions the LA plan to undertake. Both schools and Early Years providers are being consulted on the implications of this funding pressure and whether it should be eased through a transfer of funding from the respective funding blocks.

6. Options for the EYSFF 2020-21

This consultation considers 2 options for 2020-21, for which views are sought from providers. Option 1 is for no transfer to be made into High Needs, and for all additional funding made available to be added to the Base Rate. Option 2 is for a transfer to be made, such that the 3&4 year old funding central retention is at the following levels:

- 2019-20 levels (1.4% 3&4 year old central retention)
- 3.2% 3& 4 year old central retention
- 5% 3& 4 year old central retention (maximum possible)

Under all the above options, a proportional transfer from 2 year old funding has also been applied.

Please note that the above levels of transfer under option 2 are to illustrate the impact of a variable transfer on providers only, and are not intended to represent proposals from the council.

QUESTION 2a

Do you agree that should a transfer be made to High Needs, an element of both 2, and 3 & 4 year old funding should be retained for this transfer?

- ☐ Agree
- ☐ Disagree (please let us know why and what you would do differently)

QUESTION 2b

If you agree with Question 2a, do you agree that the cash change to the 3&4 year old base rate should be mirrored in 2 year old funding. For example if an 8p reduction is applied to the 3&4 year old base rate, an 8p reduction is also applied to the 2 year old base rate?

- ☐ Agree
- ☐ Disagree (please let us know why and what you would do differently)

Option 1 – No Transfer of funding to High Needs. Funds released added to Base Rate
99.5% 3&4 year old pass through rate to providers.

Table 3: Option 1 - No Transfer to High Needs

3 and 4 year olds			
	Government Rate	Provider Rate	
	£4.38		
Base Rate	£4.12	£4.12	Every child
Deprivation Supplement	£0.13	£0.53	Per eligible child
SEN/D Inclusion Fund	£0.11	£2.00 or £6.30	Per Eligible Child
HNB Contribution	£0.00		
Central Functions	£0.02		

2 year olds			
	Government Rate	Provider Rate	
	£5.31		
Base Rate	£5.08	£5.08	Every eligible 2yo
SEN/D Inclusion Fund	£0.07	£2.00 or £6.30	Per eligible child
HNB Contribution	£0.00		
Central Functions	£0.16		

Option 2a – Identical level of transfer to High Needs (HN) as in 2019-20
98.6% 3&4 year old pass through rate to providers.

Table 4: Option 2a - Identical level of transfer to High Needs as in 2019-20

3 and 4 year olds			
	Government Rate	Provider Rate	
	£4.38		
Base Rate	£4.08	£4.08	Every child
Deprivation Supplement	£0.13	£0.53	Per eligible child
SEN/D Inclusion Fund	£0.11	£2.00 or £6.30	Per Eligible Child
HNB Contribution	£0.04		
Central Functions	£0.02		

2 year olds			
	Government Rate	Provider Rate	
	£5.31		
Base Rate	£5.03	£5.03	Every eligible 2yo
SEN/D Inclusion Fund	£0.07	£2.00 or £6.30	Per eligible child
HNB Contribution	£0.05		
Central Functions	£0.16		

Option 2b – 3.2% central retention from 3&4 year old funding, similar proportional transfer to HN from 2 year old funding
97.5% 3&4 year old pass through rate to providers.

Table 3: Option 2b – Mid-way position between 2019-20 transfer to HN and maximum transfer allowed resulting in 96.5% 3&4 y.o. funding pass-through to providers

3 and 4 year olds			
	Government Rate	Provider Rate	
	£4.38		
Base Rate	£4.00	£4.00	Every child
Deprivation Supplement	£0.13	£0.53	Per eligible child
SEN/D Inclusion Fund	£0.11	£2.00 or £6.30	Per Eligible Child
HNB Contribution	£0.12		
Central Functions	£0.02		
2 year olds			
	Government Rate	Provider Rate	
	£5.31		
Base Rate	£4.95	£4.95	Every eligible 2yo
SEN/D Inclusion Fund	£0.07	£2.00 or £6.30	Per eligible child
HNB Contribution	£0.13		
Central Functions	£0.16		

Option 2c – 5% central retention from 3&4 year old funding, similar proportional transfer to HN from 2 year old funding
95% 3&4 year old pass through rate to providers.

Table 4: Option 2c –Maximum transfer allowed resulting in 95% 3&4 y.o. funding pass-through to providers

3 and 4 year olds			
	Government Rate	Provider Rate	
	£4.38		
Base Rate	£3.92	£3.92	Every child
Deprivation Supplement	£0.13	£0.53	Per eligible child
SEND/D Inclusion Fund	£0.11	£2.00 or £6.30	Per Eligible Child
HNB Contribution	£0.20		
Central Functions	£0.02		

2 year olds			
	Government Rate	Provider Rate	
	£5.31		
Base Rate	£4.86	£4.86	Every eligible 2yo
SEND/D Inclusion Fund	£0.07	£2.00 or £6.30	Per eligible child
HNB Contribution	£0.22		
Central Functions	£0.16		

QUESTION 3

Please indicate your support for the various options considered in this consultation that allow for the various levels of transfer to the High Needs budget as illustrated in section 6.

		Yes/ No	Rationale
a	Option 1 - No Transfer		
b	Option 2a – 1.4% 3&4 y.o. central retention)		
c	Option 2b - 3.2% 3&4 y.o. central retention)		
d	Option 2c - 5.0% 3&4 y.o. central retention)		

QUESTION 4

Do you agree that any changes to the formula should be applied to the base rate only, such that deprivation supplement and SEND inclusion funding are kept at 2019-20 rates?

- ☐ Agree
- ☐ Disagree (please let us know why and what you would do differently)

QUESTION 5

Do you have any operational concerns, in particular that could result in sufficiency and/or quality issues arising should the central retention be increased from 1.6% to 5.3% across all 2 and 3&4 year old funding?

☐ Yes

☐ No

If yes, please provide details below:

Question 6 allows providers to make comment on any of the information included within this document.

QUESTION 6

Please use this section to provide any additional comments you wish to make.

Responses to the consultation can be made online via the link that will be sent out via email on Monday 15th December. If you wish to contribute to this consultation you should complete the online form **by midnight Fri 10th January 2019**.

If you would prefer a paper copy, all BCP providers should please contact Fran Hadden childcare@poole.gov.uk or print this version and return, by 10th January, to:

Fran Hadden
childcare@bcpcouncil.gov.uk
Inclusion and Family Services
Dolphin Centre
Poole BH15 1SA

7. Next Steps

We will review the outcome of this consultation with provider representatives at the BCP Early Years Funding Group in December and develop final proposals to be considered by BCP's Schools Forum in January. This body will then make a

recommendation to the new Council. The final decision will be made by the BCP Council in February.

8. Timeline

13 December	Consultation papers emailed to the sector
7 January (Tue)	Consultation event at the Early Years Centre for Professional Development, Bournemouth (19:00pm-21:00pm) book here
8 January (Wed)	Consultation events at the Civic Centre, Poole (19:00pm-21:00pm) book here
9 January (Thu)	Consultation events at the Somerford Children's Centre, Christchurch (19:00pm-21:00pm) book here
10 January (Fri)	Consultation closes
17 January	Consultation outcome discussed at Schools Forum
18 February	Council Members decide EYSFF
1 April 2020	Changes are implemented

If you would like to discuss any of this information there is an opportunity for you to attend an informal consultation briefing at one of three venues across BCP, per the timeline above. Every provider is welcome to attend any briefing with*:

- Steve Ellis, Management Accountant - Children
- Iwona Onik, Early Years Funding Team Manager
- Darren Buckley, Senior Childcare Sufficiency and Funding Officer
- Jack Cutler, Planning and Statistics Officer, Quality and Commissioning

*Please note the above named LA officers may not all be present at every consultation briefing event, although the LA will ensure sufficient representation is available to answer any questions regarding this consultation you may have.

We appreciate that some of the information in this consultation is quite technical in financial terms. You are all urged to attend a briefing session and each session is open to any BCP provider, you do not need to attend only your local one. Please book your place through [CPD online](#) or through the links in the timeline above to confirm your attendance at one of these sessions.

Please note the closing date for the consultation is midnight Friday 10th January 2020. Any responses received after this time cannot be used as part of the reported feedback from the consultation.

Provider representatives have established a Schools Forum Sub-Group in order to support the Early Years Schools Forum representatives on the School Forum. During the consultation you may like to contact your Early Years Funding Group representatives, a list of which can be found in Appendix 1.

Day Nursery

*Bournemouth***Kelly Yates**

Dean Park Nursery

k.yates@deanparkdaynursery.co.uk

01202 297275

*Christchurch***Amy Alderson**

Tops Day Nurseries

amy.alderson@topsdawnurseries.co.uk

07785 455420

*Poole***Linda Duly**

Cuddles Day Nursery

Shadow Schools Forum Rep

linda@cuddlesnursery.co.uk

Preschool

*Bournemouth***Sue Johnson**

Jack in the Box Pre-school

Shadow Schools Forum Rep

info@jackintheboxbournemouth.co.uk

07970 377425

*Christchurch***Angela Miller**

Pre-school on the Marsh

Manager@preschoolonthemarsh.co.uk

07767 210278

*Poole***Toby Evans**

Hoppers Pre-school

toby@hopperspreschool.co.uk

School Nursery

Alison Holt

Ambitions Academy Trust

Alison.Holt@aat.education

Funding Example

e.g. 1. Under Option 1: a cohort of 8 children all receiving 15hrs:

- 3 x Deprivation eligible
- 1 x SEN/D inclusion at the lower tier rate
- 2 x 2 year olds

Total funding = total base rate + total deprivation + total SEN/D inclusion
= (£4.12 x 6 + £5.00 x 2) + (£0.53 x 3) + £2.00 x 1 = £38.31 per hour

Based on 15 hours per week, this would be £574.65 per week

e.g. 2. Under Option 2c: the same cohort above would attract the following funding

Total funding = total base rate + total deprivation + total SEN/D inclusion
= (£3.92 x 6 + £5.00 x 2) + (£0.53 x 3) + £2.00 x 1 = £37.11 per hour

Based on 15 hours per week, this would be £556.65 per week.

This is a reduction of £18.00 per week.

Consultation Questions List

QUESTION 1

Do you agree with these priorities?

(If not, please let us know why and what you would prioritise)

QUESTION 2a

Do you agree that should a transfer be made to High Needs, an element of both 2, and 3 & 4 year old funding should be retained for this transfer?

(If not, please let us know why and what you would do differently)

QUESTION 2b

If you agree with Question 2a, do you agree that the cash change to the 3&4 year old base rate should be mirrored in 2 year old funding. For example if an 8p reduction is applied to the 3&4 y.o. base rate, an 8p reduction is also applied to the 2 y.o. base rate?

(If not, please let us know why and what you would do differently)

QUESTION 3

Please indicate your support for the various options considered in this consultation that allow for the various levels of transfer to the High Needs budget as illustrated in section 6.

Option 1 - No Transfer
Option 2a – 1.4% 3&4 y.o.)
Option 2b - 3.2% 3&4 y.o.)
Option 2c - 5.0% 3&4 y.o.)

QUESTION 4

Do you agree that any changes to the formula should be applied to the base rate only, such that deprivation supplement and SEND inclusion funding are kept at 2019-20 rates?

(If not, please let us know why and what you would do differently)

QUESTION 5

Do you have any operational concerns, in particular that could result in sufficiency and/or quality issues arising should the central retention be increased from 1.6% to 5.3% across all 2 and 3&4 year old funding?

(If yes, please provide details below)

QUESTION 6

Please use this section to provide any additional comments you wish to make.

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BOURNEMOUTH, CHRISTCHURCH and POOLE SCHOOLS FORUM

17th January 2020

Forward Plan

June 2020

- DSG Outturn 2019-20
- High Needs Block Financial Strategy Group
- Scheme of Financing Maintained Schools (if update is required)
- Looked After Children Pupil Premium Arrangements 2020-21

September 2020

- Budget Monitoring
- Budget guidance
- Mainstream funding formula 2020-21 – Initial Discussions
- Growth funding 2020-21 – Initial Discussions

November 2020

- Early Years Formula 2020-21 Proposals for Consultation
- Mainstream Schools Formula 2020-21 Proposals for Consultation
- High Needs Block Financial Strategy Group

December 2020

- Early Years Formula Consultation Outcome
- Mainstream Schools Formula Consultation Outcome
- High Needs Block Financial Strategy Group
- Central School Services Budget 2021-22
- DSG Budget Monitoring 2020-21

January 2021

- DSG Settlement and Budget 2021-22
- Growth Fund 2021-22
- Maintained Schools Central Retention 2021-22
- Looked After Children Pupil Premium Arrangements 2021-22
- Mainstream Schools Formula 2021-22
- Early Years Funding Formula 2021-22
- Funding Transfer from Schools Block 2021-22

Future dates to be confirmed.

