

Notice of Schools Forum

Date: Thursday, 14 January 2021 at 9.00 am

Venue: Virtual Meeting



Membership:

Chairman:

Geoff Cherrill

Vice Chairman:

Patrick Earnshaw

Russell Arnold
Mark Avoth
Lauren Dean
Kate Carter
Jon Chapple
Ben Doyle
Linda Duly

Phillip Gavin
Brigid Hincks
Sue Johnson
Nadine Lapskas
Dorian Lewis
Angela Malanczuk
David Newman

Jacqueline Page
Jeremy Payne
Sean Preston
Dave Simpson
Sian Thomas
Cllr N Greene
Cllr M White

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 view the live stream of this meeting at the following link:

<https://democracy.bcpCouncil.gov.uk/ieListDocuments.aspx?MId=4562>

If you would like any further information on the items to be considered at the meeting please contact: Jack Cutler on 01202 127339 or email Jack.cutler@bcpCouncil.gov.uk

Press enquiries should be directed to the Press Office: by email at 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

6 January 2021



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

Members are requested to declare any interests on items included in this agenda. Declarations received will be reported at the meeting.

4. Minutes of the Previous Meeting

The Forum will be provided with a copy of the minutes from the previous meeting, held on 23 October 2020, prior to the meeting on 14 January 2021.

5. Public Issues

If you would like to raise anything for consideration at the upcoming schools forum meeting please contact jack.cutler@bcpcouncil.gov.uk, no later than Monday 11 January 2021. The Chair to the Forum will decide whether this should be considered at the meeting under Any Other Business, and you will be contacted in a timely manner to notify you of the outcome of this decision.

6. DSG Budget Monitoring 2020-21

5 - 8

7. DSG Settlement and Draft Budget for 2021-22

9 - 14

8. Mainstream schools and Early Years Funding formulae 2021-22 and DSG Funding Block transfer considerations

15 - 114

9. Draft LAC Pupil Premium policy 2021-22

115 - 122

10. Dates of Future Meetings

- March 2021 (tbc)
- June 2021 (tbc)
- October 2021 (tbc)
- January 2022 (tbc)

11. Any Other Business

To consider any other business, which, in the opinion of the Chairman, is of sufficient urgency to warrant consideration.

12. 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.

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BOURNEMOUTH, CHRISTCHURCH and POOLE SCHOOLS FORUM

Subject	Dedicated Schools Grant (DSG) Budget Monitoring 2020-21
Meeting Date	14 January 2021
Report Author	Nicola Webb, Assistant Chief Finance Officer e-mail: nicola.webb@bcpcouncil.gov.uk Tel: 01202 128764
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 2020-21 at a net deficit of £1.0 million. This is in addition to the budgeted funding gap of £5 million with the deficit estimated to increase by £6 million overall.</p> <p>There is a predicted overspend of £1.4 million resulting from pressures within the high needs block, but this is partially offset by funding adjustments and savings in the other expenditure blocks. (£0.4m).</p> <p>The resulting forecast deficit at 31 March 2021 is £10.6 million.</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 2020-21

1. There have been no changes to the forecast DSG income since the October report. Early years funding remains estimated. The national lockdown in January may mean that the January 2021 census will no longer be used to determine final funding as intended by the DfE in December as take up levels of provision by the normal January census data is likely to remain below normal levels.

Estimated Expenditure 2020-21

2. Estimated expenditure for each block is summarised in the appendix. An overspend of £1.4 million is expected in the high needs block despite actions taken to date to limit demand with planned savings not fully delivered. Savings in other areas reduce the in-year deficit to £1 million. The cumulative deficit is therefore

expected to increase from £4.6m to £10.6m when the budgeted funding gap of a further £5 million is also included.

Early Years Block Spend

3. Providers have continued to be funded in the autumn term according to either actual levels of take up of the free entitlement or based on pre-covid levels where demand has remained lower. The spring term was originally planned to move to actual provision, but this is now unlikely, and we await further guidance from the DfE. The forecast assumes both funding and expenditure will be maintained at normal levels.

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 2020.
5. The growth fund allocations are being paid out to schools based on the October 2020 census growth with a small saving of £0.1 million.

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 small saving in this block is from additional funding received after the budget had been set and remaining unallocated.

High Needs Block

8. The reasons for the growing high needs funding gap have been explored at length in previous reports. The overspend of £1.4 million reflects that not all budgeted savings have been delivered. These included reducing the growth in demand for education, health and care plans below the levels seen over 2019-20 and this has not been achieved. Additional place and top up funding have been provided across state schools as well as the independent sector to manage the increase in high needs pupils.

Financial Implications

9. The DSG deficit is forecast to grow from £4.6 million at the start of the year to £10.6 million by 31 March 2021 as a result of the budgeted funding gap of £5 million and the forecast outturn overspend of £1.0 million.
10. A sustainable budget position has not yet been achieved for 2021-22 with the deficit expected to grow further by 31 March 2022 due to the growing funding gap for high needs pupils.

Legal Implications

11. 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

DSG Budget Monitoring 2020-21	Budget 2020-21					Forecast at December 2020	
	Early Years £000's	Schools £000's	Central Services £000's	High Needs £000's	Total £000's	Total £000's	Variance £000's
DSG 2-year olds NFF (est)	(2,582)				(2,582)	(2,391)	191
DSG 3/4 -year olds NFF (est)	(18,394)				(18,394)	(18,408)	(14)
DSG NFF other Blocks		(205,634)	(1,978)	(42,874)	(250,486)	(250,544)	(58)
DSG July 20 adjustment					0	(95)	(95)
DSG Premises		(1,658)			(1,658)	(1,658)	0
DSG Growth fund NFF		(1,858)			(1,858)	(1,858)	0
DSG Pupil Premium	(89)				(89)	(118)	(29)
DSG Disability Access Fund	(78)				(78)	(78)	0
DSG Transfer to high needs		1,046		(1,046)	0	0	0
DSG Prior year (July 20)					0	(188)	(188)
Total Funding	(21,143)	(208,104)	(1,978)	(43,920)	(275,145)	(275,338)	(193)
Providers – 2-year olds	2,431				2,431	2,240	(191)
Providers – 3/4 Year olds	17,803				17,803	17,817	14
Providers SEN top up grants	557				557	557	0
Early years Pupil Premium	89				89	119	30
Disability Access Fund	78				78	78	0
Early Years LA duties	185				185	185	0
Mainstream Schools Formula		206,608			206,608	206,608	0
Growth Fund		500			500	369	(131)
School Admissions			423		423	423	0
Licences Purchased by DfE			235		235	235	0
Servicing Schools Forum			18		18	18	0
Ex ESG Services			1,007		1,007	1,007	0
Premature retirements			20		20	20	0
ASD Base / other			275		275	275	0
Place Funding				11,327	11,327	11,869	542
Top up Funding - State				14,587	14,587	15,208	621
Top up Funding - Independent/NMSS				13,280	13,280	13,752	472
Top up Funding - Post Schools				3,883	3,883	4,092	209
Top up Funding - Pre schools				204	204	78	(126)
Top up Funding - Excluded/AP				1,799	1,799	1,509	(290)
Outreach				1,083	1,083	1,113	30
Hospital Education Top up				128	128	39	(89)
Bespoke SEN /Therapies				1,964	1,964	2,205	241
Support for Inclusion				241	241	141	(100)
Early Years Central SEN				612	612	586	(26)
Sensory Impaired Service				758	758	758	0
Rounding					0	0	0
Total Expenditure	21,143	207,108	1,978	49,866	280,095	281,301	1,206
Budget (Surplus) / Deficit	0	(996)	(0)	5,946	4,950	5,963	
Outturn (surplus) / Deficit	* (187)	(131)	(58)	1,389			1,013
Brought forward April 2020					4,644	4,644	0
Carried forward April 2021					9,594	10,607	1,013

* adjustment to 2019-20 funding

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BOURNEMOUTH, CHRISTHCURCH and POOLE (BCP) SCHOOLS FORUM

Subject	DSG Settlement and Draft Budget for 2021-22
Meeting Date	14 January 2021
Report Author	Nicola Webb – Assistant Chief Finance Officer Email: nicola.webb@bcpcouncil.gov.uk Phone: 01202 128764
Classification	For information
Executive Summary	<p>1. The initial DSG Settlement was received on 17 December 2020. It provided:</p> <ul style="list-style-type: none"> a. Initial allocations for the early years block based on the January 2020 census incorporating the £0.08 per hour increase in 2- year old funding and £0.06 per hour for those aged 3&4. b. Final allocations for the school's block based on the October 2020 schools census. The increase in funding through the schools NFF for 2021-22 totals £10.1 million (4.7%). Higher funding values account for £7.9 million (3.6%), as reported in October, with additional pupils at census providing a further £2.2 million. Funding for in-year pupil growth at September 2021, has decreased by £0.4 million compared with last year. c. Final allocations for the central school services block provide a reduction compared with last year of £30,000 for on-going LA functions with previous levels of funding restored for historic commitments. d. Indicative allocations for the High Needs Block have increased by £0.5 million compared with the October report. However, an element of funding remains dependent on the January 2021 census with allocations to be updated again in summer 2021. <p>2. A draft DSG budget is provided in the Appendix to provide context for decisions on the meeting agenda. The funding gap for high needs pupils is projected to grow to £10.8 million in 2021/22.</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.

2021-22 DSG Settlement on 17 December 2020

1. The December Settlement information for 2021-22 compared with the forecast for 2020-21 is included in Table 1 below:

Table 1 – DSG December Settlement 2021-22

Funding Block	Forecast 2020-21	Forecast 2021-22	Annual Change	%
	£000's	£000's	£000's	
Early Years				
2-year olds Entitlement	2,391	2,427	96	1.5%
3-year olds Entitlement	18,408	18,661	253	1.4%
Pupil Premium	78	77		
Disability Access Fund (DAF)	118	118		
Total Early Years	20,995	21,283	288	1.4%
Schools Block				
Primary	108,304	117,756		
Secondary	97,330	108,010		
Teachers pay grant	10,025	0		
Total NFF	215,659	225,766	10,107	4.7%
Premises	1,659	1,679	20	
Growth	1,858	1,435	(423)	
Total Schools	219,176	228,879	9,704	4.4%
Central School Services				
NFF	1,746	1,767	21	
Teacher's pension grant	51		-51	
Commitments	291	291	0	
Total Central School Services	2,088	2,058	-30	-1.4%
High Needs (estimated gross*)				
NFF	42,969	47,756		
Teachers pay grant	769	0		
Total High Needs	43,738	47,756	4,018	9%
Total DSG Funding	285,997	299,976	13,980	4.9%

*Place funding of £5,464k deducted in net allocation tables

Early Years Block

2. The published information includes indicative allocations only and these will be updated in summer 2021 and 2022 based on future data returns.
3. The early years estimates for both 2020-21 and 2021-22 use the January 2020 early years census data. The growth in funding for those aged 2, 3 and 4 olds in table 1, therefore, represents the hourly funding increase announced for 2 years olds of £0.08 per hour and for 3 and 4-year olds of £0.06 per hour.
4. The early years funding will be updated from census take up of free entitlement hours in January 2021 and January 2022, (or alternative method due to the January 2021 national lockdown) with all funding being finalised in summer 2022.

Schools Block

5. School Block allocations are now final for 2021-22 with the mainstream school NFF allocations updated to reflect pupil numbers at the October 2020 census and with Growth Fund allocations determined according to the national approach.
6. Compared with 2020-21 the increase in the NFF total is £10.1 million (4.7%). This comprises £7.9 million (3.6%) from the increase in unit values (as shown in the October report) with a further £2.2 million (1.1%) from rising pupil numbers as shown in Table 2 below.

Table 2: Mainstream Schools Final NFF 2021-22

	October Report (based on October 2019 census)			December Settlement (based on October 2020 census)			Change
	Pupil Numbers	Unit Value £	Funding £000's	Pupil Numbers	Unit Value £	Funding £000's	Funding £000's
Primary	27,692	4,273.40	118,339	27,555	4,273.40	117,756	(583)
Secondary	18,661	5,635.49	105,164	19,166	5,635.49	108,010	2,846
Total NFF	46,353		223,503	46,721		225,766	2,263

7. The October 2020 census contained an additional 368 pupils (0.8% increase) compared with the previous year, comprising 137 fewer primary and 505 more secondary pupils. Secondary growth is expected to continue in September 2021. The growth fund proposals in a separate paper consider how this in-year growth is to be funded. DSG funding for growth has reduced by £0.4 million compared with last year.
8. Updated school data from the October 2020 census is not reflected in the NFF primary and secondary units of funding until 2022-23. The school level census data used to calculate individual school budgets arrived also in 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 for on-going functions have been increased to incorporate within the DSG the previously separate teacher's pension grant of £51,000 attributable to these services. This has increased the funding rate from £36.72 (which included the programmed 2.5 per cent reduction from the previous year equating to £44,000 as shown in the October report) to £37.83 per pupil. The rise in pupil numbers at census has provided an increase of £14,000 to provide the comparative reduction between years of £30,000.
10. The funding for historic commitments has been restored to previous levels following provision of evidence of expenditure and further consideration by the ESFA.

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 £0.5 million due to the continued rise in the number of pupils with an EHCP, taking the final total increase for the year to £4 million. The final

adjustment to reflect the cross-border flow of pupils based on the January 2021 census will be made in summer 2021.

Draft DSG Budget 2021-22

12. The Appendix includes an illustrative draft budget for 2021-22 with the budget for 2020-21 shown for comparison. Note that the high needs DSG funding shortfall for 2021-22 is projected at £10.8 million. This compares with the projected 2020-21 gap of £8.3 million (without the benefit of the school block transfer of £1 million and reflecting the estimated overspend of £1.4 million).
13. The assumptions in the draft budget for 2021-22 include:
 - a. the growth fund is shown using the recommended option within the school funding consultation paper on the meeting agenda. If an alternative is agreed, then the amount of the school's block surplus would change by an equivalent amount.
 - b. New high needs places are delivered in the year as planned.
 - c. the high needs adjustment in summer 2021 will be minimal and not change the funding gap (funding could increase or decrease dependent on high needs placements at January 2021).
 - d. no funding transfer has been included.
 - e. the central schools services block is set at the level of funding.
 - f. the early years block continues a central retention at the same level as last year with no transfer to high needs proposed.
14. The above assumptions provide an annual funding gap of £10.8 million without:
 - a. transfers of funding from other expenditure blocks
 - b. further cuts to high needs services (for example, outreach) which may be considered during the year
 - c. further activities to reduce the budget requirement.

Central School Services Block

15. The proposed budget for this block is shown in the appendix with further detail in the separate paper on the agenda. Service restructuring is on-going with continued refinement of activity and costs.
16. The latest budget proposal included in the Appendix is largely consistent with the information in the school funding consultation document. The only changes being to reflect the funding uplift from the teacher's pay grant, change in pupil numbers and cost of DfE licenses notified in the December settlement.

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. Although council are not

permitted to add funds from their own resources to clear a DSG deficit, they are expected to manage the account and bring it into balance in the medium term.

18. There is currently a projected potential DSG deficit at the end of March 2022 of £21.4 million that could be reduced to £20.1 million as follows:

Table 3 : Summary position for dedicated schools grant

	£m
Accumulated deficit 1 April 2020	4.6
Budgeted high needs shortfall 2020/21	6.0
School funding block surplus 2020/21	(1.0)
Projected savings on other blocks 2020/21	(0.4)
Projected pressure in high needs block 2020/21	1.4
Projected deficit 31 March 2021	10.6
Projected high needs funding shortfall 2021/22	10.8
Projected deficit 31 March 2022	21.4
Potential 0.5% transfer of surplus school's block funding to high needs 2021/22	(1.1)
Potential unallocated surplus schools block funding 2021/22	(0.2)
Proposed projected deficit 31 March 2022	20.1

19. 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

20. Schools Forum must be advised of the DSG Settlement for 2021-22 and consider the Budget needed to meet the needs of all pupils.

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

Background Papers

October 2020 Schools Forum Papers

Appendix

Dedicated Schools Grant	2020-21 Budget	Draft Budget 2021-22				
		Early Years £000's	Schools £000's	Central Services £000's	High Needs £000's	Total £000's
DSG 2 - year olds NFF	(2,582)	(2,427)				(2,427)
DSG 3/4 -year olds NFF	(18,394)	(18,661)				(18,661)
DSG NFF other blocks (final)	(250,486)		(225,765)	(2,058)	(47,756)	(275,579)
DSG Premises (final)	(1,658)		(1,679)			(1,679)
DSG Growth fund NFF (final)	(1,858)		(1,435)			(1,435)
DSG Pupil Premium	(89)	(118)				(118)
DSG Disability Access Fund	(78)	(78)				(78)
Total Funding	(275,145)	(21,284)	(228,879)	(2,058)	(47,756)	(299,977)
Providers – 2 - year olds	2,431	2,288				2,288
Providers – 3/4 - year olds	17,803	18,114				18,114
Providers SEN top up grants	557	501				501
Early Years Pupil Premium	89	118				118
Disability Access Fund	78	78				78
Early Years LA duties	185	185				185
Mainstream Schools Formula	206,608		227,333			227,333
Surplus above NFF	0		1,266			1,266
Growth Fund	500		280			280
School Admissions	423			423		423
Licences Purchased by DfE	235			234		234
Servicing Schools Forum	18			18		18
Ex ESG Services (all schools)	1,007			1,088		1,088
Premature retirements	20			20		20
ASD Base / other	275			275		275
Place Funding	11,327				13,058	13,058
Looked after children	0				244	244
Top up Funding - State Sector	14,587				17,651	17,651
Top up Funding - Independent/NMSS	13,280				15,555	15,555
Top up Funding - Post Schools	3,883				4,333	4,333
Top up Funding - Pre schools	204				78	78
Top up Funding – Excluded/AP	1,799				1,850	1,850
Outreach	1,083				1,113	1,113
Hospital Education Top up	128				100	100
Bespoke SEN /Therapies	1,964				3,120	3,120
Support for Inclusion	241				141	141
Early Years Central SEN support	612				587	587
Sensory Impaired Service	758				758	758
Total Expenditure	280,095	21,284	228,879	2,058	58,588	310,809
Budget (Surplus) / Deficit	4,950	0	0	0	10,832	10,832
Outturn variance	1,013					
Brought forward	4,644					10,607
Carried forward Deficit	10,607					21,439



BOURNEMOUTH, CHRISTCHURCH and POOLE SCHOOLS FORUM

Subject	SCHOOL AND EARLY YEARS FUNDING CONSULTATION OUTCOMES AND TRANSFER TO HIGH NEEDS BLOCK
Meeting Date	14 th January 2021
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 decision as outlined below. This is to ensure we meet our statutory requirements as per the Schools Forum regulations and School and Early Years Financial Regulations.
Recommendations	<p>The Schools Forum is recommended to take decisions on the following proposals:</p> <p>School Members:</p> <p>PROPOSAL 1: Recommend to Council the local mainstream school formula</p> <p>PROPOSAL 2: Agree the growth fund policy</p> <p>PROPOSAL 3: Agree the central budget for the growth fund</p> <p>All Members</p> <p>PROPOSAL 4: Agree a £1.1 million (0.5%) transfer from the Schools Block to the High Needs Block.</p> <p>School Members</p> <p>PROPOSAL 5: Recommend to Council the proposed Early Years funding formula</p> <p>All Members</p>

	<p>PROPOSAL 6. Agree the central budgets supporting the early years 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> <p>PROPOSAL 9: Agree to establish a high needs task and finish group.</p>
Reasons for Recommendations	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.

Background

1. Mainstream schools and early years funding continue to be delivered in most part through the Schools Block and Early Years Blocks of the Dedicated Schools Grant (DSG). As for 2020-21, 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).

In 2020-21 the LA transferred 0.5% from the Schools Block to the High Needs Block (HNB) which was the maximum permitted by the Secretary of State (SoS). This level of transfer was agreed for one year only and meant that the accumulated DSG deficit was budgeted to grow by £5 million over the current year.

2. A transfer is required again for 2021-22 to contribute towards the growing high needs funding gap identified. The accompanying Financial Settlement and Budget 2021-22 report on the agenda notes a projected High Needs funding gap of £10.8 million for 2021-22. This is higher than predicted earlier in the year as the rate of education health and care plan assessments has accelerated further above budget in recent weeks. This means that the significant increase in high needs places locally is not reducing the overall annual budget gap.
3. The reasons for the funding gap have been considered at length both nationally and locally with reporting at regular intervals to the DfE.

Schools Consultation

4. Schools were consulted between 23rd November and 14th December on the mainstream schools funding formula and illustrative levels of transfer into the high needs (HN) budget. The consultation document is included in Appendix 1.

5. 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.
6. 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

Total responses: 63 (69% (61) of mainstream schools, 33% (2) special schools/ PRU)

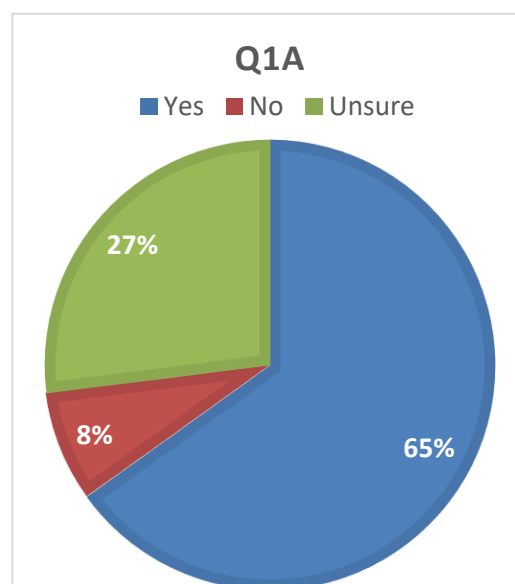
Generally, Multi-Academy Trusts have responded on behalf of the schools they represent, rather than submitting separate individual responses from each of their schools.

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: 58

There was a view from some schools that there is no fair adjustment for this. Another school argued that growth in these schools was disadvantageous to other children who apply for year 7.



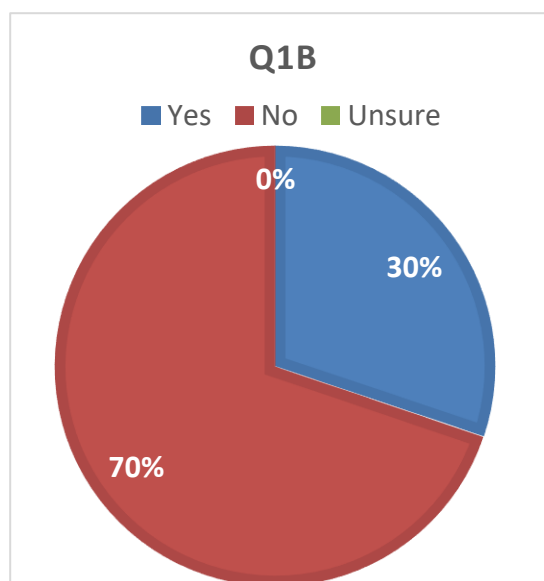
Question 1b

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: 63

There was a view that the minimum per pupil funding is exactly that- the minimum, and that for schools to continue their work with children and still be expected to deliver 'extras' such as SEN support this minimum funding level is required- particularly in light of the extra expenses COVID has incurred for schools.



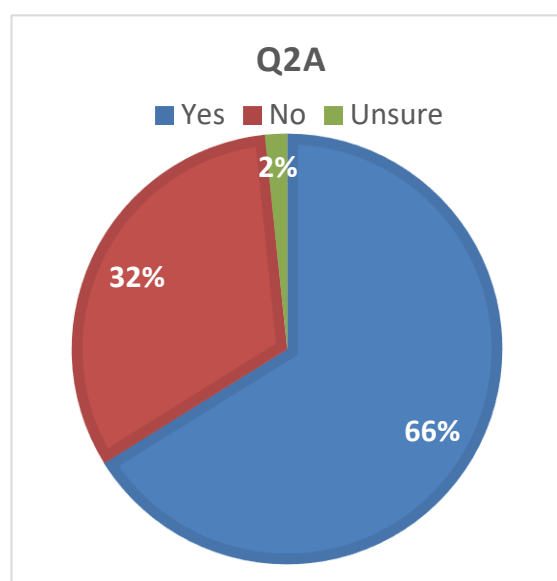
Question 2a

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: 62

There was a view that BCP could reprioritise spending from other departments. Another view was that reducing funding to schools with lower levels of High Needs pupils could exacerbate the issue by making it more difficult for these schools to manage, as they may be more likely to fail their children as a result.



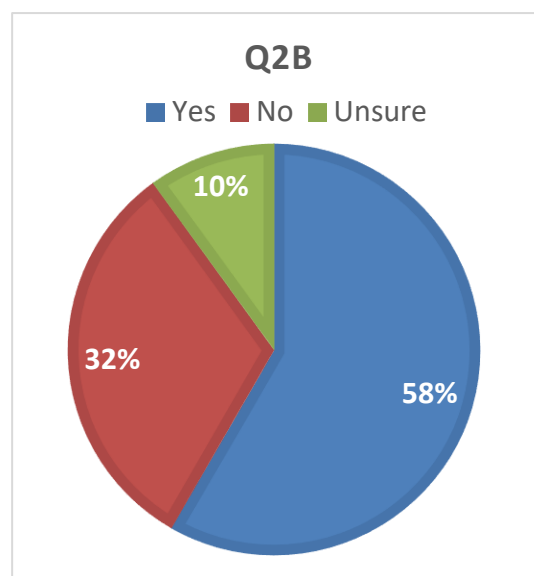
Question 2b

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: 60

Responses were split down the middle on this, with mixed views on what constitutes a fair apportionment of contribution between schools.

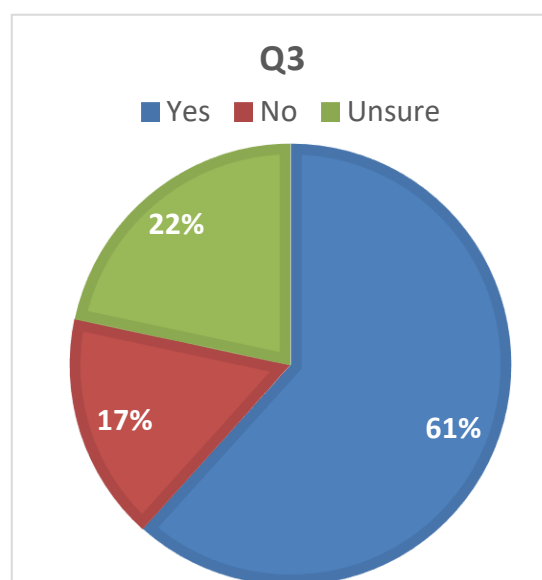


Question 3

*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: 60

There was a view that this is the only feasible element of the overall funding formula that can be adjustment without undermining other specific elements.

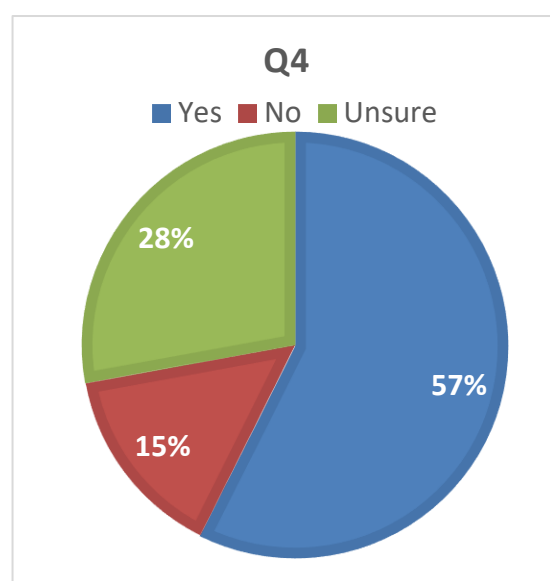


Question 4

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

Total responses: 61

The view was expressed that by adjusting this rate proportionally it makes things simpler and more transparent. Other comments made were that the Basic Entitlement rate should be protected and not scaled back.

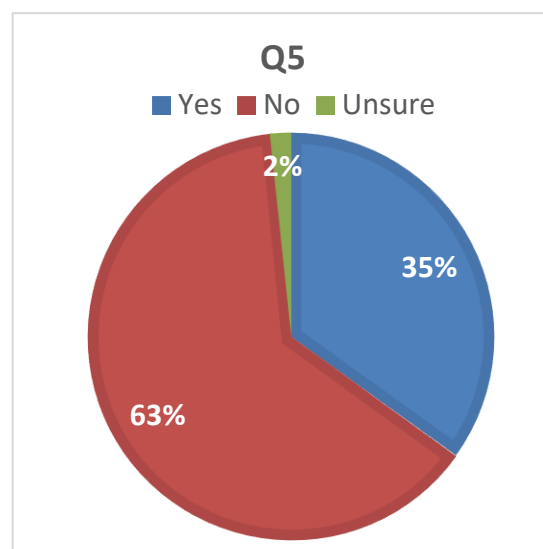


Question 5

The High Needs budget shown in Appendix 6 includes an illustrative 0.5% transfer from the school block, limiting the growth in the deficit in 2021/22 to an estimated £3.9 million. Do you support some level of transfer while the strategy adopted is being implemented recognising that schools have a part to play in limiting costs and it takes time to create new places and manage change?

Total responses: 63

There was a view expressed that capital funding for SEND places is not sufficient and that some savings factored in to the budget from additional places may not materialise should these places be delayed/ not ultimately be delivered due to capital funding pressures. It was recognised that schools have an important part to play in limiting costs.



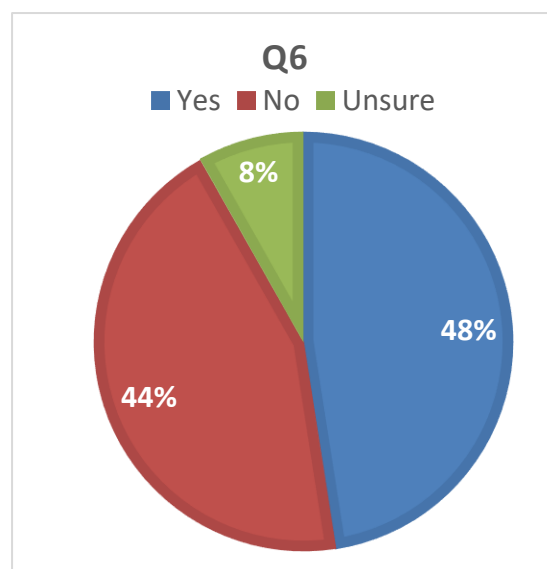
Question 6

Considering Appendix 6, do you have any suggestions on any area(s) where spend on high needs pupils can be reduced without breaching statutory requirements?

Total responses: 61

The following views were expressed:

- i. There should be greater focus on early intervention,
- ii. Reduced reliance on independent providers.
- iii. The LA should increase funding for EHCP children in mainstream schools so they can utilise and employ resources to make their provision successful in mainstream, reducing pressure on specialist provision.
- iv. Analyse schools to understand any anomalies, to see where schools are contributing a higher or lower number of children to High Needs than the average, then work closely with these schools to understand the cause and implement strategies to reduce.
- v. Continue to increase LA places for HN's.
- vi. Ensure the Longspee satellite provision is available for September 2021.
- vii. Ensuring there is a panel that is fit for purpose to look at which pupils are consulted on in the various Resource/ satellite/ special schools.
- viii. Implementing the BCP strategy and ensuring there is coherence and good communication between BCP and schools.
- ix. Improved management and budgetary oversight of the HN budget is required



- x. The LA should set up maintained AP provision (PRU's) to reduce reliance on independent providers and MAT's.
- xi. Mainstream plus initiative should be expanded to help retain EHCP's in mainstream schools.
- xii. Improved monitoring of plans. Greater attendance at SEN review meetings when schools could/ are looking to reduce/ cease EHCPs.
- xiii. Ongoing peer challenge of need and placement of students.

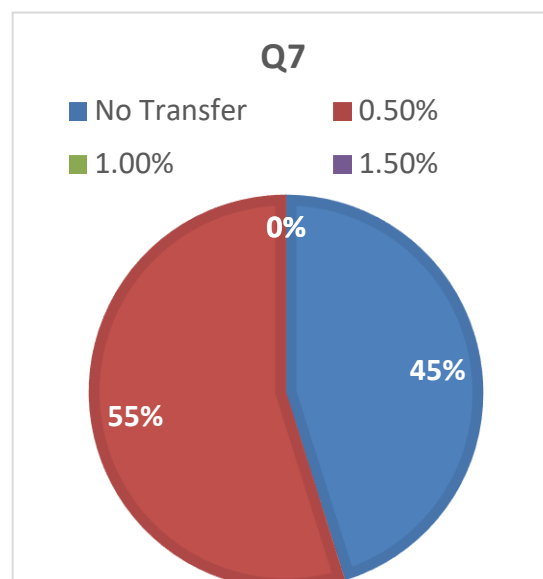
Question 7

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

Total responses: 62

The following views were expressed

- i. Money needed is rarely received the from Banding and so a school has to use its budget as top ups for EHCPs. Therefore more money is needed rather than taking money out of the school budget.
- ii. There is no mechanism that allows for fair transfer and therefore there should be no transfer. No school should be funded below MPPFL.
- iii. Schools have historically been significantly underfunded in this geographical area and need to receive the agreed NFF in full to continue to deliver high quality education to their students.
- iv. Transfer is a disadvantage to all other pupils, particularly in *[Maintained primary school -name redacted]* where it is already £626 per pupil below the norm.
- v. Up to 0.5% as there is no need for secretary of state approval in addition any increase would not fundamentally reduce the ongoing in year or cumulative deficits.
- vi. Appropriate levels of leadership, management and budgetary control need to be demonstrated before a school would accept any further transfer from the Schools Block. They would not support any transfer that required Secretary of State approval or disapplication of MPPFL



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

Transfer Level from NFF	Cumulative support (%)
1.5% (£3.4M)	0%
1.0% (£2.3M)	0%
0.5% (£1.1M)	55%

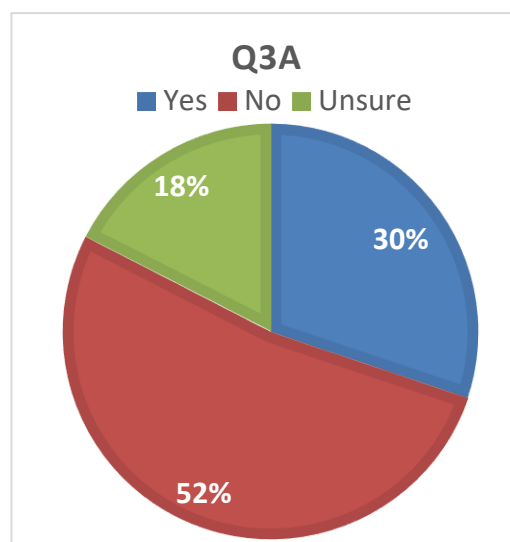
Question 8

Do you agree that should funding remain with schools rather than be transferred to the HN block for 2021-22, 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 2022-23, and that you would support such a transfer?

Total responses: 63

The following views were expressed:

- i. The focus should remain on recovering the position on the HNB for future years.
- ii. Schools funding is allocated for schools and is needed for schools.
- iii. In the current environment is best to see how the next 12 months pan out before making any sort of commitment.
- iv. Schools with high levels of SEN students have the potential to be affected twice by transfer. Firstly through a reduction in their main schools block funding (often they are the schools that are not funded on MPPFL) and secondly through the cost savings being implemented through the High Needs budget.
- v. The LA need to demonstrate leadership, management and budgetary control to reduce the funding gap in each year - they need to essentially work within a budget for each element of the HNB. There appears to be an attitude that spending more than is budgeted is acceptable because we can be bailed out by a transfer from the Schools Block - this needs to stop.
- vi. No: we don't agree as transfer additional funding out of the SB to HNB only disguises the real issue the HNB is unfunded by the Government in the short & long term basis. Any increase actually undermines the principles of NFF and equal funding for all schools.
- vii. We would like to spread the pain across two years as opposed to a larger financial 'hit' in the second year.
- viii. The year 2022/23 is an unknown quantity at present and decisions should be made nearer the time when the country's economic condition is better known.
- ix. Pressure should be put on government for additional funding providing BCP can demonstrate they are using value for money principles for all their children with High Needs.



Question 9

Do you support the growth fund proposal as set out in section 9?

Total responses: 26

The following views were expressed:

- i. A school would support this if every year 7 place was taken before a Free School was commissioned for this purpose.
- ii. There should be funding to support growth where this is necessary - however the impact of this on other schools locally should also be safeguarded e.g. from falling roll which make infant class sizes hard / impossible to fund at

- designated levels as a result of the additional capacity being put in place elsewhere.
- iii. This is a fair approach as Primary phase has previously received Growth Funding.
 - iv. Yes: the rational used by the BCP Council seems reasonable.
 - v. If there was an unsure option - would have chosen this.
 - vi. Schools should operate within the funding available to them without additional support beyond that indicated through NFF. Concerned that the LA is creating school places when sufficient school places are already available, which causes additional pressures on schools that are not full.

Question 10

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

A view expressed concern in reducing support for pupils with poor school attendance, since this support is already very low, while a question was raised as to whether budgetary savings were due to efficiency within the system or whether expenditure had been transferred directly to schools and academies, whilst noting an increase in DfE licence costs. The LA response to this is to note that the budgetary savings are primarily due to improved efficiency within the system; the LA continues to provide the same central support services to schools that the Central Schools Services Block funds.

Question 11

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

A view was expressed that a maintained school does not believe that this represents value for money and seek to adopt a pay as you go service, while another school felt they already received these services through other paid for SLA's, and that some of the services listed are not available to schools.

Question 12

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

The following views/ comments were given:

- i. To address the local provision of High Needs placements, could available space in local schools be used. For example, Ocean Academy have recently launched a consultation to become a one-form entry primary school. As there are already more than sufficient primary places within that area of Poole, could Ocean be utilised or even closed as a junior school and become specialist provision.
- ii. Local Authorities need to go to Central Government to have the HNB adequately funded. This is a national issue. There can be No more top slicing from schools.
- iii. The writing of the consultation is skewed towards an assumption that there will be a transfer from the SB to the HNB. The first question should have been question 5. The means of making an agreed transfer should have then been consulted upon subsequently. In future consultations I would like to see the HNB budget for the previous, current and future years supplemented by

the numbers of young people supported in each of those years. An analysis of the actual expenditure against that budgeted would give some indication of whether the necessary levels of planning and budgetary control are in place, and some confidence in the budget forecast for the year ahead. Given that there is an 8% increase in funding, how is it intended that the budget for 2021-22 will be spent? There is a reason why disapplication of MPPFL requires Secretary of State approval. The LA should not be seeking to subvert implementing elements of the NFF that address historic levels of underfunding and provide a level playing field for all schools.

- iv. The cost of individual schools having their finances reduced to ensure that those in need have extra allowance should be a government initiative, not one that comes from a local authority.
- v. BCP could do more to support high needs students in school regarding additional funding so that we are able to provide better support for Anxiety and working with School Refusers as well as supporting behaviour interventions so students do not become permanently excluded. Supporting the development of hubs within schools with appropriate funding would be a more cost effective solution in the long term. These responses are made on behalf of all 6 schools that are members of Twynham Learning, so please can these responses be counted 6 times.

NFF with actual October 2020 Census data

- 7. The LA has considered the response to the consultation. Alongside this, the LA must recognise that an annual high needs funding gap is not sustainable with a necessity to minimise as far as possible.
- 8. Table 1 shows the NFF applied locally updated with the latest October 2020 data – both pupil characteristics and pupil numbers. The impact is provided at school level in Appendix 3.

Table 1 – Impact of updated NFF using Oct-20 census.

Dataset	Oct-19	Oct-19	Oct-20	Change from 2020/21	
Formula Factors	BCP Formula £000's 2020-21	National Formula £000's 2021-22	National Formula £000's 2021-22	£000's	%
Primary Basic Entitlement	78,219	86,662	86,118	7,899	10.1%
Secondary Basic Entitlement	77,790	86,591	88,859	11,069	14.2%
Deprivation Primary	7,560	7,763	8,170	610	8.1%
Deprivation Secondary	6,663	6,857	7,384	722	10.8%
Low Prior Attainment Primary	8,072	8,294	7,721	-351	-4.3%
Low Prior Attainment Secondary	5,967	6,152	6,405	439	7.4%
EAL Primary	1,346	1,383	1,317	-28	-2.1%
EAL Secondary	519	535	530	11	2.1%
Primary Mobility	260	268	86	-174	-66.9%
Secondary Mobility	121	125	76	-45	-37.3%
Lump Sum	10,182	10,484	10,484	303	3.0%
Sparsity	56	58	58	2	3.6%

Floor Factor Primary (MPPFL)	2,463	5,054	5,141	2,678	108.7%
Floor Factor Secondary (MPPFL)	2,175	2,213	2,182	8	0.3%
MFG	1,359	1,030	1,052	-307	-22.6%
Total Local/ National Formula	202,752	223,586	225,497	22,745	11.2%
Total Premises Factors	1,679	1,679	1,687	8	0.5%
<i>Teacher Pay and Pension Grant</i>	<i>10,025</i>	<i>0</i>	<i>0</i>	<i>-10,025</i>	<i>-100.0%</i>

Total Formula, Premises & previous pay grants	214,456	225,265	227,333	12,878	6.0%
Primary: Secondary ratio	1:1.35	1:1.33	1:1.33		

Base NOR	46,426	46,426	46,831	405	0.9%
Per pupil funding	4.62	4.85	4.85	0.24	5.1%

9. The formula factor rates under NFF are given in the Consultation paper in Appendix 1.

10. It should be noted that there is considerably more funding (circa £1.2m) allocated through Deprivation funding compared with 2020-21. This is due to the proportion of eligible Free School Meal pupils increasing from 13.5% to 16.4% (+2.9%) between Oct 2019 and Oct 2020.

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

Table 2 – Impact of updated NFF using Oct-20 census by phase

Dataset	Oct-19 data	Oct-19 data	Oct-20 Final data		
Per pupil funding	BCP Formula £ 2020-21	National Formula £ 2021-22	National Formula £ 2021-22	Change from 2020/21	
				£	%
Infant/ First Total	4,086	4,304	4,305	219	5.36%
Junior Total	4,060	4,265	4,264	204	5.01%
Primary Total	4,148	4,335	4,331	183	4.42%
PRIMARY PHASE	4,120	4,315	4,313	193	4.69%
Middle/ Secondary Total	5,482	5,632	5,637	155	2.83%
All- through Total	4,900	5,037	5,040	140	2.86%
SECONDARY TOTAL	5,384	5,533	5,533	149	2.77%

Table 3 – Impact of updated NFF using Oct-20 census by school formula type

Dataset	Oct-19 data	Oct-19 data	Oct-20 Final data		
Per pupil funding	BCP Formula £ 2020-21	National Formula £ 2021-22	National Formula £ 2021-22	Change from 2020/21	
				£	%
Primary Formula	4,336	4,458	4,432	97	2.23%
Primary MPPFL	3,977	4,207	4,169	191	4.81%
Primary MFG	4,720	4,807	4,722	2	0.04%

Secondary Formula	5,388	5,535	5,651	264	4.90%
Secondary MPPFL	5,238	5,393	5,466	227	4.34%
Secondary MFG	6,328	6,449	7,608	1,281	20.24%
Formula	5,107	5,248	5,327	219	4.30%
MPPFL	4,302	4,512	4,503	201	4.66%
MFG	5,132	5,228	5,461	329	6.42%

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, and to remain unallocated.

Growth Fund

12. There was a strong response from the consultation to fund growth through the proposal in the consultation document, which is a continuation of the current growth fund policy for 2020-21.

13. The growth fund under this presented to the Forum in Oct 2020 is indicated in Table 4.

Table 4 – Growth Funding under proposal

School Name	Description	2020-21 Budget	2020-21 Forecast	2021-22 Forecast	2022-23 Forecast	2023-24 Forecast
		£	£	£	£	£
Avonbourne (Primary)	All through expansion from Sep 14	24,818	24,818	6,250	-	-
St Peters	All through expansion from Sep 14	24,818	24,818	6,250	-	-
Avonbourne (Secondary)	Increase 2FE Y7 from Sep 2019	138,320	138,320	-	-	-
Harewood	Increase 1FE Y7 from Sep 2019	69,160	69,160	-	-	-
Bournemouth School	Increase 1FE Y7 from Sep 2019	69,160	69,160	77,070	77,070	77,070
BSG	Increase 0.5FE Y7 from Sep 2019	32,275	32,275	35,966	35,966	35,966
Carter	Increase 2FE Y7 from Sep 2019	138,320	138,320	154,140	154,140	154,140
Highcliffe St. Marks	Set Up for 1FE expansion YrR Sep 2014	2,800	-	-	-	-
Year 7 Bulges	2FE* (schools not yet confirmed)	-	-	-	154,140	154,140
Total		499,671	496,871	279,676	421,316	421,316

14. Where agreements for funding growth pre-date the 2020-21 policy then these agreements are upheld. Currently this applies to funding growth at Carter where growth will be guaranteed to cover the increased revenue costs of expanding to a

6FE school where these do not exceed the funding they would receive under the 2020-21 policy if all the growth materialises as per the Oct 2021 census.

15. In addition to the explicit growth in table 4, Livingstone Academy (a new free school) will receive £577,357 implicit growth funding for 30 reception places and 150 year 7 places from Sep 2021.

PROPOSAL 2: Fund growth through the proposal above

16. 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 $0.3 \times$ the KS3 Basic Entitlement.
- The funding is provided for the period Sep – Mar, $7/12$ of the year.
- The school would therefore receive $(40 + 20 \times 0.3) \times £4,404 \times 7/12 = £118,174$

Academies receive funding for the full 12 months through this mechanism, but the central growth fund is only required to fund the 7 months to March. The summer term is funded from the DSG in the following year. This is through the calculated budget share for that year not being fully recouped by the EFSA leaving sufficient funds in the LA to continue payments.

17. The cost of proposed growth funding for 2021-22 is as follows:

- Explicit: £279,676 A central budget is required to be set aside
- Implicit: £577,357 This is a statutory requirement and provided through a budget share

PROPOSAL 3: The Schools Forum should agree a central growth fund. It is recommended that the explicit growth fund should be set at £279,676.

Considerations for Transfer

18. The LA has listened to feedback from the consultation and also considered the response analysis.

19. It must be recognised that the LA currently hold a £4.6 million deficit in the DSG, which is currently forecast to grow by £6 million (which is £1 million more than budgeted) by the end of 2020-21. This combined with a projected budget gap of £10.8 million for 2021-22 would result in a cumulative deficit by the end of 2021-22 of £21.4 million with further growth in future years. This is clearly not a sustainable financial position for the council.

20. Work has been ongoing this year adding special school places to avoid placement within more expensive independent and non-maintained special schools (I/NMSS) provision. A total of 25 resource base places, and 70 special school places have been added since September 2020, and a further 114 places will be added for September 2021. These additional places have already been

factored into the funding gap of £10.8 million. The council are requesting that alongside this, Schools Forum agree a transfer of 0.5% (£1.1 million) from the schools Block to the HN Block. In addition to this, the LA plan that the small remaining surplus within the Schools Block, which is currently estimated at approximately £171k is also added to the High Needs Block transfer or is left unallocated to offset the deficit. The council in considering the mainstream school's formula in February may also seek a higher level of transfer.

21. Schools need to support the council to move our pattern of provision towards national averages as this will have a significant impact on the ability to achieve budget savings. The 0.5% level of transfer is less than the reduction in costs possible if the proportion of pupils with an EHCP within mainstream schools in BCP increased to the national average.

22. Table 5 provides a breakdown of proposed 2021-22 Schools Block allocations.

	Allocation	Budget
Total Schools Block	£228,878,741	
NFF to all schools (estimated)		£226,755,961
Implicit Growth		£577,357
Growth Fund		£279,676
Surplus above NFF (0.6% of Schools Block)		£1,265,747
Total	£228,878,741	£228,878,741

Note: these figures will change slightly following the finalisation of school 2021-22 non-domestic business rate estimates.

PROPOSAL 4: Support a transfer of funding within the Schools block to the High Needs block (0.5%). The balance remaining after NFF has been distributed to schools and the central Growth Fund allocated is held in a central schools block contingency.

This is approximately a £1.27 million (0.6% Schools Block).

23. 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.

24. The formula under PROPOSAL 4 is set out in Tables 1,2 and 3., and a breakdown of the impact by school is provided in Appendix 3.

Early Years Funding 2021-22

Consultation outcomes

25. 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 summary of the general feedback received per question. The consultation document is included in Appendix 2. A total of 52 responses were received, representing a 14% response rate from the sector.

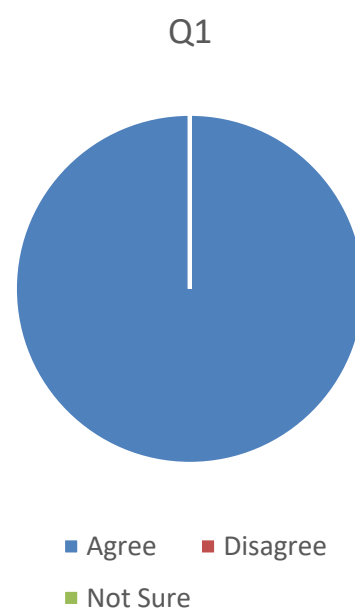
Total issued 364

Type of Setting	Total Issued	Response (Number)	Response (%)
All Respondents	364	52	14%
Childminders	208	19	9%
Day Nursery	71	14	20%
Pre School	67	16	24%
School Nursery	12	3	25%
Independent Nursery	6	0	0%

The outcome from each question asked within the consultation is summarised below, with a BCP response to the feedback from providers.

Q1. Do you agree that any additional pence per hour announced by government for 2021/22 should go straight to the base rate of 2 year olds and 3 and 4 year olds?

Type of Setting	Agree	Disagree	Not Sure
All Respondents (52)	52 (100%)	0 (0%)	0 (0%)
Childminders (19)	19 (100%)	0 (0%)	0 (0%)
Day Nursery (14)	14 (100%)	0 (0%)	0 (0%)
Pre School (16)	16 (100%)	0 (0%)	0 (0%)
School Nursery (3)	3 (100%)	-	-
Independent Nursery (0)	-	-	-



Feedback from providers

Every respondent agreed that any additional pence from the government (when announced) should go straight to the base rate and not used to increase other areas of the formula.

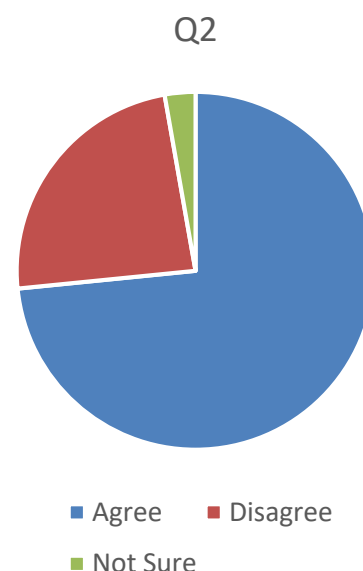
One provider commented that 'This gives us a steady funding stream for the next year and takes into account that this money will only increase if any additional funds are made available'.

Local Authority response

The full academic year 2019/20 financial year data is now available and of the 3&4 year old government funding rate, 11p per government rate is allocated to SEN/D inclusion funding, and 13p for Deprivation supplement. Given a 2p central retention, this leaves £4.12 available for the Base Rate. It is proposed to continue to fund SEN/D inclusion at £2.00 or £6.30 for tiers 1 and 2 funding, and as a result government funding rate increases should support both retaining this level of funding for SEN/D inclusion as well as increases to the base rate.

Q2. Do you support the proposal to make no changes from 2020-21 to the EYSFF for 2021-22?

Type of Setting	Agree	Disagree	Not Sure
All Respondents (49)	37 (76%)	12 (24%)	0 (0%)
Childminders (18)	14 (78%)	4 (22%)	0 (0%)
Day Nursery (13)	7 (54%)	6 (46%)	0 (0%)
Pre School (15)	13 (87%)	2 (13%)	0 (0%)
School Nursery (3)	3 (100%)	0 (0%)	0 (0%)
Independent Nursery (0)	0 (0%)	0 (0%)	0 (0%)



Feedback from providers

The majority of providers that responded agreed that there should be no changes made to the existing funding formula. Of those that were unable to agree those that commented may have misunderstood the purpose of the question (ie any additional

funding from government to be passed to the base rate, per question 1, and retain supplements at their current level). One provider that disagreed commented that as much funding should be in the base rate as possible.

Local Authority response

As a clear majority of respondents agreed with the proposal to retain the funding formula as it currently is (pending increase from government) BCP Council is minded to not make changes to the levels of supplement or central retention for the EYSFF for 2021/22.

Q3. Please use this section to provide any additional comments you wish to make

Feedback from providers

There were 14 additional comments left by providers. 5 providers mentioned that the funding rate from government was inadequate for the childcare and early education being provided. 4 felt a change in supplements would disadvantage them. 2 providers were grateful for the protection funding in place for summer and autumn and asked that protection funding is carried over to spring 2021 to give providers a small piece of security through the low numbers of children during the pandemic. Other providers wanted to comment that the government needs to simplify its funding policy, that any underspend this year is passed onto providers and that the consultation itself seems a mandatory process insofar as the council already has determined its plans for the EYSFF in 2021.

Local Authority response

The local authority has continually lobbied the DfE with regards to the money available for our early years providers, both as a standard settlement per hour, but also through protection funding during and post-pandemic. We know our providers also lobby their elected members and central government along with support from national sector representatives. At the time of writing (post consultation) the DfE have announced an 8p increase for 2 year olds and a 6p increase for 3 and 4 year olds for 2021/22.

The local authority was minded not to make changes to the deprivation supplement as this year the evidence to support such a change was not available (the impact of the supplement was intended to be measured using the Good Level of Attainment scores for children entering school in autumn 2020). In addition, modelling evidenced that a movement of funding from deprivation to base would adversely impact providers (particularly preschool providers) from areas of deprivation at a time where those providers and their ongoing availability are incredibly important to their communities.

A call to simplify the funding policy will be fed back to the DfE. Any underspend or overspend from this year will be included in the deficit carried forward.

Finally the consultation this year has been supplied with minimal change recommended for the reasons above and due to a lack of any policy changes from

the government, however despite its simplicity all providers were welcome to share their thoughts and opinions on any element of the EYSFF for the council's consideration. The consultation process is a genuine undertaking to provide the opportunity for the sector to have their voices heard and views taken into consideration, as evidenced in 2020 with elected members disagreeing that providers should contribute any of their EYSFF to the ongoing High Needs Block overspend, which had been consulted upon.

Proposal for BCP Single Funding Formula 2020-21

26. 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 2020-21 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. The impact of Covid-19 means that this review will now be undertaken for 2022-23.
27. The government have provided an additional 6p for 3&4 year old rates and 8p for 2 year old rates, a 1.4% and 1.5% increase respectively, and it is proposed that these increases should be passed on to providers where affordable.
28. Funding for 3&4 year old SEN/D inclusion supplement is proposed to continue at SEND tier 1 and 2 rates of £2.00 and £6.30 per hour respectively. Deprivation supplement for 3&4 years olds, based on either 2 year old take up or early years pupil premium eligibility funding for providers is proposed to remain unchanged at 53p per hour.
29. The LA can centrally retain up to 5% of the 3&4 year old funding rate (at least 95% 'pass through' required), with no limit on the 2 year old rate.
30. The absolute total for central retention to cover centrally retained duties is also proposed to remain unchanged. The total proposed for central retention remains at £0.185 million. This is through a 0.6% retention of the 3&4 year old government funding rate (99.4% 'pass through'), and 3.4% retention of the two year old government funding rate.
31. It is therefore proposed to increase the 3&4 year old base rate by 6p to £4.18 per hour, and the 2 year old base rate by 8p to 5.08 per hour.

PROPOSAL 5: Support the funding formula set out in Table 5. This is Option 2a from the consultation

PROPOSAL 6: Support for the central retention elements for Central Functions.

Table 6 – Proposal for Early Years Funding Formula

<u>3 and 4 Year Olds</u>	Government rate	Provider Rate	
	£4.44		
Base Rate	£4.18	£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
Central Functions	£0.02		

<u>2 Year Olds</u>	Government rate	Provider Rate	
	£5.39		
Base Rate	£5.08	£5.08	Every child
SEN/D Inclusion Fund	£0.13	£2.00 or £6.30	Per eligible child
Central Functions	£0.18		

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 and 4 year old.

Central Services Block

32. 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 2021-22

33. 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. 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 2021-22 report on this agenda. This budget is given in table 7 below.

Table 7: Central School Services 2021-22

Central School Services	2020-21 £000's	Change £000's	2021-22 £000's
School admissions and access arrangements	423	65	488
Licences purchased by DfE	235	-2	233
Servicing Schools Forum	18	0	18
Ex ESG services all schools	1,007	19	1,026
Commitments - premature retirements (ex DCC)	20	-2	18
Commitments - ASD Base / other	275	0	275
Funding secured post budget in 2020-21*	59	-59	0
Total Expenditure	2,037	21	2,058

* remaining unallocated in 2020/21 and secured by the December Settlement date for 2021/22.

School Admissions and Servicing of the Schools Forum

34. Any 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 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

35. The list of licences negotiated on behalf of all schools by the DfE is to be included in the budget 2021-22 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

36. These services are LA statutory duties on behalf of all schools, including academies and special schools. 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 is included in the table below.

Ex ESG Services	2020-21 £000's	Change £000's	2021-22 £000's
Statutory and Regulatory Duties	445	0	445
Education Welfare	414	19	433
Asset Management	148	0	148
Total Ex ESG services all schools	1,007	19	1,026

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

- Activity supporting the Children and Young People's Partnership Board 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.
- Potential capital bidding rounds could be left unsupported with lost opportunity of drawing government funds into BCP. This will include the special free school bid the council currently has in production.
- Central activity is reduced in SEND capital projects forming part of the BCP high needs action plan.

Historic Commitments

37. The historic commitment funding of £275k is 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.

38. There was little comment regarding Central Services in the consultation responses, and no significant objections raised.

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

Central Retention for LA Duties for Maintained Schools

39. 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.

40. 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 2021 to March 2022

41. The proposed per pupil (mainstream) and per place (specialist) rates for central retentions are very slightly increased from 2020-21. These derived a total allocation of £200k. An allocation for each service for the 12- month period from April 2020 is scheduled in Table 8.

Table 8: LA Budget for Maintained School Statutory Duties April 2021 to March 2022

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

42. The proposed rates per pupil and per place are given in Table 9.

Table 9: Proposed Maintained School Central Retention rates

	2020/21 Rates	Change	Proposed Rate 2021/22
Mainstream School rate per pupil	22.89	£0.28	23.17
Specialist Provider rate per place	97.27	£1.19	98.46

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 2021-22

43. The amounts for each maintained school for the 12-month period (should they remain maintained throughout) would be as set out on Table 10:

**Table 10: Proposed Maintained School Central Retentions
(based on actual Oct- 20 2020-21 pupils and estimated place numbers)**

Maintained Mainstream	NOR	Retention £
Christchurch Infant School	350	8,110
Somerford Primary School	257	5,955
Mudeford Community Infants' School	180	4,171
Mudeford Junior School	262	6,071
Burton Church of England Primary School	334	7,739
Hillbourne Primary School	236	5,468
St Katharine's Church of England Primary School	467	10,821
Corpus Christi Catholic Primary School	432	10,010
The Priory Church of England Primary School	211	4,889
St Joseph's Catholic Primary School, Christchurch	210	4,866
Highcliffe St Mark Primary School	649	15,038
St Walburga's Catholic Primary School	419	9,708
St Edward's Roman Catholic/Church of England School, Poole	909	21,062
Poole High School	1,608	37,258
	6,524	151,163
Maintained Specialist Places	Places	Retention £
Winchelsea Special	188	18,511
Christchurch Learning Centre	48	4,726
Linwood Special	397	39,089
	496	48,837
Proposed Contribution BCP		£200,000

44. 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.

45. 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 10.

High needs finance strategic oversight

46. The High Needs funding deficit recovery and strategic plan require monitoring and updating. It is proposed to establish a High Needs Task and Finish group (HN T&FG) to support with this. This group will have representation from School's Forum members and other school representatives as appropriate. Draft terms of reference for this group are included in Appendix 4. This group will feed back recommendations to the Forum that will inform budgetary decisions, and where possible identify cost savings/ avoidance linked to the actions identified within the recovery plan.

PROPOSAL 9: Establish a High Needs Task and Finish group under the terms of reference in Appendix 4.

Recommendations

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

Legal Implications

47. 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)
48. School Members of the Schools Forum must agree a Growth Fund
49. 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.
50. The Schools Forum must agree budgets for CSSB Services
51. Maintained School Members only of Schools Forum must agree the central retention for education's functions rate for mainstream schools

Financial Implications

52. Proposals in this report allow for the DSG projected in year funding gap for 2021-22 to be limited to £9.5 million with the council continuing to bear the risk of a cumulative deficit of £20.1 million on its balance sheet at 31 March 2022.
53. Also proposed is an appropriate retention from mainstream schools to support core educational functions.

Background Papers

54. Schools Forum Report 23th October - Mainstream Schools Formula 2021-22
Proposals for Consultation
<https://democracy.bcpccouncil.gov.uk/documents/s20633/Item%208%20-%20Mainstream%20Funding%20Formula%202021-22%20FINAL%20v5.pdf>
55. Schools Forum Report 23th October – BCP Growth Funding Policy 2021-22
<https://democracy.bcpccouncil.gov.uk/documents/s20621/Enc.%201%20for%20BCP%20Growth%20funding%20policy%202021-22.pdf>

List of Appendices

1. School funding consultation 2021/22
2. Early years consultation 2021/22
3. NFF estimated school level allocations 2021/22
4. Draft Terms of reference for the proposed high needs funding task and finish group

Appendix 3: NFF school level allocations 2021-22 (estimated)

2021-22 NFF	2020-21 Baseline (includes pay grants)	2020-21 per pupil baseline	21-22 per pupil Budget	Per Pupil change against 2020/21	2021-22 total Budget	Formula Type Sch. Classification
BCP TOTAL	216,632,239	4,668	4,854	4.0%	227,333,318	
Queen's Park Infant Academy	1,418,251	3,951	4,201	6.3%	1,499,684	MPPFL
St Clement's and St John's Church of England Infant School	1,284,679	4,812	4,916	2.2%	1,263,510	Floor/MFG
Stourfield Infant School	1,392,624	3,945	4,195	6.3%	1,460,016	MPPFL
Christchurch Infant School	1,425,303	4,015	4,316	7.5%	1,510,619	MPPFL
Mudeford Community Infants' School	774,276	4,399	4,458	1.3%	802,528	Formula
Ad Astra Infant School	1,086,617	4,055	4,203	3.7%	1,117,973	MPPFL
Broadstone First School	1,183,854	3,946	4,196	6.3%	1,258,890	MPPFL
Canford Heath Infant School	1,408,855	3,946	4,196	6.3%	1,502,328	MPPFL
Courthill Infant School	1,367,892	3,942	4,192	6.3%	1,450,504	MPPFL
Lilliput Church of England Infant School	1,410,278	3,950	4,199	6.3%	1,494,736	MPPFL
Merley First School	1,192,865	3,950	4,200	6.3%	1,272,582	MPPFL
Old Town Infant School and Nursery	732,795	4,918	4,934	0.3%	799,262	Formula
Springdale First School	1,168,083	3,946	4,196	6.3%	1,237,938	MPPFL
Stanley Green Infant Academy	910,752	4,030	4,197	4.1%	1,003,039	MPPFL
Livingstone Road Infant School	1,023,334	4,449	4,644	4.4%	1,119,268	Formula
Twin Sails Infant and Nursery School	1,271,936	3,962	4,211	6.3%	1,419,105	MPPFL
Infant/ First Total	19,052,396	4,086	4,305	5.4%	20,211,982	-
Christ The King Catholic Primary School	1,588,560	4,645	4,729	1.8%	1,626,604	Floor/MFG
Corpus Christi Catholic Primary School	1,734,798	4,072	4,197	3.1%	1,813,184	MPPFL
Elm Academy	2,075,243	5,049	5,157	2.1%	2,031,921	Floor/MFG
Heathlands Primary Academy	1,091,063	5,742	5,971	4.0%	949,411	Floor/MFG
Hill View Primary School	2,555,778	3,944	4,195	6.4%	2,575,736	MPPFL
Jewell Academy Bournemouth	1,922,370	4,747	4,845	2.1%	1,904,002	Floor/MFG
Kings Park Academy	2,798,471	4,379	4,467	2.0%	2,804,995	Floor/MFG
Kingsleigh Primary School	3,188,489	4,141	4,231	2.2%	3,237,088	Formula
Kinson Academy	1,082,831	4,588	4,665	1.7%	1,110,277	Floor/MFG
Malmesbury Park Primary School	2,454,082	3,997	4,198	5.0%	2,569,014	MPPFL
Moordown St John's Church of England Primary School	1,653,788	3,947	4,197	6.3%	1,762,768	MPPFL
Muscliff Primary School	2,444,696	3,956	4,206	6.3%	2,624,350	MPPFL
Pokesdown Community Primary School	1,660,386	4,040	4,202	4.0%	1,714,400	MPPFL
St James' Church of England Primary Academy	1,640,769	3,944	4,195	6.3%	1,715,559	MPPFL
St Katharine's Church of England Primary School	1,973,593	3,947	4,199	6.4%	1,960,713	MPPFL
St Luke's Church of England Primary School	1,767,505	4,101	4,353	6.1%	1,854,407	MPPFL
St Mark's Church of England Primary School	1,638,836	3,949	4,199	6.3%	1,746,816	MPPFL
St Michael's Church of England Primary School	2,618,070	3,991	4,195	5.1%	2,743,653	MPPFL
St Walburga's Catholic Primary School	1,774,385	3,943	4,194	6.4%	1,757,359	MPPFL
The Epiphany Church of England Primary School	1,666,639	3,949	4,198	6.3%	1,733,866	MPPFL
Winton Primary School	3,262,680	3,993	4,198	5.1%	3,492,523	MPPFL
Burton Church of England Primary School	1,335,253	4,096	4,263	4.1%	1,423,765	MPPFL
Highcliffe St Mark Primary School	2,543,851	3,944	4,194	6.3%	2,721,858	MPPFL
Somerford Primary School	1,273,534	4,598	4,822	4.9%	1,239,335	Formula
St Joseph's Catholic Primary School, Christchurch	919,125	4,255	4,462	4.9%	937,038	Formula
The Priory Church of England Primary School	842,518	3,974	4,196	5.6%	885,268	MPPFL
Twynham Primary School	870,177	4,047	4,238	4.7%	915,475	MPPFL
Bayside Academy	1,395,255	4,746	4,842	2.0%	1,389,797	Formula
Bearwood Primary and Nursery School	822,574	4,240	4,322	1.9%	886,009	Formula
Bishop Aldhelm's Church of England Voluntary Aided Primary School	2,362,254	3,950	4,200	6.3%	2,541,086	MPPFL
Heatherlands Primary School	2,446,098	3,945	4,195	6.3%	2,567,632	MPPFL
Hillbourne Primary School	1,069,057	4,293	4,482	4.4%	1,057,864	Formula
Longfleet Church of England Primary School	2,483,773	3,949	4,199	6.3%	2,649,458	MPPFL
Manorside Academy	1,533,420	4,458	4,510	1.2%	1,691,184	Floor/MFG
St Joseph's Catholic Primary School, Poole	1,629,861	4,190	4,274	2.0%	1,628,391	Formula
St Mary's Catholic Primary School, Poole	1,521,708	3,952	4,202	6.3%	1,659,804	MPPFL
Talbot Primary School	2,344,941	4,180	4,255	1.8%	2,459,464	Formula
Primary Total	67,986,424	4,148	4,331	4.4%	70,382,074	-

2021-22 NFF	2020-21 Baseline (includes pay grants)	2020-21 per pupil baseline	21-22 per pupil Budget	Per Pupil change against 2020/21	2021-22 total Budget	Formula Type Sch. Classification
Bethany Church of England Junior School	1,630,646	4,568	4,658	2.0%	1,649,085	Formula
Queen's Park Academy	2,007,745	3,952	4,204	6.4%	2,005,226	MPPFL
Stourfield Junior School	1,895,763	3,950	4,200	6.3%	1,969,841	MPPFL
Christchurch Junior School	1,994,195	3,972	4,215	6.1%	2,086,406	MPPFL
Mudford Junior School	1,073,694	4,067	4,298	5.7%	1,125,954	MPPFL
Baden-Powell and St Peter's Church of England Junior School	2,878,342	3,948	4,200	6.4%	3,024,243	MPPFL
Livingstone Road Junior School	1,117,529	4,580	4,679	2.2%	1,104,199	Formula
Canford Heath Junior School	1,869,825	3,961	4,197	5.9%	2,006,181	MPPFL
Hamworthy Park Junior School	1,896,540	4,079	4,195	2.8%	1,950,561	Formula
Haymoor Junior School	1,444,631	4,081	4,206	3.1%	1,509,836	MPPFL
Oakdale Junior School	2,065,581	3,972	4,207	5.9%	2,065,692	MPPFL
Ocean Academy Poole	1,434,468	4,064	4,242	4.4%	1,319,378	MPPFL
Junior Total	21,308,959	4,060	4,264	5.0%	21,816,601	-
Bournemouth School	4,155,202	5,314	5,462	2.8%	4,478,444	MPPFL
Bournemouth School for Girls	4,653,965	5,301	5,450	2.8%	4,840,008	MPPFL
Glenmoor Academy	4,620,718	5,317	5,434	2.2%	4,853,003	Formula
Avonbourne Boys Academy	2,921,451	5,926	6,052	2.1%	3,340,612	Formula
LeAF Studio	1,409,596	5,973	6,131	2.6%	1,453,025	Formula
Oak Academy	2,628,557	6,349	6,517	2.6%	2,808,845	Formula
The Bishop of Winchester Academy	5,686,143	5,515	5,700	3.3%	6,007,653	Formula
The Bourne Academy	5,013,804	5,837	5,996	2.7%	5,036,664	Formula
Winton Academy	4,927,392	5,298	5,472	3.3%	5,154,165	Formula
Highcliffe School	6,484,940	5,294	5,444	2.8%	6,739,354	MPPFL
The Grange School	2,315,868	6,259	6,486	3.6%	2,406,194	Formula
Twynham School	7,094,882	5,291	5,441	2.8%	7,263,585	MPPFL
Broadstone Middle School	2,332,471	4,520	4,722	4.5%	2,564,157	MPPFL
Carter Community School	2,563,699	6,330	6,415	1.3%	2,918,945	Floor/MFG
Corfe Hills School	3,544,406	5,461	5,609	2.7%	3,589,505	Formula
Magna Academy	4,709,488	5,483	5,587	1.9%	4,860,298	Formula
Parkstone Grammar School	4,837,319	5,304	5,454	2.8%	5,023,055	MPPFL
Poole Grammar School	4,767,085	5,303	5,453	2.8%	4,907,548	MPPFL
Poole High School	8,791,356	5,417	5,537	2.2%	8,903,411	Formula
St Aldhelm's Academy	3,612,015	6,326	6,401	1.2%	4,506,554	Floor/MFG
St Edward's Roman Catholic/Church of England School, Poole	4,746,332	5,345	5,531	3.5%	5,027,945	Formula
Middle/ Secondary Total	91,816,689	5,482	5,637	2.8%	96,682,970	-
Avonbourne Girls Academy	6,362,906	4,811	4,931	2.5%	6,918,280	Formula
St Peter's Catholic Comprehensive School	7,879,243	4,931	5,049	2.4%	8,234,531	Formula
Parkfield School	2,225,618	5,058	5,228	3.4%	2,509,523	Formula
Livingstone Academy	NA	NA	5,499	NA	577,357	Formula
All- through Total	16,467,766	4,900	5,040	2.8%	18,239,691	-
<i>Phase Summaries</i>						
Infant/ First Total	19,052,396	4,086	4,305	5.36%	20,211,982	
Junior Total	21,308,959	4,060	4,264	5.00%	21,816,601	
Primary Total	67,986,429	4,148	4,331	4.42%	70,382,074	
PRIMARY PHASE	108,347,785	4,120	4,313	4.71%	112,410,657	
Middle/ Secondary Total	91,816,689	5,482	5,637	2.84%	96,682,970	
All- through Total	16,467,766	4,900	5,040	2.85%	18,239,691	
SECONDARY TOTAL	108,284,455	5,384	5,533	2.76%	114,922,661	

Appendix 4

Draft Terms of Reference for Bournemouth, Christchurch and Poole High Needs Funding Task and Finish Group

1 Background

- 1.1 Nationally it is reported that the gap between high needs funding and high needs expenditure is forecast to continue to increase. In BCP the High Needs Block is forecast to significantly overspend in 2020-21 and 2021/22. This is anticipated to continue unless action is taken to address this overspend.
- 1.2 Where Local Authorities significantly overspend their high needs budget there is a requirement to develop a high needs budget recovery plan. In BCP a recovery plan has been developed but this needs refining and updating to ensure that the overspend is addressed.

2 Purpose

- 2.1 The overall purpose of this working group comprising Local Authority (LA) Officers and educational settings is to review and support the development of an updated High Needs Budget Recovery Plan. The Group will review BCP Council's application of the High Needs Block and develop a clearer understanding of the current and future forecast pressures on the authority's funding allocation. Key functions of the group include:
 - Review existing High Needs Spend
 - Identify and consider potential options identifying areas of efficiency
 - To assess the short, medium and long term risks and impact of alternative models of delivery.
 - Support the updating of the High Needs Budget Recovery Plan
 - To provide regular progress reports to Schools Forum
 - To consult and share information with the wider community of schools and education providers including headteachers, governors, partners and stakeholders.

3 Membership

- 3.1 The Chair shall be agreed by Schools Forum.
- 3.1 Representatives will be sought from the membership of Schools Forum/ Headteacher groups and other educational provision from across the 0-25 age range. There is a need for as a minimum representation from local early years, primary, secondary, post 16 and specialist settings.
- 3.2 Local Authority representatives from Children's Services will include SEND and finance.
- 3.3 Specialist inputs will be sought as and when required.

4 Meetings

- 4.1 There will be four meetings of the subgroup throughout the 2021 calendar year. Suggested meetings to be held in February 2021, April 2021, June 2021 and October 2021.

5 Urgent Business

- 5.1 Should urgent business requiring action be required between meetings the Chair shall contact all members by e-mail. The Chair shall then give the Local Authority a decision based upon the responses received. This shall be fully reported to the next HN T&F group meeting.

6 Working Methods

- 6.1 This group provides for the opportunity for the Local Authority to discuss in a transparent way with education providers the challenges with regards the High Needs overspend considering options. The Local Authority will provide papers and financial information to enable this conversation a week in advance of meetings in line with the agenda developed with the Chair of the working group.
- 6.2 Minutes of the meeting will be taken and be available to Schools Forum.

7 Project Timetable

Activity	When	Who
Approve draft Terms of Reference for High Needs Funding Task & Finish Group as well as membership, timetable and communication with stakeholders.	14 January 2021	Schools Forum
Elect membership	14 January 2021	Schools Forum
First meeting of the re-established T&FG	February 2021	T&F G
Progress report to March Forum	March 2021	Officers
Second meeting of T&F Group	April 2021	T&F G
Third meeting of T&F Group	June/ July 2021	T&F G
Progress report to June/ July Forum	June/ July 2021	Officers
Final meeting of T&F Group	October 2021	T&F G
Progress report to October Forum	October 2021	Officers

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Bournemouth, Christchurch and Poole

School Funding 2021-22 Consultation

Monday 23rd November 2020

Consultation closes 23:59, Monday 14th December, 2020.

Please respond to the consultation using the link below:

<https://wh1.snapsurveys.com/s.asp?k=160612910253>

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1. Introduction

This consultation concerns DSG funding allocations for the financial year 2021-22 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 2021-22 are similar to last year, but with some differences.

There is a separate consultation underway with the sector, including where there are nursery classes in mainstream schools, for early years funding 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) 2021-22

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 2021-22 will be effective for maintained schools from April 2021 and for academies from September 2021.

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 2021-22 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 2021-22 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 2020-21 NFF baselines, whilst application through the local formula protects schools against their actual 2020-21 local allocations.

It is important to note in considering Option 1 that the NFF uses data from the October 2019 school census (lagged) to provide the total funding to the LA but the local formula must use the equivalent data at October 2020. 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 2021-22. Details of the national and local picture are provided in Section 5.

The Schools Forum received a report in October 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 create additional places in mainstream units and specials school and to manage demand.

1.3. Funding Transfer to High Needs 2021-22

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 2021-22 only with a fresh decision needed next year for 2022-23 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 of restricting expenditure to the level of funding is not possible given the statutory framework of support required to be in place for pupils with high needs and the continued growth in demand. With the growing number of pupils needing provision, there continues to be pressure on the fixed cost of commissioned places, 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 23 February 2021, after taking into account the views of schools and decisions made by the Schools Forum.

During December 2020 the ESFA will provide the October 2020 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 2021. Changes were made to the operation of the growth fund for the current year (2020/21) to provide only a proportion of funding if the commissioned place remained unfilled. This change was requested by schools forum last year when it became

clear that a significant proportion of commissioned new places remained unfilled as pupils had gone to other schools. There are no proposals for further changes in 2021/22.

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 2021..

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

1.6. Next Steps

During the Covid pandemic it is not possible to arrange physical consultation event. Instead, we will be hosting an MS Teams virtual event on

- Thu 3rd December 2020, 13:30-15:00

Following the release of this consultation document an invite to this meeting shall be emailed out – to book a place at this event please accept this invite. If you have any questions relating to this event or the consultation more generally please contact:

Jack Cutler, Interim Schools and Early Years Funding and Sufficiency Manager
jack.cutler@bcpccouncil.gov.uk.

To respond to the consultation please complete the response form linked to here:

<https://wh1.snapsurveys.com/s.asp?k=160612910253>

The SF on 14th January 2021 will make its recommendation to the LA on the mainstream school's formula and make decisions regarding the other budgets included in the consultation. At the same meeting final budget decisions will be made concerning any transfer of mainstream school funding to support high needs budgets. The Council meeting on 23rd February 2021 is scheduled to consider the outcome of this consultation with all schools and the recommendations of the Schools Forum. The mainstream schools' formula for 2021-22 will be agreed at this meeting.

The unit values in the proposed formula will be tested for affordability following receipt of the October 2020 school census data from the ESFA in December 2020, 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 2021.

1.7. Budget Timetable

Consultation Issued	23 rd November 2020
Consultation Event	Thu 3 rd December 2020
Consultation Closes	Monday 14 th December 2020

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SF updated on final formula (updated data applied), recommendations and decisions	14 th January 2021
Mainstream school budgets sent to ESFA	21 st January 2021
Council agree local formula	23 rd February 2021

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

2. Schools and Early Years Funding 2021-22

2.1. DSG Summary

A summary of the indicative funding provided by the DfE for 2021-22, is detailed in Table 1 below:

Table 1: DSG Draft Settlement 2021-22

Funding Block	Forecast 2020-21	Forecast 2021-22	Annual Change	%
	£000's	£000's	£000's	
Early Years				
2 year olds Entitlement	2,391	2,391	0	-
3 year olds Entitlement	18,408	18,408	0	-
Pupil Premium	78	78	0	-
Disability Access Fund (DAF)	118	118	0	-
Total Early Years*	20,995	20,995	0	-
Schools Block				
Primary (PUF** = £4,273)	108,304	118,339	10,035	9.3%
Secondary (SUF** = £5,635)	97,330	105,164	7,834	8.0%
Teachers Pay & Pension Grants***	10,025	0	-10,025	-100%
Total NFF & other grants	215,659	223,503	7,844	3.6%
Premises	1,659	1,679	20	1.2%
Growth*	1,858	1,858	0	-
Total Schools	219,176	227,040	7,864	3.6%
Central School Services				
NFF	1,746	1,702	-44	-2.52%
Commitments	291	233	-58	-20%
Total Central School Services	2,037	1,935	-102	-5.0%
High Needs				
NFF	42,969	47,275	4,306	10%
Teachers Pay & Pension Grants**	769	0	-769	-100%
Total High Needs	43,738	47,275	3,537	8.1%
Total DSG Funding (plus Pay & pension grants)	285,946	297,245	11,299	4.0%

* Provisional allocations for the Early Years Block and Growth were not included with the July information so are included at 2020-21 levels.

** Primary Unit of Funding (PUF) and Secondary Unit of Funding (SUF) have been multiplied by October 19 census numbers to provide a provisional allocation.

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*** Teachers Pay and pension grants have been included for comparison as included in the NFF baseline in calculating the 2021-22 funding.

Some elements of funding are now fixed but final funding for BCP will be updated to reflect the October 20 school census, final growth fund allocation, high needs place return, and January 2021 census to account for change in the cross-border flow of high needs pupils.

The allocation of the DSG for 2021-22 includes some elements of historic funding according to the local budgets in either 2017-18 (high needs and central services) or 2020-21 (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 into the high needs historic protection arrangements with funding restored to schools through the NFF from 2018-19.

The schools block allocation now includes the teachers' pay and pension grants that were previously funded through separate grants. This has been delivered through an increase to Basic Entitlement rates and Minimum per Pupil Funding Levels of £180 and £265 per primary and secondary pupil respectively. The per pupil 2020-21 baselines have also been uplifted accordingly to continue this funding to school on the Minimum Funding Guarantee.

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 2020-21 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.
- ii. **Local formula elements outside of the national formula.** This is provided at the historic (now 2020-21) 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 2020-21 the DfE changed the previous historic allocation basis to one using demographic data. This continues for 2021-22, with final allocations being notified in December.

Table 1 above summarises the detail of BCP Schools Block Funding for 2021-22. In this table 2020-21 and 2021-22 funding totals for the NFF both use 2020-21 pupil numbers and data from the October 2019 census. The October 2020 census pupil numbers will be applied to the above funding rates (SUF's and PUF's) to calculate final funding.

3. Mainstream Schools National Formula

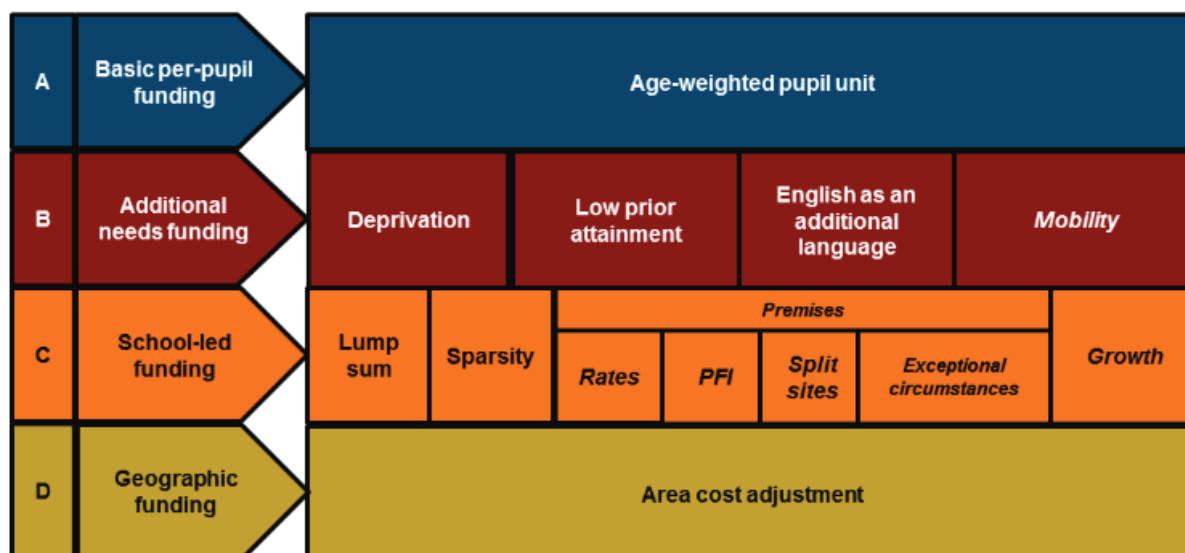
3.1. Summary of Formula

The NFF was set as a formula to apply from 2018-19 onwards, with the first 2 years being a transition period to the NFF, with capping on gains for formula schools for national affordability. Such transition was 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 2021-22 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 2020-21 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 2020-21

The 2021-22 announcements from the DfE in July 2020 included the national context of how LAs had responded to the continuation of the mainstream school NFF in 2020-21 (total of 151 LAs). Summary of the national progress, with BCP as a comparator is as follows:

- Across all LA's, 90.41% of funding was allocated through pupil-led factors, compared with 90.52% in 2019-20, and 90.57% in 2018-19. BCP was 91.8%, above the national average due to the efficiency of our school organisation (relatively few schools for the number of pupils keeping the total lump sum allocation lower than average). This is also reflected in our NFF allocation.
- 52 LAs mirrored the NFF Primary lump sum rate (including BCP), and 54 for the secondary lump sum (including BCP). This is an increase in the primary phase (from 48) but a slight decrease in the secondary phase (from 55) from 2019-20.
- 124 (82%) set Minimum Funding Guarantee (MFG) at least +1.0%. 105 (70%) set a threshold of 1.84% mirroring the MFG protection in the NFF (includes BCP).
- The MFG was a mandatory factor, as were the minimum per pupil funding rates. 2 LA's applied to use a higher per-pupil rate for primary pupils and one for KS3 and 4 pupils. Only 123 authorities actually allocated funding through this factor, since all schools in the other 28 local authorities were already receiving over the minimum level through the other funding factors. Only 31 authorities allocated more than 1% of their funding through this factor, including BCP, which allocated over 2.3% due to the characteristics of the pupils in our schools.
- The national Primary to Secondary funding ratio was 1:1.298, compared with 1:1.350 in BCP, which was slightly higher than national due to our local school

organisation leading to more key stage 4 pupils relative to key stage 3 than is typical, thereby increasing the average secondary per pupil funding level.

3.3. Summary of NFF Changes 2021-22

The estimated 3.6% NFF growth shown in Table 1 is the net impact of:

- An increase to the Primary and Secondary minimum per pupil funding levels (MPPFLs) of £250 (6.4%) and £150 (2.8%) respectively, where additional funding is provided to a school when for all other formula elements, the outcome of the NFF is below nationally set 2021-22 phase levels.
- A 3% increase to all formula rates with the exception of current free school meals that has a 2% increase in line with inflation projections.
- A minimum funding guarantee (MFG) of 2% set against 2020-21 NFF funding levels for schools where additional funding is provided when the outcome of the NFF is below the schools' historic funding level. This is compared with a 1.84% uplift in 2020-21. Note that there is still discretion in the level of the MFG in the local formula.

3.4. Detail of NFF for 2021-22

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 2021-22 compared with the local formula for 2020-21 are shown below in Table 2, based on the 2020-21 local formula pupil base (the 2019 October census plus funded pupil growth).

Table 2: Impact by factor of the National Formula for 2021-22

Formula Factors	BCP Formula £000's 2020-21	National Formula £000's 2021-22	Growth / (Reduction)	
			£000's	%
Primary Basic Entitlement	78,219	86,662	8,442	10.8%
Secondary Basic Entitlement	77,790	86,206	8,415	10.8%
Deprivation Primary	7,560	7,763	202	2.7%
Deprivation Secondary	6,663	6,857	195	2.9%
Low Prior Attainment Primary	8,072	8,294	223	2.8%
Low Prior Attainment Secondary	5,967	6,152	185	3.1%
EAL Primary	1,346	1,383	38	2.8%
EAL Secondary	519	535	16	3.1%
Primary Mobility	260	268	7	2.9%
Secondary Mobility	121	125	4	3.2%
Looked After Children	0	0	0	
Lump Sum	10,182	10,484	303	3.0%
Sparsity	56	58	2	3.6%
Floor Factor Primary (MPPFL)	2,463	5,054	2,590	105.1%
Floor Factor Secondary (MPPFL)	2,175	2,213	38	1.7%
MFG	1,359	1,030	-330	-24.3%

Total Local/ National Formula	202,752	224,762	22,009	10.9%
Total Premises Factors	1,679	1,679	0	0.0%
<i>Teacher Pay and Pension Grant</i>	<i>10,025</i>	<i>0</i>	<i>-10,025</i>	<i>-100.0%</i>

Total Formula, Premises, Grants	214,456	226,440	11,985	5.6%
Total Primary Phase	98,643	104,474	5,831	5.9%
Total Secondary Phase	95,666	100,471	4,805	5.0%

Table 2 above shows how the NFF for 2021-22 compares with the distributed BCP total in 2020-21. This difference therefore includes surplus NFF allocated to BCP after required growth and the NFF formula had been applied to the October 2019 census data for all schools. A proportion of this surplus was transferred to the High needs Block (0.5% of the Schools Block allocation), whilst the remainder stayed unallocated within the DSG.

The higher MPPFLs in 2021-22 apply to potentially 43 primary schools, 1 middle school and 6 secondary schools with more schools in 2021/22 drawn into this group from the primary phase as the MPPFL increase is greater than for other formula factors.

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 2022-23 for factors currently funded outside the NFF; namely the premises factors including split sites and business rates. It is possible for 2021-22 to replicate almost 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 2021-22 compared with the 2020-21 local formula allocations rather than referencing the 2020-21 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 2022-23 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).

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 2020-21 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 2021-22 when released by the ESFA in December. We have become aware, for example, that pupils entitled to free school meals have increased significantly since the October 2019 data used in the calculation of the 2021-22

primary and secondary per pupil funding levels being used by the ESFA in the December 2020 settlement for the LA. 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 2020, particularly where there is a change in pupil numbers, and schools should bear this in mind when estimating final funding for 2021-22.

4.2. Comparison BCP 2020-21 and NFF 2021-22

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 3 below compares each BCP local formula for 2020-21 with the NFF 2021-22 (option 1).

Table 3: Comparison of Local Formula 2020-21 and BCP NFF 2021-22

(a) Factors within the NFF

Factor	BCP formula 2020-21		Option 1 NFF 2021-22	
	Rate	Description	Rate	Description
Basic Entitlement - Primary	3,037*	NFF	£3,123	NFF
Basic Entitlement - Secondaries	KS3 £4,283* KS4 £ 4,826*		KS3 £4,404 KS4 £4,963	
Deprivation - FSM data	£450 FSM £560 Primary FSMe6 £815 Secondary FSMe6	NFF	£460 FSM £575 Primary FSMe6 £840 Secondary FSMe6	NFF
Deprivation** - IDACI bands	Range £210 to £625	NFF	Range £215 to £680	NFF
Prior Attainment Primary	£1,065	NFF	£1,095	NFF
Prior Attainment Secondary	£1,610	NFF	£1,660	NFF
LAC	£0	NFF (Not used)	£0	NFF (Not used)
EAL Primary	£535	NFF	£550	NFF
EAL Secondary	£1,440	NFF	£1,485	NFF
Lump Sum Primary	£114,400	NFF	£117,800	NFF
Lump Sum Secondary	£114,400	NFF	£117,800	NFF
Sparsity		NFF		NFF
Mobility	£875 Primary £1,250 Secondary	NFF	£900 Primary £1,290 Secondary	NFF - formulaic

Minimum per pupil funding levels (MPPFL)	Primary £3,930* KS3 £5,065* KS4 £5,565* Secondary £5,265*	NFF	Primary £4,180 KS3 £5,215 KS4 5,715 Secondary £5,265*	NFF
Capping & Scaling	None	NFF	None	NFF
Minimum increase per pupil (MFG)	+1.84%	NFF	+2.00%	NFF

* Baseline rates for 2020-21 have been adjusted to include teacher pay and pension grants

** Upper range shown is IDACI band E as band F is not relevant across BCP.

(b) Factors and mechanisms outside the NFF

Factor	BCP formula 2020-21	Option 1 NFF 2021-22
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)

It is proposed 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 2020-21 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

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 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 2020/21

The MFG is important as it provides funding stability between years. It must be set between plus 0.5% and plus 2.0% per pupil (compared with plus 0.5% and plus 1.84% 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%, the same as last year.

Funding changes for mainstream schools in 2021-22 will be due to differences between the NFF formula values as well as data changes from the October 2020 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 2020/21 BCP formula school allocations, which were slightly different.

If there is to be no transfer to High Needs then it is proposed that the MFG factor is set at plus 2.00%, in line with the NFF rate.

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 November and 16th January 2021 (for amendments), 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, should these schools receive additional funding through the MFG. 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 2020-21 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 2019-20 and 2020-21 to derive the adjusted 2020-21 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

The NFF MPPFLs are mandatory for use in the local formula and are not to be set below the NFF values and any disapplication would be agreed by the DfE only if these were unaffordable. 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?

5. The High Needs Block (HNB)

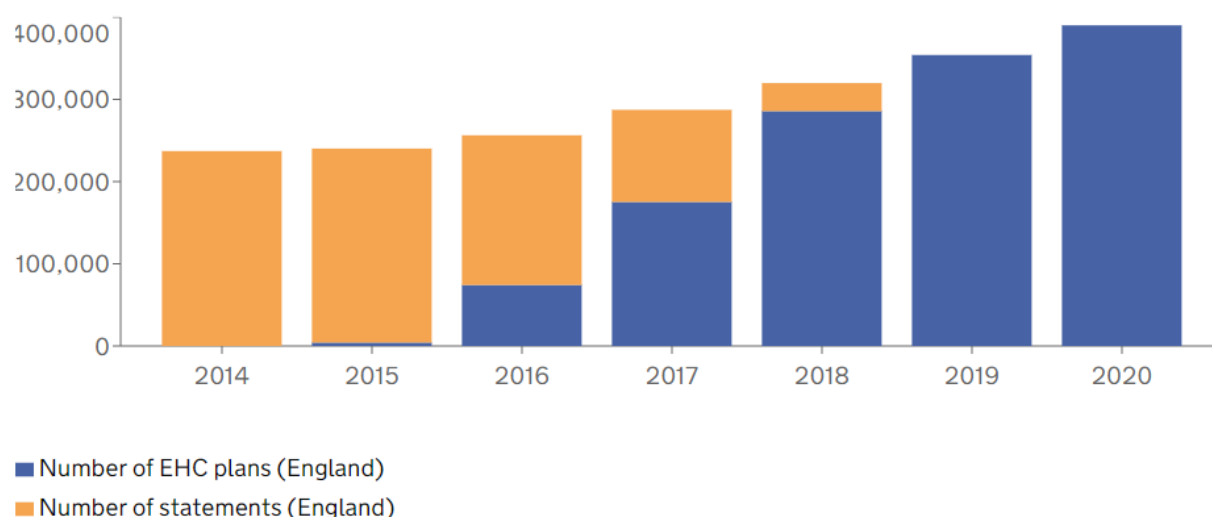
5.1. Overview

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 several 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, and across the country there is becoming ever increasing reliance on I/NMSS provision as a result of sufficiency pressures within special schools and increasing complexity of need.

Figure 2: National Picture of Growing Numbers of children and Young people with Statements or EHC plans

Number of statements of SEN and EHC plans, 2014 to 2020



Source: SEN2

Figure 3: National Picture of High Needs Placements

Number of statements and EHC plans, by age, 2014 to 2020

	England						
	2014	2015	2016	2017	2018	2019	2020
Under 5	11,482	11,250	10,513	11,629	12,516	14,094	15,398
Age 5 to 10	88,732	91,045	92,213	97,379	105,689	117,222	128,764
Age 11 to 15	113,796	112,340	111,225	112,540	117,354	126,332	137,639
Age 16 to 19	23,101	25,538	41,300	58,034	70,084	77,587	83,095
Age 20 to 25	n/a	10	1,064	7,708	14,176	18,760	25,213
Total	237,111	240,183	256,315	287,290	319,819	353,995	390,109

Source: SEN2

Figure 4: National Picture by type of need

	2018/19	2019/20
Autistic Spectrum Disorder	73,450	82,847
Hearing Impairment	5,873	6,027
Moderate Learning Difficulty	29,100	29,592
Multi- Sensory Impairment	915	965
Other Difficulty/Disability	6,766	7,069
Physical Disability	13,094	13,371
Profound & Multiple Learning Difficulty	9,878	10,003
Severe Learning Difficulty	29,921	30,593
Social, Emotional and Mental Health	34,922	39,189
Specific Learning Difficulty	9,080	9,947
Speech, Language and Communications needs	38,070	42,589
Visual Impairment	3,385	3,411
Missing	1	1
Total	254,455	275,604

Source: Special educational needs in England, Age and gender - by SEN provision, type of need and school type

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 £11.8million in-year for 2021-22 originally identified in the 2020-21 funding consultation unless planned initiatives were successful. Due to significant ongoing work, this projected funding gap has now been reduced by almost £7million to £4.9million without any transfer from the school's block, reducing to a gap of £3.9million assuming a 0.5% transfer into the high needs block in 2021-22.

Based on the total funding announced by the government last year for schools over the three years from 2020-21 to 2022-23 BCP funding in the High Needs block is expected to grow at similar levels each year (approximately 8% per annum) with a provisional increase announced of 8.1% (£3.54m) in 2021-22 as shown in table 1 above.

This increase reflects the growing demand nationally as demonstrated in figures 2, 3 and 4 above. Locally, budget pressures mirror the national picture from the main budget drivers 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. Early signs are that strategies introduced last year are starting to work but the impact of Covid 19 on pupil attendance at school in the summer term will be obscuring recent trends.
- 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. BCP will have created over 240 places since Sep 2019 by Sep 2021 and the average cost per EHCP placement is seen to be reducing partly as a result of this.

5.3. BCP Budget Position 2020-21

The DSG budget for BCP in 2020-21 was set with a funding gap of £5m, which is currently forecast to be almost achieved. Action plans are in place to dampen funding demands, but further budget growth will be needed with current trends continuing in 2021-22.

5.4. Budget Progress 2021-22

The October Schools Forum report linked to here

<https://democracy.bpcouncil.gov.uk/documents/s20631/Item%207%20-%20HNB%20financial%20strategy%20report%20FINALv3.pdf>

contains information on the DSG budget position and the financial strategy underpinning bringing this budget out of a deficit position. Such strategy includes support for the high needs block from the schools block via an annual transfer of 0.5%.

The factors responsible for the budget shortfall remain the same as those included within this consultation last year, although significant work has been undertaken to reduce these pressures.

The BCP budget for high needs has been high compared nationally over many years and this reflected 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 last year exceeded that of national. LA historic expenditure is protected in the National High Needs Formula through a funding floor mechanism in a similar way to MFG for mainstream school funding. Funding increase to the High Needs Block has been provided through an uplift to this funding floor for 2021-22.

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 budget for 2021-22 is based on a reduction in permanent exclusion placements as a result of the BCP on-going preventing exclusions strategy, for which an objective is to reduce the number of permanent exclusions from BCP schools.

5.4.1. 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. 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. In preparation for this decision, the next section considers how funding could be found from the NFF for varying levels of transfer when this is established.

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

6.1. DSG Regulations

It is possible to transfer funding from mainstream schools to support expenditure in other funding blocks. This requires the agreement of the 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 2021-22 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 final outcome in 2020-21 was that the NFF was fully affordable for all schools after a 0.5% transfer was made to high needs. This may not be possible in 2021-22 as the number of pupils eligible for FMS have increased since last year and a surplus may not be available from the growth fund allocation which has not yet been announced. Schools forum members have mixed views about how any adjustments should be made to the NFF. Some members feel that all schools should contribute to a transfer if one is agreed, with others not supporting any reduction in the minimum per pupil funding levels (MPPFL) within the local formula

6.3. Principles

It is proposed that all schools should see reduced funding compared with their potential NFF allocations as equitably as possible, as allowed within the financial regulations, or where a disapplication of regulations is supported through this consultation and agreed by the secretary of state.

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

Less than half of all schools across BCP in 2021/22 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 2%

LEVER 2. Reduce a formula unit value. A sensible value to adjust would be the phase appropriate Basic Entitlement rate.

LEVER 3. 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 2020-21.

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 2% NFF is shown in Table 4. 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 2020/21 and potentially also under the NFF stay closer to their funding allocations determined according to their most recent data.

Table 4 – impact of variable Minimum Funding Guarantee

MFG	Funding released from 2020-21 NFF	% Schools Block	Pupils impacted
1.5%	£91,462	0.04%	3,810
1.0%	£182,923	0.08%	3,810
0.5%	£262,085	0.12%	3,810

6.6. Lever 2 - Scaling back Basic Entitlement

This lever can be used as an alternative to release funding from formula schools, as per Table 5. The maximum funding released under this approach would be to scale back funding through the formula at any level by varying amounts, and all formula schools are on MFG, (illustrated using MFG at 2.0%).

Table 5 – 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
99.5%	£ 307,820	0.14%	25,449
99.0%	£ 543,939	0.24%	25,449
98.5%	£586,214	0.26%	25,449
MAX	£640,884	0.28%	25,449

6.7. Lever 3 – Reducing MPPFL below the NFF (requires a disapplication of regulations)

A disapplication request is required to set MPPFLs below NFF). Following a successful disapplication, MPPFLs could be set at a level that the DfE would allow. Table 6 shows the illustrative impact of reducing MPPFLs by varying amounts (a disapplication to reduce rates below these levels is not expected to be proposed and so is not modelled below).

Table 6 – impact of variable MPPFL rates

MPPFLs	Funding released from 2020-21 NFF	% Schools Block	Pupils impacted
NFF 2021-22 - £15	£380,772	0.17%	17,153
NFF 2021-22 - £30	£752,055	0.33%	17,153
NFF 2021-22 - £50	£ 1,212,541	0.53%	17,153

6.8. 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 7. The effects of the various formula changes are compounded in this table.

Table 7: Illustrative extremes for transfer to High Needs considerations

Description	MFG @0.5%	All schools on MFG @2.0% or MPPFL	All schools on MFG @0.5% or MPPFL	All schools on MFG @0.5%
MFG	0.5%	2.00%	0.5%	0.5%
Basic Entitlement	100%	Max released	Max released	Max released
MPPFLs	NFF	NFF	NFF	2020-21 formula + 0.5%
% Transfer	0.12%	0.28%	0.81%	3.13%
Maximum funding that could be released from NFF formula £'000s	262	641	1,848	7,106
Disapplication required?	No	No	No	Yes – to vary MPPFL

6.10 Varying Levels of Funding Transfer

Table 8: Transfer Options – Proposals to Release Funding from the NFF

Transfer			
Formula Changes (implemented in this order)	MFG	MPPFLs changed against 2021- 22 NFF £	Basic Entitlement all phases %
2021-22 NFF	+2.00%	0	100.0%
(a) 0.5% only MFG & Formula schools contribute	+1.00%	No change	98.3%
(b) 0.5% all schools contribute	+1.40%	-20	99.3%

Table 9: Comparison of Option Unit Values / Mechanisms for 2021/22

Factor	Option 1 NFF	Option 2 a 0.5% MFG and Formula	Option 2 b 0.5% all schools
Basic Entitlement Primary	£3,123.00	£3,069.91	£3,101.14
Basic Entitlement KS3	£4,404.00	£4,329.13	£4,373.17
Basic Entitlement KS4	£4,963.00	£4,878.63	£4,928.26
Minimum per Pupil Funding Level Primary	£4,1800	£4,1800	£4,160
Minimum per Pupil Funding Level KS3	£5,215	£5,215	£5,195
Minimum per Pupil Funding Level KS4	£5,715	£5,715	£5,695
Gains Cap	None	None	None
MFG	2.00%	1.00%	1.4%

QUESTION 2a:

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 2b:

If you agree that all schools should make a contribution, do you agree with the approach outlined in Table 8 and Table 9 for varying levels of transfer?

- ☐ Yes
- ☐ No
- ☐ Unsure

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

QUESTION 3:

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

- ☐ Yes
- ☐ No
- ☐ Unsure

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

7. Formula affordability

Final school budgets will be calculated following receipt of the October 2020 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 19 to Oct 20 censuses, the SUFs and PUFs based on Oct 19 proxy data will allocate more (less) funding to the Schools Block than required to distribute locally through NFF. There is an indication that the prevalence of free school meals across the area may have increased by approximately 20% compared with last year's prevalence, which is likely to impact affordability.

These final formula adjustments could involve:

- i. In the case of a funding shortfall:
 - Introducing a gains cap
 - Applying lower MFG protection (if greater protection than 0.5% is initially planned)
 - 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:
 - Applying greater MFG protection (if a level less than +2.00%) 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.
 - Offset the historic deficit

7.1.1. 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 as far as permitted.

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.

The resourcing for the High Needs budget is set out in Appendix 6. The vast majority of this spend is on place and top-up funding within early years providers, mainstream and special schools, AP placements for both hospital education and exclusions, and non-maintained and independent special schools

QUESTION 5

The High Needs budget shown in Appendix 6 includes an illustrative 0.5% transfer from the school block, limiting the growth in the deficit in 2021/22 to an estimated £3.9 million. Do you support some level of transfer while the strategy adopted is being implemented recognising that schools have a part to play in limiting costs and it takes time to create new places and manage change?

- ☐ Yes
☐ No
☐ Unsure

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 (only MFG and Formula (a), and all schools (b) contribute) provided in Table 10 below:

Table 10: Summary Final Formula Positions (based on 2020-21 data)

Number of schools	NFF		
	Option1	Option 2a	Option 2b
Transfer Level	0%	0.50%	0.50%
MFG	10	11	10
MPPFL	50	56	51
Fully formula funded	29	22	28
Total Schools	89	89	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 2020-21 local formula. This removes the impact of changing pupil numbers and pupil data and enables a direct comparison to be made with 2020-21 funding levels.

8.2. High Needs Financial Strategy for 2021-22

This is a continuation of the financial strategy set out in the 2020-21 consultation, which is beginning to show positive results.

QUESTION 6

Considering Appendix 6, do you have any suggestions on any 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). Please provide any rationale behind your decision.

- ☐ No Transfer
- ☐ Up to 0.5% (Schools Forum level of approval without need for further consideration by the Secretary of State.)
- ☐ Up to 1.0% (Schools to contribute 25% towards the forecast 2021-22 in year high-needs funding gap)
- ☐ Up to 1.5% (Schools to contribute 50% towards the forecast 2021-22 in year high-needs funding gap)
- ☐ Other

Please provide any rationale behind your decision.

QUESTION 8

Do you agree that should funding remain with schools rather than be transferred to the HN block for 2021-22, 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 2022-23, and that you would support such a transfer?

- ☐ Yes, as long as no reduction in NFF is needed
- ☐ Yes, even if the NFF needs to be reduced
- ☐ No
- ☐ Unsure

If No, please provide further details

9. Growth Fund

9.1. Proposed policy for 2021-22

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

Since 2019-20, funding to cover mainstream pupil growth is allocated to the LA using a formulaic method based on lagged growth data. The amount allocated in 2020-21 was £1.858m. The allocation for 2020-21 has not yet been confirmed.

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 is a new free school opening with 150 places in year 7 in September 2021. The cost to BCP of implicit growth from this is expected to be approximately £503,000.

It is proposed to use the existing 2020-21 policy for the local optional Growth Funding for 2021-22 (explicit growth where we have discretion).

This policy funds each new place added at the relevant key stage Basic Entitlement for the period September to March, for both permanent and temporary growth. Where the growth does not materialise according to the following October census, that place is only funded at 30% of the above. New and growing schools in line with the definition in 9.3 will receive start up and diseconomy of scale funding from the Growth Fund in-line with that previously provided by the DfE to new Free Schools, along with the resources funding also provided to such free schools.

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. Further, there is a requirement that the growth fund allocates start up and diseconomy of scale funding to new local Free Schools delivered through the presumption route. It would also be disingenuous to stop paying, or significantly reduce the payments, for existing growth that is working its way through the school.

9.2. Indicative financial cost of funding growth

The total estimated growth fund cost annually is as below. Note the growth fund allocation has already been agreed for 2020-21. If Livingstone Academy does not open with 150 year 7 places for Sep 2021, a contingency should be added to the 2021-22 growth fund that would cost up to an additional £385k. Should Livingstone Academy open for Sep 2021 with 150 year 7 places, this will cost approximately £503,000 through implicit growth.

Table 11: Summary of explicit growth fund under proposed policy

	2020-21 Budget	2020-21 Forecast	2021-22 Forecast	2022-23 Forecast	2023-24 Forecast
Total	499,671	496,871	279,676	421,316	421,316

Further details of the proposed policy are set out in Appendix 7, with a more detailed breakdown of forecast spend.

QUESTION 9

Do you support the growth fund proposal as set out in section 9?

- ☐ Yes
☐ No

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

10. Central Schools Services Block

10.1. Funding and Draft Budget 2021-22

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 place 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 which is scheduled to decrease by 20% each year unless an application to the DfE is successful in retaining enough funding to cover prudential borrowing repayments and early retirement commitments. This application was successful last year and as nothing has changed it is hoped it will be again for 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 12: Central School Services 2021-22

Central School Services	2020-21 £000's	Change £000's	2021-22 £000's
School admissions and access arrangements	423	0	423
Licences purchased by DfE	235	17	252
Servicing Schools Forum	18	0	18
Ex ESG services all schools	1,007	0	1,007
Commitments - premature retirements (ex DCC)	20	-2	18
Commitments - ASD Base / other	275	0	275
Funding secured post budget in 2020-21*	59	-59	0
Total Expenditure	2,037	-44	1,993

* Included in total for 2021/22 (assuming application will be successful again)

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 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. Steve to provide latest numbers.

Table 13: Ex ESG Services 2021-22

Ex ESG Services	2020-21 £000's	Change £000's	2021-22 £000's
Statutory and Regulatory Duties	445	0	445
Education Welfare	414	0	414
Asset Management	148	0	148
Total Ex ESG services all schools	1007	0	1007

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

- Activity supporting the Children and Young People's Partnership Board 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 BCP. This will include the special free school bid the council currently in production.

10.5. Historic Commitments

The historic commitment of 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. Historic early retirement costs were passed to BCP from Dorset Council when the new Authority was formed in April 2019.

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 2021 to March 2022

The proposed per pupil (mainstream) and per place (specialist) rates for central retentions are unchanged from 2020-21. These derived a total allocation of £200k. An allocation for each service for the 12- month period from April 2021 is scheduled in Table 14 below:

Table 14: LA Budget for Maintained School Statutory Duties April 2020 to March 2021

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 2021-22

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

Table 15: Proposed Maintained schools central retention rates

	Proposed Rate 2021/22
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 2021-22

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: Indicative Proposed Maintained School Central Retentions
(based on 2020-21 pupils and projected 2021-22 place numbers which will be updated in final allocations)**

Maintained Mainstream	NOR	Retention £
Christchurch Infant School	355.00	8,125.95
Somerford Primary School	277.00	6,340.53
Mudeford Community Infants' School	176.00	4,028.64
Mudeford Junior School	264.00	6,042.96
Burton Church of England Primary School	326.00	7,462.14
Hillbourne Primary School	249.00	5,699.61
St Katharine's Church of England Primary School	500.00	11,445.00
Corpus Christi Catholic Primary School	426.00	9,751.14

The Priory Church of England Primary School	212.00	4,852.68
St Joseph's Catholic Primary School, Christchurch	216.00	4,944.24
Highcliffe St Mark Primary School	645.00	14,764.05
St Walburga's Catholic Primary School	450.00	10,300.50
St Edward's Roman Catholic/Church of England School, Poole	888.00	20,326.32
Poole High School	1623.00	37,150.47
	6,607	151,234
Maintained Specialist Places	Places	Retention £
Winchelsea Special	188	18,286.76
Christchurch Learning Centre	48	4,668.96
Linwood Special	397	38,616.19
	496	48,245
Proposed Contribution BCP		£ 199,479

If the retention is not supported in full maintained schools could see some services reduce. 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 must provide (such as to comply with accounting regulations, paying budget shares, and completing data returns) Other measures could include applying charges 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 2021	<ul style="list-style-type: none"> LA does not retain from school budget share
2 April 2020 to 31 March 2022	<ul style="list-style-type: none"> LA retains agreed school budget up to conversion date (e.g. conversion on 1 January 2022 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. There was no de-delegation for 2020-21 and no proposals are being brought forward for 2021-22.

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, 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, until the end of the current contract period at which point schools individually will need to consider whether to join instead the government scheme. Exceptionally, a school may not be able to join central schemes, 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 Monday 14th December 2020, but earlier responses are welcomed.

Please respond either using:

- the online survey link (preferred) which has been provided separately in an email and is also included below:

<https://wh1.snapsurveys.com/s.asp?k=160612910253>

- or using the Consultation Response Form that can be provided on request, as follows:

E-mail return to ppp.consultations@bcpcouncil.gov.uk

Responses will be collated and considered at the Schools Forum meeting on 14th January 2021 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 considered by full BCP Council on 23rd February 2021. Schools Forum will receive a report at the January 2021 meeting detailing the outcome of the agreed mainstream formula for 2021-22 and final schools budget calculations to be sent to the ESFA taking into account the October 2020 census.

NFF Factor Values and total National spend in 2021-22

Factors	Unit Values	Total Funding (including ACA)	Proportion of core total
Basic per pupil Funding		£28,905m	76.5%
AWPU		£28,450m	75.3%
Primary AWPU	£3,123	£14,482m	38.3%
KS3 AWPU	£4,404	£8,236m	21.8%
KS4 AWPU	£4,963	£5,731m	15.2%
Minimum per pupil		£455m	1.2%
Primary Minimum Per Pupil funding	£4,180	£319m	0.8%
Secondary Minimum Per Pupil funding	£5,415	£136m	0.4%
Additional Needs Funding		£6,426m	17.0%
Deprivation		£3,341m	8.8%
Primary FSM	£460	£372m	1.0%
Secondary FSM	£460	£230m	0.6%
Primary FSM6	£575	£613m	1.6%
Secondary FSM6	£840	£712m	1.9%
Primary IDACI A	£620	£97m	0.3%
Primary IDACI B	£475	£145m	0.4%
Primary IDACI C	£445	£133m	0.4%
Primary IDACI D	£410	£117m	0.3%
Primary IDACI E	£260	£139m	0.4%
Primary IDACI F	£215	£108m	0.3%
Secondary IDACI A	£865	£81m	0.2%
Secondary IDACI B	£680	£129m	0.3%
Secondary IDACI C	£630	£120m	0.3%
Secondary IDACI D	£580	£106m	0.3%
Secondary IDACI E	£415	£141m	0.4%
Secondary IDACI F	£310	£99m	0.3%
Low Prior Attainment		£2,613m	6.9%
Primary LPA	£1,095	£1,557m	4.1%
Secondary LPA	£1,660	£1,055m	2.8%
English as an Additional Language		£420m	1.1%
Primary EAL	£550	£311m	0.8%
Secondary EAL	£1,485	£108m	0.3%
Mobility		£52m	0.1%
Primary Mobility	£900	£42m	0.1%
Secondary Mobility	£1,290	£10m	0.0%
School Led Funding		£2,473m	6.5%
Lump Sum		£2,430m	6.4%
Primary lump sum	£117,800	£2,032m	5.4%
Secondary lump sum	£117,800	£398m	1.1%
Sparsity		£42m	0.1%
Primary sparsity	£45,000	£38m	0.1%
Secondary sparsity	£70,000	£4m	0.0%
Premises		£531m	1.4%
Area Cost Adjustment: Multiplier applied to basic per pupil, additional needs and school led funding. (It is already included in the factor subtotals.)		£949m	
Core total (excluding funding floor)		£37,804m	
Protections			
Floor		£581m	
Primary floor funding		£334m	
Secondary floor funding		£247m	
Total		£38,916m	

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NFF applied to BCP schools

Appendix 2

	2020-21 Baseline (includes pay & pension grant)	2020-21 per pupil baseline	21-22 NFF per pupil Budget	Per Pupil change against 2020/21	2021-22 NFF Budget	Formula Type Sch. Classification
BCP TOTAL	216,632,239	4,668	4,843	3.8%	224,761,691	
Queen's Park Infant Academy	1,418,251	3,951	4,201	6.3%	1,508,044	MPPFL
St Clement's and St John's Church of England Infant School	1,284,679	4,812	4,899	1.8%	1,307,939	Floor/MFG
Stourfield Infant School	1,392,624	3,945	4,195	6.3%	1,480,916	MPPFL
Christchurch Infant School	1,425,303	4,015	4,265	6.2%	1,514,096	MPPFL
Mudford Community Infants' School	774,276	4,399	4,582	4.2%	806,516	Formula
Ad Astra Infant School	1,086,617	4,055	4,203	3.7%	1,126,333	MPPFL
Broadstone First School	1,183,854	3,946	4,196	6.3%	1,258,890	MPPFL
Canford Heath Infant School	1,408,855	3,946	4,196	6.3%	1,498,148	MPPFL
Courthill Infant School	1,367,892	3,942	4,192	6.3%	1,454,684	MPPFL
Lilliput Church of England Infant School	1,410,278	3,950	4,200	6.3%	1,499,571	MPPFL
Merley First School	1,192,865	3,950	4,200	6.3%	1,268,402	MPPFL
Old Town Infant School and Nursery	732,795	4,918	5,075	3.2%	756,102	Formula
Springdale First School	1,168,083	3,946	4,196	6.3%	1,242,118	MPPFL
Stanley Green Infant Academy	910,752	4,030	4,198	4.2%	948,699	MPPFL
Livingstone Road Infant School	1,023,334	4,449	4,549	2.2%	1,046,300	Formula
Twin Sails Infant and Nursery School	1,271,936	3,962	4,213	6.3%	1,352,225	MPPFL
Infant/ First Total	19,052,396	4,086	4,304	5.3%	20,068,982	
Christ The King Catholic Primary School	1,588,560	4,645	4,731	1.8%	1,617,864	Floor/MFG
Corpus Christi Catholic Primary School	1,734,798	4,072	4,197	3.1%	1,788,104	MPPFL
Elm Academy	2,075,243	5,049	5,144	1.9%	2,114,290	Floor/MFG
Heathlands Primary Academy	1,091,063	5,742	5,844	1.8%	1,110,411	Floor/MFG
Hill View Primary School	2,555,778	3,944	4,194	6.3%	2,717,856	MPPFL
Jewell Academy Bournemouth	1,922,370	4,747	4,835	1.9%	1,958,308	Floor/MFG
Kings Park Academy	2,798,471	4,379	4,463	1.9%	2,851,919	Floor/MFG
Kingsleigh Primary School	3,188,489	4,141	4,228	2.1%	3,255,638	Formula
Kinson Academy	1,082,831	4,588	4,669	1.8%	1,101,995	Floor/MFG
Malmesbury Park Primary School	2,454,082	3,997	4,198	5.0%	2,577,374	MPPFL
Moordown St John's Church of England Primary School	1,653,788	3,947	4,197	6.3%	1,758,588	MPPFL
Muscliff Primary School	2,444,696	3,956	4,206	6.3%	2,599,270	MPPFL
Pokesdown Community Primary School	1,660,386	4,040	4,202	4.0%	1,726,940	MPPFL
St James' Church of England Primary Academy	1,640,769	3,944	4,194	6.3%	1,744,819	MPPFL
St Katharine's Church of England Primary School	1,973,593	3,947	4,197	6.3%	2,098,653	MPPFL
St Luke's Church of England Primary School	1,767,505	4,101	4,351	6.1%	1,875,307	MPPFL
St Mark's Church of England Primary School	1,638,836	3,949	4,199	6.3%	1,742,636	MPPFL
St Michael's Church of England Primary School	2,618,070	3,991	4,195	5.1%	2,752,013	MPPFL
St Walburga's Catholic Primary School	1,774,385	3,943	4,193	6.3%	1,886,939	MPPFL
The Epiphany Church of England Primary School	1,666,639	3,949	4,200	6.3%	1,772,190	MPPFL
Winton Primary School	3,262,680	3,993	4,198	5.1%	3,429,823	MPPFL
Burton Church of England Primary School	1,335,253	4,096	4,262	4.0%	1,389,320	MPPFL
Highcliffe St Mark Primary School	2,543,851	3,944	4,194	6.3%	2,704,809	MPPFL
Somerford Primary School	1,273,534	4,598	4,762	3.6%	1,319,097	Formula
St Joseph's Catholic Primary School, Christchurch	919,125	4,255	4,415	3.8%	953,603	Formula
The Priory Church of England Primary School	842,518	3,974	4,195	5.6%	889,412	MPPFL
Twynham Primary School	870,177	4,047	4,273	5.6%	918,746	MPPFL
Bayside Academy	1,395,255	4,746	4,902	3.3%	1,441,103	Formula
Bearwood Primary and Nursery School	822,574	4,240	4,352	2.6%	844,219	Formula

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Bishop Aldhelm's Church of England Voluntary Aided Primary School	2,362,254	3,950	4,200	6.3%	2,511,826	MPPFL
Heatherlands Primary School	2,446,098	3,945	4,195	6.3%	2,601,173	MPPFL
Hillbourne Primary School	1,069,057	4,293	4,403	2.5%	1,096,235	Formula
Longfleet Church of England Primary School	2,483,773	3,949	4,199	6.3%	2,641,098	MPPFL
Manorside Academy	1,533,420	4,458	4,540	1.8%	1,561,613	Floor/MFG
St Joseph's Catholic Primary School, Poole	1,629,861	4,190	4,290	2.4%	1,668,845	Formula
St Mary's Catholic Primary School, Poole	1,521,708	3,952	4,203	6.3%	1,618,004	MPPFL
Talbot Primary School	2,344,941	4,180	4,288	2.6%	2,405,385	Formula
Primary Total	67,986,429	4,148	4,335	4.5%	71,045,425	
Bethany Church of England Junior School	1,630,646	4,568	4,686	2.6%	1,672,921	Formula
Queen's Park Academy	2,007,745	3,952	4,202	6.3%	2,134,806	MPPFL
Stourfield Junior School	1,895,763	3,950	4,200	6.3%	2,015,821	MPPFL
Christchurch Junior School	1,994,195	3,972	4,223	6.3%	2,119,755	MPPFL
Mudford Junior School	1,073,694	4,067	4,255	4.6%	1,123,234	MPPFL
Baden-Powell and St Peter's Church of England Junior School	2,878,342	3,948	4,198	6.3%	3,060,680	MPPFL
Livingstone Road Junior School	1,117,529	4,580	4,684	2.3%	1,142,830	Formula
Canford Heath Junior School	1,869,825	3,961	4,197	6.0%	1,981,101	MPPFL
Hamworthy Park Junior School	1,896,540	4,079	4,236	3.9%	1,969,798	Formula
Haymoor Junior School	1,444,631	4,081	4,206	3.1%	1,488,936	MPPFL
Oakdale Junior School	2,065,581	3,972	4,206	5.9%	2,186,928	MPPFL
Ocean Academy Poole	1,434,468	4,064	4,203	3.4%	1,483,732	MPPFL
Junior Total	21,308,959	4,060	4,265	5.0%	22,380,540	
Bournemouth School	4,155,202	5,314	5,464	2.8%	4,272,674	MPPFL
Bournemouth School for Girls	4,653,965	5,301	5,451	2.8%	4,785,858	MPPFL
Glenmoor Academy	4,620,718	5,317	5,471	2.9%	4,753,886	Formula
Avonbourne Boys Academy	2,921,451	5,926	6,084	2.7%	2,999,543	Formula
LeAF Studio	1,409,596	5,973	6,134	2.7%	1,447,700	Formula
Oak Academy	2,628,557	6,349	6,501	2.4%	2,691,576	Formula
The Bishop of Winchester Academy	5,686,143	5,515	5,668	2.8%	5,843,646	Formula
The Bourne Academy	5,013,804	5,837	5,985	2.5%	5,141,248	Formula
Winton Academy	4,927,392	5,298	5,456	3.0%	5,074,296	Formula
Highcliffe School	6,484,940	5,294	5,444	2.8%	6,668,959	MPPFL
The Grange School	2,315,868	6,259	6,485	3.6%	2,399,374	Formula
Twynham School	7,094,882	5,291	5,441	2.8%	7,296,327	MPPFL
Broadstone Middle School	2,332,471	4,520	4,724	4.5%	2,437,627	MPPFL
Carter Community School	2,563,699	6,330	6,450	1.9%	2,612,388	Floor/MFG
Corfe Hills School	3,544,406	5,461	5,613	2.8%	3,642,652	Formula
Magna Academy	4,709,488	5,483	5,590	2.0%	4,801,395	Formula
Parkstone Grammar School	4,837,319	5,304	5,454	2.8%	4,974,320	MPPFL
Poole Grammar School	4,767,085	5,303	5,453	2.8%	4,902,133	MPPFL
Poole High School	8,791,356	5,417	5,569	2.8%	9,037,872	Formula
St Aldhelm's Academy	3,612,015	6,326	6,447	1.9%	3,681,472	Floor/MFG
St Edward's Roman Catholic/Church of England School, Poole	4,746,332	5,345	5,488	2.7%	4,873,773	Formula
Middle/ Secondary Total	91,816,689	5,482	5,632	2.7%	94,338,719	
Avonbourne Girls Academy	6,362,906	4,811	4,945	2.8%	6,540,159	Formula
St Peter's Catholic Comprehensive School	7,879,243	4,931	5,074	2.9%	8,108,295	Formula
Parkfield School	2,225,618	5,058	5,181	2.4%	2,279,571	Formula
All- through Total	16,467,766	4,900	5,037	2.8%	16,928,025	
<i>Phase Summaries</i>						
Infant/ First Total	19,052,396	4,086	4,304	5.34%	20,068,982	
Junior Total	21,308,959	4,060	4,265	5.03%	22,380,540	
Primary Total	67,986,429	4,148	4,335	4.50%	71,045,425	
PRIMARY PHASE	108,347,785	4,120	4,315	4.75%	113,494,947	
Middle/ Secondary Total	91,816,689	5,482	5,632	2.75%	94,338,719	
All- through Total	16,467,766	4,900	5,037	2.79%	16,928,025	
SECONDARY TOTAL	108,284,455	5,384	5,533	2.75%	111,266,744	
Count of schools by type	Formula	MPPFL				
Infant/ First Total	3	12				
Junior Total	3	9				
Primary Total	8	22				
PRIMARY PHASE	14	43				
Primary %	22%	66%				
Middle/ Secondary Total	12	7				
All- through Total	3	-				
SECONDARY TOTAL	15	7				
Secondary %	63%	29%				

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School Level Impact of Transfer Option 2a - MFG & formula contribute

Appendix 3

	2020-21 Baseline (includes pay & pension grant)	2020-21 per pupil baseline	21-22 per pupil Budget	Per Pupil change against 2020/21	2021-22 Budget	Formula Type Sch. Classification
BCP TOTAL	216,632,239	4,668	4,819	3.2%	223,658,469	
Queen's Park Infant Academy	1,418,251	3,951	4,201	6.3%	1,508,044	MPPFL
St Clement's and St John's Church of England Infant School	1,284,679	4,812	4,855	0.9%	1,296,309	Floor/MFG
Stourfield Infant School	1,392,624	3,945	4,195	6.3%	1,480,916	MPPFL
Christchurch Infant School	1,425,303	4,015	4,265	6.2%	1,514,096	MPPFL
Mudford Community Infants' School	774,276	4,399	4,533	3.0%	797,722	Formula
Ad Astra Infant School	1,086,617	4,055	4,203	3.7%	1,126,333	MPPFL
Broadstone First School	1,183,854	3,946	4,196	6.3%	1,258,890	MPPFL
Canford Heath Infant School	1,408,855	3,946	4,196	6.3%	1,498,148	MPPFL
Courthill Infant School	1,367,892	3,942	4,192	6.3%	1,454,684	MPPFL
Lilliput Church of England Infant School	1,410,278	3,950	4,200	6.3%	1,499,571	MPPFL
Merley First School	1,192,865	3,950	4,200	6.3%	1,268,402	MPPFL
Old Town Infant School and Nursery	732,795	4,918	5,025	2.2%	748,657	Formula
Springdale First School	1,168,083	3,946	4,196	6.3%	1,242,118	MPPFL
Stanley Green Infant Academy	910,752	4,030	4,198	4.2%	948,699	MPPFL
Livingstone Road Infant School	1,023,334	4,449	4,499	1.1%	1,034,808	Formula
Twin Sails Infant and Nursery School	1,271,936	3,962	4,213	6.3%	1,352,225	MPPFL
Infant/ First Total	19,052,396	4,086	4,295	5.1%	20,029,620	
Christ The King Catholic Primary School	1,588,560	4,645	4,688	0.9%	1,603,212	Floor/MFG
Corpus Christi Catholic Primary School	1,734,798	4,072	4,197	3.1%	1,788,104	MPPFL
Elm Academy	2,075,243	5,049	5,097	0.9%	2,094,766	Floor/MFG
Heathlands Primary Academy	1,091,063	5,742	5,793	0.9%	1,100,737	Floor/MFG
Hill View Primary School	2,555,778	3,944	4,194	6.3%	2,717,856	MPPFL
Jewell Academy Bournemouth	1,922,370	4,747	4,791	0.9%	1,940,339	Floor/MFG
Kings Park Academy	2,798,471	4,379	4,421	1.0%	2,825,195	Floor/MFG
Kingsleigh Primary School	3,188,489	4,141	4,204	1.5%	3,237,308	MPPFL
Kinson Academy	1,082,831	4,588	4,629	0.9%	1,092,413	Floor/MFG
Malmesbury Park Primary School	2,454,082	3,997	4,198	5.0%	2,577,374	MPPFL
Moordown St John's Church of England Primary School	1,653,788	3,947	4,197	6.3%	1,758,588	MPPFL
Muscliff Primary School	2,444,696	3,956	4,206	6.3%	2,599,270	MPPFL
Pokesdown Community Primary School	1,660,386	4,040	4,202	4.0%	1,726,940	MPPFL
St James' Church of England Primary Academy	1,640,769	3,944	4,194	6.3%	1,744,819	MPPFL
St Katharine's Church of England Primary School	1,973,593	3,947	4,197	6.3%	2,098,653	MPPFL
St Luke's Church of England Primary School	1,767,505	4,101	4,351	6.1%	1,875,307	MPPFL
St Mark's Church of England Primary School	1,638,836	3,949	4,199	6.3%	1,742,636	MPPFL
St Michael's Church of England Primary School	2,618,070	3,991	4,195	5.1%	2,752,013	MPPFL
St Walburga's Catholic Primary School	1,774,385	3,943	4,193	6.3%	1,886,939	MPPFL
The Epiphany Church of England Primary School	1,666,639	3,949	4,200	6.3%	1,772,190	MPPFL
Winton Primary School	3,262,680	3,993	4,198	5.1%	3,429,823	MPPFL
Burton Church of England Primary School	1,335,253	4,096	4,262	4.0%	1,389,320	MPPFL
Highcliffe St Mark Primary School	2,543,851	3,944	4,194	6.3%	2,704,809	MPPFL
Somerford Primary School	1,273,534	4,598	4,712	2.5%	1,305,256	Formula
St Joseph's Catholic Primary School, Christchurch	919,125	4,255	4,365	2.6%	942,810	Formula
The Priory Church of England Primary School	842,518	3,974	4,195	5.6%	889,412	MPPFL
Twynham Primary School	870,177	4,047	4,273	5.6%	918,746	MPPFL
Bayside Academy	1,395,255	4,746	4,852	2.2%	1,426,413	Formula
Bearwood Primary and Nursery School	822,574	4,240	4,302	1.5%	834,525	Formula

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Bishop Aldhelm's Church of England Voluntary Aided Primary School	2,362,254	3,950	4,200	6.3%	2,511,826	MPPFL
Heatherlands Primary School	2,446,098	3,945	4,195	6.3%	2,601,173	MPPFL
Hillbourne Primary School	1,069,057	4,293	4,353	1.4%	1,083,793	Formula
Longfleet Church of England Primary School	2,483,773	3,949	4,199	6.3%	2,641,098	MPPFL
Manorside Academy	1,533,420	4,458	4,499	0.9%	1,547,516	Floor/MFG
St Joseph's Catholic Primary School, Poole	1,629,861	4,190	4,240	1.2%	1,649,408	Formula
St Mary's Catholic Primary School, Poole	1,521,708	3,952	4,203	6.3%	1,618,004	MPPFL
Talbot Primary School	2,344,941	4,180	4,238	1.4%	2,377,353	Formula
Primary Total	67,986,429	4,148	4,320	4.1%	70,805,944	
Bethany Church of England Junior School	1,630,646	4,568	4,636	1.5%	1,655,082	Formula
Queen's Park Academy	2,007,745	3,952	4,202	6.3%	2,134,806	MPPFL
Stourfield Junior School	1,895,763	3,950	4,200	6.3%	2,015,821	MPPFL
Christchurch Junior School	1,994,195	3,972	4,223	6.3%	2,119,755	MPPFL
Mudford Junior School	1,073,694	4,067	4,255	4.6%	1,123,234	MPPFL
Baden-Powell and St Peter's Church of England Junior School	2,878,342	3,948	4,198	6.3%	3,060,680	MPPFL
Livingstone Road Junior School	1,117,529	4,580	4,634	1.2%	1,130,637	Formula
Canford Heath Junior School	1,869,825	3,961	4,197	6.0%	1,981,101	MPPFL
Hamworthy Park Junior School	1,896,540	4,079	4,195	2.9%	1,950,611	MPPFL
Haymoor Junior School	1,444,631	4,081	4,206	3.1%	1,488,936	MPPFL
Oakdale Junior School	2,065,581	3,972	4,206	5.9%	2,186,928	MPPFL
Ocean Academy Poole	1,434,468	4,064	4,203	3.4%	1,483,732	MPPFL
Junior Total	21,308,959	4,060	4,255	4.8%	22,331,323	
Bournemouth School	4,155,202	5,314	5,464	2.8%	4,272,674	MPPFL
Bournemouth School for Girls	4,653,965	5,301	5,451	2.8%	4,785,858	MPPFL
Glenmoor Academy	4,620,718	5,317	5,435	2.2%	4,723,043	MPPFL
Avonbourne Boys Academy	2,921,451	5,926	6,011	1.4%	2,963,570	Formula
LeAF Studio	1,409,596	5,973	6,058	1.4%	1,429,684	Formula
Oak Academy	2,628,557	6,349	6,427	1.2%	2,660,973	Formula
The Bishop of Winchester Academy	5,686,143	5,515	5,594	1.4%	5,767,456	Formula
The Bourne Academy	5,013,804	5,837	5,911	1.3%	5,077,732	Formula
Winton Academy	4,927,392	5,298	5,444	2.7%	5,062,492	MPPFL
Highcliffe School	6,484,940	5,294	5,444	2.8%	6,668,959	MPPFL
The Grange School	2,315,868	6,259	6,410	2.4%	2,371,845	Formula
Twynham School	7,094,882	5,291	5,441	2.8%	7,296,327	MPPFL
Broadstone Middle School	2,332,471	4,520	4,724	4.5%	2,437,627	MPPFL
Carter Community School	2,563,699	6,330	6,390	0.9%	2,588,043	Floor/MFG
Corfe Hills School	3,544,406	5,461	5,606	2.6%	3,638,236	MPPFL
Magna Academy	4,709,488	5,483	5,536	1.0%	4,755,103	Floor/MFG
Parkstone Grammar School	4,837,319	5,304	5,454	2.8%	4,974,320	MPPFL
Poole Grammar School	4,767,085	5,303	5,453	2.8%	4,902,133	MPPFL
Poole High School	8,791,356	5,417	5,495	1.4%	8,917,999	Formula
St Aldhelm's Academy	3,612,015	6,326	6,387	1.0%	3,646,744	Floor/MFG
St Edward's Roman Catholic/Church of England School, Poole	4,746,332	5,345	5,454	2.0%	4,842,820	MPPFL
Middle/ Secondary Total	91,816,689	5,482	5,599	2.1%	93,783,637	
Avonbourne Girls Academy	6,362,906	4,811	4,881	1.5%	6,455,346	Formula
St Peter's Catholic Comprehensive School	7,879,243	4,931	5,006	1.5%	7,999,521	Formula
Parkfield School	2,225,618	5,058	5,121	1.2%	2,253,078	Formula
All- through Total	16,467,766	4,900	4,972	1.5%	16,707,945	
<i>Phase Summaries</i>						
Infant/ First Total	19,052,396	4,086	4,295	5.13%	20,029,620	
Junior Total	21,308,959	4,060	4,255	4.80%	22,331,323	
Primary Total	67,986,429	4,148	4,320	4.15%	70,805,944	
PRIMARY PHASE	108,347,785	4,120	4,303	4.45%	113,166,887	
Middle/ Secondary Total	91,816,689	5,482	5,599	2.14%	93,783,637	
All- through Total	16,467,766	4,900	4,972	1.46%	16,707,945	
SECONDARY TOTAL	108,284,455	5,384	5,494	2.04%	110,491,582	

School Level Impact of Transfer Option 2b – all schools contribute

	2020-21 Baseline (includes pay & pension grants)	2020-21 per pupil baseline	21-22 per pupil Budget	Per Pupil change against 2020/21	2021-22 Budget	Formula Type Sch. Classificati on
BCP TOTAL	216,632,239	4,668	4,819	3.24%	223,652,297	
Queen's Park Infant Academy	1,418,251	3,951	4,181	5.8%	1,500,864	MPPFL
St Clement's and St John's Church of England Infant School	1,284,679	4,812	4,873	1.3%	1,300,961	Floor/MFG
Stourfield Infant School	1,392,624	3,945	4,175	5.8%	1,473,856	MPPFL
Christchurch Infant School	1,425,303	4,015	4,245	5.7%	1,506,996	MPPFL
Mudford Community Infants' School	774,276	4,399	4,561	3.7%	802,668	Formula
Ad Astra Infant School	1,086,617	4,055	4,183	3.2%	1,120,973	MPPFL
Broadstone First School	1,183,854	3,946	4,176	5.8%	1,252,890	MPPFL
Canford Heath Infant School	1,408,855	3,946	4,176	5.8%	1,491,008	MPPFL
Courthill Infant School	1,367,892	3,942	4,172	5.8%	1,447,744	MPPFL
Lilliput Church of England Infant School	1,410,278	3,950	4,180	5.8%	1,492,431	MPPFL
Merley First School	1,192,865	3,950	4,180	5.8%	1,262,362	MPPFL
Old Town Infant School and Nursery	732,795	4,918	5,053	2.7%	752,844	Formula
Springdale First School	1,168,083	3,946	4,176	5.8%	1,236,198	MPPFL
Stanley Green Infant Academy	910,752	4,030	4,178	3.7%	944,179	MPPFL
Livingstone Road Infant School	1,023,334	4,449	4,527	1.8%	1,041,272	Formula
Twin Sails Infant and Nursery School	1,271,936	3,962	4,193	5.8%	1,345,805	MPPFL
Infant/ First Total	19,052,396	4,086	4,283	4.8%	19,973,051	
Christ The King Catholic Primary School	1,588,560	4,645	4,705	1.3%	1,609,073	Floor/MFG
Corpus Christi Catholic Primary School	1,734,798	4,072	4,177	2.6%	1,779,584	MPPFL
Elm Academy	2,075,243	5,049	5,116	1.3%	2,102,576	Floor/MFG
Heathlands Primary Academy	1,091,063	5,742	5,814	1.2%	1,104,607	Floor/MFG
Hill View Primary School	2,555,778	3,944	4,174	5.8%	2,704,896	MPPFL
Jewell Academy Bournemouth	1,922,370	4,747	4,809	1.3%	1,947,527	Floor/MFG
Kings Park Academy	2,798,471	4,379	4,438	1.3%	2,835,884	Floor/MFG
Kingsleigh Primary School	3,188,489	4,141	4,206	1.6%	3,238,805	Formula
Kinson Academy	1,082,831	4,588	4,645	1.2%	1,096,246	Floor/MFG
Malmesbury Park Primary School	2,454,082	3,997	4,178	4.5%	2,565,094	MPPFL
Moordown St John's Church of England Primary School	1,653,788	3,947	4,177	5.8%	1,750,208	MPPFL
Muscliff Primary School	2,444,696	3,956	4,186	5.8%	2,586,910	MPPFL
Pokesdown Community Primary School	1,660,386	4,040	4,182	3.5%	1,718,720	MPPFL
St James' Church of England Primary Academy	1,640,769	3,944	4,174	5.8%	1,736,499	MPPFL
St Katharine's Church of England Primary School	1,973,593	3,947	4,177	5.8%	2,088,653	MPPFL
St Luke's Church of England Primary School	1,767,505	4,101	4,331	5.6%	1,866,687	MPPFL
St Mark's Church of England Primary School	1,638,836	3,949	4,179	5.8%	1,734,336	MPPFL
St Michael's Church of England Primary School	2,618,070	3,991	4,175	4.6%	2,738,893	MPPFL
St Walburga's Catholic Primary School	1,774,385	3,943	4,173	5.8%	1,877,939	MPPFL
The Epiphany Church of England Primary School	1,666,639	3,949	4,180	5.8%	1,763,750	MPPFL
Winton Primary School	3,262,680	3,993	4,178	4.6%	3,413,483	MPPFL
Burton Church of England Primary School	1,335,253	4,096	4,242	3.6%	1,382,800	MPPFL
Highcliffe St Mark Primary School	2,543,851	3,944	4,174	5.8%	2,691,909	MPPFL
Somerford Primary School	1,273,534	4,598	4,740	3.1%	1,313,041	Formula
St Joseph's Catholic Primary School, Christchurch	919,125	4,255	4,393	3.2%	948,881	Formula
The Priory Church of England Primary School	842,518	3,974	4,175	5.1%	885,172	MPPFL
Twynham Primary School	870,177	4,047	4,253	5.1%	914,446	MPPFL
Bayside Academy	1,395,255	4,746	4,880	2.8%	1,434,676	Formula
Bearwood Primary and Nursery School	822,574	4,240	4,330	2.1%	839,978	Formula

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Bishop Aldhelm's Church of England Voluntary Aided Primary School	2,362,254	3,950	4,180	5.8%	2,499,866	MPPFL
Heatherlands Primary School	2,446,098	3,945	4,175	5.8%	2,588,773	MPPFL
Hillbourne Primary School	1,069,057	4,293	4,381	2.0%	1,090,792	Formula
Longfleet Church of England Primary School	2,483,773	3,949	4,179	5.8%	2,628,518	MPPFL
Manorside Academy	1,533,420	4,458	4,515	1.3%	1,553,155	Floor/MFG
St Joseph's Catholic Primary School, Poole	1,629,861	4,190	4,268	1.9%	1,660,341	Formula
St Mary's Catholic Primary School, Poole	1,521,708	3,952	4,183	5.8%	1,610,304	MPPFL
Talbot Primary School	2,344,941	4,180	4,266	2.1%	2,393,121	Formula
Primary Total	67,986,429	4,148	4,313	4.0%	70,696,142	
Bethany Church of England Junior School	1,630,646	4,568	4,664	2.1%	1,665,117	Formula
Queen's Park Academy	2,007,745	3,952	4,182	5.8%	2,124,646	MPPFL
Stourfield Junior School	1,895,763	3,950	4,180	5.8%	2,006,221	MPPFL
Christchurch Junior School	1,994,195	3,972	4,203	5.8%	2,109,715	MPPFL
Mudford Junior School	1,073,694	4,067	4,235	4.1%	1,117,954	MPPFL
Baden-Powell and St Peter's Church of England Junior School	2,878,342	3,948	4,178	5.8%	3,046,100	MPPFL
Livingstone Road Junior School	1,117,529	4,580	4,662	1.8%	1,137,496	Formula
Canford Heath Junior School	1,869,825	3,961	4,177	5.4%	1,971,661	MPPFL
Hamworthy Park Junior School	1,896,540	4,079	4,214	3.3%	1,959,632	Formula
Haymoor Junior School	1,444,631	4,081	4,186	2.6%	1,481,856	MPPFL
Oakdale Junior School	2,065,581	3,972	4,186	5.4%	2,176,528	MPPFL
Ocean Academy Poole	1,434,468	4,064	4,183	2.9%	1,476,672	MPPFL
Junior Total	21,308,959	4,060	4,244	4.5%	22,273,597	
Bournemouth School	4,155,202	5,314	5,444	2.5%	4,257,034	MPPFL
Bournemouth School for Girls	4,653,965	5,301	5,431	2.5%	4,768,298	MPPFL
Glenmoor Academy	4,620,718	5,317	5,438	2.3%	4,725,868	Formula
Avonbourne Boys Academy	2,921,451	5,926	6,052	2.1%	2,983,804	Formula
LeAF Studio	1,409,596	5,973	6,101	2.1%	1,439,818	Formula
Oak Academy	2,628,557	6,349	6,469	1.9%	2,678,187	Formula
The Bishop of Winchester Academy	5,686,143	5,515	5,636	2.2%	5,810,313	Formula
The Bourne Academy	5,013,804	5,837	5,953	2.0%	5,113,459	Formula
Winton Academy	4,927,392	5,298	5,424	2.4%	5,044,350	Formula
Highcliffe School	6,484,940	5,294	5,424	2.5%	6,644,459	MPPFL
The Grange School	2,315,868	6,259	6,452	3.1%	2,387,330	Formula
Twynham School	7,094,882	5,291	5,421	2.5%	7,269,507	MPPFL
Broadstone Middle School	2,332,471	4,520	4,704	4.1%	2,427,307	MPPFL
Carter Community School	2,563,699	6,330	6,414	1.3%	2,597,781	Floor/MFG
Corfe Hills School	3,544,406	5,461	5,586	2.3%	3,625,256	MPPFL
Magna Academy	4,709,488	5,483	5,557	1.4%	4,773,646	Formula
Parkstone Grammar School	4,837,319	5,304	5,434	2.5%	4,956,080	MPPFL
Poole Grammar School	4,767,085	5,303	5,433	2.5%	4,884,153	MPPFL
Poole High School	8,791,356	5,417	5,536	2.2%	8,985,428	Formula
St Aldhelm's Academy	3,612,015	6,326	6,411	1.3%	3,660,635	Floor/MFG
St Edward's Roman Catholic/Church of England School, Poole	4,746,332	5,345	5,456	2.1%	4,845,052	Formula
Middle/ Secondary Total	91,816,689	5,482	5,605	2.2%	93,877,766	
Avonbourne Girls Academy	6,362,906	4,811	4,917	2.2%	6,503,053	Formula
St Peter's Catholic Comprehensive School	7,879,243	4,931	5,044	2.3%	8,060,706	Formula
Parkfield School	2,225,618	5,058	5,155	1.9%	2,267,980	Formula
All- through Total	16,467,766	4,900	5,009	2.2%	16,831,740	
Phase Summaries						
Infant/ First Total	19,052,396	4,086	4,283	4.83%	19,973,051	
Junior Total	21,308,959	4,060	4,244	4.53%	22,273,597	
Primary Total	67,986,429	4,148	4,313	3.99%	70,696,142	
PRIMARY PHASE	108,347,785	4,120	4,294	4.24%	112,942,790	
Middle/ Secondary Total	91,816,689	5,482	5,605	2.24%	93,877,766	
All- through Total	16,467,766	4,900	5,009	2.21%	16,831,740	
SECONDARY TOTAL	108,284,455	5,384	5,505	2.24%	110,709,507	
Count of schools by type	Formula	MPPFL				
Infant/ First Total	3	12				
Junior Total	3	9				
Primary Total	8	22				
PRIMARY PHASE	14	43				
Primary %	22%	66%				
Middle/ Secondary Total	11	8				
All- through Total	3	-				
SECONDARY TOTAL	14	8				
Secondary %	58%	33%				

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 2020-21 related to that year only; new decisions will be required for any service to be de-delegated in 2021-22.

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 2021-22.

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)

Appendix 6 – High Needs Demand Profile

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	2019-20	BCP 2020-21 BUDGET			2020-21 YEAR END FORECAST			2021-22 YEAR END FORECAST			2022-23 YEAR END FORECAST		
	FTE	Budget FTE	Cost	Average Top-Up	Forecast FTE	Cost	Average Top-Up	Forecast FTE	Cost	Average Top-Up	Forecast FTE	Cost	Average Top-Up
Total Independent	124.65	148.98	7,275,143	48,834	136.17	6,580,217	48,325	114.17	5,682,585	49,774	119.17	6,109,401	51,268
Total Non-Maintained Special Schools	153.12	158.07	6,005,255	37,990	160.94	6,202,034	38,537	151.94	6,030,856	39,693	154.94	6,334,434	40,884
Total Independent & Non-Maintained	277.77	307.05	13,280,398	43,251	297.10	12,782,251	43,023	266.10	11,713,441	44,018	274.10	12,443,835	45,398
Total Colleges	270.33	353.52	1,742,116	4,928	286.17	1,897,726	6,632	306.17	2,030,357	6,632	316.17	2,096,673	6,632
Specialist colleges								8.00	96,000	12,000			
Total Independent Colleges	33.04	38.83	2,140,959	55,136	37.50	1,989,279	53,047	23.50	1,284,013	54,639	24.50	1,378,811	56,278
Total Post 16	303.37	392.35	3,883,075	9,897	323.67	3,887,005	12,009	337.67	3,410,370	10,100	340.67	3,475,484	10,202
Total Special Schools	726.89	786.57	11,126,015	14,145	799.58	11,647,614	14,567	919.58	14,467,320	15,732	979.58	15,411,268	15,732
Total Mainstream	759.76	897.82	2,761,570	3,076	797.15	2,786,788	3,496	867.15	3,031,504	3,496	902.15	3,153,861	3,496
Total Mainstream Bases	26.00	43.71	699,129	15,994	37.99	562,151	14,797	47.99	710,125	14,797	57.99	858,100	14,797
Total Mainstream and Special Units	785.76	941.53	3,460,699	3,676	835.14	3,348,939	4,010	915.14	3,741,629	4,089	960.14	4,011,961	4,179
Total Medical / Therapies	9.50	11.50	52,754	4,587	6.25	44,369	7,099	6.25	44,369	7,099	6.25	44,369	7,099
Total Bespoke	138.10	143.06	1,911,995	13,365	161.22	3,138,115	19,465	106.22	2,129,554	20,049	106.22	2,193,440	20,651
Total Pre-School	19.21	11.24	203,648	18,123	11.56	82,169	7,107	11.56	82,169	7,107	11.56	82,169	7,107
TOTAL PLACEMENTS	2,260.62	2,593.30	33,918,584	13,079	2,434.52	34,930,461	14,348	2,562.52	35,588,851	13,888	2,678.52	37,662,526	14,061
Total Zero Top-up	126.57	108.92	0	0	146.56	12,000	82	148.56	12,164	82	150.56	12,328	82
BCP LAC - plan agreed by OLA	0.01	0.00	0	#DIV/0!	6.00	221,122	36,854	6.00	221,122	36,854	6.00	221,122	36,854
Awaiting School Placement / New Arrival in Area	5.17	0.00	0	#DIV/0!	0.00	0	#DIV/0!						
TOTAL EHCPs	2,392.36	2,702.22	33,918,584	12,552	2,587.09	35,163,583	13,592	2,717.09	35,822,136	13,184	2,835.09	37,895,975	13,367
In year increase		13.0%			8.1%								
Total Commissioned Services			1,841,000			1,871,000			1,871,000			1,871,000	
0-5 High Needs			612,000			612,000			612,000			612,000	
Prior Year Adjustments			0			-1,216,647			0			0	
PLACES 20-21 SEN			8,901,000			8,925,953			10,125,953			10,725,953	
TOTAL SEN			45,272,584			45,355,889			48,431,089			51,104,928	
Total AP - Medical	56.38	50.00	500,000	10,000	13.85	111,599	8,058	13.85	111,599	8,058	13.85	111,599	8,058
Total AP - PEX	139.42	139.00	1,398,416	10,061	146.47	1,918,083	13,095	93.02	1,218,083	13,095	93.02	852,658	9,167
Total AP - Other	10.50	9.00	200,000	22,222	4.68	45,351	9,690	4.68	45,351	9,690	4.68	45,351	9,690
Pupil Reintegration Programme			0			0			0			0	
Other Grants for HN Expenditure			-50,000			-50,000			-50,000			-50,000	
PEX Charges			-250,000			-179,000			-252,000			-252,000	
Inclusion & Out of School			241,000			241,000			241,000			241,000	
Hospital			128,000			74,415			74,415			74,415	
PLACES 20-21 AP			2,426,000			2,443,424			2,443,424			2,443,424	
TOTAL AP			4,593,416			4,604,873			3,831,873			3,466,448	
TOTAL HNB			49,866,000			49,960,762			52,262,962			54,571,376	
Total Funding Available			43,920,000			44,014,762			48,314,762			51,714,762	
NET			5,946,000			5,946,000			3,948,200			2,856,614	
% of HNB funding spent			114%			114%			108%			106%	

Appendix 7**Proposed 2021-22 growth fund policy**

This proposed policy is a continuation of the 2020-21 agreed policy and would fund the following:

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 only funds requested growth places that are not occupied as per the following October census at 30% of the pro-rated Basic Entitlement rate per unoccupied place.

Permanent Expansions

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

For growth added from September 2020, 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.

Growth added pre-September 2020 is funded at the age relevant Basic Entitlement rate per place, funded for the period Sep -March.

The proposed policy only funds requested growth places that are not occupied as per the following October census at 30% of the pro-rated Basic Entitlement rate per unoccupied place.

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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 2021-22, which is no change from 2020-21.

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 3rd 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.

Forecast explicit growth under the proposal – individual school level

School Name	Description	2020-21 Budget	2020-21 Forecast	2021-22 Forecast	2022-23 Forecast	2023-24 Forecast
		£	£	£	£	£
Avonbourne (Primary)	All through expansion from Sep 14	24,818	24,818	6,250	-	-
St Peters	All through expansion from Sep 14	24,818	24,818	6,250	-	-
Avonbourne (Secondary)	Increase 2FE Y7 from Sep 2019	138,320	138,320	-	-	-
Harewood	Increase 1FE Y7 from Sep 2019	69,160	69,160	-	-	-
Bournemouth School	Increase 1FE Y7 from Sep 2019	69,160	69,160	77,070	77,070	77,070
BSG	Increase 0.5FE Y7 from Sep 2019	32,275	32,275	35,966	35,966	35,966
Carter	Increase 2FE Y7 from Sep 2019	138,320	138,320	154,140	154,140	154,140
Highcliffe St. Marks	Set Up for 1FE expansion YrR Sep 2014	2,800	-	-	-	-
Year 7 Bulges	^4FE* (schools not yet confirmed)	-	-	-	308,280	308,280
Total		499,671	496,871	279,676	587,956	587,956

CONTINGENCY: Additional costs should Livingstone Academy year 7 not be delivered for Sep 2021 (risk is very low), but delivered for Sep 2022.

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Year 7 Bulges	5FE* (schools to be confirmed if required)	-	-	385,350	-	-
Total if contingency used		499,671	496,871	665,026	587,956	587,956

Note:

- I. The forecasts are only estimates, since where growth does not materialise only 30% of the rate for each of those 'unoccupied' places is paid, based on the applicable Autumn census count.
- II. The actual 2020-21 payments will be confirmed once the Autumn 2020 census count is known. The estimate provides a maximum for the actual payments, which cannot exceed this.
- iii. The projected growth funding assumes that Livingstone Academy provides 5FE into year 7 from September 2021, and is not eligible for any Schools Block growth funding as places have not been created at the request of the LA
- iv. ^+4 additional FE required each year for Sep 2022 and Sep 2023 under the highest take-up scenario. The low- take up scenario will require an additional 2FE in each of these years.
- v. In addition to the explicit growth included in the table above, Livingstone Academy will cost implicit growth approximately £503k in 2021-22, and then approximately £600k in 2022-23 onwards for the next 4 years up to and including 2025-26 whilst the school fills its secondary phase; implicit growth will continue for another 3 years to 2028-29 for just the primary phase growing year groups.

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 2a

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 2b

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 3

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 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

Considering Appendix 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 8

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 2022-23, and that you would support such a transfer?

If No, please provide further details

Question 9

Do you support the growth fund proposal as set out in section 9?

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

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

Question 12

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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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 April 2021 – March 2022

Monday 23 November 2020

Consultation closes 23:59 on Monday 14 December 2020

1. Introduction

This document outlines the proposed funding formula for the free early entitlement for 2, 3 and 4 year olds, for April 2021 – March 2022. It also includes arrangements to funding for children requiring extra support.

The government have yet to announce the 2021/22 Early Years National Funding Formula to be paid by the Department for Education (DfE) to the local authority (anticipated early December). For the purposes of this consultation we will use the 2020/21 rates, with the understanding that any additional pence per hour paid to the LA, above the current £4.38 (3 and 4 year olds) and £5.31 (2 year olds), will go straight to the base rate per age category.

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.

As we've yet to receive notification of the governments funding rate this consultation will work from £4.38 per hour for 3 and 4 year olds and £5.31 per hour for 2 year olds.

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 2020/21 the local authority allocated 16p of this funding rate for central functions, leaving £5.15 available for the funding rate for providers and any contribution to a 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 2020/21 retention as a baseline, and then apply similar changes to the Base Rate as per those applied to 3 and 4 year old funding.

Funding for 3 and 4 year olds

The operational guidance (2020/21) places requirements on local authorities, some of which are below:

- A minimum amount of 95% funding to be passed through to providers.
- 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 a 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 can retain up to 5% of 3 and 4 year old funding for central functions supporting the early entitlement. The amount retained for central functions in 2020-21 was 2p per hour (< 0.5% of a potential 5%) of the £4.38 funding rate, leaving £4.36 for distribution to providers.

3. Current Funding Rates in 2020-21

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

Table 1: Current government and provider Hourly Funding Rates across BCP

<u>3 and 4 Year Olds</u>	Government rate	Provider Rate	
	£4.38		
Base Rate	£4.08	£4.12	Every child
Deprivation Supplement	£0.13	£0.53	Per eligible child*
SEN/D Inclusion Fund	£0.14	£2.00 or £6.30	Per eligible child
Central Functions	£0.02		

<u>2 Year Olds</u>	Government rate	Provider Rate	
	£5.31		
Base Rate	£5.00	£5.08	Every child
SEN/D Inclusion Fund	£0.13	£2.00 or £6.30	Per eligible child
Central Functions	£0.18		

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 and 4 year old.

4. Options for the EYSFF 2021-22

This consultation proposes a single option for 2021-22, for which views are sought from providers. This option is for no change to the existing 2020-21 EYSFF. Subject to the government updating the BCP funding rates for 2021-22, any additional government funding compared with 2020-21 government funding rates to be added to the respective 2, and 3 and 4 year old Base rates. The rationale behind this is that the expected Early Years Foundation Stage Profile (EYFSP) information from Summer 2020 that would have informed any proposed changes to deprivation and SEN Inclusion funding is not available this year, due to the Coronavirus pandemic. The unavailability of sufficient EYFSP data means that no sensible conclusions can be drawn that would support varying either of these elements of the funding formula. Consideration of changes to these elements will be explored as part of establishing the 2022-23 formula when adequate EYFSP data is expected to be available.

To help support consideration for this option the LA have modelled in this section the impact various changes to both the Deprivation Supplement and the SEN Inclusion funding rates, on the EYSFF. It should be noted that any decrease to the 3 and 4 year old Deprivation supplement rate would result in an increase to the Base rate for all 3 and 4 year old children, while any increase to the funding for the SEN Inclusion fund, would in turn decrease the base rate for or all 2 year old children and 3 and 4 year old children.

PROPOSAL – No change to the existing EYSFF as per table 1 above.
Any additional government funding compared with 2020-21 government funding rates to be added to the respective 2, and 3 and 4 year-old Base rates

4.1. Contextual analysis of changes to the Deprivation Supplement

The modelling below shows the impact of a reduction in the Deprivation Supplement per eligible child, linked to an increase in the base rate for all 3 and 4 year olds

The LA has used funding data from all BCP providers September 2019 – August 2020 to model the potential impact of two variations to the Deprivation Supplement to every provider and sector type. Every 4p paid under Deprivation equates to 1p base rate.

Providers are reminded that any changes to Deprivation will impact most on providers that are based in areas of deprivation across BCP. The % impact shown here will vary, particularly for preschools,

- A)** Reduce the existing 53p Deprivation Supplement by 20p (to 33p) and increase the Base Rate by 5p (to £4.17). Under this model the impact on providers is as follows:

Table 2:

	Sum of Hours AY2019/20	Value (inc all weighting)	Dep to 33p Base to £4.17	+ or -	% Impact
Childminder	268,203	£1,146,617	£1,149,549	£2,932	0.3%
Day Nursery	2,221,540	£9,721,488	£9,733,690	£12,203	0.1%
Independent	100,908	£419,149	£422,908	£3,759	0.9%
Pre-School	1,161,971	£5,227,191	£5,209,051	-£18,139	-0.3%
School Nursery	273,215	£1,176,447	£1,178,708	£2,261	0.2%
Grand Total	4,025,836	£17,690,892	£17,693,907	£3,015	0.0%

B) Reduce the existing 53p Deprivation Supplement by 32p (to 21p) and increase the Base Rate by 8p (£4.20). Under this model the impact on providers is as follows:

Table 3:

	Sum of Hours AY2019/20	Value (inc all weighting)	Dep to 21p Base to £4.20	+ or -	% Impact
Childminder	268,203	£1,146,617	£1,151,308	£4,692	0.4%
Day Nursery	2,221,540	£9,721,488	£9,741,012	£19,524	0.2%
Independent	100,908	£419,149	£425,163	£6,014	1.4%
Pre-School	1,161,971	£5,227,191	£5,198,168	-£29,023	-0.6%
School Nursery	273,215	£1,176,447	£1,180,065	£3,617	0.3%
Grand Total	4,025,836	£17,690,892	£17,695,716	£4,824	0.0%

For both options above the following numbers of providers in the sector are affected (per our modelling of hours funded in AY 2019/21), showing the number of providers that see an increase, or a decrease in their funded income, along with the peak ranges of change per sector.

Table 4:

	Increase	Decrease	Range Dep @ 33p	Range Dep @ 21p
Childminder	117	35	1.2% to -3.2%	1.9% to -5.2%
Day Nursery	43	31	1.2% to -1.7%	1.9% to -2.7%
Independent	6	0	1.2% to 0.4%	1.9% to 0.7%
Pre-School	23	42	1.2% to -2.0%	1.9% to -3.2%
School Nursery	8	4	1.2% to -1.8%	1.9% to -2.9%
Grand Total	197	112	1.2% to -3.2%	1.9% to -5.2%

The impact of any change to the Deprivation Supplement will be felt by those providers, in the main, based in areas of deprivation in BCP. The LA maintains that any increase in government funding pence per hour for 2021/22 will already go straight to the base rate and does not recommend a change to the deprivation supplement.

4.1. Contextual analysis of changes to the SEN Inclusion fund rates

Our providers that support SEN children and receive Tier 1 (£2) and Tier 2 (£6.30) funding call for an increase in these Tier rates. Any increase to these rates would be funded through a decrease to the base rate.

Table 5 shows the modelled impact of reducing both the 2 and 3 and 4 year old base rates by 1p in order to fund a 7% increase in both the SEN Inclusion tier 1 and tier 2 rates, increasing them to £2.14 and £6.74 per eligible hour respectively.

Table 6 shows the modelled impact of reducing both the 2 and 3 and 4 year old base rates by 3p (table 4), in order to fund a 21% increase in both the SEN Inclusion tier 1 and tier 2 rates, increasing them to £2.42 and £7.62 per eligible hour respectively.

A summary of the impact on individual providers under both formula adjustments is shown in table 7. **Please note tables 5 to 7 include both 2, and 3 and 4 year old hours and funding.**

Table 5: increase in SEN funding rates by 10% - impact on total funding

Base Rates	2.y.o: £	5.07	3&4.y.o.: £	4.11	
	Sum of Hours AY2019/20	Value (inc all weighting)	Increase SEN Tiers by 10%	+ or -	% Impact
Childminder	297,719	1,299,944	1,298,174	£1,770	-0.1%
Day Nursery	2,465,650	10,993,682	10,992,745	£937	0.0%
Independent	100,908	419,149	418,140	£1,009	-0.2%
Pre-School	1,340,285	6,157,334	6,162,281	£4,948	0.1%
School Nursery	274,525	1,183,103	1,181,800	£1,304	-0.1%
Grand Total	4,479,086	20,053,213	£20,053,140	£73	0.0%

Table 6: increase in SEN funding rates by 21% - impact on total funding

Base Rates	2.y.o: £	5.05	3&4.y.o.: £	4.09	
	Sum of Hours AY2019/20	Value (inc all weighting)	Increase SEN Tiers by 20%	+ or -	% Impact
Childminder	297,719	1,299,944	1,294,633	£5,311	-0.4%
Day Nursery	2,465,650	10,993,682	10,990,870	£2,812	0.0%
Independent	100,908	419,149	416,122	£3,027	-0.7%
Pre-School	1,340,285	6,157,334	6,172,177	£14,843	0.2%
School Nursery	274,525	1,183,103	1,179,192	£3,911	-0.3%
Grand Total	4,479,086	20,053,213	£20,052,994	£220	0.0%

Table 7: Range of funding impact on providers by provider type

	Increase	Decrease	Range SEN + 7%	Range SEN + 21%
Childminder	6	146	3% to -0.8%	9% to -2.3%
Day Nursery	19	55	1.5% to -0.3%	4.5% to -0.9%
Independent	0	6	-0.2% to -0.2%	-0.7% to -0.7%
Pre-School	30	35	1.7% to -0.3%	5% to -0.8%
School Nursery	3	9	0.1% to -0.2%	0.2% to -0.7%
Grand Total	58	251	3% to -0.8%	9% to -2.3%

Please follow [this link](#) to make your contribution to this consultation. The questions asked online are referenced below.

QUESTION 1

Do you agree that any additional pence per hour announced by government for 2021/22 should go straight to the base rate of 2 year olds and 3 and 4 year olds?
(If not, please let us know why and what you would prioritise)

- ☐ Yes
☐ No

If no, please provide details below:

QUESTION 2

Do you support the proposal to make no changes from 2020-21 to the EYSFF for 2021-22?

- ☐ Yes
☐ No

If applicable, please provide more details below:

QUESTION 3

Please use this section to provide any additional comments you wish to make.

Responses to the consultation can be made online via the survey link provided. If you wish to [contribute to this consultation](#) you should complete the online form **by midnight Monday 14 December 2020**.

5. Next Steps

We will review the outcome of this consultation with provider representatives of the BCP Early Years Funding Group in early January and develop final proposals to be considered by BCP's Schools Forum on 14 January. This body will then make a recommendation to the Council. The final decision will be made by the BCP Council in February 2021

6. Timeline

23 November	Consultation papers emailed to the sector
2 December 11:00am	Online consultation event am – MS Teams invites to be provided separately
2 December 6:30pm	Online consultation event pm - MS Teams invites to be provided separately
14 December	Consultation closes
14 January 2021	Consultation outcome discussed at Schools Forum
23 February 2021	Council Members decide EYSFF
1 April 2021	Changes are implemented

If you would like to discuss any of this information there is an opportunity for you to attend an informal consultation online briefing for which details will be provided separately. Every provider is welcome to attend any briefing with*:

- Jack Cutler, Interim School and Early Years Funding and Sufficiency Team Manager
- Steve Ellis, Management Accountant - Children
- Iwona Onik, Early Years Funding Team Manager
- Darren Buckley, Senior Childcare Sufficiency and Funding Officer

*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.

Please note the closing date for the consultation is midnight Monday 14 December 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

Cuddles Day Nursery

Linda Duly *Schools Forum Rep*
linda@cuddlesnursery.co.uk

Dean Park Day Nursery

Kelly Yates
k.yates@deanparkdaynursery.co.uk

Tops Day Nursery

Stacey Nash
Stacey.Nash@topsdaynurseries.co.uk

Pre-school

East Cliff Pre-school

Beckie Capewell
eastcliffpre-school@outlook.com

Jack in the Box Pre-school

Sue Johnson *Schools Forum Rep*
info@jackintheboxbournemouth.co.uk

Pre-school on the Marsh

Angela Miller
manager@preschoolonthemarsh.co.uk

School Nursery

Ambitions Academy Trust

Alison Holt
alison.holt@aat.education

Funding Example

e.g. 1.

Under the proposed formula (*no change from 2019-20*): 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 + £5.08 x 2) + (£0.53 x 3) + £2.00 x 1) = **£38.47** per hour

Based on 15 hours per week, this would be £577.05 per week

e.g. 2.

Under the proposed formula (*no change from 2019-20*): a cohort of 4 children, 2 receiving the extended entitlement, 2 the 15hrs entitlement and also in receipt of

- 1x Deprivation eligible
- 1 x SEN/D inclusion at the higher tier rate

Total funding = total base rate + total deprivation + total SEN/D inclusion
 = (£4.12 x 4 + £0.53 x 1) + £6.30 x 1) = **£23.31** per hour, for 15 hours per week.

A further 15 hours are eligible for 2 of the children, such that total weekly income would be

Based on 15 hours per week, this would be £481.49 per week

Consultation Questions List

QUESTION 1

Do you agree that any additional pence per hour announced by government for 2021/22 should go straight to the base rate of 2 year olds and 3 and 4 year olds?
(If not, please let us know why and what you would prioritise)

QUESTION 2

Do you support the proposal to make no changes from 2020-21 to the EYSFF for 2021-22?

QUESTION 3

Please use this section to provide any additional comments you wish to make.

**BOURNEMOUTH, CHRISTCHURCH and POOLE
SCHOOLS FORUM**



Subject	Pupil Premium Plus Policy 2021-22
Meeting Date	14 January 2021
Report Author	Luana Girling, BCP LAC Virtual School e-mail: luana.girling @bcpcouncil.gov.uk Tel: 01202 128764
Contributors	
Status	Public
Classification	For consultation
Executive Summary	This report provides an overview of the draft policy for central retention of LA Pupil Premium funding, and the allocation of funding to schools and early years settings. It also details the proposals for requirement to access funding.
Recommendation	The report is to be considered and indication of support for the proposed policy noted.
Reason for the recommendation	The LA must agree an annual Pupil premium plus policy and must consult the Schools Forum on this.

PUPIL PREMIUM PLUS (PP+) POLICY APRIL 2021- MARCH 2022

BCP Inclusion and Family services

BCP Virtual School

Author: Luana Girling
Version: V1.1
Date: Jan 2021

1. INTRODUCTION

1.1 The Local Authority has a statutory duty to appoint someone (called the Virtual School Headteacher) who holds the responsibility for promoting the educational achievement of Children in Care (CIC). This includes 'maintaining accurate and up-to-date information about how Looked After Children (LAC) are progressing at school and taking urgent and individual action when they are not achieving well'.

1.2 The 'Pupil Premium 2021-2022 Conditions of Grant' document informs us that school age LAC attract a Pupil Premium plus (PP+) grant of **tbc**. For early years the amount is **tbc** per year.

1.3 'Promoting the education of LAC and Previously Looked After Children (PLAC) statutory guidance for local authorities'¹ dated February 2018 gives clarity on how this grant should be managed and the accountability measures required.

1.4 Since September 2018 the duty also includes promoting the educational achievement of PLAC² in their area by providing information and advice to:

- any person that has parental responsibility for the child
- providers of funded early years education, designated teachers for previously looked after children in maintained schools, academies, and other educational establishments
- any other person the authority considers appropriate for promoting the educational achievement of relevant children

1.5 In Bournemouth, Christchurch and Poole, the Virtual School do not use the terms Looked after Children (LAC) or previously Looked after Children (PLAC). Instead we use Children in Care (CIC) and Young People with Care experience (YPCE) in all documentation produced.

2. RESPONSIBILITY AND ACCOUNTABILITY

2.1 The Virtual School holds responsibility and accountability for:

- *making sure that there is a system to track and monitor the attainment and achievement of Children in Care*³
- *ensuring that all Children in Care have a robust and effective Personal Education Plan (PEP) with access to appropriate support, including personal tuition where appropriate*⁴
- *championing the educational needs of Children in Care across the authority and those placed out-of-authority*

¹ Promoting the education of looked-after and previously looked-after children (February 2018)

² Previously looked after children are those who are no longer looked after by a local authority in England and Wales (as defined by the Children Act 1989 or Part 6 of the Social Services and Well-being (Wales) Act 2014) because they are the subject of an adoption, special guardianship or child arrangements order; and were adopted from 'state care' outside England and Wales. This may/may not always include those who spend a period in care and then return home depending on the individual circumstances.

³ Any educational establishments who receives a pupil premium grant for a previously look after child is responsible for monitoring and tracking the attainment and achievement of PLAC outlined in¹.

⁴ BCP use a secure online platform called ePEP provided by Welfare Call.

2.2 In Bournemouth, Christchurch and Poole (BCP), the PP+ grant is managed by the Virtual School Head (VSH) and used to improve educational outcomes for Children in Care looked after by BCP. It is expected that schools and early years providers will use the funding to address pupils' identified needs as detailed in this policy.

2.3 All expenditure of the PP+ grant is scrutinised annually by the Corporate Parenting Board and the annual report is published for transparency purposes.

2.4 Schools who have CIC from other Local Authorities on their roll must contact the Virtual School of the relevant authority to request information on their policy for allocation of PP+. The name and contact details of other Virtual Schools can be requested from the BCP Virtual School team.

2.5 The Virtual School has a responsibility to initiate a PEP meeting date via the ePEP system within 10 days of the child coming into care. We do this in partnership with the school/setting and the social worker. All future PEP meetings should be initiated and invites to all parties sent by the Designated Teacher (DT) in the school/setting at the end of each PEP meeting.

2.6 There is an expectation that schools and settings will also engage with support and training offered by the Virtual School to ensure their (DT) is best placed to serve the needs of all CIC. Attendance at DT networks will be monitored and any non-attendance may be discussed with Headteachers/Principals as appropriate. The Virtual School will support schools by offering training to all Governance/Trust Boards alongside a pro forma for the purposes of annual reporting to the Governance Board.

2.7 The Virtual School reserves the right to withhold funding allocations to schools if the conditions stipulated in section 4 are not met. However, support for schools/settings will be provided to ensure this is minimised. Any school/ setting whose funding has been withheld can challenge the decision by contacting the VSH. Any withheld funding subsequently released would be paid retrospectively in the following termly allocation payment.

3. ARRANGEMENTS FOR CENTRALLY RETAINED FUNDS

3.1 The Virtual School retains £tbc of the annual £tbc grant for each looked after child and it is used to improve outcomes for all CIC to BCP, including those placed outside of BCP. Pupil outcomes and impact of the centrally retained funding is reported to the Corporate Parenting working group annually.

3.2 Expenditure of the centrally retained funds is planned strategically by the Virtual School Leadership team to support any educational activities deemed necessary for pupils from pre-school through to year 13. All expenditure is monitored by the Central Finance Team for compliance with the conditions of grant.

4. ALLOCATION OF FUNDING TO SCHOOLS

4.1 PP+ funding for school age CIC will continue to be allocated on a termly basis in order to follow children who move schools during this period. Allocation will be based on what has been 'actually' spent by schools termly up to a maximum of £tbc

per year. Planned and actual spend amounts must be noted in the ePEPs termly with clearly identified, costed interventions linked to the targets set. Any planned interventions that spread across more than one term should only have each term's actual cost entered in the ePEP document for that term. Funds are unable to be paid in advance in case activities do not take place as planned and to ensure compliance with internal audit.

4.2 Pupil Premium will only be allocated for pupils who have been in care for at least 4 weeks continuously and have had an ePEP completed. This is to reduce the risk of overspend through allocation to pupils who are looked after for brief periods with no agreed targets in place.

4.3 Allocation of funds will be subject to the termly completion and submission by social workers and DTs, of high quality ePEPs that include: a review on how the previous term's allocation has been spent; demonstration of outcomes/impact of previously set targets and funding and clearly costed new targets linked to the use of that term's requested allocation. The Virtual School team member responsible for each pupil will attend PEP meetings as appropriate and proportionately according to pupil and school needs. PEPs may also take place via telephone / video conference. Allocation of funds is also subject to the submission of any data collections requested by the Virtual School. All attendance data and end of KS results are collected on our behalf by Welfare Call and all schools/AP providers are required to supply this data directly to Welfare Call. On occasion there may be a need to request ad hoc data from the Virtual School Team members.

4.4 The notional PP+ allocation for each CIC will be up to up to £~~tb~~^c annually per financial year (April to March). This is paid termly subject to the conditions identified in 4.3. All funding is paid via BACs and accompanied with remittance slips.

4.5 The Virtual School will also consider any proposal to use PP+ funds to direct pupils off-site for short term interventions as part of a joint-funding arrangement. Such interventions may reasonably be requested when there is clear evidence that a change in provision will be of benefit to the pupil. They must be time-limited and accompanied by a clear exit strategy that culminates in a successful reintegration to an appropriate full-time timetable. Schools will retain responsibility for safeguarding and quality assuring any off-site provision in accordance with the statutory guidance around the use of the B-code.

4.6 Where a school wishes to reduce a pupil's time in class by either instigating a part-time timetable or a bespoke provision, it may apply to the Virtual School for financial support in sourcing a suitable package. As with 4.5, any reduced provision must be time-limited, with clear objectives and time scales pertaining to a successful return to full-time education. The Virtual School provides a reintegration planning tool which should be used to track and monitor any short-term Alternative Provision arrangements.

4.7 PP+ funding will not be allocated to schools offering highly specialist provision that is funded by the LA. Appropriate provision for achieving the highest educational outcomes for these CIC will be stipulated at the point of commissioning a contract for placement.

5. ALLOCATION OF FUNDING TO EARLY YEARS SETTINGS

5.1 The BCP Virtual school does not hold funding for Early Years settings. Both policy and payment procedures of Early Years PP+ are paid within the free early education entitlement payments to settings managed by the Early Years support teams. Please contact them for further information.

5.2 Some children in early years settings are placed with carers who are not eligible for the full 30 hours free early education entitlement. This is usually due to the carer's inability to undertake any other 'paid work' as their main occupation is that of being a carer, often for more than one child. In these circumstances, the Virtual School would consider awarding funding to the setting for extra hours that would benefit the child's education and to enable the child to be more 'school ready'. This would not apply if the extra hours sole purpose was to increase childcare provision.

Some of the following criteria would also need to apply:

- The child must be due to start school in the forthcoming September
- The child is behind their peers educationally within the EYFS framework
- The child would benefit from additional hours to support their learning and development.
- Additional hours would support the child's daily routine to be school ready

5.3 The need for an allocation of funding would be agreed by all parties during the child's termly PEP meeting and detailed within the completed ePEP. Funding would be approved by the Virtual School during the QA process and paid via BACs and accompanied with remittance slips. All ePEPs should be completed by both the Social Worker and the DT within five school days of the PEP meeting taking place

6. ePEPS AS A REQUIREMENT FOR ACCESSING FUNDING

6.1 ePEPs are the primary monitoring system to provide the Virtual school with an oversight of all Children and Young People's educational plans. The ePEP is mandatory and a shared multi-agency document crucial to the educational planning of CIC. Termly monitoring of the PEP document and meetings by the Virtual School team provides information and data to enable the Virtual School Officers and Headteacher to retain oversight of all pupils' progress and attainment and to address any issues across all agencies involved with that pupil. Additional ePEPs may be required if pupils move between schools in year or where there is another compelling need.

6.2 For school age (Year R to Year 11):

The PP+ funding is provided to meet the additional needs of pupils through enabling associated interventions and support identified in the ePEP. The requested funding must be costed and linked to SMART⁵ targets focused on development, progress and improvement that are underpinned by detailed intervention and support. The targets and interventions/ support will be agreed with the Virtual School team member responsible for the pupil before or during the meeting. At any time in the term, a request can be made to amend the funding via email with the relevant member of the Virtual School team. After agreement by email, the ePEP will then be

⁵ SMART - Specific, Measurable, Achievable, Relevant, Time-bound

amended by the Virtual School to ensure the correct allocation is awarded at the end of that term during the QA sign off process.

6.2.1 - Pupil needs can include the following areas:

- Academic attainment or achievement
- Attendance
- Wider achievement e.g. in an area in which the pupil is gifted and talented
- Inclusion (reducing exclusion from the curriculum)
- Social Skills
- Transition to the next phase of education
- Emotional wellbeing such as those needs arising from the effects of attachment or childhood trauma upon learning
- Alternative provision provided as part of a reduced timetable

6.2.2 These needs will not routinely include the following areas unless agreed in advance with the Virtual School:

- Purchase of uniform, PE kit / trainers
- Purchase of laptops or similar devices
- Any interventions or support that is part of the Universal offer for all pupils
- Contributions to school curriculum trips or for the cost of residential trips

6.2.3 The Virtual School will no longer organise and directly fund interventions for any pupil 'on roll' in a school. All interventions for pupils 'on roll' in a school will be organised and funded by the 'on roll' school. This will include tuition provided by third party organisations. The aim is to ensure that the holistic overview of a pupil's education is retained by the 'on roll' school thereby giving full autonomy to the school to put into place any interventions agreed with the Virtual School team member during the PEP process or via email communication. Any expenditure should be included in the ePEP documentation. 6.2.4 The Virtual school will use retained funds for any pupils 'not on roll' to support any educational activities deemed necessary for pupils from year R to year 13.

7. SCHOOL AGE PUPILS WHO ENTER/EXIT CARE MID FINANCIAL YEAR

7.1 The Department for Education (DfE) allocates PP+ to the Virtual School during the period April 2021 to March 2022 as a provisional amount of **tbc** per child looked after for at least one day, as recorded in the March 2020 children looked after data return (SSDA903), and aged 4 to 15 at 31 August 2020. The DfE updates and finalises this allocation in December 2021, based on the number of children looked after for at least one day during the year ending March 2021, as recorded in the March 2021 children looked after data return (SSDA903), and aged 4 to 15 at 31 August 2020. It is the responsibility of all Virtual schools to set their own policy with regard to any allocation criteria. For BCP this criterion is as stated in section 4 and 5.

7.2 If a pupil comes into care outside these parameters the Virtual School will not be allocated any 'PP+' grant for the pupil in that financial year however, schools and settings will still be allocated funding in line with section 4 and 5 of this policy.

7.3 If a pupil whose school is in receipt of PP+ enters and /exits care outside these parameters the Virtual Schools allocation of PP+ grant for that pupil may be affected.

7.4 No payments will be made for any pupils who were previously a Child in Care where the pupil is eligible for the school's own allocation of Pupil Premium funding under the government published criteria. However, additional funding requests will be considered for any pupil whose continued support is unable to be funded from other sources. For example, this might be where a pupil's 'left care' date falls between school census dates therefore school funding cannot be accessed.

8. ARRANGEMENTS FOR ADDITIONAL (IN FINANCIAL YEAR) FUNDING REQUESTS AND TRANSITION

8.1 Additional funding for pupils in excess of the notional PP+ allocation of £tbc for the financial year can be applied for in exceptional circumstances via the relevant section on the ePEP after discussion with the relevant Virtual School team member.

8.2 Starting school/ preschool and transition to a new school between key stages or in year can be a difficult period for CIC and any funds requested to support 'transition' can be included in the ePEP completed in the term prior to the planned transition taking place. Funding should only be requested for activities outside the routine universal transition arrangements expected of a provision.

8.3 In the event that a pupil receives a Permanent Exclusion, it remains the Local Authorities responsibility to arrange for a suitable full-time education from the sixth day of any such period. As per the statutory guidance on exclusions, the Virtual School will, wherever possible, consider any applications for financial support that enable suitable education to be in place before the sixth day. In all cases, it is expected that schools demonstrate how their existing PP+ allocation has been utilised to mitigate any risks of exclusion before any additional funding is requested.

9. QUALITY ASSURANCE OF PEPs

9.1 The Virtual School carry out QA checks on all completed PEPs. Feedback is then provided via the ePEP and will need to be actioned to enable the ePEP to be submitted as a true and final record of the PEP meeting. The analysis of QA will be used to identify learning and good practice that will be discussed at termly networks as appropriate.

9.2 On a termly basis all PP+ expenditure will be monitored for patterns and trends in either good practice or learning recommendations. The monitoring of impact will also be looked at for identification of potential case studies.

10. EXCEPTIONAL CIRCUMSTANCES

11.1 The Virtual School Head can at any time, under exceptional circumstances, take actions / use PP+ funds outside the requirements of this policy to meet the immediate or urgent needs of any pupil/s. For example, this could be a payment awarded to the school/setting when a child first enters care to help with immediate educational needs or a payment to a school for participation in specified educational projects / extra-curricular activities. All requests must be discussed with the relevant Virtual school team member initially who will then request approval from the Virtual School Head. Any funds agreed must then be entered on the ePEP document.