

# Notice of Schools Forum



Date: Monday, 15 January 2024 at 10.00 am

Venue: HMS Phoebe, BCP Civic Centre, Bournemouth BH2 6DY / Remotely  
Via MS Teams

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## Membership:

### Chairman:

Geoff Cherrill Maintained Special

### Vice-Chairman:

Patrick Earnshaw	Academies - Secondary
Kate Carter	Academies - Primary
Esther Curry	Academies - Primary
Kate Curtis	Academies - Primary
Sean Preston	Academies - Primary
Heather Waugh	Academies - Primary
Vacancy	Academies - Primary
Vacancy	Academies - Primary
Mark Avoth	Academies - Secondary
Paul Gray	Academies - Secondary
Michelle Dyer	Academies - Secondary
James Sankey	Academies - Secondary
Natasha Ullah	Academies - Secondary
Sian Thomas	Special Academy
Ben Doyle	All Through Academies
Russell Arnold	Alternative Provision Academy
Brigid Hincks	Maintained Primary (Governor)
Chris Barnett	Maintained Secondary
Phillip Gavin	Mainstream PRU
Vicky Peters	Early Years
Linda Duly	Early Years
Dorian Lewis	14-19 Provision
Vacancy	Catholic Diocese
Vacancy	CofE Diocese
Cllr R Burton	LA Observer Member

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

This meeting is open to the public. It is a hybrid meeting you may join in person at the above venue or contact democratic services in advance to join Via MS Teams.

<https://democracy.bcpCouncil.gov.uk/ieListDocuments.aspx?MIId=5760>

If you would like any further information on the items to be considered at the meeting please contact: Claire Johnston email [democratic.services@bcpCouncil.gov.uk](mailto:democratic.services@bcpCouncil.gov.uk)

Press enquiries should be directed to the Press Office: Tel: 01202 454668 or email [press.office@bcpCouncil.gov.uk](mailto:press.office@bcpCouncil.gov.uk)

This notice and all the papers mentioned within it are available at [democracy.bcpCouncil.gov.uk](https://democracy.bcpCouncil.gov.uk)

GRAHAM FARRANT  
CHIEF EXECUTIVE

8 January 2024

**DEBATE**  
**NOT HATE**



Available online and  
on the Mod.gov app

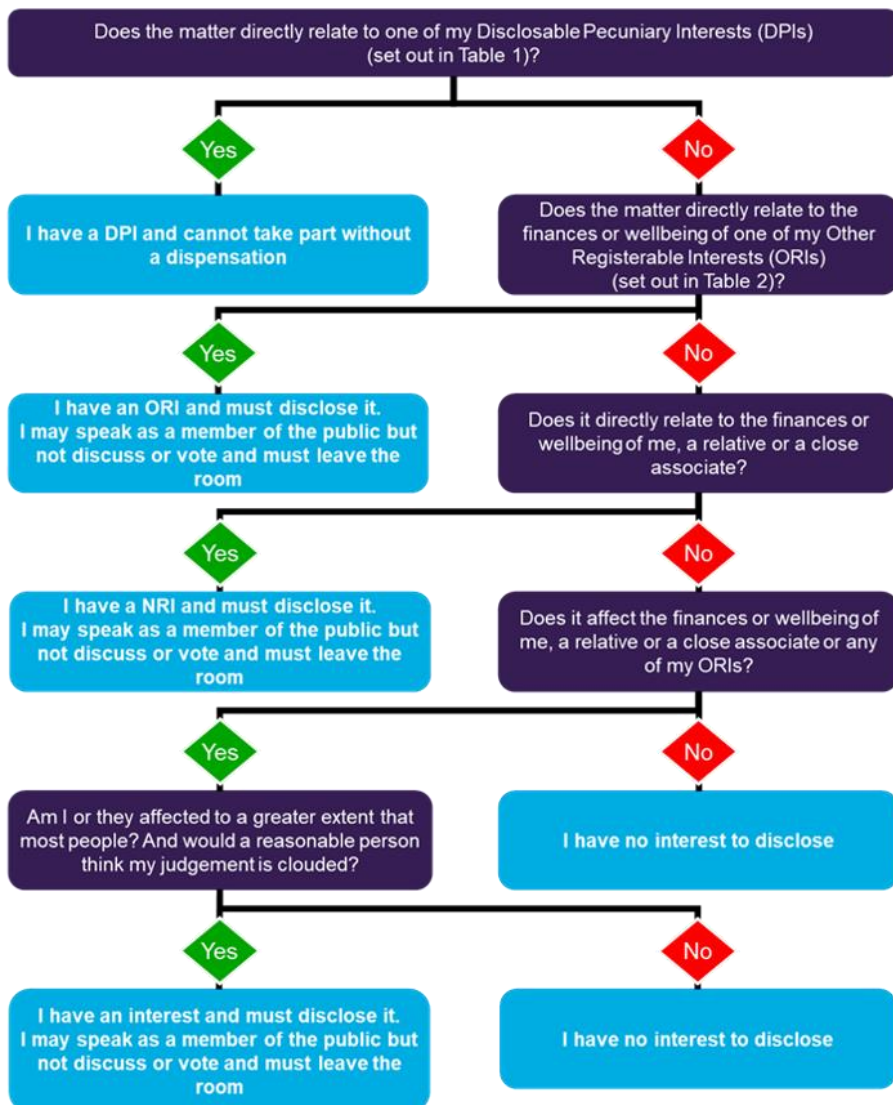


## Maintaining and promoting high standards of conduct

### Declaring interests at meetings

Familiarise yourself with the Councillor Code of Conduct which can be found in Part 6 of the Council's Constitution.

Before the meeting, read the agenda and reports to see if the matters to be discussed at the meeting concern your interests



What are the principles of bias and pre-determination and how do they affect my participation in the meeting?

Bias and predetermination are common law concepts. If they affect you, your participation in the meeting may call into question the decision arrived at on the item.

#### Bias Test

In all the circumstances, would it lead a fair minded and informed observer to conclude that there was a real possibility or a real danger that the decision maker was biased?

#### Predetermination Test

At the time of making the decision, did the decision maker have a closed mind?

If a councillor appears to be biased or to have predetermined their decision, they must NOT participate in the meeting.

For more information or advice please contact the Monitoring Officer  
([janie.berry@bcpcouncil.gov.uk](mailto:janie.berry@bcpcouncil.gov.uk))

### Selflessness

Councillors should act solely in terms of the public interest

### Integrity

Councillors must avoid placing themselves under any obligation to people or organisations that might try inappropriately to influence them in their work. They should not act or take decisions in order to gain financial or other material benefits for themselves, their family, or their friends. They must declare and resolve any interests and relationships

### Objectivity

Councillors must act and take decisions impartially, fairly and on merit, using the best evidence and without discrimination or bias

### Accountability

Councillors are accountable to the public for their decisions and actions and must submit themselves to the scrutiny necessary to ensure this

### Openness

Councillors should act and take decisions in an open and transparent manner. Information should not be withheld from the public unless there are clear and lawful reasons for so doing

### Honesty & Integrity

Councillors should act with honesty and integrity and should not place themselves in situations where their honesty and integrity may be questioned

### Leadership

Councillors should exhibit these principles in their own behaviour. They should actively promote and robustly support the principles and be willing to challenge poor behaviour wherever it occurs

# AGENDA

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

## 1. Apologies for Absence

To receive any apologies for absence.

## 2. Declarations of Interest

Councillors are requested to declare any interests on items included in this agenda. Please refer to the workflow on the preceding page for guidance. Declarations received will be reported at the meeting.

## 3. Minutes of the Previous Meeting

7 - 12

To confirm the minutes of the previous meeting, held on 13 December 2023, as a correct record.

## 4. Dedicated Schools Grant Settlement and Draft Budget 2024-25

13 - 20

1. The DSG Settlement for 2024-25 was received on 19 December 2023. It included:
  - a. Indicative allocations for the early years block reflecting the new free entitlements in 2024-25.
  - b. Final allocations for the school's block based on the October 2023 schools census with the increase in funding through the schools NFF at £5.1m (2%). Higher funding values account for £4.3m (1.7%) with additional pupils at census providing a further £0.8m (0.3%). Funding for in-year pupil growth at September 2024, has increased by £83,000 (4.6%) compared with last year.
  - c. Allocations for the central school services block provide an increase of £55,000 (3.2%) compared with last year for on-going LA functions with previous levels of funding not yet restored for historic commitments.
  - d. Allocations for the high needs block are an increase of £1.7m (3%).
  - e. A draft DSG budget for 2024-25 is provided in the Appendix to provide context for decisions on the meeting agenda. The funding gap for high needs pupils is projected to be £29m in the absence of additional funding sources.

The report also includes budget monitoring information for quarter three 2023-24. This indicates that the accumulated DSG deficit is projected at £63m for March 2024, rising to £92m by March 2025.

## 5. DSG Management Plan 2024 to 2039

To Follow

## 6. Mainstream School Funding and Transfer to High Needs 2024/25

21 - 34

This report sets out the outcome of applying the 2024-25 National Funding Formula (NFF) to the October 2023 schools census data and options for the local mainstream schools funding formula linked to a transfer of funding to high needs.

It also sets out the 2024-25 growth fund budget for approval.

## 7. Maintained school services – de-delegation and central retention

35 - 62

This report provides proposals for:

- The central retention of services where the LA retains a statutory duty to undertake activity to support maintained schools only (both

mainstream and specialist);

- De-delegation of services applicable only to mainstream schools. These are services where schools retain the statutory duties, but better efficiency could be achieved through central delivery by the LA.

## **8. Forward Plan**

63 - 64

To consider and note the Forward Plan

## **9. Dates of Future Meetings**

February 2024 - Date TBC

24 June 2024

23 September 2024

18 November 2024

13 January 2025

23 June 2025

## **10. Any Other Business**

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

## **11. 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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## **SCHOOLS FORUM**

**WEDNESDAY, 13TH DECEMBER, 2023**

**Present:** Geoff Cherrill (Maintained Special) – **Chairman**

Kate Carter, Academies - Primary  
Kate Curtis, Academies - Primary  
Sean Preston, Academies - Primary  
Heather Waugh, Academies - Primary  
Mark Avoth, Academies - Secondary  
Paul Gray, Academies - Secondary  
Michelle Dyer, Academies - Secondary  
James Sankey, Academies - Secondary  
Sian Thomas, Special Academy  
Ben Doyle, All Through Academies  
Russell Arnold, Alternative Provision Academy  
Brigid Hincks, Maintained Primary (Governor)  
Chris Barnett, Maintained Secondary  
Vicky Peters, Early Years  
Linda Duly, Early Years  
Dr Dorian Lewis, 14-19 Provision

**Officers in attendance:** Amanda Gridley, Early Years Services Manager  
Jo Collis-Heavens, Group Accountant  
Steve Ellis, Accountant - Education  
Nicola Webb, Assistant Chief Financial Officer  
Sharon Muldoon, BSF Transformation Consultant  
Paul Reidy, Project Manager (Major Change & PPMO)

### **1 Apologies for Absence**

Apologies were received from Natasha Ullah, Secondary Academy representative.

### **2 Declarations of Interest**

None received

### **3 Minutes of the Previous Meeting**

The minutes of the meeting were agreed as a correct record subject to the inclusion of Cllr R Burton, Portfolio Holder for Children's Services in the list of attendees as an observer member.

### **4 Reconstitution of the Schools Forum**

The Chair advised that this would normally be an opportunity for everyone to introduce themselves for new members but as there was a large agenda this would be left until the end of the meeting if time available.

Seven members attended the session on Monday with the Chair for an informal welcome chat about the forum.

### **5 Dedicated Schools Grant Budget Monitoring 2023/24 at Quarter 2**

The Assistant Chief Finance Officer presented a report, a copy of which had been circulated to each Member and a copy of which appears as Appendix A to these minutes in the Minute Book. The Forum was advised that this was an information report which detailed the projected year end position, which was that the budgeted funding gap of £27.1 million will be realised across all DSG blocks. The cumulative deficit at 31 March 2024 is forecast to be £62.9 million including the schools block variance, which had not yet been referenced in the deficit management plan. The Forum was reminded that there was not a balanced budget set which was mostly due to the High Needs Block.

The outturn forecast was broadly where it was expected to be. A funding gap of £27.1 million had been budgeted for. The forecast for the High Needs block was still based on assumptions but was looking balanced. The Forum was informed that there was forecasted to be £69.2 million deficit at the end of the year. It was noted that this had been flattened slightly by the delivering better value program but not sufficiently to balance the budget. There was a declining population of under 4's at present and there would be changes coming up to Early Years funding.

**Action to note report: Noted**

**6 Dedicated Schools Grant (DSG) Management Plan**

The Interim Education Director presented a report, a copy of which had been circulated to each Member and a copy of which appears as Appendix B to these minutes in the Minute Book. The Forum was informed that the DSG accumulated deficit had grown rapidly from £3.6 million in April 2019 to £35.8 million by March 2023, with £63.4 million estimated by March 2024 from the high needs funding gap. As a result of the high deficit, BCP was invited to join the DfE's Safety Valve (SV) Programme in July 2023. Local authorities with SV agreements were asked to focus on one mission statement: to develop plans to reform their high needs systems as quickly as possible to provide a good service within their available funding, normally by the end of a maximum five-year period. The deficit growth over 2023-24 reflected an annual DSG high needs funding gap of £27.5 million. The Council was required to undertake temporary borrowing to fund the cash payments. The borrowing cost was estimated to cost the council £2.5m in 2023-24 and was to the detriment of services that it would otherwise be able to provide. The report outlined the progress made in developing a deficit management plan and next steps underway.

There was a new SEN strategy in development with eight priority areas which would be sent to schools in January. There had been a significant increase in the number of children accessing independent SEN placements. There was £38 million leaving the state-funded schools sector moving into independent provision.

The Assistant Chief Finance Officer advised that there were two scenarios outlined in the paper to balance the budget in 5 years. It was noted that the first provided a sense of scale but was not realistically achievable. The second scenario also presented a number of challenging assumptions but would potentially be deliverable. It would mean a restriction to EHCP support and moving children from independent specialist school to local provision. Assumptions were being looked at further to reduce spend but it was expected that this would take longer than the five-year period proscribed by the DfE. This made it a very challenging environment to meet this from both a financial point of view and to meet requirements for children and families. It was important to think collectively how a balanced budget could be delivered.

The Director for Children's Services advised that £124 million would be needed over the first five years from the schools block to balance the budget. It was not expected that this would be agreed to. There was a robust plan but this would not be what was required to get a deal from the safety valve programme.



Scenario 2 which outlined the £27 million deficit at year 5 had a list of assumptions and the DfE recognised that these assumptions were not unambitious. These included the changing landscape of post 16 provision and fewer pupils moving to specialist schools from the primary sector. The budget had been taken as far as it could be but there was still a forecast £27 million deficit.

In response to a question, it was confirmed that the Council had been invited by the DfE to be part of the Safety Valve Programme and this had been agreed by the Chief Executive. The consultation process was being gone through now, the scenarios were not all worked up in time for the consultation process and were still being worked through and the consultation period was still ongoing, and views were still being sought on scenarios.

The report requested that the Forum make recommendations to the Council concerning the deficit management plan. An example given was for a 10 percent transfer from the schools block.

A 10 percent transfer was not specifically included within the consultation process and a member felt that due to this the consultation was flawed. The Chair made an alternative recommendation as it was not felt that the Schools Forum was in a position to make a recommendation to Council at this time. Due to the further information shared on this issue the Chair proposed and it was resolved:

**RESOVLED that the Forum request that the Council come back at the earliest opportunity with 2 alternative models. At least one of these models be a 10 percent reduction including the impact across all schools.**

Voting: Unanimous

The Chair requested that this also comes back to Forum members in good time in order for it to be shared with the representative groups.

**It was requested that in future that BCP Council's consultation needed to comply with the relevant section of the "Schools Operation Guide" in order to ensure that the consultation was clearer and operated within the recommended timeframes.**

It was also noted that a one year funding proposal was not sufficient to enable head teachers to set three year budgets. It was noted that only those in the safety valve programme were able to move away from the one-year timeframe. It was suggested that an ongoing transfer should also be modelled if the Council were within the Safety Valve Programme.

(Note: This recommendation was proposed and agreed following the recommendations agreed under the Schools Funding Consultation and Budget Proposals 2024)

## **7 School Funding Consultation and Budget Proposals 2024-25**

The Assistant Chief Finance Officer presented a report, a copy of which had been circulated to each Member and a copy of which appears as Appendix C to these minutes in the Minute Book. The report included the outcome of the school funding consultation for 2024-25 and outlined proposals for the DSG budget. These included that surplus schools block funding be transferred to support the high needs budget. The report also considered how a higher level of transfer could be achieved through mainstream schools contributing from national formula allocations. The amount of the transfer proposed for 2024-25 would be considered with the DfE as part of the deficit management plan discussions in December and January 2024. The consultation also included proposals for a revised growth fund policy and considered funding allocated through the central school services block for 2024-25.

The Forum was advised that the consultation went out in November although there was a glitch in the online form. Most responses were received by the deadline and a number after this from a total of 65 schools (which included a single response from a Multi Academy Trusts covering a number of schools).

The appendix with consultation responses was circulated to Forum members on the preceding Monday with information from schools. It was noted that early years' representatives were included as schools Members for voting.

There was a surplus of block funding coming from growth fund. If there was a surplus it would be recommend that this would move across to the High Needs Block and would need to help with reducing the deficit in some way. There was a high level of support for surplus to be used in this way. The Forum was provided with an outline of the response received.

The report outlined that the Forum must be consulted on the local funding formula for mainstream schools and agree a range of central DSG budgets The Chair went through each recommendation in turn which were voted on by the appropriate Forum Members as follows:

1. Agree that as a minimum, surplus school block funding after the NFF has been applied can be transferred to support pupils with high needs.

For - 13, Against – 0, Abstain – 1

2. Agree if further school block funding can be transferred to support pupils with high needs, with NFF allocations reduced, to provide a funding transfer of at least 0.5% in total.

For - 0, Against – 13, Abstain – 1

3. Agree if a transfer above 0.5% can be considered with the DfE.

For - 0, Against - 13, Abstain 1?

4. Agree that the funding for the central schools service block is allocated fully to support the central services supporting all schools.

For - 14, Against - 0, Abstain 0

5. Recommend to Council how the NFF should be adjusted (if agreed) to provide funding to transfer to high needs – The related recommendation at 2 was not agreed.

6. Recommend to Council how the NFF should be adjusted if there is a shortfall in school block funding (without there being a transfer to high needs). The Chair outlined that this meant that a recommendation be brought back to the Forum by BCP in January 2024

For - 14, Against 0, Abstain 0

7. Agree the growth fund policy for 2024-25.

For - 14, Against - 0, Abstain 0

The Director of Children's Services thanked the Forum for their time and consideration of these issues and would take the issues raised by the Forum on Board. The Chair acknowledged that this situation was rapidly changing and that the process had moved on from when the consultation was initially formulated, and this was not reflected fully within the consultation.

**8      Early Years Funding Update 2024/25**

The Early Years Services Manager presented a report, a copy of which had been circulated to each Member and a copy of which appears as Appendix D to these minutes in the Minute Book. The report presented an overview of upcoming changes to childcare support and an approach to 2024-2025 Early Years Single Funding Formula development. The Forum was advised that the government had launched the most ambitious childcare expansion to date to begin in 2024. There would be an increase in funding provided for 15 hours which was currently from 2-year-olds which would in future also be provided to children from 9 months old from September 2024. This would then increase to 30 funded hours from the following September.

It was noted that the Local Authority must consult Schools Forum on the Local Funding Formulae for Early Years. The Forum was advised that there was still a lot of work to do with providers. Extra money had been put into the sector last year in a supplementary grant from the government which was distributed to the sector as quickly as possible.

There was significant work to do over the next few months to bring a new formula forward for Schools Forum approval in February 2024 in line with the Cabinet schedule. It was noted that there were still many challenges for the sector Recently been given the funding formula for next year. Meeting with early years sub-group about the formula in Jan and will come to forum in Feb for approval in line with Cabinet schedule.

It was noted that the sector was grateful for the support received from the schools Forum.

**9      Forward Plan**

Reconstitution not quite finalised there are still a couple of vacancies still, these will be shared.

**10     Dates of Future Meetings**

15 Jan 2024

The Chair requested that this meeting be moved back by one week if possible. It was also noted that an additional meeting would be needed in February.

**11     Any Other Business**

It was confirmed that anyone who was not able to attend the forum meetings could send someone else on your behalf from the same sector.

There was not an opportunity for all members to introduce themselves at the meeting so this would happen at the meeting in January.

**Duration of the meeting:** 3.00 - 4.45 pm

**Chairman at the meeting on  
Wednesday, 13 December 2023**

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## SCHOOLS FORUM

Subject	<b>DSG Settlement and Draft Budget for 2024-25</b>
Meeting Date	15 January 2024
Status	Public Report
Executive Summary	<ol style="list-style-type: none"> <li>1. The DSG Settlement for 2024-25 was received on 19 December 2023. It included: <ol style="list-style-type: none"> <li>a. Indicative allocations for the early years block reflecting the new free entitlements in 2024-25.</li> <li>b. Final allocations for the school's block based on the October 2023 schools census with the increase in funding through the schools NFF at £5.1m (2%). Higher funding values account for £4.3m (1.7%) with additional pupils at census providing a further £0.8m (0.3%). Funding for in-year pupil growth at September 2024, has increased by £83,000 (4.6%) compared with last year.</li> <li>c. Allocations for the central school services block provide an increase of £55,000 (3.2%) compared with last year for on-going LA functions with previous levels of funding not yet restored for historic commitments.</li> <li>d. Allocations for the high needs block are an increase of £1.7m (3%).</li> <li>e. A draft DSG budget for 2024-25 is provided in the Appendix to provide context for decisions on the meeting agenda. The funding gap for high needs pupils is projected to be £29m in the absence of additional funding sources.</li> </ol> </li> <li>2. The report also includes budget monitoring information for quarter three 2023-24. This indicates that the accumulated DSG deficit is projected at £63m for March 2024, rising to £92m by March 2025.</li> </ol>
Recommendations	<ol style="list-style-type: none"> <li><b>1. To note the contents of the report.</b></li> <li><b>2. To agree the budgets within the central schools services block (CSSB).</b></li> </ol>
Reasons for Recommendations	<ol style="list-style-type: none"> <li>1. The Schools Forum is to be notified of the DSG settlement and consulted on the budget annually.</li> <li>2. Schools Forum is to agree the budgets within the CSSB and has a consultation role for the high needs block.</li> <li>3. The schools block is considered in a separate paper on the meeting agenda.</li> <li>4. The early years block is to be considered at the February 2024 meeting.</li> </ol>

Portfolio Holder(s):	Councillor Richard Burton, Children and Young People
Corporate Directors	Cathi Hadley, Director of Children's Services
Report Author	Nicola Webb – Assistant Chief Finance Officer Email: <a href="mailto:nicola.webb@bcpcouncil.gov.uk">nicola.webb@bcpcouncil.gov.uk</a>
Wards	Council-wide
Classification	For information and decision

## 2024-25 DSG Settlement on 19 December 2023

1. The December Settlement information for 2024-25 compared with the current year is included in Table 1 below:

**Table 1 – DSG December Settlement 2024-25**

Funding Block	Forecast	Announced	Annual Change	%
	2023-24	2024-25		
	£000's	£000's		
2-year olds Entitlement	2,323	9,140	6,817	293.4%
3-year olds Entitlement	18,462	21,229	2,767	15.0%
Under 2 year olds	0	4,141	4,141	
Pupil Premium	190	330	140	73.7%
Disability Access Fund (DAF)	118	215	97	82.0%
<b>Total Early Years (DfE estimated)</b>	<b>21,093</b>	<b>35,054</b>	<b>13,961</b>	<b>66.2%</b>
Primary	123,571	128,007		
Secondary	124,028	133,047		
Supplementary grant	8,473	<i>subsumed above</i>		
<b>NFF</b>	<b>256,072</b>	<b>261,054</b>	<b>4,982</b>	<b>1.9%</b>
Premises	1,705	1,832	127	7.4%
Growth	1,796	1,879	83	4.6%
<b>Total Schools (final)</b>	<b>259,573</b>	<b>264,765</b>	<b>5,192</b>	<b>2.0%</b>
NFF	1,733	1,788	55	3.2%
Commitments	291	233	(58)	(19.9%)
<b>Total Central School Services</b>	<b>2,023</b>	<b>2,021</b>	<b>(3)</b>	<b>(0.1%)</b>
NFF (gross)	56,790	60,920		
Supplementary grant	2,373	<i>subsumed above</i>		
<b>Total High Needs</b>	<b>59,162</b>	<b>60,920</b>	<b>1,758</b>	<b>3.0%</b>
<b>Total Funding</b>	<b>341,852</b>	<b>362,760</b>	<b>20,908</b>	<b>6.1%</b>

## Early Years Block

2. The published information includes indicative allocations only and these will be updated in summer 2024 and 2025 based on future data returns.
3. The early years block funds the local early years single funding formula (EYSFF) as well as a range of council services supporting the early years free entitlements.
4. The early years supplementary grant (EYSG) from September 2023 is separate to the funding provided through the early years block of the DSG for the existing free entitlements in 2023-24. It has been subsumed into the funding rates for 2024-25. The % funding increases shown for the existing entitlements in the table were therefore partly delivered from September 2023.
5. The funding includes for the expansion the free entitlement for 2 year olds with working parents (currently available only to families with low incomes) from April 2024 and a new free entitlement for those aged between 9 months and 2 years from September 2024.
6. Local consultation with the early years sector for 2024-25 funding is currently underway in January, with the outcome to be presented to Schools Forum in February where a recommendation for the 2024-25 EYSFF is to be made to the council for consideration at Cabinet in March.

## Schools Block

7. School Block allocations are now final for 2024-25 with the mainstream school NFF allocations updated to reflect pupil numbers at the October 2023 census and with growth fund allocations determined according to the national approach.
8. Compared with 2023-24 the increase in the NFF (including premises) is £5.1m (2%). This comprises £4.3m (1.7%) from the increase in unit values (as included in the consultation report) with a further £0.8m (0.3%) from the increase in pupil numbers.
9. Table 2 below shows the impact of changing pupil numbers. Nationally, these are already declining overall but in BCP the growth in secondary pupils is still outweighing the reduction at primary by a small margin (26 pupils).

**Table 2: Mainstream Schools Final NFF 2024-25**

	Consultation Report (based on October 22 census)			December Settlement (based on October 2023 census)			Change
	Pupil Numbers	Unit Value £	Funding £000's	Pupil Numbers	Unit Value £	Funding £000's	Funding £000's
Primary	27,196	£4,777.80	129,939	26,792	£4,777.80	128,007	(1,933)
Secondary	20,405	£6,385.77	130,302	20,835	£6,385.77	133,047	2,746
<b>Total NFF</b>	<b>47,601</b>		<b>260,241</b>	<b>47,627</b>		<b>261,054</b>	<b>813</b>

10. Compared with the October 2023 census, the primary roll reduced by 404 pupils and the secondary roll increased by 430. Secondary growth is expected to continue in September 2024 with primary pupils continuing to reduce.
11. 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.

12. Updated school data from the October 2023 census is not reflected in the NFF primary and secondary units of funding until 2025-26. The pupil characteristics included in the NFF have continued to increase each year since covid with unused growth funding needed to top up the NFF to be affordable in full.

### **Central School Services Block (CSSB)**

13. The funding rate for the CSSB for on-going functions is £37.54 (previously £36.40) per pupil as announced in July. Taking account also of the additional pupils the final funding increase is £55,000 (3.2%).
14. The funding for historic commitments has not yet been restored to previous levels.

### **High Needs Block**

15. Indicative high needs block allocations were announced in July 2023 with changes made in December to reflect the autumn place return, increasing the high needs NFF by £62,500. Total funding is £60.9 million, representing an increase between years of 3%.
16. The cross-border flow of pupils based on the January 2024 census will be updated in summer 2024.

### **Draft DSG Budget 2024-25**

17. The Appendix includes a draft budget for 2024-25 with the budget and year end forecast for 2023-24 shown for comparison. The high needs DSG funding shortfall for 2024-25 is projected at £29m (£2m more than the forecast for 2023-24) as shown in the latest DSG management plan.
18. The shortfall for 2024-25 has been reduced significantly from that shown at the conclusion of the DfE delivering better value programme. Further information is included in the DSG management plan report on the agenda.
19. The assumptions in the draft budget for 2024-25 include:
- a. the growth fund is agreed as proposed within the mainstream school funding paper on the agenda. If an alternative is agreed, then the amount of the school's block surplus would change by an equivalent amount.
  - b. The DSG management actions for the high needs budget are delivered as planned.
  - c. the high needs adjustment in summer 2023 will be minimal and not change the funding gap (funding could increase or decrease dependent on high needs placements at January 2024).
  - d. surplus schools block funding of £0.4m has been transferred to support high needs as agreed in December.
  - e. the early years central retentions are agreed as proposed in the February 2024 meeting.
20. Central schools services expenditure is set at the level of funding as agreed in December 2023.



21. The detail of the budgets in the CSSB for agreement are included in Table 3 below:

<b>Central School Services Block</b>	<b>2023-24 £000's</b>	<b>Change £000's</b>	<b>2024-25 £000's</b>
School admissions and access arrangements	387	23	410
Licenses purchased by DfE *	277	33	310
Servicing Schools Forum	10	0	10
Ex ESG services all schools:			
- Statutory and Regulatory Duties **	497	(92)	405
- Education Welfare	413	24	437
- Asset Management	148	9	157
Commitments – premature retirements (ex DCC)	17	0	17
Commitments – ASD Base / other	275	0	275
<b>Total Expenditure</b>	<b>2,024</b>	<b>(3)</b>	<b>2,021</b>

\*The cost of licenses has not yet been finalised by the DfE with an estimate included in the above table. \*\* This budget will be adjusted when the CSSB is finalised.

22. The budgets are as included and detailed in the school funding consultation paper with an adjustment made to statutory and regulatory duties to balance to the funding level. There were few comments from schools regarding these budgets and a link to the consultation outcome in the December papers is included at the end of this report.

### **DSG Budget Monitoring 2023-24 at Quarter 3**

23. The 2023-24 budget monitoring position at the end of December 2023 is a forecast in-year deficit of £27.2m, largely as budgeted.

24. Overall DSG funding is £0.4m below that budgeted, mainly due to the net early years adjustment forecast. Also included is the high needs block reduction in quarter two (£54,000) from the import/export adjustment for the cross border flow of high needs pupils.

25. Expenditure is projected to be £0.4m less than budget, and this is linked to the reduced take-up of the early years free entitlements impacting on funding levels.

26. The expenditure forecast has increased by £67,000 compared with the estimate at quarter 2 reported in December:

- a. Growth fund spend has been increased, with the October 2023 census data indicating some use of the contingency will be required. There is the potential for this to increase further once outstanding queries have been resolved.
- b. The £180,000 set aside for Dingley's promise in early years will not be required in full this year due a delay in the start of this provision. The 15-year management plan includes this cost moving forward each year so there is no impact in the budget for 2024-25.
- c. Movement between EHCP spend by type of provision has been updated to reflect placements now made (previously under assessment), the net of this movement is additional cost of £153,000.

## Financial Implications - DSG cumulative deficit

27. There is currently a projected DSG deficit at the end of March 2024 of £63m, rising to £92m at March 2025 with the addition of the projected £29m funding shortfall for high needs in 2024-25.

**Table 3: Summary position for dedicated schools grant at March 2024 and 2025**

	£m
<b>Accumulated deficit 1 April 2023</b>	<b>35.8</b>
Budgeted shortfall 2023-24	27.1
Projected overspend	0.1
<b>Projected deficit 31 March 2024</b>	<b>63.0</b>
Projected high needs funding shortfall 2024/25	29.4
Surplus schools block funding	(0.4)
<b>Projected deficit 31 March 2025</b>	<b>92.0</b>

28. The DSG deficit and management plan is considered further in a separate paper on the meeting agenda.

## Legal Implications

29. Schools Forum must be advised of the DSG Settlement for 2024-25 and be presented with a draft budget to consider as part of the annual consultation process.
30. Schools Forum also has a range of decision making powers with those for the CSSB included in this report.

## Summary of human resources/sustainability/public health implications

31. None

## Summary of equality implications

32. An equalities impact assessment has not been undertaken as the operation of the DSG and expenditure to be met from each block is prescribed by the DfE. The council is running a large DSG deficit to support pupils with additional needs.

## Summary of risk assessment

33. The main risk within the DSG relates is the high needs funding gap for which there is currently no government solution.
34. There continues to be a risk that projected costs will rise further with activities to reduce budget demand not delivering outcomes as required.

## Background Papers

School Funding Announcements 2024-25

<https://www.gov.uk/government/publications/dedicated-schools-grant-dsg-2024-to-2025>

## Appendix

Budget 2024-25	Early Years £000's	Schools £000's	Central Services £000's	High Needs £000's	Total Budget £000's
DSG under 2s NFF	-4,141				-4,141
DSG 2 year olds NFF	-9,140				-9,140
DSG 3&4 year olds NFF	-21,229				-21,229
DSG Pupil Premium	-330				-330
DSG Disability Access Fund	-215				-215
DSG Prior Year					0
DSG NFF School Block		-261,054			-264,765
DSG Premises		-1,832			
DSG Growth Fund NFF (final)		-1,879			
Block Transfer					0
DSG High Needs Block				-60,920	-60,920
DSG Central School Services Block			-2,021		-2,021
<b>Total Funding</b>	<b>-35,054</b>	<b>-264,765</b>	<b>-2,021</b>	<b>-60,920</b>	<b>-362,760</b>
Providers - under 2 year olds	3,830				3,830
Providers - 2 year olds	8,546				8,546
Providers - 3 and 4 Year olds	19,637				19,637
Providers SEN top up grants	1,380				1,380
Early Years Pupil Premium	330				330
Disability Access Fund	215				215
Contingency	254				254
Early Years LA duties	863				863
Mainstream Schools Formula		264,248			264,248
Growth Fund - budget		134			134
School Admissions			410		410
Servicing Schools Forum			10		10
Ex ESG Services (all schools)			999		999
Commitments - Premature retirements			17		17
Commitments - ASD Base / other			275		275
Licences Purchased by DfE			310		310
Place Funding				14,931	14,931
Top up Funding - State Sector				31,689	31,689
Top up Funding - Independent/NMSS				20,994	20,994
Top up Funding - Post Schools				9,029	9,029
Top up Funding - Pre schools				107	107
Top up Funding - Excluded Pupils/AP				2,274	2,274
Commissioned Services including Outreach				1,771	1,771
Hospital Education Top up					0
Bespoke SEN /Therapies				2,744	2,744
Support for Inclusion				3,057	3,057
Special Schools Teachers Pay & Pension Grants				1,925	1,925
Early Years Central SEN support				869	869
Sensory Impaired Service				876	876
<b>Total Expenditure</b>	<b>35,054</b>	<b>264,382</b>	<b>2,021</b>	<b>90,267</b>	<b>391,724</b>
<b>In-year (Surplus) / Deficit</b>	<b>0</b>	<b>-383</b>	<b>0</b>	<b>29,347</b>	<b>28,964</b>
<b>(Surplus) / Deficit bf</b>					<b>63,010</b>
<b>(Surplus) / Deficit cf</b>					<b>91,974</b>

23-24 Budget £000's	23-24 Q3 Forecast Outturn £000's	Variance £000's
-2,424	-2,323	101
-19,146	-18,461	684
-177	-190	-13
-118	-118	0
0	-352	-352
-251,100	-251,100	0
	0	0
	0	0
0	0	0
-59,240	-59,162	78
-1,965	-2,024	-58
<b>-334,172</b>	<b>-333,731</b>	<b>441</b>
2,296	2,323	27
17,967	17,154	-812
1,123	1,473	350
177	190	13
118	118	0
184	184	0
250,448	250,243	-205
467	458	-9
387	387	0
10	10	0
999	1,057	58
17	17	0
275	275	0
277	277	0
13,794	14,267	473
23,448	27,621	4,173
29,584	24,037	-5,547
7,073	6,498	-575
152	216	64
1,492	3,030	1,538
1,427	1,507	80
100	75	-25
5,589	5,682	93
146	153	7
2,330	2,161	-169
626	648	22
758	834	76
<b>361,265</b>	<b>360,897</b>	<b>-367</b>
<b>27,093</b>	<b>27,166</b>	<b>74</b>
<b>35,844</b>	<b>35,844</b>	
<b>62,937</b>	<b>63,010</b>	

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## SCHOOLS FORUM



Report subject	<b>Mainstream School Funding and Transfer to High Needs 2024/25</b>
Meeting date	15 January 2024
Status	Public
Executive summary	<p>This report sets out the outcome of applying the 2024-25 National Funding Formula (NFF) to the October 2023 schools census data and options for the local mainstream schools funding formula linked to a transfer of funding to high needs.</p> <p>It also sets out the 2024-25 growth fund budget for approval.</p>
Recommendations	<p><b>It is RECOMMENDED that Schools Forum agree for 2024-25 the following:</b></p> <p><b>School Members:</b></p> <ol style="list-style-type: none"> <li>1. Recommend to Council the preferred option for the local mainstream schools' formula.</li> <li>2. Agree the growth fund budget requirement of £134,000 as set out in paragraph 17.</li> </ol> <p><b>All Members:</b></p> <ol style="list-style-type: none"> <li>3. Agree a level of transfer for the schools NFF to high needs.</li> </ol>
Reason for recommendations	The Schools Forum must be consulted on the local funding formula and agree any transfer to high needs and the growth fund budget.
Portfolio Holder(s):	Councillor Richard Burton, Children and Young People
Corporate Directors	Cathi Hadley, Director of Children's Services
Report Author	Nicola Webb, Assistant Chief Finance Officer <a href="mailto:nicola.webb@bcpcouncil.gov.uk">nicola.webb@bcpcouncil.gov.uk</a>
Wards	Council-wide
Classification	For Decision

### Background

1. Final 2024-25 DSG funding for the school block to fund mainstream schools totals £264.8m (NFF £262.9m and growth fund £1.9m).
2. The council is responsible for setting the funding formula for mainstream schools for reception to year 11, after taking account of the recommendations of the School's Forum which in turn should be based on the views of schools.
3. Schools Forum can agree a level of funding transfer up to 0.5% of school block funding (£1.3m in 2024-25) with the DfE needing to agree any higher level in support of a DSG management plan.

4. The Schools Forum on 13 December 2023 recommended that all schools should receive their NFF allocations in full, if affordable, and agreed that only surplus schools block funding could be transferred to support the high needs budget.
5. At the time of the consultation with schools the latest DSG management plan available was that based on the work on the DfE delivering better value (DBV) consultants. A summary outcome of the plan was included in the documentation, and this showed few savings being achieved in the near future with the funding gap and cumulative deficit continuing to rise annually.
6. Progress in updating the DSG management plan in preparation for the safety valve (SV) submission was reported to Schools Forum in December. This plan was then not yet finalised but showed more progress being made to reduce the funding gap in the initial years but with the cumulative deficit still growing and by the end of the plan (year 7) at £256m.
7. The council's intention to seek a greater contribution from the schools NFF to close the high needs funding gap (estimated at circa 10% of school block funding) was discussed with it agreed that further local formula options were to be considered at the January meeting.
8. As part of the school block, Schools Forum is also responsible for deciding the mainstream school's growth fund policy and level of budget. A revised policy was agreed in December 2023 to reflect updated DfE guidance, with the final budget requirement to be agreed in January 2024.

#### **2024-25 NFF applied to school October 2023 census data**

9. A summary of the 2024-25 NFF applied locally with the updated October 2023 school data in comparison with the 2023-24 baseline is included below in table 1.

**Table 1: 2024-25 NFF Factor Summary from October 2023 Census**

NFF (all amounts include intrinsic growth funding)	23-24 Baseline*	24-25 NFF	Change	
	£ m	£m	£m	%
Basic Entitlement	202.146	205.937	3.791	1.9%
Deprivation (see below)	20.370	20.903	0.533	2.6%
EAL	2.301	2.655	0.354	15.4%
Mobility	0.432	0.580	0.148	34.4%
Low prior attainment	14.946	15.576	0.630	4.2%
Lump Sum	12.058	12.230	0.172	1.4%
Sparsity factor	0.055	0.083	0.028	49.6%
Split Sites	0.230	0.155	-0.075	-32.8%
Rates	1.384	1.553	0.169	12.2%
Exceptional premises (Joint use)	0.113	0.117	0.004	3.2%
Top up funding for MPPFL	4.211	3.977	-0.234	-5.6%
Top up funding for MFG	0.523	0.481	-0.042	-8.0%
<b>Total</b>	<b>258.771</b>	<b>264.248</b>	<b>5.478</b>	<b>2.1%</b>

\*The baseline includes the 2023-24 mainstream schools additional grant (MSAG) rolled into the DSG.

10. In 2024-25, there is a greater proportion of pupils funded at the higher secondary unit values. The net numbers on roll (NOR) increased by only 26 pupils in the October 23 census, with a falling roll in primary offset by growth in secondary. Plus, the secondary phase NOR growth for Cornerstone Academy is now funded through the formula instead of the central growth fund. As an example, the basic entitlement funding has increased by 1.9% reflecting the 1.4% increase in NFF unit values plus the greater number of pupils in secondary year groups.
11. Top up funding continues to reduce for the minimum per pupil funding levels (MPPFLs) and the minimum funding guarantee (MFG) with more schools moving closer to the underlying formula over time.
12. A summary of the NFF funding positions for schools updated with the October 2023 census data is provided in table 2 below with school level detail in appendix 1.

**Table 2: Summary of 2024-25 NFF using data from October 2023 compared with data from October 2022**

Formula Position	Oct 22 data * 2024-25 Number	%	Oct 23 data 2024-25 Number	%
MFG	7	8%	10	11%
MPPFL	32	35%	28	31%
Fully formula funded	52	57%	53	58%
<b>Total</b>	<b>91</b>	<b>100%</b>	<b>91</b>	<b>100%</b>

\*as used in the consultation

13. The initial funding boost for low funded schools when the NFF was introduced put the majority of schools across BCP in the MPPFL category, but the proportion has been reducing each year as MPPFL unit values initially increased by less than those for formula factors and pupil characteristic data has been rising since covid. Schools funded by the main formula are now in the majority at 58%.
14. Pupil characteristics attracting funding are reflected in the local formula school budget allocations one year before being funded through the NFF primary and secondary units of funding to allocate the DSG to councils. The NFF funding per pupil for 2024-25 has already been fixed based on data from October 2022. As more schools become fully funded according to the main formula, data changes at the October census each year have greater impact on individual school funding levels. As a result, there is a £0.5m shortfall in NFF funding for mainstream schools in 2024-25.
15. A summary of school block funding compared with the costs of the local formula using the NFF and estimated growth fund is shown in table 3 below:

**Table 3: Summary of NFF as the local formula 2024-25**

NFF Funding Elements	NFF Funding	NFF as Local Formula	Pressure/ (saving)
Primary NFF*	128,007	128,389	288
Secondary NFF*	133,047	133,461	236
Premises (split sites, joint use & rates)	1,832	1,824	(7)
Growth funding (see below)	1,879	**978	(901)
	<b>264,765</b>	<b>264,381</b>	
<b>Available to transfer</b>			<b>(384)</b>

\* excluding intrinsic growth in the local formula which is funded from the separate NFF for basic need pupil growth. \*\* total cost of extrinsic plus intrinsic growth.

## Growth fund budget

16. Growth funding is allocated to schools either through the formula (implicit growth for permanent expansions) or from the central budget for temporary expansions (explicit growth).
17. According to the revised growth fund policy agreed in December, a central budget of £134,000 is required in 2024-25 as set out in table 4.

**Table 4: Proposed central growth fund 2024-25**

School	Detail	Budget
Avonbourne Girls	Bulge class in year 7 - 1 teacher x 7/12	£34,000
Contingency	Bulge classes 1 teacher x 7/12 x 3 classes	£100,000
<b>Total</b>		<b>£134,000</b>

18. Funding for the September 2024 intake of Livingstone Academy and Cornerstone Academy is provided through the formula as intrinsic growth of £0.84m rather than funding being set aside in the central growth fund in table 4 above.
19. Surplus growth funding in recent years has enabled the NFF to be provided to schools in full. The surplus growth funding in 2024-25 is £0.9m with £0.5m possible to cover the schools NFF shortfall.

## Transfer of school block funding to high needs

20. Schools Forum agreed in December that surplus schools block funding can be transferred to high needs. In 2024-25 this is estimated at £0.4m (0.1% of total school block funding) after the NFF has been provided in full and the growth fund budget calculated according to the agreed policy. A larger surplus is no longer available due to the impact of school data changes between years as noted above and the amount needed to support growing schools.
21. Schools Forum is to consider further if schools should contribute funding from their NFF allocations to transfer to high needs.

## Options for reduced NFF allocations

22. Unless the DfE specifically approve, the local mainstream school funding formula must adopt the factors and methods contained within the NFF with unit values set within 2.5% of those used in the NFF. This is to ensure national convergence to the NFF, manage affordability within the local funding envelope and allow for the potential to transfer funding to support the budget for pupils with high needs.
23. No schools in the consultation responses supported reducing individual school NFF allocations to provide a level of transfer beyond surplus school block funding.
24. In considering if a level of transfer was agreed by Schools Forum beyond surplus funding, the majority of responses did not support all schools contributing (only 37% agreed), with either reductions to the MFG or MPPFLs being unacceptable. There was, however, greater support this year for capping per pupil increases (58% of responses).
25. It is accepted that any reduction in NFF funding for schools is not welcome but there is a need to balance the demands of the high needs budget with funding for individual schools.
26. The DfE signalled through the DSG consultation last year that reducing NFF allocations for schools is one option being considered to support management of DSG deficits in future.



The consultation included that future DSG arrangements could allow all schools in a local area to contribute NFF funding to reduce the funding gap. This included that the DfE could agree to reductions in the MPPFL as managing high needs expenditure requires the support of all stakeholders.

27. The DSG management plan in the safety valve submission to the DfE included a request to allow the MPPFL to be reduced, the MFG to be negative and funding values to potentially reduce below 2.5% of NFF values to give maximum flexibility in the options to consider.
28. In considering all options it is accepted that:
  - any reduction in NFF allocations is not supported by schools
  - the increase in per pupil funding compared with 2023-24 is already low
  - the DfE may not accept some of the NFF adjustments proposed (for example, reducing the MPPFL)
29. The options illustrated start with one that would close the £29m funding gap in the DSG management plan for 2024-25.
30. Further options then consider those within the regulations that the Schools Forum is able to recommend to the council without further approval from the DfE and others where the DfE must agree a specific adjustment to the NFF or a transfer above 0.5%.

**Table 5: Summary of options**

	Option Summary	Formula Adjustments	Transfer Amount*	DfE Approval Required?
<b>1</b>	<b>Maximum transfer to close funding gap 2024-25</b>			<b>Yes – above 0.5%</b>
1a	All schools contribute	MFG/ MPPFL/negative cap (-10.5%)	£29m (11%)	Yes - MFG and MPPFLs below NFF
1b	Exclude MPPFL schools	All schools at MPPFL / high negative MFG/cap (-33%)	£14.1m (5.3%)	Yes - MFG
<b>2</b>	<b>Maximum transfer without DfE approval at 0.5%</b>			<b>No – within 0.5%</b>
2a	All schools contribute	0.4% MFG, Reduce MPPFL & basic entitlement by 0.45%,	£1.3m (0.5%)	Yes MPPFL below NFF
2b	Exclude MPPFL and add capping	Capping gains at 1.47%	£1.3m (0.5%)	Formula compliant
2c	Exclude MPPFL and reduce basic entitlement	Basic entitlement 0.74% reduction	£1.3 (0.5%)	Formula compliant
<b>3</b>	<b>Transfer at 1%</b>			<b>Yes – above 0.5%</b>
3a	All schools contribute	0% MFG, Reduce MPPFL & basic entitlement by 1%,	£2.6m (1%)	Yes MPPFL below NFF
3b	Exclude MPPFL schools	Capping gains (and MFG) at 0.35%	£2.6m (1%)	Formula compliant

\*Figures include the surplus schools block £383,000 already agreed.

31. The paragraphs below describe the impact of each option. The range of impact described for individual schools does not include the impact for Livingstone Academy, which as a growing school adding year groups has additional protections within the regulations and their per pupil funding increases cannot be capped by the local formula.
32. A summary impact across schools is provided in table 6 below: The individual impact for all schools can be found in Appendix 1.

**Table 6: Summary of options – range of impact for individual schools**

NFF % range released			Min %	Max %
1a	Maximum transfer to close funding gap 2024-25	All schools contribute	9.5	16.1
1b		Exclude MPPFL schools	0.0	28.4
2a	Maximum transfer without DfE approval at 0.5%	All schools contribute	0.1	0.5
2b		Cap of 1.47% applied	0.0	6.0
2c		Basic entitlement 0.74% reduction	0.0	0.6
3a	Transfer at 1%	All schools contribute	0.4	1.1
3b		Exclude MPPFL schools	0.0	6.9

**Option 1: Maximum transfer to close the 2024-25 high needs funding gap**

33. This option illustrates the scale of the high needs funding shortfall.
34. Two sub options modelled:
- Option 1a: all schools contributing and requiring additional DfE approval to reduce the MPPFL alongside the MFG below 0%. This gives a range of individual school, per pupil, movements, compared with 2023-24, from a reduction of 7.1% to a maximum reduction of 10.7% (excluding Livingstone which cannot be capped), with some schools recovering budget through pupil numbers growth, while those with falling rolls lose a greater %.
  - Option 1b: if instead those schools with MPPFL allocations were excluded from contributing, then those schools would still see an increase (unless falling roll) and other schools would see greater reductions. Per pupil movements are in the range of a reduction of 28.9% to an increase of 1.6% (for the MPPFL schools) but the maximum transfer with this option is £14.1m.

**Option 2: Maximum transfer without DfE approval of £1.3m (0.5%)**

35. Three sub options modelled:
- Option 2a: All schools contributing. This could be achieved by:
    - reducing MPPFL by 0.45% (requiring DfE approval)
    - setting an MFG of 0.4% (within the regulations)
    - reducing the basic entitlement by 0.45% (within the 2.5% tolerance permitted)

Per pupil movements are in the range of a reduction of 0.9% to an increase of 9.9%
  - Option 2b: Capping per pupil gains (the preferred method in the responses from schools in the consultation should a transfer be agreed) at 1.47%. This option is within the regulations and if agreed by Schools Forum requires no further DfE

consideration. Per pupil movements are in the range of a reduction of 0.8% to an increase of 3.7%

- c. Option 2c: Basic entitlement reduction 0.74% instead of capping implemented. This option is also within the regulations.
36. A cap can be implemented as a single threshold (for example, no per pupil gains above 1%) or by also scaling (for example, all those with per pupil gains above 1% give up a proportion of the gain). Modelling has used a cap only.

### **Option 3: Funding transfer at 1%**

37. Two sub options modelled:
- a. Option 3a: All schools contributing. This scenario gives a range of individual school per pupil movements from a reduction of 1.2% to an increase of 9.4%. The MFG has been set at 0% in this scenario to ensure all schools contribute a proportion of their NFF. Legislation allows an MFG between 0% and 0.5%, the maximum an MFG school can therefore contribute here is 0.5% with other schools having to find, on average, more.
  - b. Option 3b: Capping per pupil gains at 0.35%. This requires the MFG to be set at 0.35% in line with the cap which is within the regulations.

### **Summary of financial implications**

38. The financial implications are summarised in the table below:

**Table 7: Summary impact of options to transfer NFF funding**

<b>Allocation of Funding 2024-25</b>	<b>£000's</b>
DSG schools block allocation	264,765
Central growth fund according to agreed policy	(134)
Transfer to high needs of surplus only (agreed December 2023)	(383)
<b>Mainstream formula total at NFF – including intrinsic growth</b>	<b>264,248</b>

<b>Funding Transfer Options (from table 5)</b>	<b>Transfer £000's</b>
Transfer of surplus only	(383)
Option 2: providing the balance of a 0.5% transfer	(1,324)
Option 3: providing a further 0.5% transfer up to 1%	(2,648)
Option 1b: up to maximum with MPPFL schools not contributing	(14,061)
Option 1a: final amount with MPPFL schools contributing	(29,347)

### **Summary of legal implications**

39. The consultation undertaken is compliant with the School Funding Statutory Framework for 2024-25 and formula options not compliant with the regulations and requiring disapplication by the DfE are indicated in the report.
40. School budgets must be finalised and notified to maintained schools by 28 February 2024 with the DfE timetable the same for academy budgets.

### **Summary of human resources implications**

41. Implications for staffing levels from mainstream funding changes rests within individual schools.

### **Summary of sustainability impact / public health implications**

42. None

### **Summary of equality implications**

43. An equalities impact assessment has not been undertaken. The DfE have undertaken equality impact assessments in determining how DSG funding is to be allocated and the structure of the mainstream funding formulae. In the absence of government fully funding their high needs reforms in 2014, options need to be considered to reduce funding for universal provision and towards an increasing cohort of pupils identified with additional needs.

### **Summary of risk assessment**

44. There remains a financial risk for the council from the unsustainable level of the high needs budget and accumulated DSG deficit.
45. There is the risk that individual mainstream schools will have insufficient funding to support their universal provision when funding is allocated instead to support pupils with additional needs across BCP.

### **Background papers**

Schools Forum 15 December 2023:

- School funding consultation and outcome
- Draft DSG Management Plan

[BCP Council – Democracy \(ced.local\)](https://www.bcp.gov.uk/council-democracy)

DfE School Funding Settlement 2024-25

<https://www.gov.uk/government/publications/dedicated-schools-grant-dsg-2024-to-2025>

### **Appendices**

- Appendix 1 School level impact of the NFF and alternative options for 2024-25

						NFF) Schools funded at full NFF. Only surplus schools block transfers to high needs. Transfer = £0.383 million (0.1%)		
	A	B	C	D	E	F	G	H
	NOR Oct-22	NOR Oct-23	% change	23-24 Budget adjusted for SSG (excl rates)		24-25 NFF (excl rates)		Per pupil change from LY
Primary								
Ad Astra Infant School	265	255	-3.8%	£1,248,517	formula	£1,240,732	formula	3.3%
Avonwood Primary School	536	509	-5.0%	£2,439,637	MFG	£2,346,490	MPPFL	1.3%
Baden-Powell and St Peter's Church of England Junior School	718	718	0.0%	£3,257,006	MPPFL	£3,309,980	MPPFL	1.6%
Bayside Academy	254	234	-7.9%	£1,397,893	formula	£1,304,225	MFG	1.3%
Bearwood Primary and Nursery School	207	198	-4.3%	£1,017,766	formula	£994,317	formula	2.1%
Bethany Church of England Junior School	369	383	3.8%	£1,965,747	formula	£2,057,145	formula	0.8%
Bishop Aldhelm's Church of England Primary School	609	597	-2.0%	£2,772,418	MPPFL	£2,752,170	MPPFL	1.3%
Broadstone First School	313	317	1.3%	£1,424,058	MPPFL	£1,461,370	MPPFL	1.3%
Burton Church of England Primary School	327	296	-9.5%	£1,497,125	formula	£1,395,107	formula	2.9%
Canford Heath Infant School	360	359	-0.3%	£1,643,166	formula	£1,662,963	formula	1.5%
Canford Heath Junior School	472	473	0.2%	£2,149,745	MFG	£2,180,530	MPPFL	1.2%
Christ The King Catholic Primary School	350	355	1.4%	£1,784,867	MFG	£1,816,815	MFG	0.4%
Christchurch Infant School	323	308	-4.6%	£1,479,508	MFG	£1,423,455	MPPFL	0.9%
Christchurch Junior School	491	499	1.6%	£2,234,322	MFG	£2,300,390	MPPFL	1.3%
Corpus Christi Catholic Primary School	431	419	-2.8%	£2,018,143	formula	£1,974,852	MFG	0.7%
Courthill Infant School	340	348	2.4%	£1,551,516	MFG	£1,604,280	MPPFL	1.0%
Elm Academy	410	395	-3.7%	£2,283,994	MFG	£2,215,705	MFG	0.7%
Hamworthy Park Junior School	461	462	0.2%	£2,116,657	formula	£2,168,320	formula	2.2%
Haymoor Junior School	361	360	-0.3%	£1,650,637	formula	£1,679,665	formula	2.0%
Heatherlands Primary School	624	622	-0.3%	£2,843,813	MFG	£2,891,419	formula	2.0%
Heathlands Primary Academy	153	168	9.8%	£992,235	MFG	£1,081,046	MFG	-0.8%
Highcliffe St Mark Primary School	649	641	-1.2%	£2,945,058	MPPFL	£2,955,010	MPPFL	1.6%
Hill View Primary School	595	608	2.2%	£2,706,884	MFG	£2,802,880	MPPFL	1.3%
Hillbourne Primary School	218	243	11.5%	£1,116,888	formula	£1,275,803	formula	2.5%
Jewell Academy Bournemouth	372	341	-8.3%	£1,952,237	MFG	£1,809,082	MFG	1.1%
King's Park Academy	620	602	-2.9%	£3,010,198	MFG	£2,940,669	MFG	0.6%
Kingsleigh Primary School	777	778	0.1%	£3,679,467	formula	£3,763,468	formula	2.2%
Kinson Academy	200	209	4.5%	£1,077,689	formula	£1,149,823	formula	2.1%
Lilliput Church of England Infant School	351	348	-0.9%	£1,593,370	MPPFL	£1,604,280	MPPFL	1.6%
Livingstone Road Infant School	214	191	-10.7%	£1,091,991	MFG	£993,345	MFG	1.9%
Livingstone Road Junior School	230	229	-0.4%	£1,225,948	formula	£1,239,086	formula	1.5%
Longfleet Church of England Primary School	629	630	0.2%	£2,860,610	MPPFL	£2,904,300	MPPFL	1.4%
Malmesbury Park Primary School	632	639	1.1%	£2,906,331	formula	£3,019,214	formula	2.7%
Manorside Academy	389	374	-3.9%	£1,950,832	formula	£1,938,029	formula	3.3%
Merley First School	300	282	-6.0%	£1,364,206	MPPFL	£1,300,020	MPPFL	1.4%
Moordown St John's Church of England Primary School	414	419	1.2%	£1,886,958	MFG	£1,931,590	MPPFL	1.1%
Mudeford Community Infants' School	179	178	-0.6%	£864,503	formula	£868,369	formula	1.0%
Mudeford Junior School	260	257	-1.2%	£1,239,330	formula	£1,249,578	formula	2.0%
Muscliff Primary School	599	574	-4.2%	£2,727,710	MFG	£2,646,140	MPPFL	1.2%
Oakdale Junior School	435	402	-7.6%	£1,997,817	MFG	£1,899,889	formula	2.9%
Ocean Academy Poole	306	324	5.9%	£1,457,005	formula	£1,567,850	formula	1.6%
Old Town Infant School and Nursery	163	151	-7.4%	£912,103	formula	£899,037	formula	6.4%
Pokesdown Community Primary School	416	417	0.2%	£1,898,894	formula	£1,923,530	formula	1.1%
Queen's Park Academy	474	480	1.3%	£2,157,390	MFG	£2,212,800	MPPFL	1.3%
Queen's Park Infant Academy	359	339	-5.6%	£1,673,211	formula	£1,644,242	formula	4.1%
Somerford Primary School	212	189	-10.8%	£1,167,946	formula	£1,090,066	formula	4.7%
Springdale First School	301	299	-0.7%	£1,367,378	MPPFL	£1,378,390	MPPFL	1.5%
St Clement's and St John's Church of England Infant School	234	221	-5.6%	£1,337,767	formula	£1,337,551	formula	5.9%
St James' Church of England Primary Academy	410	399	-2.7%	£1,869,385	MFG	£1,844,548	formula	1.4%
St Joseph's Catholic Primary School, Christchurch	216	215	-0.5%	£1,089,417	formula	£1,112,949	formula	2.6%
St Joseph's Catholic Primary School, Poole	370	386	4.3%	£1,742,391	formula	£1,888,280	formula	3.9%
St Katharine's Church of England Primary School	436	437	0.2%	£1,979,220	MFG	£2,014,570	MPPFL	1.6%
St Luke's Church of England Primary School	434	430	-0.9%	£2,108,717	formula	£2,139,204	formula	2.4%

	A	B	C	D	E	F	G	H
	NOR Oct-22	NOR Oct-23	% change	23-24 Budget adjusted for SSG (excl rates)		24-25 NFF (excl rates)		Per pupil change from LY
<p><b>NFF) Schools funded at full NFF.</b>  <b>Only surplus schools block transfers</b>  <b>to high needs.</b>  <b>Transfer = £0.383 million (0.1%)</b></p>								
<b>Primary</b>								
St Mark's Church of England Primary School	415	414	-0.2%	£1,886,858	MPPFL	£1,908,540	MPPFL	1.4%
St Mary's Catholic Primary School, Poole	406	394	-3.0%	£1,846,142	MPPFL	£1,841,673	formula	2.8%
St Michael's Church of England Primary School	623	625	0.3%	£2,954,065	formula	£3,049,404	formula	2.9%
St. Walburga's Catholic Primary School	419	416	-0.7%	£1,902,978	MPPFL	£1,917,760	MPPFL	1.5%
Stanley Green Infant Academy	219	197	-10.0%	£1,042,461	formula	£965,092	formula	2.9%
Stourfield Infant School	304	243	-20.1%	£1,397,152	MFG	£1,148,817	MPPFL	2.9%
Stourfield Junior School	452	461	2.0%	£2,064,209	MFG	£2,125,210	MPPFL	0.9%
Talbot Primary School	596	576	-3.4%	£2,842,251	formula	£2,764,469	MFG	0.6%
The Epiphany School	422	421	-0.2%	£1,916,030	MPPFL	£1,940,810	MPPFL	1.5%
The Priory Church of England Primary School	209	201	-3.8%	£968,303	formula	£945,849	formula	1.6%
Twin Sails Infant and Nursery School	342	328	-4.1%	£1,584,014	formula	£1,541,338	formula	1.5%
Twynham Primary School	217	219	0.9%	£990,354	formula	£1,011,626	formula	1.2%
Winton Primary School	838	838	0.0%	£3,815,045	MFG	£3,863,180	MPPFL	1.3%
<b>Middle-deemed Secondary</b>								
Broadstone Middle School	688	659	-4.2%	£3,543,858	formula	£3,510,637	formula	3.4%
<b>Secondary</b>								
Avonbourne Boys' Academy	719	789	9.7%	£4,803,989	formula	£5,356,438	formula	1.6%
Avonbourne Girls Academy	944	1,000	5.9%	£6,152,523	formula	£6,629,959	formula	1.7%
Bournemouth School	873	901	3.2%	£5,156,533	MPPFL	£5,401,495	MPPFL	1.5%
Bournemouth School for Girls	888	897	1.0%	£5,244,522	MPPFL	£5,377,515	MPPFL	1.5%
Corfe Hills School	692	734	6.1%	£4,360,517	formula	£4,676,583	formula	1.1%
Glenmoor Academy	895	896	0.1%	£5,467,723	formula	£5,579,151	formula	1.9%
Highcliffe School	1286	1,293	0.5%	£7,608,598	MPPFL	£7,767,660	formula	1.5%
LeAF Studio	241	243	0.8%	£1,673,013	formula	£1,693,539	MFG	0.4%
Magna Academy	889	895	0.7%	£5,609,027	formula	£5,714,673	formula	1.2%
Oak Academy	508	598	17.7%	£3,697,709	formula	£4,364,481	formula	0.3%
Parkstone Grammar School	926	938	1.3%	£5,471,856	MPPFL	£5,623,310	MPPFL	1.5%
Poole Grammar School	891	897	0.7%	£5,260,565	MPPFL	£5,377,515	MPPFL	1.5%
Poole High School	1608	1,566	-2.6%	£9,891,726	formula	£9,756,830	formula	1.3%
St Aldhelm's Academy	852	833	-2.2%	£6,048,820	formula	£5,961,085	formula	0.8%
St Edward's Roman Catholic/Church of England School, Poole	911	916	0.5%	£5,657,913	formula	£5,794,293	formula	1.9%
The Bishop of Winchester Academy	1055	1,051	-0.4%	£6,691,228	formula	£6,750,471	formula	1.3%
The Bourne Academy	821	828	0.9%	£5,536,578	formula	£5,666,965	formula	1.5%
The Cornerstone Academy	596	687	15.2%	£4,193,627	formula	£4,935,787	formula	2.2%
The Grange School	373	391	4.8%	£2,721,822	formula	£2,877,953	formula	0.9%
Twynham School	1313	1,315	0.2%	£7,855,523	formula	£7,962,390	formula	1.2%
Winton Academy	931	909	-2.4%	£5,740,888	formula	£5,664,978	formula	1.1%
<b>All-through</b>								
Livingstone Academy Bournemouth*	484.5	706	45.7%	£2,967,088	formula	£4,409,440	formula	2.0%
Parkfield School	496	375	-24.4%	£3,064,542	formula	£2,554,049	formula	10.2%
St Peter's Catholic Comprehensive School	1619	1,607	-0.7%	£9,029,532	formula	£9,059,074	formula	1.1%
<b>TOTAL</b>	<b>47,730</b>	<b>47,764</b>	<b>0.1%</b>	<b>£257,387,201</b>		<b>£262,694,609</b>		
				NFF surplus		£383,487		
				<b>Total transfer</b>		<b>£383,487</b>		
						<b>0.1%</b>		



Scenario	Option 1a) MFG / MPPFL and Cap set at -10.5% Transfer = <b>£29,346 (11.1%)</b>			Option 1b) All schools move to MPPFL by setting MFG and Cap at -33% Transfer = <b>£14,061 (5.3%)</b>			Option 2a) MFG set to 0.4% with MPPFL and Basic Entitlement reduced by 0.45% Transfer = <b>£1,324 (0.5%)</b>			Option 2b) NFF - gains capped at 1.47% Transfer = <b>£1,324 (0.5%)</b>			Option 2c) Basic Entitlement reduced by 0.74% Transfer = <b>£1,324 (0.5%)</b>			Option 3a) MFG set to 0% with MPPFL and Basic Entitlement reduced by 1% Transfer = <b>£2,647 (1.0%)</b>			Option 3b) NFF - gains (and MFG) capped at 0.35% Transfer = <b>£2,647 (1.0%)</b>		
	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC
	% per pupil change from 2023-4 Transfer from NFF % of NFF transferred			% per pupil change from 2023-4 Transfer from NFF % of NFF transferred			% per pupil change from 2023-4 Transfer from NFF % of NFF transferred			% per pupil change from 2023-4 Transfer from NFF % of NFF transferred			% per pupil change from 2023-4 Transfer from NFF % of NFF transferred			% per pupil change from 2023-4 Transfer from NFF % of NFF transferred			% per pupil change from 2023-4 Transfer from NFF % of NFF transferred		
<b>Primary</b>																					
Ad Astra Infant School	-9.0%	£147,212	11.9%	-2.2%	£65,182	5.3%	2.9%	£4,087	0.3%	1.7%	£18,488	1.5%	2.7%	£6,752	0.5%	2.5%	£9,654	0.8%	0.7%	£30,508	2.5%
Avonwood Primary School	-9.4%	£247,226	10.5%	1.3%	£0	0.0%	0.8%	£10,559	0.5%	1.3%	£0	0.0%	1.3%	£0	0.0%	0.3%	£22,975	1.0%	1.3%	£0	0.0%
Baden-Powell and St Peter's Church of England Junior School	-9.1%	£348,739	10.5%	1.6%	£0	0.0%	1.2%	£14,895	0.5%	1.6%	£0	0.0%	1.6%	£0	0.0%	0.5%	£35,180	1.1%	1.6%	£0	0.0%
Bayside Academy	-8.7%	£128,460	9.8%	-16.2%	£225,485	17.3%	1.2%	£1,164	0.1%	1.3%	£0	0.0%	1.2%	£1,164	0.1%	0.8%	£5,820	0.4%	1.1%	£1,749	0.1%
Bearwood Primary and Nursery School	-8.5%	£103,984	10.5%	-6.2%	£81,537	8.2%	1.8%	£3,174	0.3%	1.9%	£2,530	0.3%	1.6%	£5,243	0.5%	1.4%	£7,496	0.8%	0.9%	£12,004	1.2%
Bethany Church of England Junior School	-10.1%	£222,188	10.8%	-13.5%	£291,515	14.2%	0.5%	£6,139	0.3%	0.8%	£0	0.0%	0.3%	£10,142	0.5%	0.1%	£14,500	0.7%	0.1%	£15,268	0.7%
Bishop Aldhelm's Church of England Primary School	-9.4%	£289,969	10.5%	1.3%	£0	0.0%	0.8%	£12,385	0.5%	1.3%	£0	0.0%	1.3%	£0	0.0%	0.2%	£29,251	1.1%	1.3%	£0	0.0%
Broadstone First School	-9.4%	£153,970	10.5%	1.3%	£0	0.0%	0.9%	£6,576	0.5%	1.3%	£0	0.0%	1.3%	£0	0.0%	0.2%	£15,532	1.1%	1.3%	£0	0.0%
Burton Church of England Primary School	-8.6%	£157,135	11.3%	0.7%	£30,547	2.2%	2.6%	£4,745	0.3%	2.3%	£9,024	0.6%	2.4%	£7,839	0.6%	2.1%	£11,206	0.8%	1.3%	£22,855	1.6%
Canford Heath Infant School	-9.6%	£182,343	11.0%	1.0%	£7,973	0.5%	1.1%	£5,754	0.3%	1.4%	£1,855	0.1%	1.0%	£7,973	0.5%	0.7%	£13,591	0.8%	1.0%	£7,973	0.5%
Canford Heath Junior School	-9.4%	£229,741	10.5%	1.2%	£0	0.0%	0.8%	£9,812	0.4%	1.2%	£0	0.0%	1.2%	£0	0.0%	0.1%	£23,176	1.1%	1.2%	£0	0.0%
Christ The King Catholic Primary School	-9.8%	£184,748	10.2%	-9.6%	£180,265	9.9%	0.3%	£1,674	0.1%	0.4%	£0	0.0%	0.3%	£1,674	0.1%	-0.1%	£8,370	0.5%	0.2%	£2,515	0.1%
Christchurch Infant School	-9.1%	£141,552	9.9%	0.6%	£3,575	0.3%	0.8%	£1,283	0.1%	0.9%	£0	0.0%	0.8%	£1,283	0.1%	0.4%	£6,413	0.5%	0.8%	£1,927	0.1%
Christchurch Junior School	-9.4%	£242,369	10.5%	1.3%	£0	0.0%	0.9%	£10,352	0.4%	1.3%	£0	0.0%	1.3%	£0	0.0%	0.2%	£24,450	1.1%	1.3%	£0	0.0%
Corpus Christi Catholic Primary School	-9.6%	£202,102	10.2%	-1.5%	£43,262	2.2%	0.6%	£1,831	0.1%	0.7%	£0	0.0%	0.6%	£1,831	0.1%	0.2%	£9,156	0.5%	0.5%	£2,751	0.1%
Courthill Infant School	-9.6%	£169,027	10.5%	1.0%	£0	0.0%	0.6%	£7,219	0.5%	1.0%	£0	0.0%	1.0%	£0	0.0%	0.0%	£17,051	1.1%	1.0%	£0	0.0%
Elm Academy	-9.7%	£228,550	10.3%	-17.2%	£394,755	17.8%	0.6%	£2,071	0.1%	0.7%	£0	0.0%	0.6%	£2,071	0.1%	0.2%	£10,355	0.5%	0.6%	£3,111	0.1%
Hamworthy Park Junior School	-9.9%	£256,667	11.8%	0.4%	£38,500	1.8%	1.9%	£7,405	0.3%	1.4%	£18,142	0.8%	1.6%	£12,234	0.6%	1.4%	£17,491	0.8%	0.4%	£38,500	1.8%
Hay Moor Junior School	-9.7%	£192,537	11.5%	0.8%	£20,065	1.2%	1.7%	£5,770	0.3%	1.4%	£10,987	0.7%	1.5%	£9,533	0.6%	1.2%	£13,629	0.8%	0.8%	£20,065	1.2%
Heatherlands Primary School	-9.5%	£326,110	11.3%	1.2%	£23,999	0.8%	1.6%	£9,970	0.3%	1.4%	£16,563	0.6%	1.4%	£16,471	0.6%	1.2%	£23,548	0.8%	1.2%	£23,999	0.8%
Heathlands Primary Academy	-10.3%	£103,952	9.6%	-28.9%	£306,566	28.4%	-0.9%	£942	0.1%	-0.8%	£0	0.0%	-0.9%	£942	0.1%	-1.2%	£4,710	0.4%	-0.9%	£1,415	0.1%
Highcliffe St Mark Primary School	-9.1%	£311,340	10.5%	1.6%	£0	0.0%	1.1%	£13,298	0.4%	1.6%	£0	0.0%	1.6%	£0	0.0%	0.5%	£31,407	1.1%	1.6%	£0	0.0%
Hill View Primary School	-9.3%	£295,311	10.5%	1.3%	£0	0.0%	0.9%	£12,613	0.4%	1.3%	£0	0.0%	1.3%	£0	0.0%	0.3%	£29,790	1.1%	1.3%	£0	0.0%
Hillbourne Primary School	-10.5%	£161,630	12.7%	-10.0%	£155,573	12.2%	2.2%	£3,895	0.3%	0.1%	£30,135	2.4%	2.0%	£6,435	0.5%	1.7%	£9,200	0.7%	-0.9%	£42,414	3.3%
Jewell Academy Bournemouth	-9.2%	£183,898	10.2%	-12.2%	£237,072	13.1%	1.0%	£1,666	0.1%	1.1%	£0	0.0%	1.0%	£1,666	0.1%	0.6%	£8,332	0.5%	1.0%	£2,503	0.1%
King's Park Academy	-9.9%	£308,159	10.5%	-5.0%	£165,449	5.6%	0.5%	£2,792	0.1%	0.6%	£0	0.0%	0.5%	£2,792	0.1%	0.1%	£13,962	0.5%	0.5%	£4,195	0.1%
Kingsleigh Primary School	-10.2%	£453,427	12.0%	-2.6%	£176,888	4.7%	1.8%	£12,471	0.3%	1.4%	£27,224	0.7%	1.6%	£20,602	0.5%	1.4%	£29,454	0.8%	0.3%	£67,023	1.8%
Kinson Academy	-9.8%	£133,544	11.6%	-14.4%	£186,333	16.2%	1.8%	£3,350	0.3%	0.8%	£15,187	1.3%	1.6%	£5,534	0.5%	1.4%	£7,912	0.7%	-0.2%	£26,239	2.3%
Lilliput Church of England Infant School	-9.1%	£169,027	10.5%	1.6%	£0	0.0%	1.1%	£7,219	0.5%	1.6%	£0	0.0%	1.6%	£0	0.0%	0.5%	£17,051	1.1%	1.6%	£0	0.0%
Livingstone Road Infant School	-7.8%	£94,322	9.5%	-9.7%	£112,835	11.4%	1.8%	£855	0.1%	1.9%	£0	0.0%	1.8%	£854	0.1%	1.5%	£4,273	0.4%	1.8%	£1,284	0.1%
Livingstone Road Junior School	-9.3%	£132,389	10.7%	-13.5%	£183,396	14.8%	1.2%	£3,671	0.3%	1.4%	£1,897	0.2%	1.0%	£6,064	0.5%	0.8%	£8,670	0.7%	0.4%	£14,083	1.1%
Longfleet Church of England Primary School	-9.3%	£305,997	10.5%	1.4%	£0	0.0%	0.9%	£13,069	0.5%	1.4%	£0	0.0%	1.4%	£0	0.0%	0.3%	£30,868	1.1%	1.4%	£0	0.0%
Malmesbury Park Primary School	-10.1%	£377,467	12.5%	0.2%	£73,424	2.4%	2.4%	£10,243	0.3%	1.4%	£40,956	1.4%	2.2%	£16,921	0.6%	1.9%	£24,192	0.8%	0.3%	£72,379	2.4%
Manorside Academy	-9.5%	£241,239	12.4%	-8.1%	£213,889	11.0%	3.0%	£5,995	0.3%	1.6%	£31,550	1.6%	2.8%	£9,903	0.5%	2.6%	£14,159	0.7%	0.6%	£51,131	2.6%
Merley First School	-8.9%	£131,400	10.1%	1.4%	£0	0.0%	1.0%	£4,978	0.4%	1.4%	£0	0.0%	1.4%	£0	0.0%	0.6%	£9,602	0.7%	1.4%	£0	0.0%
Moordown St John's Church of England Primary School	-9.5%	£203,512	10.5%	1.1%	£0	0.0%	0.7%	£8,692	0.5%	1.1%	£0	0.0%	1.1%	£0	0.0%	0.1%	£20,530	1.1%	1.1%	£0	0.0%
Mudeford Community Infants' School	-8.8%	£84,439	9.7%	-4.5%	£47,789	5.5%	0.7%	£2,853	0.3%	1.0%	£0	0.0%	0.5%	£4,714	0.5%	0.2%	£6,739	0.8%	0.4%	£5,406	0.6%

Scenario	Option 1a) MFG / MPPFL and Cap set at -10.5% Transfer = <b>£29.346 (11.1%)</b>			Option 1b) All schools move to MPPFL by setting MFG and Cap at -33% Transfer = <b>£14.061 (5.3%)</b>			Option 2a) MFG set to 0.4% with MPPFL and Basic Entitlement reduced by 0.45% Transfer = <b>£1.324 (0.5%)</b>			Option 2b) NFF - gains capped at 1.47% Transfer = <b>£1.324 (0.5%)</b>			Option 2c) Basic Entitlement reduced by 0.74% Transfer = <b>£1.324 (0.5%)</b>			Option 3a) MFG set to 0% with MPPFL and Basic Entitlement reduced by 1% Transfer = <b>£2.647 (1.0%)</b>			Option 3b) NFF - gains (and MFG) capped at 0.35% Transfer = <b>£2.647 (1.0%)</b>		
	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC
	% per pupil change from 2023-4 Transfer from NFF % of NFF transferred			% per pupil change from 2023-4 Transfer from NFF % of NFF transferred			% per pupil change from 2023-4 Transfer from NFF % of NFF transferred			% per pupil change from 2023-4 Transfer from NFF % of NFF transferred			% per pupil change from 2023-4 Transfer from NFF % of NFF transferred			% per pupil change from 2023-4 Transfer from NFF % of NFF transferred			% per pupil change from 2023-4 Transfer from NFF % of NFF transferred		
<b>Primary</b>																					
Mudeford Junior School	-9.3%	£138,069	11.0%	-3.3%	£64,808	5.2%	1.7%	£4,119	0.3%	1.4%	£6,931	0.6%	1.4%	£6,805	0.5%	1.2%	£9,730	0.8%	0.4%	£19,177	1.5%
Muscliff Primary School	-9.4%	£278,797	10.5%	1.2%	£0	0.0%	0.8%	£11,908	0.4%	1.2%	£0	0.0%	1.2%	£0	0.0%	0.2%	£26,665	1.0%	1.2%	£0	0.0%
Oakdale Junior School	-9.3%	£224,871	11.8%	0.4%	£46,669	2.5%	2.6%	£6,444	0.3%	1.9%	£18,104	1.0%	2.3%	£10,645	0.6%	2.1%	£15,219	0.8%	0.9%	£37,412	2.0%
Ocean Academy Poole	-10.1%	£180,592	11.5%	-3.2%	£74,210	4.7%	1.3%	£5,193	0.3%	0.8%	£12,445	0.8%	1.1%	£8,579	0.5%	0.8%	£12,266	0.8%	-0.2%	£28,147	1.8%
Old Town Infant School and Nursery	-7.8%	£120,095	13.4%	-17.6%	£202,927	22.6%	6.1%	£2,420	0.3%	2.4%	£33,591	3.7%	5.9%	£3,999	0.4%	5.7%	£5,717	0.6%	1.5%	£41,668	4.6%
Pokesdown Community Primary School	-9.6%	£203,701	10.6%	1.0%	£1,160	0.1%	0.7%	£6,684	0.3%	1.1%	£0	0.0%	1.0%	£1,160	0.1%	0.2%	£15,787	0.8%	1.0%	£1,160	0.1%
Queen's Park Academy	-9.4%	£233,141	10.5%	1.3%	£0	0.0%	0.8%	£9,958	0.5%	1.3%	£0	0.0%	1.3%	£0	0.0%	0.2%	£23,519	1.1%	1.3%	£0	0.0%
Queen's Park Infant Academy	-9.2%	£209,856	12.8%	-1.1%	£81,452	5.0%	3.7%	£5,434	0.3%	1.8%	£35,384	2.2%	3.5%	£8,977	0.5%	3.3%	£12,834	0.8%	0.8%	£51,677	3.1%
Somerford Primary School	-7.9%	£131,330	12.0%	-16.3%	£218,776	20.1%	4.4%	£3,029	0.3%	2.7%	£20,696	1.9%	4.2%	£5,005	0.5%	4.0%	£7,155	0.7%	1.7%	£31,027	2.8%
Springdale First School	-9.2%	£145,227	10.5%	1.5%	£0	0.0%	1.0%	£6,203	0.4%	1.5%	£0	0.0%	1.5%	£0	0.0%	0.4%	£14,650	1.1%	1.5%	£0	0.0%
St Clement's and St John's Church of England Infant School	-8.9%	£186,381	13.9%	-19.4%	£318,741	23.8%	5.6%	£3,542	0.3%	1.9%	£49,920	3.7%	5.4%	£5,852	0.4%	5.2%	£8,367	0.6%	0.9%	£62,663	4.7%
St James' Church of England Primary Academy	-9.5%	£198,956	10.8%	1.1%	£5,158	0.3%	1.0%	£6,396	0.3%	1.4%	£0	0.0%	1.1%	£5,158	0.3%	0.6%	£15,106	0.8%	1.1%	£5,158	0.3%
St Joseph's Catholic Primary School, Christchurch	-9.2%	£128,108	11.5%	-8.6%	£121,799	10.9%	2.3%	£3,446	0.3%	1.3%	£13,970	1.3%	2.1%	£5,694	0.5%	1.9%	£8,140	0.7%	0.4%	£24,629	2.2%
St Joseph's Catholic Primary School, Poole	-10.0%	£253,098	13.4%	-2.1%	£108,820	5.8%	3.5%	£6,187	0.3%	1.0%	£51,678	2.7%	3.3%	£10,221	0.5%	3.1%	£14,613	0.8%	0.0%	£70,487	3.7%
St Katharine's Church of England Primary School	-9.1%	£212,255	10.5%	1.6%	£0	0.0%	1.1%	£9,066	0.4%	1.6%	£0	0.0%	1.6%	£0	0.0%	0.5%	£21,412	1.1%	1.6%	£0	0.0%
St Luke's Church of England Primary School	-9.8%	£254,780	11.9%	-1.6%	£82,789	3.9%	2.1%	£6,892	0.3%	1.4%	£19,909	0.9%	1.8%	£11,387	0.5%	1.6%	£16,279	0.8%	0.4%	£41,841	2.0%
St Mark's Church of England Primary School	-9.3%	£201,084	10.5%	1.4%	£0	0.0%	0.9%	£8,588	0.4%	1.4%	£0	0.0%	1.4%	£0	0.0%	0.3%	£20,285	1.1%	1.4%	£0	0.0%
St Mary's Catholic Primary School, Poole	-9.3%	£216,702	11.8%	1.4%	£25,333	1.4%	2.4%	£6,315	0.3%	1.6%	£21,689	1.2%	2.2%	£10,434	0.6%	2.0%	£14,916	0.8%	1.4%	£25,333	1.4%
St Michael's Church of England Primary School	-10.1%	£384,321	12.6%	-2.8%	£168,154	5.5%	2.6%	£10,018	0.3%	1.4%	£44,678	1.5%	2.3%	£16,550	0.5%	2.1%	£23,662	0.8%	0.3%	£76,394	2.5%
St. Walburga's Catholic Primary School	-9.2%	£202,055	10.5%	1.5%	£0	0.0%	1.0%	£8,630	0.4%	1.5%	£0	0.0%	1.5%	£0	0.0%	0.4%	£20,383	1.1%	1.5%	£0	0.0%
Stanley Green Infant Academy	-7.7%	£99,914	10.4%	-3.2%	£56,922	5.9%	2.6%	£3,158	0.3%	2.7%	£1,836	0.2%	2.4%	£5,217	0.5%	2.1%	£7,458	0.8%	1.7%	£10,994	1.1%
Stourfield Infant School	-7.1%	£111,394	9.7%	0.3%	£28,587	2.5%	2.8%	£1,009	0.1%	2.9%	£0	0.0%	2.8%	£1,009	0.1%	2.4%	£5,047	0.4%	2.7%	£1,516	0.1%
Stourfield Junior School	-9.7%	£223,912	10.5%	0.9%	£0	0.0%	0.5%	£9,563	0.4%	0.9%	£0	0.0%	0.9%	£0	0.0%	-0.1%	£22,576	1.1%	0.9%	£0	0.0%
Talbot Primary School	-9.9%	£288,810	10.4%	-3.3%	£109,109	3.9%	0.5%	£2,617	0.1%	0.6%	£0	0.0%	0.5%	£2,617	0.1%	0.2%	£13,085	0.5%	0.5%	£3,932	0.1%
The Epiphany School	-9.2%	£204,484	10.5%	1.5%	£0	0.0%	1.1%	£8,734	0.5%	1.5%	£0	0.0%	1.5%	£0	0.0%	0.5%	£20,628	1.1%	1.5%	£0	0.0%
The Priory Church of England Primary School	-8.5%	£93,963	9.9%	-0.5%	£19,239	2.0%	1.2%	£3,222	0.3%	1.6%	£0	0.0%	1.0%	£5,323	0.6%	0.8%	£7,610	0.8%	0.9%	£6,661	0.7%
Twin Sails Infant and Nursery School	-9.3%	£163,144	10.6%	-0.5%	£29,258	1.9%	1.1%	£5,258	0.3%	1.5%	£0	0.0%	0.9%	£8,686	0.6%	0.6%	£12,418	0.8%	0.7%	£11,802	0.8%
Twynham Primary School	-9.2%	£104,397	10.3%	1.0%	£2,036	0.2%	0.9%	£3,510	0.3%	1.1%	£676	0.1%	1.0%	£2,036	0.2%	0.4%	£8,291	0.8%	1.0%	£2,036	0.2%
Winton Primary School	-9.4%	£407,025	10.5%	1.3%	£0	0.0%	0.8%	£17,384	0.5%	1.3%	£0	0.0%	1.3%	£0	0.0%	0.2%	£41,060	1.1%	1.3%	£0	0.0%



## Scenario

	Option 1a) MFG / MPPFL and Cap set at -10.5% Transfer = <b>£29.346 (11.1%)</b>			Option 1b) All schools move to MPPFL by setting MFG and Cap at -33% Transfer = <b>£14.061 (5.3%)</b>			Option 2a) MFG set to 0.4% with MPPFL and Basic Entitlement reduced by 0.45% Transfer = <b>£1.324 (0.5%)</b>			Option 2b) NFF - gains capped at 1.47% Transfer = <b>£1.324 (0.5%)</b>			Option 2c) Basic Entitlement reduced by 0.74% Transfer = <b>£1.324 (0.5%)</b>			Option 3a) MFG set to 0% with MPPFL and Basic Entitlement reduced by 1% Transfer = <b>£2.647 (1.0%)</b>			Option 3b) NFF - gains (and MFG) capped at 0.35% Transfer = <b>£2.647 (1.0%)</b>		
	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC
	% per pupil change from 2023-4 Transfer from NFF % of NFF transferred			% per pupil change from 2023-4 Transfer from NFF % of NFF transferred			% per pupil change from 2023-4 Transfer from NFF % of NFF transferred			% per pupil change from 2023-4 Transfer from NFF % of NFF transferred			% per pupil change from 2023-4 Transfer from NFF % of NFF transferred			% per pupil change from 2023-4 Transfer from NFF % of NFF transferred			% per pupil change from 2023-4 Transfer from NFF % of NFF transferred		
<b>Middle-deemed Secondary</b>																					
Broadstone Middle School	-9.8%	£450,485	12.8%	0.8%	£90,097	2.6%	3.0%	£12,915	0.4%	1.6%	£62,453	1.8%	2.8%	£21,337	0.6%	2.5%	£30,504	0.9%	0.8%	£90,097	2.6%
<b>Secondary</b>																					
Avonbourne Boys' Academy	-10.5%	£637,716	11.9%	-10.3%	£626,383	11.7%	1.3%	£18,705	0.3%	1.2%	£22,453	0.4%	1.0%	£30,901	0.6%	0.8%	£44,179	0.8%	0.1%	£79,906	1.5%
Avonbourne Girls Academy	-10.4%	£792,113	11.9%	-8.0%	£634,959	9.6%	1.4%	£23,815	0.4%	1.3%	£26,653	0.4%	1.1%	£39,344	0.6%	0.9%	£56,249	0.8%	0.2%	£98,131	1.5%
Bournemouth School	-9.2%	£569,102	10.5%	1.5%	£0	0.0%	1.0%	£24,307	0.5%	1.5%	£0	0.0%	1.5%	£0	0.0%	0.4%	£57,410	1.1%	1.5%	£0	0.0%
Bournemouth School for Girls	-9.2%	£566,575	10.5%	1.5%	£0	0.0%	1.1%	£24,199	0.4%	1.5%	£0	0.0%	1.5%	£0	0.0%	0.4%	£57,155	1.1%	1.5%	£0	0.0%
Corfe Hills School	-10.4%	£531,855	11.4%	-2.5%	£166,642	3.6%	0.7%	£17,965	0.4%	1.1%	£0	0.0%	0.5%	£29,679	0.6%	0.2%	£42,431	0.9%	0.2%	£43,888	0.9%
Glenmoor Academy	-10.3%	£668,016	12.0%	-1.9%	£207,631	3.7%	1.5%	£21,258	0.4%	1.4%	£26,929	0.5%	1.3%	£35,119	0.6%	1.0%	£50,209	0.9%	0.3%	£86,794	1.6%
Highcliffe School	-9.3%	£832,826	10.7%	1.3%	£16,125	0.2%	1.1%	£30,658	0.4%	1.4%	£7,836	0.1%	1.3%	£16,125	0.2%	0.6%	£72,411	0.9%	1.3%	£16,125	0.2%
LeAF Studio	-9.8%	£171,210	10.1%	-11.5%	£200,466	11.8%	0.3%	£1,551	0.1%	0.4%	£0	0.0%	0.3%	£1,552	0.1%	-0.1%	£7,757	0.5%	0.3%	£2,331	0.1%
Magna Academy	-10.3%	£649,397	11.4%	-4.0%	£291,948	5.1%	0.8%	£21,258	0.4%	1.2%	£0	0.0%	0.6%	£35,119	0.6%	0.3%	£50,210	0.9%	0.3%	£49,420	0.9%
Oak Academy	-10.7%	£477,421	10.9%	-17.6%	£779,471	17.9%	-0.1%	£14,055	0.3%	0.3%	£0	0.0%	-0.2%	£18,699	0.4%	-0.5%	£33,196	0.8%	-0.2%	£20,806	0.5%
Parkstone Grammar School	-9.2%	£592,472	10.5%	1.5%	£0	0.0%	1.0%	£25,305	0.4%	1.5%	£0	0.0%	1.5%	£0	0.0%	0.4%	£59,767	1.1%	1.5%	£0	0.0%
Poole Grammar School	-9.2%	£566,575	10.5%	1.5%	£0	0.0%	1.1%	£24,199	0.4%	1.5%	£0	0.0%	1.5%	£0	0.0%	0.5%	£57,155	1.1%	1.5%	£0	0.0%
Poole High School	-10.4%	£1,121,140	11.5%	-2.5%	£368,660	3.8%	0.9%	£37,161	0.4%	1.3%	£0	0.0%	0.6%	£61,392	0.6%	0.4%	£87,771	0.9%	0.4%	£86,723	0.9%
St Aldhelm's Academy	-10.3%	£653,406	11.0%	-14.5%	£907,350	15.2%	0.5%	£19,739	0.3%	0.8%	£0	0.0%	0.4%	£21,029	0.4%	0.1%	£44,159	0.7%	0.4%	£23,934	0.4%
St Edward's Roman Catholic/Church of England School, Poole	-10.3%	£691,216	11.9%	-3.5%	£302,873	5.2%	1.5%	£21,747	0.4%	1.4%	£24,369	0.4%	1.2%	£35,927	0.6%	0.9%	£51,365	0.9%	0.3%	£86,639	1.5%
The Bishop of Winchester Academy	-10.3%	£772,311	11.4%	-5.5%	£449,726	6.7%	0.9%	£24,965	0.4%	1.3%	£0	0.0%	0.7%	£41,243	0.6%	0.4%	£58,965	0.9%	0.4%	£61,256	0.9%
The Bourne Academy	-10.3%	£658,353	11.6%	-11.1%	£703,105	12.4%	1.1%	£19,583	0.3%	1.4%	£4,185	0.1%	0.9%	£32,352	0.6%	0.7%	£46,253	0.8%	0.3%	£65,271	1.2%
The Cornerstone Academy	-10.6%	£618,407	12.5%	-14.8%	£820,220	16.6%	1.8%	£16,187	0.3%	1.0%	£57,008	1.2%	1.6%	£26,741	0.5%	1.4%	£38,232	0.8%	-0.1%	£109,431	2.2%
The Grange School	-10.2%	£317,035	11.0%	-17.8%	£533,908	18.6%	0.5%	£9,259	0.3%	0.9%	£0	0.0%	0.3%	£15,296	0.5%	0.1%	£21,869	0.8%	0.1%	£21,782	0.8%
Twynham School	-10.4%	£909,562	11.4%	0.2%	£78,965	1.0%	0.8%	£31,222	0.4%	1.2%	£0	0.0%	0.6%	£51,579	0.6%	0.3%	£73,742	0.9%	0.3%	£68,059	0.9%
Winton Academy	-10.2%	£633,315	11.2%	-2.8%	£215,523	3.8%	0.7%	£21,598	0.4%	1.1%	£0	0.0%	0.4%	£34,678	0.6%	0.2%	£51,012	0.9%	0.4%	£37,428	0.7%
<b>All-through</b>																					
Livingstone Academy Bournemouth*	2.0%	£0	0.0%	2.0%	£0	0.0%	1.6%	£15,044	0.3%	2.0%	£0	0.0%	1.4%	£24,852	0.6%	1.2%	£35,531	0.0%	2.0%	£0	0.0%
Parkfield School	-7.5%	£410,868	16.1%	-16.0%	£608,893	23.8%	9.9%	£8,294	0.3%	3.7%	£152,408	6.0%	9.6%	£13,702	0.5%	9.4%	£19,590	0.8%	2.6%	£176,543	6.9%
St Peter's Catholic Comprehensive School	-10.4%	£1,025,718	11.3%	-6.1%	£642,831	7.1%	0.7%	£34,916	0.4%	1.1%	£0	0.0%	0.4%	£57,683	0.6%	0.2%	£82,469	0.9%	0.4%	£64,591	0.7%
<b>TOTAL</b>		<b>£28,963,236</b>			<b>£13,677,600</b>			<b>£940,303</b>			<b>£940,339</b>			<b>£940,342</b>			<b>£2,264,165</b>			<b>£2,314,165</b>	
NFF Surplus		£383,487			£383,487			£383,487			£383,487			£383,487			£383,487		2.0%	£383,487	
<b>Total Transfer</b>		<b>£29,346,724</b>			<b>£14,061,087</b>			<b>£1,323,790</b>			<b>£1,323,826</b>			<b>£1,323,829</b>			<b>£2,647,652</b>			<b>£2,697,652</b>	
		<b>11.1%</b>			<b>5.3%</b>			<b>0.5%</b>			<b>0.5%</b>			<b>0.5%</b>			<b>1.0%</b>			<b>1.0%</b>	
<b>Saved by those originally on:</b>																					
Formula		£19,315,747	66.7%		£11,670,171	85.3%		£601,136	63.9%		£940,339	100.0%		£920,884	97.9%		£1,417,356	62.6%		£2,284,935	98.7%
MPPFL		£7,753,278	26.8%		£32,162	0.2%		£322,003	34.2%		£0	0.0%		£2,292	0.2%		£760,989	33.6%		£3,443	0.1%
MFG		£1,894,211	6.5%		£1,975,266	14.4%		£17,164	1.8%		£0	0.0%		£17,165	1.8%		£85,820	3.8%		£25,786	1.1%
CAP		£0	0.0%		£0	0.0%		£0	0.0%		£0	0.0%		£0	0.0%		£0	0.0%		£0	0.0%
		<b>£28,963,236</b>			<b>£13,677,600</b>			<b>£940,303</b>			<b>£940,339</b>			<b>£940,342</b>			<b>£2,264,165</b>			<b>£2,314,165</b>	
	-7.1%	Max	16.1%	1.6%	Max	28.4%	9.9%	Max	0.5%	3.7%	Max	6.0%	9.6%	Max	0.6%	9.4%	Max	1.1%	2.7%	Max	6.9%
	-10.7%	Min	9.5%	-28.9%	Min	0.0%	-0.9%	Min	0.1%	-0.8%	Min	0.0%	-0.9%	Min	0.0%	-1.2%	Min	0.4%	-0.9%	Min	0.0%

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# SCHOOLS FORUM



Report subject	<b>Maintained school services – de-delegation and central retention</b>
Meeting date	15 January 2024
Status	Public Report
Executive summary	<p>This report provides proposals for:</p> <ul style="list-style-type: none"> <li>• The central retention of services where the LA retains a statutory duty to undertake activity to support maintained schools only (both mainstream and specialist);</li> <li>• De-delegation of services applicable only to mainstream schools. These are services where schools retain the statutory duties, but better efficiency could be achieved through central delivery by the LA.</li> </ul>
Recommendations	<p>It is <b>RECOMMENDED</b> that the Maintained Schools members of the Schools Forum only:</p> <p><b>(A) Agree collectively the retention rates per pupil and budgets for LA duties supporting maintained schools as set out in paragraphs 8-10.</b></p> <p><b>(B) Agree separately for primary and secondary, the de-delegation of funding for school improvement duties as set out in paragraphs 11-12</b></p>
Reason for recommendations	Maintained School Forum members must be consulted on proposals for the central retention and de-delegated budget shares and agree these.
Portfolio Holder(s):	Cllr Richard Burton
Corporate Director	Cathi Hadley, Director Children's Services
Report Authors	Paul Reidy, Project Manager
Wards	Council-wide
Classification	For Recommendation

## Background

1. The deployment of the DSG is regulated by the DfE through the School Finance Regulations, which are updated annually.
2. The local School's Forum must be consulted on how the grant is used and has a range of decision-making powers.
3. The council is responsible for setting the formula for mainstream schools for Reception to Year 11 after taking account of the recommendations of the Schools Forum which in turn should be based on the views of schools.
4. Maintained schools' representatives on the Schools Forum are asked to agree that some services should be funded from the budget shares of maintained primary and secondary schools. The services and the proposed total amount to be funded are in respect of the following:
  - **Central Retention:** Proposals for the central retention of services where the LA retains a statutory duty to undertake activity to support maintained schools only. These include a range of services such Financial and Audit Services, Asset Management and monitoring national curriculum assessments.
  - **De-delegation:** Proposals for de-delegation of services applicable only to mainstream schools. These are services where schools retain the statutory duties, but better efficiency could be achieved through central delivery by the LA.
5. There are currently 13 mainstream maintained schools, and these will need to be accounted with this status for a full year on the APT containing the budget shares sent to the DfE in January. In addition, there are 3 specialist maintained providers (including the PRU).
6. **Consultation with Maintained Schools Only:** The detail of these budgets was set out in the consultation paper ( **Appendix 1** to this report) with the consequences if funding was not agreed. The consultation was ongoing at the time of writing this report and details of all consultation responses will be reported to the Forum in an oral update.
7. **Central retention from maintained school budget shares for LA statutory duties:** It is understood that it will be important for headteachers to reassure themselves that the services provided offer value for money. Reflecting comments to the consultation received last year, BCP has appended to the consultation paper, detail of the services provided for each of the service headings paid for from schools budget shares. In all cases, the amount of retention supports the delivery of statutory functions and duties of the Council and is the only funding source for these duties. The actual costs and hours of service provided under each service heading is difficult to determine. This reflects that in the case of some service areas i.e. Financial Services, there are no longer dedicated staff teams working only with maintained schools and there are no records of time spent on this activity only.
8. The guidance sets out that Local authorities should set a single rate per 5 to 16-year-old pupil for all mainstream maintained schools, both primary and secondary (and this

is deducted from basic entitlement funding). It is important to note that the rate does not include early years or post-16 pupils who are funded through different formulae. Local authorities may 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 is expressed per place rather than per pupil for special schools and PRUs. The proposed per pupil (mainstream) and per place (specialist) rates for central retentions for 2024-25 are set out in the table below (Table 1). This represents a 5% increase for 2024/25 to reflect additional inflationary costs incurred by BCP.

Table 1: Proposed Maintained School Central Retention Rates April 2024 - March 2025

	2022/23	2023/24	Proposed 2024/25
Mainstream School rate per pupil	23.17	23.15	24.31
Specialist Provider rate per place	98.46	98.37	103.29

9. The guidance sets out that 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. In line with the DfE's guidance, table 2 sets out the planned total spending for the 12 months period from April 2024. Spending is shown under maintained school service headings which align to statutory and regulatory duties of the Local Authority. **Appendix 1** provides details of maintained school duties with a comparison of those for all schools funded from the central school services block. Detail of the actual services provided locally by BCP are set out in **Appendix 2** along with the risks/consequences of the amount not being held centrally.

Table 2: LA Budget for Maintained School Statutory Duties April 2024 to March 2025

Statutory and Regulatory Duties	Central Budget Retained £000's
Education Services	60.5
Finance and Audit	73.5
Human Resources	15.5
Asset Management	52.5
Monitoring National Curriculum Assessments	21
<b>Total Statutory &amp; Regulatory</b>	<b>223</b>

10. The guidance requires LA to provide details of the impact on individual school budgets, and their overall financial position. The amounts for each maintained school for the 12-month period (should they remain maintained throughout) based on 2023-24 pupils and projected 2024-25 place numbers are set out in the table below (estimated figures have been used for Special School Places).

Table 3: Maintained School Central Retentions April 2024 to March 2025

<b>Maintained Mainstream</b>	<b>NOR</b>	<b>Central Retention</b>
Christchurch Infant School	308	£7,487
Somerford Primary School	189	£4,595
Mudeford Community Infants' School	178	£4,327
Mudeford Junior School	257	£6,248
Burton Church of England Primary School	296	£7,196
St Katharine's Church of England Primary School	437	£10,623
Corpus Christi Catholic Primary School	419	£10,186
The Priory Church of England Primary School	201	£4,886
St Joseph's Catholic Primary School,	215	£5,227
Highcliffe St Mark Primary School	641	£15,583
St Walburga's Catholic Primary School	416	£10,113
St Edward's RC/C England School, Poole	916	£22,268
Poole High School	1566	£38,069
<b>Maintained Specialist Places</b>	<b>Places</b>	
Winchelsea Special	220	£22,742
Christchurch Learning Centre	48	£4,958
Linwood Special	422	£43,588
<b>Proposed Contribution BCP</b>		<b>£218,096</b>

### De-delegation of School Duties

11. De-delegation of services is currently applicable only to mainstream schools. These are services where schools retain the statutory duties, but better efficiency could be achieved through central delivery by the LA. The arrangements for maintained special and AP providers are currently the same as those for academies through traded services, Schools Forum makes the decision on behalf of all maintained schools by primary and secondary phases separately.
12. DfE guidance sets out that de-delegated services are for maintained mainstream schools only and that 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. Where de-delegation is agreed for maintained primary and secondary schools, local authorities typically offer the service on a buyback basis i.e. traded services to those schools/academies in their area which are not covered by the de-delegation and for their consideration individually. BCP currently offer a service level agreement for checking free school meal eligibility.

13. **De-delegation does not apply to special schools, nursery schools, or PRUs.** In the case of special schools and PRUs, the funding to buy such services will be included in any top-up payments. For this reason, special schools and PRUs will need to agree the charge on an individual basis.
14. **Academy Conversion.** In line with DfE guidance, arrangements for maintained schools on conversion to academy status are contained in **Appendix 3**. New decisions will be required for any service to be de-delegated in 2024/2025. There are no specific proposals for new traded services.

### 15. Core School Improvement Duties

The DfE previously funded the core school improvement duties through specific grant with the amount received by each council proportionate to the number of maintained schools in their area. BCP previously received the minimum allocation of £50,000 with this grant now ended. Following the government decision to end the grant, an amount is now required to be funded via de-delegation from maintained schools' budget share. This enables the LA to fund core improvement activities. These include monitoring the performance of maintained schools, brokering school improvement provision and exercising the council's statutory intervention powers. The core improvement activities are set out in Part 4 of the Education and Inspections Act 2006 (the 2006 Act) and in the Schools Causing Concern guidance. Part 4 of the 2006 Act provides councils with statutory powers to warn and intervene in schools causing concern, through issuing a warning notice setting out actions the governing body are to take. Further details are contained in **Appendix 4**.

16. The school improvement team also discharge the shared statutory responsibility for SACRE and the Agreed RE Syllabus under the 1948 Act. All support for the improvement of RE across all BCP maintained schools is free to access and will be delivered to all maintained schools with EIF supporting subject assessment and tools in January 2024.

17. As for 2023/24, it is proposed that de-delegation is done on a per pupil basis in the same way as the central retention to replace the amount of the previous grant attributable to mainstream schools. Specialist providers would need to buy into a traded service individually to replace the balance of the lost grant. Meeting the costs of providing the de-delegated services would equate to the following rates per pupil for mainstream schools:

**Table 4: Proposed Maintained School De-delegation Rates April 2024 - March 2025**

	2023/24	Proposed 2024/25
Mainstream School rate per pupil	4.66	4.89

### Indicative De-delegation Amounts 2024-2025

**Table 5: Indicative Maintained School De-Delegation Amounts April 2024 – March 2025**

Maintained Mainstream	NOR	De-delegation
Christchurch Infant School	308	£1,506
Somerford Primary School	189	£924

Mudford Community Infants' School	178	£870
Mudford Junior School	257	£1,257
Burton Church of England Primary School	296	£1,447
St Katharine's Church of England Primary School	437	£2,137
Corpus Christi Catholic Primary School	419	£2,049
The Priory Church of England Primary School	201	£983
St Joseph's Catholic Primary School,	215	£1,051
Highcliffe St Mark Primary School	641	£3,135
St Walburga's Catholic Primary School	416	£2,034
St Edward's RC/C England School, Poole	916	£4,479
Poole High School	1566	£7,658
<b>Total</b>		<b>£28,795</b>

18. In respect of special maintained schools and PRUs, **De-delegation does not apply and therefore** special schools and PRUs will need to agree the charge on an individual basis. Based on a per pupil place rate (same multiplier as the central retention) these amounts are shown in the table below as referred to as SLA amounts. Special Schools, PRUs will be contacted individually to agree this.

**Table 6: SLA Amounts Core School Improvement April 2024 - March 2025**

	<b>NOR</b>	<b>SLA Amounts</b>
Winchelsea Special	220	£4,578
Christchurch Learning Centre	48	£988
Linwood Special	422	£8,781
<b>Total</b>		<b>£14,347</b>

### **Traded Services**

19. As in the current year, a number of services may be offered to maintained schools only, as provision centrally complements our statutory duties. 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.
20. Maintained schools also get traded services such as Evolve (trips and visits) which support our responsibility to a broad and balanced curriculum and Pobble (Writing publishing platform) for free as part of charged services for MATs. The latter support primary moderation and can also be used for KS3 assessment for learning.



## **Recommendations for maintained schools only**

21. **Central Retention:** The maintained schools' members of the schools forum (primary, secondary, special, and pupil referral units (PRUs)) should agree the amount the local authority will retain as set out in paragraphs 9 and 10. 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.
22. **De-delegation:** Schools forum members for primary maintained schools and secondary maintained schools must decide separately for each phase whether the service should be provided centrally as set out in paragraphs 15 and 16. The decision will apply to all maintained mainstream schools in that phase. Members must decide on fixed contributions for these services so that funding can then be removed from the formula before school budgets are issued.

## **Summary of financial implications**

23. The budgets for the schools and central school services blocks are set within the available DSG funding.

## **Summary of legal implications**

24. There are no legal implications.

## **Summary of human resources implications**

25. There is a risk that in the event that amounts are not agreed, staffing levels would reduce resulting in diminished services for maintained schools. Implications for staffing levels from mainstream funding changes rests within individual schools.

## **Summary of sustainability impact**

26. None

## **Summary of public health implications**

27. None

## **Summary of equality implications**

28. The DfE undertook an equality impact assessment in determining how DSG funding is to be allocated and the structure of the mainstream funding formulae. The local budgets are aligned with the national scheme.

## **Summary of risk assessment**

29. School finance regulations allow local authorities to centrally retain funding from school budget shares. The proposal to charge for services from maintained school budgets is to enable the council to continue to undertake these functions/maintain a

central education function in relation to maintained schools. Importantly, the council is obliged to carry out a number of statutory duties and in the event that the proposed retention is not agreed, the Council would:

- Fail to discharge its duties and this would impact the effective operation of education support services in BCP;
- Find it difficult to set a balanced budget without making cuts to other vital services.

### **Background papers**

30. DSG LA guidance 2024-25.

### **List of Appendices**

Appendix 1 Consultation Paper – Central Retention and De-delegation Maintained Schools  
Appendix 2 Services Provided by BCP Council Central Budget Retention  
Appendix 2B Statutory H&S services for BCP maintained schools  
Appendix 3 Conversion to Academy Status Extract from DfE Guidance  
Appendix 4 The Schools Causing Concern Guidance  
Appendix 5 De-delegated Services Extract from DfE Guidance

# Central Retention and De-delegation Funding Consultation

## Maintained Schools Only 2024-2025

The closing date for comments is **Thursday 11 January 2024**

<https://forms.office.com/e/FPkcP2qRe1>

### Services for Maintained Schools Only

This consultation provides details of the funding mechanisms applicable to maintained schools only. Maintained schools' representatives on the Schools Forum are asked to agree that some services should be funded from the budget shares of maintained primary and secondary schools. The services and the proposed total amount to be funded are in respect of the following:

- **Central Retention:** Proposals for the central retention of services where the LA retains a statutory duty to undertake activity to support maintained schools only. These include a range of services such Financial and Audit Services, Asset Management and monitoring and moderating national curriculum assessments and that every school in BCP is Good or better. The LA also provides Governor Services and an LA Governor for every maintained school.
- **De-delegation:** Proposals for de-delegation of services applicable only to mainstream schools. These are services where schools retain the statutory duties, but better efficiency could be achieved through central delivery by the LA.

### Central Retention

Central retention is applicable to both mainstream and specialist providers. These are services where the LA retains a statutory duty to undertake activity to support all maintained schools only. These services are to be funded from central retention of school budget shares on an amount per pupil or per place. Schools Forum maintained school representatives make the decision on behalf of all maintained schools collectively.

Following the withdrawal of the Education Services Grant (ESG) previously allocated to local authorities by the Government for the provision of statutory services in relation to schools, the DFE introduced a provision within the School Funding Regulations for local authorities to agree a contribution from LA maintained schools budget shares towards the cost of statutory services. This principle reflects the charge that most Multi Academy Trusts (MATs) place on their partner academies for central services. This means that with the agreement of maintained school members of the Schools Forum, Local authorities are able to fund some services relating to maintained schools only from maintained school budget shares. The relevant maintained school members of the Schools Forum (primary, secondary, special, and PRUs) should agree the amount the local authority will retain.

The guidance sets out that Local authorities should set a single rate per 5 to 16-year-old pupil for all mainstream maintained schools, both primary and secondary (and this is deducted from basic entitlement funding). It is important to note that the rate does not include early years or post-16 pupils

who are funded through different formulae. Local authorities may 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 is expressed per place rather than per pupil for special schools and PRUs. The proposed per pupil (mainstream) and per place (specialist) rates for central retentions for 2024-25 are set out in the table below (Table 1). This represents a 5% increase for 2024/25 to reflect additional inflationary costs incurred by BCP.

**Table 1: Proposed Maintained School Central Retention Rates April 2024 - March 2025**

	2022/23	2023/24	Proposed 2024/25
Mainstream School rate per pupil	23.17	23.15	24.31
Specialist Provider rate per place	98.46	98.37	103.29

The guidance sets out that 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. In line with the DfE's guidance, table 2 sets out the planned total spending for the 12 months period from April 2024. Spending is shown under maintained school service headings which align to statutory and regulatory duties of the Local Authority. **Appendix 1** provides details of maintained school duties with a comparison of those for all schools funded from the central school services block. Detail of the actual services provided locally by BCP are set out in **Appendix 2** along with the risks/consequences of the amount not being held centrally.

**Table 2: LA Budget for Maintained School Statutory Duties April 2024 to March 2025**

Statutory and Regulatory Duties	Central Budget Retained £000's
Education Services	60.5
Finance and Audit	73.5
Human Resources	15.5
Asset Management	52.5
Monitoring National Curriculum Assessments	21
<b>Total Statutory &amp; Regulatory</b>	<b>223</b>

The guidance requires LA to provide details of the impact on individual school budgets, and their overall financial position. The amounts for each maintained school for the 12-month period (should they remain maintained throughout) based on 2023-24 pupils and projected 2024-25 place numbers (to be updated in final allocations) are set out in the table below.

**Table 3: Indicative Maintained School Central Retentions April 2024 to March 2025**

Maintained Mainstream	NOR	Central Retention
Christchurch Infant School	308	£7,487
Somerford Primary School	189	£4,595
Mudeford Community Infants' School	178	£4,327
Mudeford Junior School	257	£6,248
Burton Church of England Primary School	296	£7,196
St Katharine's Church of England Primary School	437	£10,623
Corpus Christi Catholic Primary School	419	£10,186
The Priory Church of England Primary School	201	£4,886
St Joseph's Catholic Primary School,	215	£5,227

Highcliffe St Mark Primary School	641	£15,583
St Walburga's Catholic Primary School	416	£10,113
St Edward's RC/C England School, Poole	916	£22,268
Poole High School	1566	£38,069
<b>Maintained Specialist Places</b>	<b>Places</b>	
Winchelsea Special	220	£22,742
Christchurch Learning Centre	48	£4,958
Linwood Special	422	£43,588
<b>Proposed Contribution BCP</b>		<b>£218,096</b>

As the Council's pressures intensify, it will be necessary to review the amounts centrally retained.

### De-delegation of School Duties

De-delegation of services is currently applicable only to mainstream schools. These are services where schools retain the statutory duties, but better efficiency could be achieved through central delivery by the LA. The arrangements for maintained special and AP providers are currently the same as those for academies through traded services, Schools Forum makes the decision on behalf of all maintained schools by primary and secondary phases separately.

DfE guidance sets out that de-delegated services are for maintained mainstream schools only and that 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. Where de-delegation is agreed for maintained primary and secondary schools, local authorities typically offer the service on a buyback basis i.e. traded services to those schools/academies in their area which are not covered by the de-delegation and for their consideration individually. BCP currently offer a service level agreement for checking free school meal eligibility.

**De-delegation does not apply to special schools, nursery schools, or PRUs.** In the case of special schools and PRUs, the funding to buy such services will be included in any top-up payments. For this reason, special schools and PRUs will need to agree the charge on an individual basis.

### Academy Conversion

In line with DfE guidance, arrangements for maintained schools on conversion to academy status are contained in **Appendix 3**.

New decisions will be required for any service to be de-delegated in 2024/2025. There are no specific proposals for new traded services.

### Core School Improvement Duties

The DfE previously funded the core school improvement duties through specific grant with the amount received by each council proportionate to the number of maintained schools in their area. BCP previously received the minimum allocation of £50,000 with this grant now ended. Following the government decision to end the grant, an amount is now required to be funded via de-delegation from maintained schools' budget share. This enables the LA to fund core improvement activities. These include monitoring the performance of maintained schools, brokering school improvement provision and exercising the council's statutory intervention powers. The core improvement activities are set out in Part 4 of the Education and Inspections

Act 2006 (the 2006 Act) and in the Schools Causing Concern guidance. Part 4 of the 2006 Act provides councils with statutory powers to warn and intervene in schools causing concern, through issuing a warning notice setting out actions the governing body are to take. Further details are contained in **Appendix 4**.

The school improvement team also discharge the shared statutory responsibility for SACRE and the Agreed RE Syllabus under the 1948 Act. All support for the improvement of RE across all BCP maintained schools is free to access and will be delivered to all maintained schools with EIF supporting subject assessment and tools in January 2024.

As for 2023/24, it is proposed that de-delegation is done on a per pupil basis in the same way as the central retention to replace the amount of the previous grant attributable to mainstream schools. Specialist providers would need to buy into a traded service individually to replace the balance of the lost grant. Meeting the costs of providing the de-delegated services would equate to the following rates per pupil for mainstream schools:

**Table 4: Proposed Maintained School De-delegation Rates April 2024 - March 2025**

	220232/24	Proposed 2024/25
Mainstream School rate per pupil	4.66	4.89

#### **Indicative De-delegation Amounts 2024-2025**

**Table 5: Indicative Maintained School De-Delegation Amounts April 2024 – March 2025**

Maintained Mainstream	NOR	De-delegation
Christchurch Infant School	308	£1,506
Somerford Primary School	189	£924
Mudford Community Infants' School	178	£870
Mudford Junior School	257	£1,257
Burton Church of England Primary School	296	£1,447
St Katharine's Church of England Primary School	437	£2,137
Corpus Christi Catholic Primary School	419	£2,049
The Priory Church of England Primary School	201	£983
St Joseph's Catholic Primary School,	215	£1,051
Highcliffe St Mark Primary School	641	£3,135
St Walburga's Catholic Primary School	416	£2,034
St Edward's RC/C England School, Poole	916	£4,479
Poole High School	1566	£7,658
<b>Total</b>		<b>£28,795</b>

In respect of special maintained schools and PRUs, **De-delegation does not apply and therefore** special schools and PRUs will need to agree the charge on an individual basis. Based on a per pupil place rate (same multiplier as the central retention) these amounts are shown in the table below as referred to as SLA amounts. Special Schools, PRUs will be contacted individually to agree this.

**Table 6: SLA Amounts Core School Improvement April 2024 - March 2025**

	NOR	SLA Amounts
Winchelsea Special	220	£4,578

Christchurch Learning Centre	48	£988
Linwood Special	422	£8,781
<b>Total</b>		<b>£14,347</b>

### Traded Services

As in the current year, a number of services may be offered to maintained schools only, as provision centrally complements our statutory duties. 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.

Maintained schools also get traded services such as Evolve (trips and visits) which support our responsibility to a broad and balanced curriculum and Pobble (Writing publishing platform) for free as part of charged services for MATs. The latter support primary moderation and can also be used for KS3 assessment for learning.

### How to make your views known and process of decision making

Maintained School headteachers are asked to comment on this consultation. The questionnaire can be accessed at the following link: <https://forms.office.com/e/FPkcP2qRe1>

**The deadline for responses is 11 January 2024.** All responses will be reported to the Schools Forum (maintained school forum members only) for a decision on 15 January 2024.

**Central Retention:** 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.

**De-delegation:** Schools forum members for mainstream 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. Members must decide on fixed contributions for these services so that funding can then be removed from the formula before school budgets are issued.

Extracts from DfE guidance on Maintained School Funding is provided at **Appendix 5**.

Any queries in respect of this consultation may be sent to [paul.reidy@bcpcouncil.gov.uk](mailto:paul.reidy@bcpcouncil.gov.uk)

## Consultation Responses - Questions for all Maintained Schools

Please follow the MS Forms link to access the questionnaire electronically. The closing date for comments is **Thursday 11 January 2024**.

<https://forms.office.com/e/FPkcP2qRe1>

### Central Retention Questions 1a and 2b

#### **QUESTION 1a**

Do you support the proposals for the central retention?

Education Services	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Unsure
Finance and Audit	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Unsure
Human Resources	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Unsure
Asset Management	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Unsure
Monitoring NC Assessments	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Unsure

#### **QUESTION 1b**

Do you have any comments about the proposals for the central retention?

### Questions for Mainstream Maintained Schools Only De-delegation –Questions 2a and 2b

#### **QUESTION 2a (for mainstream maintained schools only)**

Do you support de-delegation of funding from mainstream maintained school budget shares to support the delivery of Core School improvement functions?

- ☐ Yes
- ☐ No
- ☐ Unsure

If no, can you suggest how these LA duties should be funded?

#### **QUESTION 2b (for mainstream maintained schools only)**

If the above is to be continued, is using pupil / place numbers the right approach?

- ☐ Yes
- ☐ No
- ☐ Unsure

If no, can you suggest an alternative with reasons?



## LA Statutory Education Functions 2024-2025

Central Education Services, Governors, Finance, Audit, HR	
Responsibilities held for all schools	Responsibilities held for maintained schools only
<ul style="list-style-type: none"> <li>• Director of children's services and personal staff for director (Sch 2, 15a)</li> <li>• Planning for the education service as a whole (Sch 2, 15b)</li> <li>• Revenue budget preparation, preparation of information on income and expenditure relating to education, and external audit relating to education (Sch 2, 22)</li> <li>• Authorisation and monitoring of expenditure not met from schools' budget shares (Sch 2, 15c)</li> <li>• Formulation and review of local authority schools funding formula (Sch 2, 15d)</li> <li>• Internal audit and other tasks related to the authority's chief finance officer's responsibilities under Section 151 of LGA 1972 except duties specifically related to maintained schools (Sch 2, 15e)</li> <li>• Consultation costs relating to non staffing issues (Sch 2, 19)</li> <li>• Plans involving collaboration with other LA services or public or voluntary bodies (Sch 2, 15f)</li> <li>• Standing Advisory Committees for Religious Education (SACREs) (Sch 2, 17)</li> <li>• To provide an LA governor for all schools including specialist and AP schools</li> </ul> <p>17) &amp; provision for maintained non-faith schools of the Agreed Syllabus for RE which will be delivered in January 2023</p> <p>Provision of information to or at the request of the Crown other than relating specifically to maintained schools (Sch 2, 21)</p>	<ul style="list-style-type: none"> <li>• Functions of LA related to best value and provision of advice to governing bodies in procuring goods and services (Sch 2, 57)</li> <li>• Budgeting and accounting functions relating to maintained schools (Sch 2, 74)</li> <li>• Authorisation and monitoring of expenditure in respect of schools which do not have delegated budgets, and related financial administration (Sch 2, 58)</li> <li>• Monitoring of compliance with requirements in relation to the scheme for financing schools and the provision of community facilities by governing bodies (Sch 2, 59)</li> <li>• Internal audit and other tasks related to the authority's chief finance officer's responsibilities under Section 151 of LGA 1972 for maintained schools (Sch 2, 60)</li> <li>• Functions made under Section 44 of the 2002 Act (Consistent Financial Reporting) (Sch 2, 61)</li> <li>• Investigations of employees or potential employees, with or without remuneration to work at or for schools under the direct management of the headteacher or governing body (Sch 2, 62)</li> <li>• Functions related to local government pensions and administration of teachers' pensions in relation to staff working at maintained schools under the direct management of the headteacher or governing body (Sch 2, 73)</li> <li>• Retrospective membership of pension schemes where it would not be appropriate to expect a school to meet the cost (Sch 2, 76)</li> <li>• HR duties, including: advice to schools on the management of staff, pay alterations, conditions of service and composition or organisation of staff (Sch 2, 64); determination of conditions of service for non-teaching staff (Sch 2, 65); appointment or dismissal of employee functions (Sch 2, 66)</li> <li>• Consultation costs relating to staffing (Sch 2, 67)</li> <li>• Compliance with duties under Health and Safety at Work Act (Sch 2, 68)</li> <li>• Provision of information to or at the request of the Crown relating to schools (Sch 2, 69)</li> <li>• School companies (Sch 2, 70)</li> <li>• Functions under the Equality Act 2010 (Sch 2, 71)</li> <li>• Establish and maintaining computer systems, including data storage (Sch 2, 72)</li> <li>• Appointment of governors and payment of governor expenses (Sch 2, 73)</li> </ul>

## Appendix 1

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

Asset Management	
Responsibilities held for all schools	Responsibilities held for maintained schools only
<ul style="list-style-type: none"> <li>Management of the LA's capital programme including preparation and review of an asset management plan, and negotiation and management of private finance transactions (Sch 2, 14a)</li> <li>General landlord duties for all buildings owned by the local authority, including those leased to academies (Sch 2, 14b)</li> </ul>	<ul style="list-style-type: none"> <li>General landlord duties for all maintained schools (Sch 2, 77a &amp; b (section 542(2)) Education Act 1996; School Premises Regulations 2012) to ensure that school buildings have: <ul style="list-style-type: none"> <li>appropriate facilities for pupils and staff</li> <li>the ability to sustain appropriate loads</li> <li>reasonable weather resistance</li> <li>safe escape routes</li> <li>appropriate acoustic levels</li> <li>lighting, heating and ventilation to required standards</li> <li>adequate water supplies and drainage</li> <li>playing fields of the appropriate standards</li> </ul> </li> <li>General health and safety duty as an employer for employees and others who may be affected (Health and Safety at Work etc. Act 1974)</li> <li>Management of the risk from asbestos in community school buildings (Control of Asbestos Regulations 2012)</li> </ul>

Monitoring national curriculum assessment	
Responsibilities held for all schools	Responsibilities held for maintained schools only
<ul style="list-style-type: none"> <li>Primary phase moderation has to be available and offered to all schools (only 1 trust opts out)</li> </ul>	<ul style="list-style-type: none"> <li>Monitoring of National Curriculum assessments (Sch 2, 75) and moderation of all assessments in primary phase</li> </ul>

Premature retirement and redundancy	
Responsibilities held for all schools	Responsibilities held for maintained schools only
<ul style="list-style-type: none"> <li>No functions</li> </ul>	<ul style="list-style-type: none"> <li>Dismissal or premature retirement when costs cannot be charged to maintained schools (Sch 2, 78) <b><i>BCP does not fund these costs - see Scheme of Financing Schools</i></b></li> </ul>

## Appendix 2

### Services Provided by BCP Council Central Budget Retention

**Education Services** - including appointment of governors, government data returns, functions under the equality act, legal services advice, handling complaints, academy conversion support.

- **Governors:** Advice and support by e-mail, telephone or in person to all those involved in governance in schools to enable governors to effectively fulfil their roles and responsibilities
- Access to governor/committee member training – free commissioned training for all maintained governors and governing bodies including briefings on major changes in education policy and legislation.
- Free bespoke training for all maintained governors, individual governors, clerks and chairs
- The LA provides support for governing bodies to recruit headteachers and deputies and provides induction and mentoring for new and aspiring leaders in maintained schools.
- Support for school governance, training and recruitment of school governors and offer of performance management of school leadership and SLT is incorporated into this work.
- Support focused on outcomes to assist governing bodies play a proactive role in raising standards as part of an experienced team working collaboratively with professional colleagues in school improvement
- Provision of recruitment of LA governor and support for Careers Governors in secondary phase and SEND/AP
- Access to Gold Service of NGA - governing body including legal advice underwritten by NGA.
- **LA Lead Contact:** [Julia.Coleman@bcpcouncil.gov.uk](mailto:Julia.Coleman@bcpcouncil.gov.uk)

### Legal Services and Complaints Handling Advice

- Employment law, Safeguarding matters arising under inter-agency arrangements including compliance with statutory responsibilities towards children protection, Neighbour disputes, property law, contractual issues and disputes, parental rights and responsibilities, pupil records, exclusions and other disciplinary sanctions, special educational needs and disabilities administration of medicines, Equalities and human rights issues, procurement issues, debt recovery and information compliance.
- Academy Conversion Support
- **LA Lead Contact:** Please contact [Julia.Coleman@bcpcouncil.gov.uk](mailto:Julia.Coleman@bcpcouncil.gov.uk) and/or [paul.reidy@bcpcouncil.gov.uk](mailto:paul.reidy@bcpcouncil.gov.uk)

### Finance and Audit

- Production of budget schedules and payment of funding allocations and DfE grants, consolidation of annual accounts and quarterly returns.
- Advice, best value and procurement advice
- Scheme of financing maintained schools
- Internal audit including advice, guidance and assistance for control, risk and governance processes, specialists knowledge to assist in or lead fraud and irregularity investigations. Support governors and staff in the effective discharge of their responsibilities and advice in good practice approach
- Government Data Returns
- Banking and treasury activities, financial regulations adaptation for schools (for example delegation of some CFO approvals to school governors).
- **LA Lead Contact:** [steve.ellis@bcpcouncil.gov.uk](mailto:steve.ellis@bcpcouncil.gov.uk) and [paul.reidy@bcpcouncil.gov.uk](mailto:paul.reidy@bcpcouncil.gov.uk)

### Human Resources

- Employee investigations,
- pension administration,
- pay scales and conditions of service,
- TU negotiations for local government employees
- **LA Lead Contact:** [hrservice.delivery@bcpcouncil.gov.uk](mailto:hrservice.delivery@bcpcouncil.gov.uk) and [recruitment@bcpcouncil.gov.uk](mailto:recruitment@bcpcouncil.gov.uk) and [payroll.team@bcpcouncil.gov.uk](mailto:payroll.team@bcpcouncil.gov.uk)

### Asset management

Services and functions provided by BCP in order to discharge the General landlord duties for all maintained schools (Schedule 2, 79a & b (section 542(2)) Education Act 1996; School Premises Regulations 2012) is commissioned by the Education and Skills Service working with BCP Property Services and the Corporate Health and Safety team. The central budget provides a contribution towards the costs of staffing, property professional fees, survey and membership costs. The actual staffing costs alone exceed the nominal central budget retained.

#### Arrangements for the management of the school estate include the following:

**Health and Safety:** Statutory H&S services for BCP maintained schools are provided by BCP Corporate Health and Safety team. A summary of the service provided is contained in Appendix 2b attached.

**LA Lead Contact (Health and Safety):** [rebecca.lawry@bcpcouncil.gov.uk](mailto:rebecca.lawry@bcpcouncil.gov.uk)

#### Hard Facilities Management comprising re-active and planned maintenance functions as follows:

- **Reactive maintenance management:** Access to emergency helpdesk/call out 24 hours/365 days per year, access to urgent works team.
- Access to urgent works/reactive maintenance fund in the capital programme above affordable levels as indicated by school's devolved formula capital allocations.
- Advice and guidance from BCP property professionals including surveyors and structural engineers
- Support/assistance from a Client Project Officer from Education and Skills Service
- **Planned and backlog maintenance – Implement a plan of cyclical maintenance management:** Access to Predictive/Planned Maintenance fund in the capital programme identifying cyclical maintenance works necessary for statutory compliance and planned lifecycle replacement to ensure properties remain safe, compliant and fully operational
- Advice and assurance to achieve statutory compliance for example lighting, heating, ventilation, asbestos, H&S requirements.
- Regular/updated surveys of School Buildings identifying works in priority order.
- **School Estate:** Preparation of returns to the DfE and submission of nominations for funding under School Rebuilding Programmes.
- Submission of Section 77 applications in respect of School Playing Fields as necessary.
- **LA Lead Contact:** [paul.reidy@bcpcouncil.gov.uk](mailto:paul.reidy@bcpcouncil.gov.uk)

## **Monitoring National Curriculum Assessments**

- QA of the assessment process
- Visits and moderation
- **LA Lead Contact:** [Julia.coleman@bcpcouncil.gov.uk](mailto:Julia.coleman@bcpcouncil.gov.uk)

### **Consequences if the proposed central retention was not approved.**

The proposal to charge for services from maintained school budgets is to enable the council to continue to undertake these functions/maintain a central education function in relation to maintained schools. This operates in much the same way as multi-academy trusts might top-slice budgets of individual academies to pay for central functions. Specifically, the school's budget share in most cases provides a contribution towards staffing costs. Importantly, the council is obliged to carry out a number of statutory duties, for example in relation to financial regulation and asset management and, in the event that the proposed retention is not agreed, the Council would:

- fail to discharge its duties and this would impact the effective operation of education support services in BCP.
- find it difficult to set a balanced budget without making cuts to other vital services.

**Statutory H&S services for BCP maintained schools provided by BCP Corporate Health and Safety team**

- Comprehensive advice and support from Health & Safety team in response to H&S enquiries/concerns raised by school (by phone, email or visit to school where necessary)
- periodically undertake full or part audits of school facilities and/or safety management systems at a frequency based on risk
- Provide access to the BCP Council Corporate Health, Safety and Welfare policy
- Provide a model school-based health and safety policy, including, a statement of policy, roles and responsibilities and arrangement sections
- Provide assistance with the reporting of serious accidents / incidents involving employees and non-employees to the Health and Safety Executive under the RIDDOR regulations
- investigation of serious accidents and other incidents, in association with the school's management team (as appropriate)
- Where specific H&S training need has been identified and agreed between school and H&S team, facilitate/provide basic health and safety training for school staff (at a cost to be agreed if applicable). School will be notified of the cost prior to any training being delivered.
- Where necessary, signpost to or refer to relevant BCP teams on matters related to school buildings and premises safety or BCP Fire Safety team on fire safety matters
- Signpost to or contact other specialist advisors within BCP Council where required so that suitable assistance can be given
- Provide and inform schools of their membership of CLEAPSS, which provides H&S information and services regarding the safe delivery of science, design technology and art in schools as stated below:
  - To support governing bodies/schools in their responsibilities to provide effective safe working and learning conditions in the areas of Science, Design & Technology and Art for all staff, pupils and visitors to school.
  - Provide access information to the CLEAPSS website giving access to guidance, risk assessments, updates etc (log on details provided on purchase)
  - CLEAPSS telephone and email helpline (all year round not just term time) for expert subject advice
  - HAZcards and recipe cards containing advice on use of chemicals in lessons
  - Provide CLEAPSS Radiation Protection advice service (Secondary schools only)

All governing bodies/secondary schools have a statutory duty to ensure they have a Radiation Protection Adviser (RPA) affiliated to their school for the purposes of overseeing the safe storage and use of radiation sources. This falls within the Ionising Radiation Regulations 1999.

This service provides an alternative less costly way of complying with these regulations by acting as an identified link with the RPA.

The role of Radiation Protection Officer (RPO) is an approved method for schools to use as an 'official intermediary'. The RPO is in regular contact with the RPA and acts on his/her behalf and under their direction. The Corporate H&S team act as the RPO.

The service includes:

- annual membership to the CLEAPSS LA run RPA scheme
- a site visit every 2-3 years (dependant on historical risk assessment) to carry out monitoring of the school's implementation of the L93 CLEAPSS guidance booklet
- access via the RPO to a named RPA for both proactive and reactive expert advice

### **School responsibilities**

To ensure that effective services can be provided, there is a responsibility for schools to:

- provide BCP Corporate Health and Safety team with a named contact
- seek early advice on complex health and safety issues
- comply with all relevant Health and Safety legislation
- provide access to the Governing Body as necessary
- access the CLEAPSS website where appropriate and use the resources within it.

### **Delivery of Service**

The corporate Health & Safety team comprises Health and Safety professionals and Health and Safety / Regulatory Team Managers. Expertise of staff is maintained and developed through a programme of continuing professional development, other training and liaison with fellow professionals. The team have online access to up to date legislation and codes of practice.



### Conversion to Academy Status Extract from DfE Guidance

2024 to 2025 de-delegation arrangements for schools converting to academy status are as follows:

- conversion date on or before 1 April 2024 – no de-delegation
- conversion date between 2 April 2024 and 1 September 2025 – local authority retains any de-delegated funding until 1 September 2025
- conversion date between 2 September 2024 to 21 March 2025 – local authority retains any de-delegated funding until 31 March 2025

After the dates specified, the academy will receive the full formula allocation and the department will recoup this from the local authority.

The local authority should continue to provide the services to new academies where funding is de-delegated, if they are asked to do so. If the local authority is unable to provide the requested service, the department expects the local authority and the academy to come to an arrangement to pay the funding directly to the academy.

Exceptions to this would be in cases where contractual arrangement to pay services in advance have already been made, and the local authority does not have the ability to continue to provide this service.

Where there has been agreement that a school is entitled to receive an allocation from a de-delegated contingency fund, that agreement should be honoured if the school converts to an academy at any point in the year.

Where a school converts to an academy in the period 2 April 2024 to 1 September 2024, local authorities will have an opportunity to present an evidence-based case to request a recoupment adjustment for the period 2 September 2024 to 31 March 2025.

Local authorities should report any unspent de-delegated funding remaining at year-end to their schools forum.

Local authorities can carry funding forward to the following funding period as with any other centrally retained budget and can choose to use it specifically for de-delegated services.

### The Schools Causing Concern guidance sets out expectations that councils should:

- Understand the performance of maintained schools in their area, using data as a starting point to identify any that are underperforming, while working with them to explore ways to support progress.
- Work closely with the relevant Regional School Commissioner (RSC), diocese and other local partners to ensure schools receive the support they need to improve
- Where underperformance has been recognised in a maintained school, proactively work with the relevant RSC, combining local and regional expertise to ensure the right approach, including sending warning notices and using intervention powers where this will improve leadership and standards.
- Encourage good and outstanding maintained schools to take responsibility for their own improvement.
- Support other schools; and enable them to access the support they need to improve.
- **LA Lead Contact:** [Julia.Coleman@bcpcouncil.gov.uk](mailto:Julia.Coleman@bcpcouncil.gov.uk)

## **Funding for Maintained School Education Services (Central Retention) Extract from DfE Guidance**

1. 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.
2. The relevant maintained schools members of the schools forum (primary, secondary, special, and PRUs) should agree the amount the local authority will retain.
3. 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.
4. 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.
5. The department will not allow adjustments to other factors, and the rate will not include early years or post-16 pupils, who are funded through different formulae.
6. 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,
7. 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, the department 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. The academy will be reimbursed in its monthly general annual grant payment from the point of conversion.
8. Unlike for de-delegated services, there will be no phased transfer of funding following conversion so there will be immediate recoupment of this part of the budget. For example, if a school converts on 1 January 2024 (3 months prior to the end of the financial year), the department will recoup 3 twelfths of the retained amount relating to that school.
9. Local authorities can fund some administrative functions, (as previously funded in the ESG), relating to maintained schools out of the DSG, with the agreement of either the schools forum or the Secretary of State. For expenditure to be funded out of the DSG, it has to be defined as part of the Schools Budget. This definition is set out in [School and Early Years Finance \(England\) Regulations 2022](#), regulation 6(1) and includes the whole of schedule 2 to the regulations. From 2018 to 2019, some elements that used to be defined in schedule 1 (non-schools education budget) were transferred to schedule 2.
10. At the same time, local authorities may not wish to fund these administrative functions out of the DSG, but to fund them out of general funds.

### De-delegated Services Extract from DfE Guidance

1. 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.
2. De-delegation does not apply to special schools, nursery schools, or PRUs. Where de-delegation has been agreed for maintained primary and secondary schools, the department's presumption is that the local authority will offer the service on a buyback basis to those schools and academies in their area which are not covered by the de-delegation.
3. 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 2023 to 2024 related to that year only, new decisions will be required for any service to be de-delegated in 2024 to 2025.
4. S forums have been able to agree to de-delegate funding for local authorities' core school improvement activities in relation to maintained schools.
5. 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.
6. They must decide on fixed contributions for these services so that funding can then be removed from the formula before school budgets are issued.
7. There may be different decisions for each phase. The services which may be de-delegated are:
  - school improvement services
  - contingencies (including schools in financial difficulties and deficits of closing schools)
  - behaviour support services
  - support to underperforming ethnic groups and bilingual learners
  - free school meals eligibility
  - insurance
  - RPA
  - museum and library services
  - staff costs supply cover (for example, long-term sickness, maternity, trade union and public duties)
  - licences and subscriptions; except for the following, which are paid for by the department:
    - 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 Authority (NLA)
    - Performing Rights Society (PRS)
    - Phonographic Performance Limited (PPL)
    - Schools Printed Music Licence (SPML)

Local authorities should make a clear statement of how the funding is being taken out of the formula for each de-delegated service. For example:

- primary insurance £20 per pupil
- secondary behaviour support services £30 per FSM pupil

There should be a clear statement of how contingencies and other resources will be allocated. Academies will continue to receive a share of funding for these services in their delegated budget.

Where de-delegation is agreed, middle schools will potentially be subject to 2 different decisions, and the unit value for de-delegation can be different for primary and secondary age pupils. For example, if the primary sector agreed to de-delegate a service but the secondary sector did not, middle schools in the local authority would have their formula allocation reduced only for their primary pupils at the agreed primary school rate.

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## **Bournemouth, Christchurch and Poole Schools Forum**

### **Forward Plan**

#### **January 2024**

- DSG Settlement and draft Budget 2024-25
- Maintained school services – de-delegation and central retention
- Mainstream Schools Formula and Funding Transfer to High Needs
- DSG Management Plan 2024-2039

#### **February 2024**

- Looked After Children Pupil Premium Arrangements 2024-25
- Early Years Formula 2024-25
- Forward Plan Refresh

#### **June 2024**

- DSG Outturn 2023-24
- High Needs Block Update
- Forward Plan

#### **September 2024**

- DSG Settlement 2025-26
- High Needs Budget
- Transfer from Schools Block
- Forward Plan

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