

# *Bristol Schools Forum*

**Agenda Tuesday 2<sup>nd</sup> April 2019 at 5.00pm,**

**CITY HALL, Writing Room**

**please note meeting starts at 5.00 – tea and coffee available from 4.30pm**

	<b>Start</b>	<b>Item</b>	<b>Action</b>	<b>Owner</b>	<b>Paper</b>
1	5.00	Welcome	A	Chair	
2	5.05	Forum standing business (a) Apologies for Absence: <i>Carew Reynell</i> (b) Confirmation meeting is quorate  (c) Appointment of new members: <i>To note the appointment of Lorraine Wright,            Head of Elmlea Junior School to the Primary            Academy Vacancy</i>  (d) Notification of Vacancies <i>(i) Secondary Academy Governor            (ii) Primary Maintained Head</i>  (e) Declarations of Interest	A	Clerk	Verbal
3	5.10	Minutes of meeting held on 16 <sup>th</sup> January 2019 (a) Corrections and approval (b) Matters arising not covered on agenda <ul style="list-style-type: none"> <li>• Abstentions to voting to be recorded at future meetings;</li> <li>• Clarification of figures relating to Bristol school places (page 12)</li> </ul>	A	Chair	Attached
4	5.15	Correspondence	I	Chair	
5	5.20	Chair and Vice Chairs' Proposals for Future Forum Training	A	Chair	Attached
6	5.30	Presentation on Schools Block Funding	Di	TY / DT	Attached
7	6:00	Report on Schools Block Funding	I	DT	Attached
8	6:20	DSG Overview 2018-19 and 2019-20	I	DT	Attached
9	6:50	High Needs Block	I	EWJ / MT	Attached
10	7.10	Place Planning /Growth Fund/ Capital Funding	I	AS	Attached
11	7:30	Any Other Business			

(\*) A = Admin, I = Information, De = Decision required, C = Consultation, Di = Discussion  
**Clerk:** Corrina Haskins email: [corrina.haskins@bristol.gov.uk](mailto:corrina.haskins@bristol.gov.uk) Tel: 0117 35 76519 City Hall  
**Chair:** Carew Reynell (contact via clerk)

## FUTURE MEETINGS

Date	Items
15 <sup>th</sup> May 2019	High Needs Funding – presentation and discussion Budget Monitoring EY Strategic Overview of funding formula Scheme for financing schools Place Planning
16 <sup>th</sup> July 2019 <i>*clashes with full Council – Writing Room not available 1P05 provisionally booked for Finance Sub Group (15-24 capacity)</i>	High Needs Update Budget Monitoring EY Education Overview

Provisional dates for 2019-20

Tuesday 24 September 2019 - AGM  
 Tuesday 26 November 2019  
 Wednesday 15 January 2020 (Council 14<sup>th</sup>)  
 Tuesday 31 March 2020  
 Tuesday 26 May 2020  
 Wednesday 15 July 2020 (Council 14<sup>th</sup>)

# Bristol Schools' Forum

## Minutes of the meeting held on Tuesday 16<sup>th</sup> January 2019 at 17.00 hrs at City Hall

### Present:

Karen Brown	Maintained Secondary Governor Rep, St Mary Redcliffe & Temple
Jamie Barry	Academy Primary Headteacher Rep, Parson Street Primary
Jane Carter	Support Staff Rep
Steve Davies	Support Staff Rep
Patricia Dodds	Academy Primary Governor Rep,
Simon Eakins	Academy Primary Headteacher Rep, Cathedral Primary
Peter Evans	Special School Headteacher Rep, Knowle DGE
Simon Holmes	Nursery Head Rep, St Phillips Marsh Nursery
Tracey Jones	Academy Primary Headteacher Rep, Bannerman Road Academy
Gary Maher	Diocese of Clifton Rep
Aileen Morrison	PRU Rep, St Matthias Park
Chris Pring	Maintained Primary Headteacher Rep, Cabot Primary
Carew Reynell	Academy Secondary Governor Rep, Henbury School
Cedric Sanguinol	Maintained Primary Governor Rep, Bishop Road Primary
Simon Shaw	Maintained Secondary Headteacher Rep, St Mary Redcliffe & Temple
Christine Townsend	Maintained Primary Governor Rep, Whitehall Primary
David Yorath	Academy Secondary Governor Rep, Cotham School

### In attendance:

Becky Wilkins	Clerk to Schools Forum
Sally Jaeckle	Service Manager, Early Years
Cllr Anna Keen	Councillor
Denise Murray	Service Director Finance
Alan Stubbersfield	Interim Director Education Learning & Skills Improvement
Mary Taylor	Business Manager SEND
David Tully	Interim Finance Business Partner
Emilie Williams Jones	Head of Special Education, Autism & Travel
Travis Young	Corporate Finance

### Observers:

Anne Sheridan  
 Alderman Brian Price  
 Kevin Jay

	Action
<b>1. Welcome and introductions</b>	
The Chair opened the meeting at 17:00.	
<b>2. Forum standing business</b>	
<b>Apologies</b> Emma Cave, Graham Clark, Cllr Ruth Pickersgill, Jez Piper, Will Shield, Sarah Lovell Clerk confirmed meeting was quorate.	
<b>New members</b> Jamie Barry – Primary Academy Head	

<p><b>Vacancies:</b>                  Maintained Primary Head – requested applications</p> <p>Garry Maher – Diocese of Clifton Rep. Head of St Bedes, declared an interest under item 10, growth fund</p>	
<p><b>3. Minutes of the meeting held on 27<sup>th</sup> November 2018</b></p>	
<p>Minutes were accepted as correct:</p> <p>Matters Arising</p> <p>CP gave name of <a href="#">ProjectBusiness</a> Manager – actioned.                  Item 9 – not yet actioned.                  Consultation paper foot of page 6. The report had been subject to comment in the meeting. This was referred to the procurement team and they confirmed the contract was completed, therefore this was not a contractual matter.</p> <p>CT asked if this was a change in practice.                  DM advised this was not a change in procurement practice.</p> <p>CT asked what would stop this from happening again.                  AS confirmed due process.</p> <p>CT asked if the process was followed as an update has not been received on whether the report was value for money.                  DM advised due process was followed in terms of the relevant thresholds and the procurement process met.</p> <p>CT asked if the Council could be in a position where the same thing happens again.                  AS indicated that you can't guarantee the quality of future work other than by due process and management.</p> <p>DM added that it is for the commissioning officer to decide whether the report was acceptable. The report was accepted and the consultant paid. The commissioning officer is no longer here so we are unsure if the quality of the report was challenged at the time. We now understand the report was not as complete as might have been subsequently preferred, however no procedural changes need to be made but we need to understand why the commissioner accepted the report, as they are no longer here we can't deal with this retrospectively. We don't feel it warrants an external investigation is carried out.</p> <p>CT asked the cost of the report.                  AS advised it was slightly below £9,000.</p>	
<p><b>4. Correspondence</b></p>	
<p>CR confirmed a letter was received from SENCOS regarding pressure on the high needs block, which has been forwarded to AS.</p>	

<p><b>5. DSG Overview</b></p>	
<p>DT presented the report and clarified the financial position for 2018/19 and 2019/20.</p> <p>After analysing the Oct 2018 pupil census and working on the basis that we will have the same level of participation in Jan 19 as Jan 18, we think the Early Years underspend will be £1m, with sensitivity of £0.1m either way for a 1% change in participation levels.</p> <p>It was noted that the DfE acknowledge that there was a cost pressure to the high needs block nationally and allocated £350m across all LA's and £1m to Bristol in 2018/19 and also 2019/20.</p> <p>Proposed budgets for 2019/20. The schools block settlement was agreed in December based on an additional 1,010 pupils.</p> <p>DT gave an explanation of table 2, proposing to use DSG High Needs Block funding from 2020/21 in advance so we can include in the returns to government an account of what we expect to spend, as the DfE and ESFA have had discussions regarding a possible re-baselining the high needs budget . If we include the level of spend we expect to be incurring that places us in a good place and we may benefit from this. There are, however, no guarantees that this will happen.</p> <p>Proposing to use £0.517m of early years underspend to maintain the nursery school supplement.</p> <p>It was noted the report was included in cabinet papers. Looking to Schools Forum for feedback to inform their decision.</p> <p>£2.5m in-year deficit for 2019/20 if we spend in line with proposals.</p> <p><b>Decision:</b> Forum noted the information about current year and overview and context for next year.</p>	
<p><b>6. Schools Block</b></p>	
<p>DT explained the report to the forum, confirming that the principles on which the formula had been based arose from the work of the Schools Forum sub-group, the consultation with all schools and the decisions of Schools Forum in September and November 2018. All schools were funded at the same per pupil rates as in 2018/19 and any funding beyond that was distributed through the National Funding Formula values (as far as the arithmetic would allow) for deprivation, English as an Additional Language and Prior Attainment.</p> <p>With 1,010 additional pupils, the expectation was that the additional funding would be neutral in effect, as the additional funding would be included in formula budgets to schools. The Minimum Funding Guarantee (MFG) pupil unit values, however, were</p>	

higher in the schools where increased pupil numbers were recorded. This increased the cost of a standstill budget and reduced the amount of headroom, compared to that estimated in November 2018 (0.4%), to 0.23%.

An extra free school commences in September 2019, which had been budgeted for in the Growth Fund, but this new school will be funded through the formula itself, so £0.4m from the Growth Fund has been transferred to the formula, leaving the Growth Fund budget at £1.6m, rather than £2.0m.

It was noted that, with the proposed minimum funding guarantee, every school is guaranteed to receive the same per head as in 2018/19.

The impact of this is that the £0.6m available beyond a standstill budget (ie the headroom) only goes to 32 schools out of 128, because of the MFG. Schools get the higher of their formula allocation or the MFG. Putting more money through the formula does not produce a formula allocation higher than the MFG for around three-quarters of schools; they continue to be entitled to their MFG driven budget. For around one quarter of schools, (ie those benefiting from more funding through National Funding Formula values for deprivation, English as an Additional Language or prior attainment, or indeed, those whose formula was already close to the MFG level) the extra money does produce a formula allocation that is higher than the MFG.

SE asked if only 32 schools have a budget allocation that is higher than the standstill position.

DT confirmed this was correct, however all schools are guaranteed to receive the same as 2018/19.

CT advised that she expected the funding to go to schools with higher Pupil Premium numbers, Free School Meals Ever Six and SEND and this is not how the funding is being distributed. Therefore, she was not happy to agree to something that she does not fully understand.

CR confirmed that the individual position is based upon need. The effect of the change in the formula will reduce the MFG..

CT explained that she thought the money would go to the schools that have the children with the greatest need but the report doesn't seem to reflect this.

DT confirmed that what was expected to happen has.

CT asked why City Academy not receiving the ever 6 funding.

DT confirmed that they are within the local formula.

CT asked who decided last year's formula.

DT confirmed it was Schools forum.

CT asked why schools with the highest deprivation have not received any additional funding.

SE confirmed it is because there are a number of other factors that have to be considered.

DT confirmed finance have applied the principles that Schools Forum agreed in November.

CT asked for an explanation as to why there is a school on the list that hasn't opened but will receive more money.

DT confirmed it is a growing school and the estimated numbers are used, which is why they have received additional funding as if they were actual. They have no MFG because they have no prior budget, so if there is more formula funding, they will receive a share.

CT asked why a school with no children and no impact of the demographics can receive more money.

SE confirmed that the ESAF have to work on estimated numbers. If a new school then doesn't achieve those numbers the funding is clawed back. .

DT commented that the funding for growing schools is funded from the £3.9m DSG allocation for growth within the Schools Block.

It was noted that the formula is already agreed.

CT asked for training to be provided on the formula and how it is calculated for schools forum members.

CR noted that the forum looked at the outcome of the consultation and received a presentation previously.

DM confirmed finance would be happy to provide a separate session to go through the formula with any member of the forum who would like to understand in greater detail.

CR advised that the timing of any session would need to be considered to fit in with budget planning.

PE asked for the figures to be presented alongside demographic information.

PE indicated confusion regarding funding for a new free school.

SE confirmed there are different rules for mainstream and special schools in terms of how the funding is allocating.

**Decision:** Schools Forum endorsed the arrangements for the mainstream schools formula and the Growth Fund budget for 2019/20

For – 7 (including chair's casting vote because of a tie)

Against – 6

Schools Forum also agreed to two items of feedback to pass on to Cabinet.

- CR. This will be a difficult year for schools, allocations for most of the schools reflect a MFG at a cash stand still, so in real terms a reduction. Forum may feel it appropriate to indicate that this is not going to be easy.

<ul style="list-style-type: none"> <li>• CR. Figures include transfer between blocks, school block to higher needs. Growth fund funding has increased and we had more money than we needed so that has helped to finance the transfer to the higher needs block. This may not happen in the future so sustaining this sort of transfer would be difficult and medium term planning will need to take place.</li> </ul> <p>Discussion then took place with regard to the funding formula and the forum better understanding this.</p> <p>It was noted that Schools Forum is still concerned about the operation of the formula and will be looking at opportunities to address this.</p> <p>AM confirmed the forum had conversations before about allocating additional funding to high needs and deprivation. The principle that we have agreed we trusted would be implemented. It's frustrating and disappointing as we do not understand why this isn't happening. We do need more training as it isn't coming out with results we expected.</p> <p>CP, indicated that the result was surprising and it would be helpful to understand the ingredients of the formula so the forum can understand why these schools have received additional funding.</p> <p>SE, confirmed that the history needs to be factored in. Five to six years ago there was a significant change to funding, moving out of deprivation into AWPU. This resulted in an increase in MFG for some schools.</p> <p>SE. Asked that the funding models and weighting for individual schools is shared.          DM. Yes. This information will be shared</p> <p>DT explained how the funding was allocated, including the MFG and confirmed that the principles directed by the forum have been implemented, however the MFG has to be taken into consideration and has an impact on the amounts allocated to each individual school.</p> <p>CT Asked how long it would take for this to change in terms of funding.          DT Confirmed if the percentage rate stays at zero this could take a very long time.</p> <p>Forum agreed to feedback the following to cabinet:-</p> <ul style="list-style-type: none"> <li>• That a standstill in funding means a real terms reduction.</li> <li>• Future planning should not be based on continuing assumption of transfer from schools block to higher needs.</li> </ul> <p>DM – Build training around detailed modelling and scenarios for funding into the schedule for the sub group.</p>	DM/DT
<p><b>7. Central Services Report</b></p>	
<p>AS – gave an overview of the central services report.</p>	

Approval of 18/19 and 19/20 budgets required.

3.1 Talks about central services block, rearranging factors so money is moved into DSG from ESG and top slicing arrangements for historical arrangements are now in CSB. There will not be a budget for prudential borrowing.

Appendices detail the totals.

Section 5 gives a wider context about Trading with Schools, the principles of why it was established and aspirational comments. How the system operates for schools and also the LA. The point is made in 5.4, that the LA took the decision to underwrite the cost of redundancies etc. as it's in effect a commercial entity.

It was noted that Trading with Schools is now part of Commercialisation and Communities Directorate.

AS confirmed he is happy for TwS to sit in commercialisation and equally strong in the view that he will retain the relationship as a professional manager, in a matrix management arrangement, especially for those services such as EWS and Inclusion.

CP confirmed it was good to have the report as this has been requested for eighteen months. TwS was set up as a not for profit organisation, so concerned it's making a profit/surplus. It also doesn't seem to sit with their values around children. It also states about the modest surpluses, which was approx. £800k last year and if this was redistributed to schools it would have reduced any overspend. It's hard to take when it's funding central teams.

AS noted there is a difference between surplus and profit and central departments of the authority have to support council teams, including TwS and that also has to be sustainable as well.

CR Also noted that the projected surplus for 19/20 is far lower than previous years.

KB asked if the TwS surplus can be challenged.

DM confirmed the position was justified as there is an overspend on overall Education budget spending, and the TwS surplus has been used to reduce this.

This forum noted this.

PE noted that consultation costs are almost doubling, which is a concern.

PE asked why these are doubling, is this related to the judicial review.

AS confirmed it is likely that we may not spend all of this money, however we have to ensure it is there following the judicial review, to ensure we have provision for consultation on SEND services.

PE asked if the LA can review the home to school transport budget to ensure this is managed effectively.

EWJ and PE agreed to discuss individual cases outside of the forum.

<p>AS confirmed home to school transport is another area being looked at by consultants, with a view to ensuring the appropriate decisions are being made.          AS has also had a discussion with audit regarding prioritising home to school transport and making decisions in the correct way.</p> <p>PE Asked why Hope school is funded from the High Needs Block and not general fund. DT confirmed this was correct and the decision was taken previously before AS was in post.          JB asked if the decision can be challenged.          AS indicated that to make new proposals at this stage is not a helpful process due to the tight timescale to submit to DfE. We can take on-board all these points for future reference.          JB asked when the forum could exercise their powers to ask for this to be changed.          CR noted that it would be helpful to ask for officer advice through the budget monitoring process to understand the impact of the change.</p> <p><b>Decisions:</b>          Forum approved the proposed use of the central services block.          Forum noted the point regarding licences.          Forum noted the position about core funding in the current year.          Forum noted the wider context regarding general fund spending in education.</p>	
<p><b>8. High Needs Update</b></p>	
<p>Report presented by EWJ and MT to schools forum on period 7. 2.1-3.3 to be considered.</p> <p>SEND Services are expected to have a deficit of £3.3m by March 2020. It is proposed that we will use funding from 2020/21 DSG to cover this.</p> <p>Table 1 details this information.</p> <p>Additional funding is coming to Bristol from central government, which means that our lobbying has worked.</p> <p>High needs transformation project has begun, looking at four specific areas to help improve outcomes for children and secure more effective processes and support.</p> <p>Officers will look at further opportunities to transfer funding from different blocks. The above will be used to mitigate historical funding pressures.</p> <p>Table 2 – sets out the budget monitoring position.          Table 3 – details special school place numbers, year on year.</p> <p>Reduced expenditure on SEN top up. The back log is being cleared on 18<sup>th</sup> January.</p> <p>Figures are indicative of the shortage of specialist provision places in Bristol.          Post 16 numbers have decreased.</p>	

Perm exclusions in Bristol of children with EHCP is zero in Bristol 16/17.  
Requests for statutory assessment have increased, which is indicative of need.  
New SEND data dashboard is currently being developed.

SEND survey went live on 30<sup>th</sup> November, extended to 13<sup>th</sup> January. Currently analysing info and will share with schools forum in January. We had 352 responses, plus additional comments.

Four key points from consultees:-

It is perceived that the current top up process could be improved as to fairness and transparency.

Two panels per year are not enough.

Panel days could be more effective.

Parents responding do not feel included in the support that is being provided to their child or young person, they do not know what is put in place.

Stakeholder engagement events took place on 14<sup>th</sup> and 15<sup>th</sup> January with regard to how top up will be managed going forward.

All of the transformation projects are following due process. We will also have a period of review post implementation.

Number of 1-5 year olds, 1092. Of those 497 are supported by SEN and 30 have EHCP.

Funding from DfE to train SENCO's to level 3. This will commence next month.

PE Thanked Emily for her very detailed and informative paper and noted his concern regarding EHCP not being fairly delivered in health and social care and asked that the forum keep a close eye on support services as special schools are then under pressure to fund.

JB Noted that whilst he understands that SEN is going through a period of change, better communication regarding top up would be appreciated as the engagement events on 14<sup>th</sup> and 15<sup>th</sup> January were only communicated prior to the Christmas holiday. More notice is required.

EWJ indicated that the top up panel is an interim measure put in place whilst in a difficult position. If not enough reps from schools have volunteered we can't go ahead with the panels. An email was subsequently sent to schools and Richard Hanks has helped talking to schools regarding this.

SE Asked for additional information in the reports.

EWJ to implement this.

CR Indicated that the Implication for 2020/21, due to cumulative pressures, is a potentially very substantial overspending. Needs to be an area of very serious concern and suggest that regular reports are given on the transformation and higher needs spending so we can see the scale of the problem.

CT Asked for the rationale behind accessing the future year's funding.

DT Clarified that the LA are proposing to use funding for high needs from 2020/21 in

EWJ

<p>advance. The reason why we support this move in budgeting for a deficit is that we will thus more fairly account for estimated spend, and be able to report this to the DfE to inform any future rebaselining review .</p> <p>CT Indicated that she was concerned about using future money, leaving a deficit for people that come behind us.          DT Confirmed that whether we bring forward the money or not we will still be in a £3.3m deficit position.          EWJ Also confirmed that work undertaken for the LGA indicates that the majority of LA's across the country are propping up the higher needs block and this has been happening for a long time.</p> <p>KB Noted that there has to be correlation between the reduction in school funding and the increase in top up requests being granted.</p> <p>SH Asked if the Schools forum can receive information regarding the national picture and whether there is a better model anywhere else.          AS Confirmed that locally we are doing everything that can be done and we have benchmarked against good practice in the lobbying report. The local system is under control, national system is not.</p> <p>PE indicated that he was not aware of the stakeholder events and unsure if any of his colleagues were.          MT Confirmed that these will be rescheduled by six weeks to increase engagement.</p> <p><b>Decisions.</b></p> <ul style="list-style-type: none"> <li>• Forum notes the budget position of current year.</li> <li>• Forum notes the 2019/20 budget.</li> <li>• Forum notes the progress of the transformational project and that a further report will be brought to the April meeting.</li> <li>• Forum expresses great concern about medium term position.</li> </ul>	
<p><b>9. Early Years</b></p>	
<p>SJ confirmed the purpose of report to update forum of current financial position and consultation that took place.</p> <p>Consultation took place over Christmas period, 79 responses. All proposals endorsed.</p> <p>Some very useful suggestions made which can be used to lobby the government.</p> <p>Early years funding formula includes funding for emerging SEND and more complex needs should be funded by the higher needs block. We are engaged with the transformation project.</p> <p>Risks that the Nursery School supplement could be under pressure if the underspend is not realised.</p> <p>SH Asked when is the national review going to happen as this has been pushed back a</p>	

<p>number of times.                  SJ Confirmed it will happen and there is a national campaign. It has been raised in parliament and an active debate is currently taking place. We have been informed by the MP for early years that we shouldn't make a decision at present on maintained nursery schools.</p> <p>SH Indicated that nurseries are trying to set their budgets at present and it is very difficult with no indication of funding.                  SJ Understood the point and confirmed that the supplement from central government has reduced year on year and confirmed the LA is trying to maintain the status quo.</p> <p>Decisions:                  Forum noted the arrangements for 2018/19 and 2019/20 for the Early Years block;                  Forum agreed the use of the £1.504m for centrally retained spend;                  Forum endorsed the proposed formula values including supplement for maintained nursery schools; and                  Forum noted the support for changes to the rates for Early Years SEN, a matter which will be referred to the High Needs Transformation project on top-ups.</p>	
<p><b>10. Growth Fund</b></p>	
<p>Clarified that the member of the public in attendance has asked to record the item relating to the growth fund.</p> <p>It was noted that as this is a public meeting you can make a resolution to have a private session, prior to discussing the paper, however the paper must be discussed in public and the decision made in public and the public can record if they choose to.</p> <p><b>Decision:</b> Forum voted on whether to agree a move to make a resolution to go into a confidential session for the initial conversation for this section.</p> <p>Those in favour 2.                  Against 6.</p> <p>The forum voted against, therefore a private session was not convened.</p> <p>Report presented by AS who confirmed it had been checked by an LA solicitor. Following a challenge it has also been checked by the head of Legal Services.</p> <p>AS Confirmed that in summary he is satisfied that the LA's stance is lawful and is common practice, and a practice routinely approved by the secretary of state, therefore the LA is not minded to change its current policy and sees a change as unnecessary.</p> <p>AS indicated that the LA and the schools forum have to agree to the policy and if an agreement is not made, this would go to the secretary of state. It can't be implemented without the agreement of both parties.</p> <p>AS Advised on the point of legitimacy applying to popularity rather than need. The</p>	

interpretation of the scope of the growth fund is fundamental to this. Existing growth fund policy is lawful, in simple terms that relates to common practice approved by the secretary of state and we do not know of any other LA with a policy reflecting the change proposed previously.

AS also advised part of the thinking behind that is to do with how catchment areas cross LA borders. The question arises how to you deal with this situation with regard to growth fund. Correspondence from Wiltshire was read out, illustrating they deal with this and do not discriminate against external demand, which is covered by the LA's growth fund in the example given. The precedent is well established.

AS indicated that the proposed change is not unlawful either. If a change were sought there are comments from our solicitors regarding the consultation and due process we would have to be undertaken to ensure the outcome is resistant to challenge.

CT – AS has outlined that solicitors have looked at this now, however in a previous meeting he was wrong with regards to governance process. It is important to point out the forum's responsibilities in terms of making decisions. So the legal advice that was communicated is corrected in the advice that is in the paper?

CT Asked what the possibility of discrimination is based on if we change the growth fund policy.

AS Confirmed it would be the uneven impact of the change on schools and mainly in the roman catholic sector.

CT Indicated that Colston girl's schools have 31.5% of their cohort from out of area and St Bedes is 40% since expansion and that number has increased for both schools. The number of Bristol school pupils has reduced at St Bedes, despite the increase in places.

AS Indicated that the LA does not agree with those figures.

CT – I am going to suggest that there is wording in the way that it is presented so that governing bodies and officers can't make decision on what the policy looks like. Growth fund has not impacted on how schools chose to allocate their places. Growth funding is for Bristol children, those schools that have increased in size are not taking Bristol children.

CT noted that the figures in the report are incorrect because they relate to one school, and challenged the idea that there are no other policies that do the same as proposed in this change. EFSA produced a report and Solihull was used as guidance 'growth funding cannot be used for schools that admit school pupils that have a reasonable alternative school place'. Any child coming into the city has a reasonable alternative school place as their authority has to provide that for them. The LA's paper does not include the Solihull example despite its being sent to officers. Cambridgeshire policy also states, any growth or expansion due to parental preference will not be eligible for growth fund. CT also noted that Cathedral are looking to remove post codes from their admissions criteria.

TD Noted that it is common practice that children cross borders to go to school. There are Bristol children that are going out of Bristol because of parental choice.

CT Asked if they are they filling already existing places in schools outside of Bristol.

KB Indicated that it's interesting seeing what other authorities have in terms of their policies and that we could end up disadvantaged if we change our policies and neighbouring authorities do the same, as more children are going to school outside of Bristol, rather than coming in.

JB Warned that we have to be careful if it's parental choice. We could lose schools because we are expanding in certain areas.

SH Indicated that he was struggling to understand what the issue is.

PE Advised that after reading the growth fund policy he agrees with the majority of it.

PE Asked if the LA can hold the school to account for providing places for Bristol children ad infinitum, so they couldn't change their admissions policy after they have received their three years growth fund.

AS Noted it would not be possible to do that.

CT Indicated that the figures she sent show that hasn't been the case.

SE Bristol desperately needs places and changing the policy could put the LA at risk. The majority of growth places still go to Bristol children.

GM Indicated that the decision to expand the school that he represents was initiated from the LA. He had made an assumption that growth fund would be there and to suddenly have this decision changed is very frightening. The deficit that the school would go into would not be manageable if the money was removed. Bristol students have increased by 21 from Sept 2017. Catholic parents will choose a catholic based education for their children and St Bedes is their closest school. Any change would be setting a very worrying precedent.

CT asserted that children do not have the right to a faith based education, if this was the case we would have other faith based schools. The legal reason is that faith schools may allocate their places on the basis of faith if they are oversubscribed. All children have the right to education in a reasonable place. It is within the gift of the school that they can make changes that catholic applications from Bristol children are given preference if they are oversubscribed, or they may do nothing at all. It didn't sit well with her that schools are choosing to use growth fund to fund pupils from outside of Bristol.

AS advised in response to questions that:

- The head of St Bede's school had clarified an increase of Bristol pupils at that school.
- We have been through a process to ratify all budgets in Schools Forum and this is no different from the growth fund and other public sector budgets which are relied on for planning.
- BCC accepts that Roman Catholic schools and other schools that have catchments may go beyond the Bristol border. This happens in other LA's and where relevant those places are funded by growth fund. Immigration and emigration of pupils is taken into account in school place planning, so LAs don't give places to all home pupils. Collaboration between neighbouring authorities is how the system works.

<ul style="list-style-type: none"> <li>• The LA does not agree the relevance of the Solihull and Cambridgeshire examples. Examples of catchment areas included in growth fund policies have been given, but not of LA borders.</li> </ul> <p>He believed that the LA may continue with the existing approved growth fund policy and it could also go on with the alternative, but it chooses not to.</p> <p>AS Indicated that the question then was - should we continue the existing policy and the recommendation is that we should as we do not want to be a test case that isn't proven. AS also did not believe that the secretary of state would be likely to approve the change.</p> <p>AS also indicated that BCC works closely with neighbouring authorities and would be wary of any changes and how the impact on these would be taken by others. We also need to be able to persuade schools to expand and we need to be able to offer them a growth fund that is predictable.</p> <p>AS requested that the forum agree to this.</p> <p>JB Asked if we indicated we were not sure could it go to the secretary of state to ok. AS Confirmed the secretary of state can have arbitration. As demonstrated, his own and others' interpretations are different, however it needs to be a yes or no decision at present.</p> <p>JB Asked that if we vote no, would that take St Bedes funding away to places that they have already committed to.</p> <p>It was confirmed that it would.</p> <p>GM Indicated that they have lobbied the government for real time funding.</p> <p>SH Indicated there are many complex factors in deciding school places for families, it is not in the interest of anyone to draw boundaries.</p> <p>Decision: Schools Forum agreed to the LA's proposal that the Growth Fund be unchanged for 2019/20 financial year. 12 votes in favour, 3 against.</p> <p>It was noted that GM was not allowed to vote and did not vote.</p>	
<p><b>11. Forum Composition</b></p>	
<p>AS discussed.</p> <p>Review of the forum, along with observations.</p> <p>It seems sensible to look at who is represented in terms of phases and types of schools. Alternative providers are not represented.</p> <p>We have an opportunity to take account of AP issues via Chris Davis, as he co-ordinates the work of those providers. He can attend as an officer rather than a member when there is an appropriate agenda item.</p>	

<p>If this is felt to be effective it can be reviewed further next year.</p> <p>Post 16 representation, proposing to leave as it is at present.</p> <p>The third point was Diocese representation. Again the LA policy is a standard one, and AS wouldn't advise changing this.</p> <p>PE – Can I be clear on alternative provision, AM provides excellent representation. I would agree with an additional officer rather than a member.          AS – I would agree.</p> <p><b>No decision</b> for forum to make.</p> <p>CT - The constitution indicates an equal voice and there isn't. CT stated her view that the constitution needs to be changed.</p>	
<p><b>12. Non Teaching Pay 2019/20</b></p>	
<p>James Brereton updated the forum on changes to the pay structure.</p> <p>It was noted the council follows a national agreement, which was for a two year settlement; the first year was last year, second year commences April 2019.</p> <p>The current draft of new pay points was shared with members and subject to agreement with TU's, it was hoped to agree in coming weeks. Will communicate when this has been reached.</p> <p>We will look at managing compression at the lower end of the scale in the future.</p> <p>Further work to be carried out and consultation with the forum.</p> <p>CP Asked when the increases will be applied.          JB Confirmed in the April salaries.</p> <p><b>Decision:</b> Forum noted the report.</p>	
<p><b>13. AOB</b></p>	
<p>None</p>	

The meeting closed at 20.45hrs

Schools Forum  
2nd April 2019

Following the discussion of training needs at the January meeting of the Forum, the Chair and Vice Chairs have met, and propose the following:

- some Forum meetings to start with a 30 minute high-level presentation. As part of the mainstream of Forum meetings, this would ensure that the information reaches all members. April: mainstream funding - how money gets from the DfE to individual schools, as an introduction to the detailed report on the agenda; May: high needs funding; September: the role and the work programme of the Schools Forum;
- after the April presentation, Forum to be asked whether members would also like a dedicated training session - the format of which would depend on how many members say 'yes';
- the Finance Sub-Group to be reconstituted to examine mainstream funding in more detail, to help to inform Forum's consideration of options for 20/21 and beyond;
- Forum members to be signposted to information about the education finance system on the internet e.g. DfE website, The Key;
- production of an induction pack for Forum members, covering both how the Forum operates and its role/work programme, for the start of the next academic year. Possibly also offer 'buddies' for new members;
- attention to be given to the layout and style of reports, to ensure that they are as accessible as reasonably possible. Officers, as far as possible, to ensure the Chair/Vices have time to review reports before they are issued.

Carew Reynell

# Mainstream Schools Funding 2019/20

Travis Young and David Tully  
Schools Forum  
2<sup>nd</sup> April 2019

Resources

Finance

Slide 1



# Purpose of this item

- First of a series of refreshers on key aspects of the financial arrangements within the scope of the Schools Forum's remit.
- This one deals with mainstream schools funding through the Schools Block, putting Minimum Funding Guarantee and Notional SEN funding in context.
- A short presentation, followed by an opportunity for questions.

# Context

The Schools Block is one of 4 blocks in the Dedicated Schools Grant (DSG)

- **Schools Block**
- High Needs Block
- Early Years Block
- Central School Support Block

# DSG Budget decisions 2019-20

<b>DSG Blocks</b>	<b>DSG Budgets 2018/19 (P7) £m</b>	<b>Reversal of one-off transfers in 2018/19 £m</b>	<b>DfE notified changes for 2019/20 £m</b>	<b>Total DSG notified by DfE December 2018 £m</b>	<b>Transfers between blocks 2019/20 £m</b>	<b>Allocations from underspend or future years DSG £m</b>	<b>Proposed Schools Budget 2019/20 £m</b>	
Schools block	253.423	-1.400	9.422	261.445	-2.000	0.000	259.445	
Central school services block	2.262	+0.566	0.067	2.895	-0.566	0.000	2.329	
High needs block	54.471	-3.448	2.191	53.214	2.566	2.407	58.187	
Early Years baseline (Provisional)	36,600	0	-0.167	36.433	0	0.517	36.950	
<b>Total</b>	<b>346.756</b>	<b>-4.282</b>	<b>11.513</b>	<b>353.987</b>	<b>0.000</b>	<b>2.924</b>	<b>356.911</b>	
Funded from								
(UPDATED) Estimated brought forward DSG surplus from 2018/19 (Adjusted Period 10 forecast)								-1,497
DSG advised by ESFA up to 19 <sup>th</sup> December 2018								-353.987
Estimated carry-forward DEFICIT at end of 2019/20 (if spend is at budget level)								-1.427
<b>Total</b>								<b>-356.911</b>

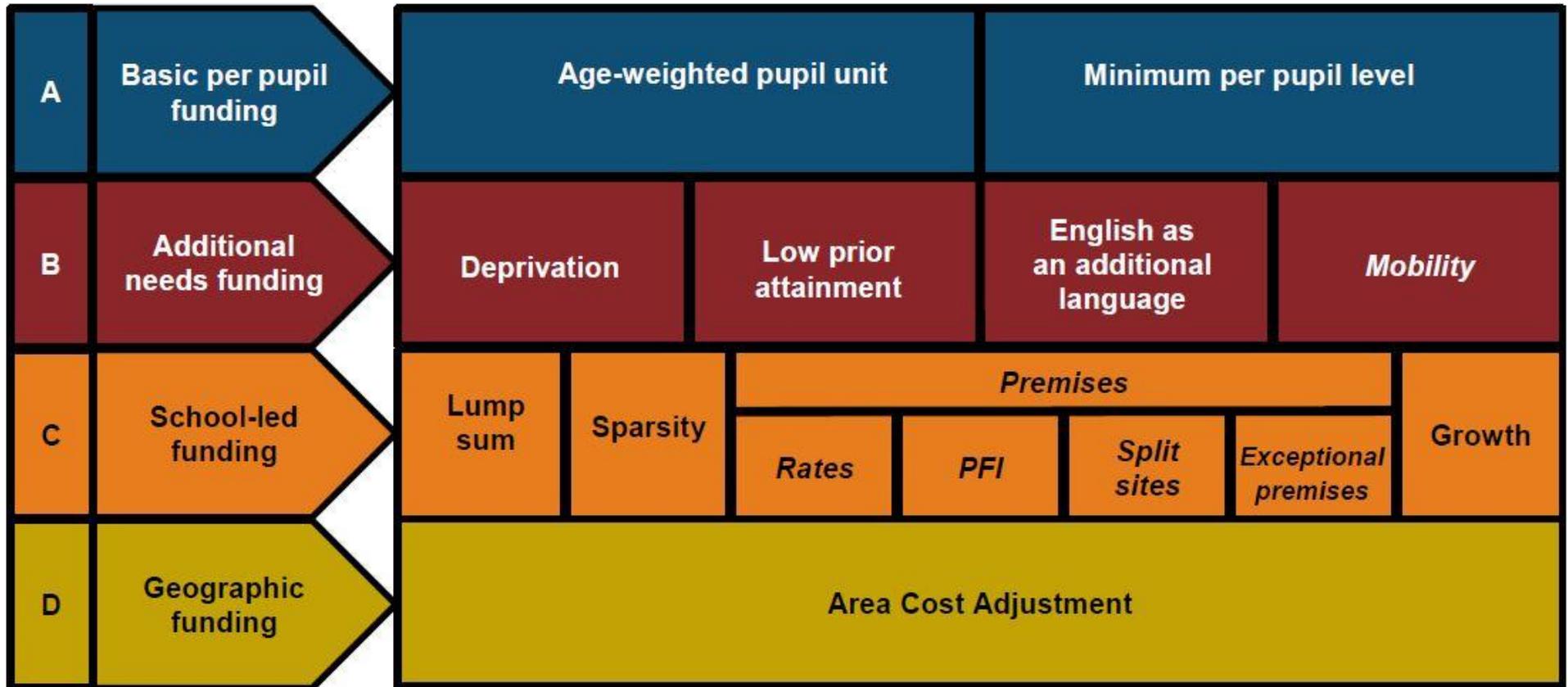
# Schools Block

- DSG Schools Block funding is initially allocated by the Education Skills Funding Agency (ESFA) to the Local Authority (LA) and then the LA allocates it to schools
- Schools are funded on the October census count for the financial year April to March, the DSG received from the ESFA is then allocated using a local formula, funding targeted at the pupil need within the school
- Schools' Forum and Members determine the factors to be used in the formula
- LAs submit school budget calculation to ESFA around the 20 January. This is checked by the ESFA and early in February. The ESFA take back funding for academies and free schools (recoupment)
- Schools budgets for maintained schools are required to be issued by the 28th February

# Schools Formula Factors

- Funding is for the period April to March and in general is based on the October census, which records pupil numbers and pupil characteristics.
- The National Funding Formula (NFF) dictates what factors each LA should use, however as the NFF is still in its “soft” phase, LAs have some local discretion over both which of the allowable factors to use, and the unit values of funding each factor awards. When the NFF is in its “hard” phase, then there will be no local discretion allowed.
- Some factors can count towards the notional SEN funding that’s implicit within the formula
- Some factors count towards the calculation of the minimum funding guarantee (MFG). These are generally the pupil-led factors, although some optional premises factors can count too.
- LAs can still choose the level of the MFG from a fixed range -1.5% to +0.5%

# Schools Block – NFF composition



# Components of local formula 2019/20

Category	Factor	Primary	Secondary	Counts toward Notional SEN?	Counts toward MFG calculation?
AWPU	Basic Entitlement (Primary)	2,868.25	0	10%	Yes
AWPU	Basic Entitlement (KS3)	0	4,091.93	10%	Yes
AWPU	Basic Entitlement (KS4)	0	4,315.33	10%	Yes
Deprivation	Free School Meals	375.52	384.26	10%	Yes
Deprivation	Free School Meals Ever 6	360.74	524.42	10%	Yes
Deprivation	IDACI (F)	250.46	310.58	10%	Yes
Deprivation	IDACI (E)	300.55	400.75	10%	Yes
Deprivation	IDACI (D)	427.45	531	10%	Yes
Deprivation	IDACI (C)	494.23	607.8	10%	Yes
Deprivation	IDACI (B)	561.01	681.26	10%	Yes
Deprivation	IDACI (A)	851.51	1,008.50	10%	Yes
EAL	EAL3	525.38	1,197.24	0%	Yes
Prior Attainment	Low Attainment	916.91	1,369.99	100%	Yes
Per school	Lump Sum	125,000.00	125,000.00	20%	No
Premises	PFI	Bespoke	Bespoke	0%	Yes
Premises	Split Site	Bespoke	Bespoke	0%	Yes
Premises	NNDR	Bespoke	Bespoke	0%	No

## Resources

# Minimum Funding Guarantee (MFG)

- The function of the MFG is to provide schools with a level of stability from year to year.
- The MFG does not protect against fluctuations in pupil numbers, it only protects against fluctuations in pupil characteristics, and therefore protects the average per-pupil unit funding that a school receives year-on-year.
- Since 2018-19 Bristol set MFG at 0%.
- This means MFG mechanism ensures the school gets the higher of the current formula per-pupil average or last year's paid per-pupil average.
- Where a school needs protection this is done so on the current (actual) number of pupils, not last year's number of pupils.

# Summary of 2019/20 Formula

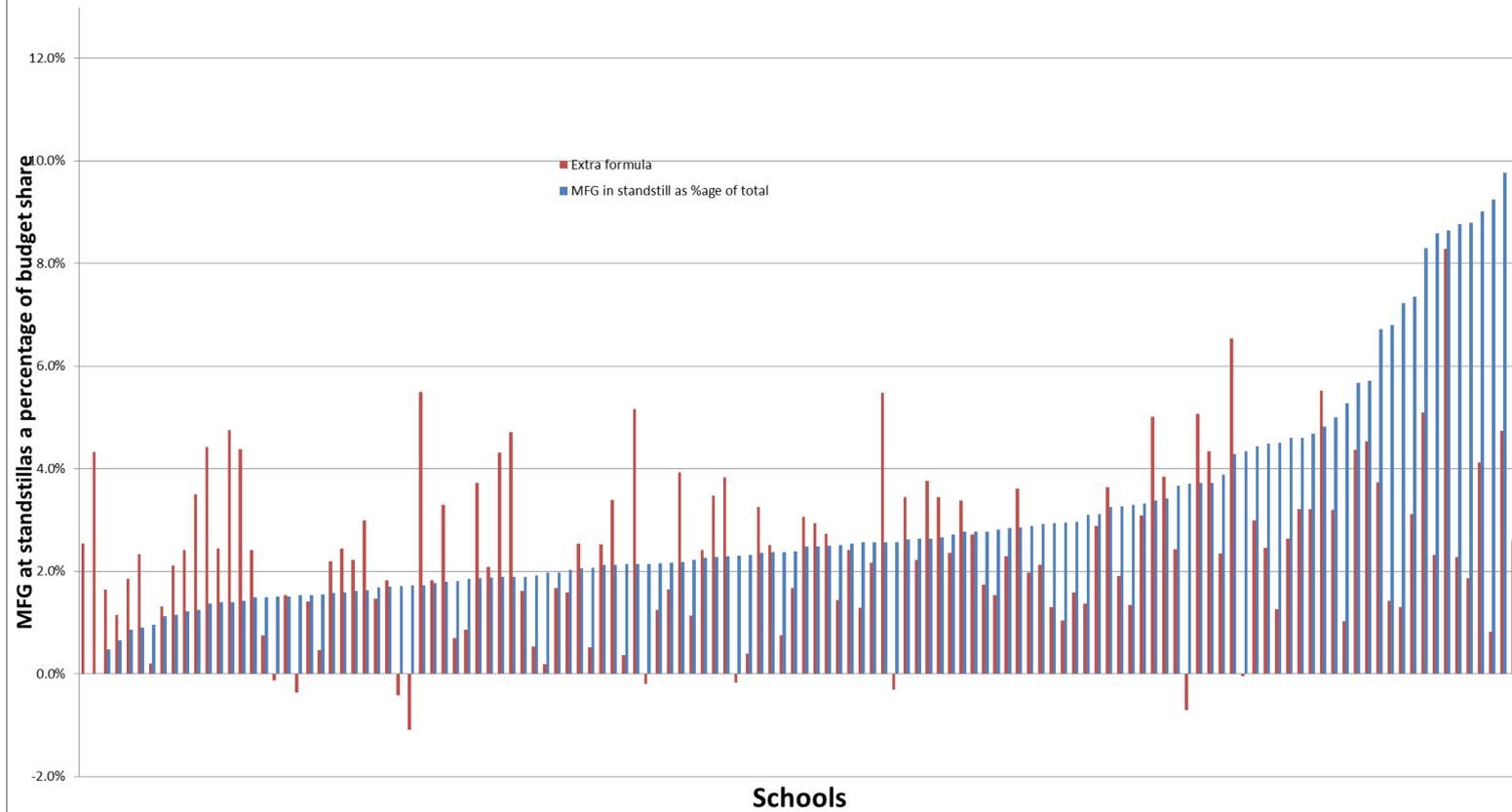
	Standstill budget (all schools at MFG level) £m	Impact of including £1.5m headroom £m	Proposed formula 2019/20 £m	NOTIONAL SEN BUDGET £m
AWPU	181.4	-	<b>181.4</b>	18.1
Deprivation	24.5	2.7	<b>27.2</b>	2.7
EAL	2.9	0.2	<b>3.1</b>	0
Prior attainment	13.2	4.7	<b>17.9</b>	17.9
Lump sum	15.9	-	<b>15.9</b>	3.2
Split sites	0.6	-	<b>0.6</b>	0
Rates	2.6	-	<b>2.6</b>	0
PFI	6.3	-	<b>6.3</b>	0
<b>Total factor funding</b>	<b>247.3</b>	<b>7.7</b>	<b>255.0</b>	<b>41.9</b>
MFG cost	9.0	-6.2	<b>2.8</b>	<b>0</b>
<b>Total formula funding</b>	<b>256.3</b>	<b>1.5</b>	<b>257.8</b>	<b>41.9</b>

MFG constitutes 1% of the total funding.

SEN Notional budget constitutes 16% of total funding.



Blue bars are percentage MFG at a standstill position  
Red bars are the extra headroom distributed by NFF factors



# MFG considerations

- It offers the school a degree of funding stability, but only on per-pupil funding. It does not protect against reduced funding due to falling rolls
- It will always give the school the greater of the pure formula share or what they got last year
- Because of the certainty it offers, it makes predicting future funding easier and more reliable
- It effectively ignores the characteristics of the current pupil cohort in the school and so over time can lead to large discrepancies between what a school “should” be getting from the formula, and what they actually do end up getting.
- This makes re-directing funding away from some factors and towards others very difficult, as where funding no longer entitled it may still be awarded.

# Questions and discussion



## **Bristol Schools Forum – Schools Block**

<b>Date of meeting:</b>	2 <sup>nd</sup> April 2019
<b>Time of meeting:</b>	5:00pm
<b>Venue:</b>	City Hall

### **1. Purpose of report (FOR INFORMATION)**

- 1.1 To provide further information to demonstrate how the principles agreed by Schools Forum about the 2019/20 mainstream funding formula have been applied and why they produce the results they do.
- 1.2 The report also advises on a DSG funding anomaly that resulted in a change to the distribution of Schools Block Funding for 2019/20 to that reported at Schools Forum in January 2019. This anomaly applied to previous years, too.
- 1.3 While this report may provide much detail on these issues, it offers a basis for further analysis by the sub-group that may have more time to consider the implications.

### **2. Recommendations**

- 2.1 That Schools Forum note this report and refer the issues raised in it to the Schools Block Sub-Group for further consideration.

### **3. Background and update since Schools Forum**

- 3.1 At Schools Forum in January 2019, there was surprise expressed that particular schools benefitted from the additional funding. This report attempts to provide some evidence that the principles that were applied were those requested by Schools Forum in November and this may help explain why the outcomes were as they were.
- 3.2 Moreover, subsequent to the Schools Forum and Cabinet meetings, an anomaly was identified in the Authority Proforma Tool (APT, ie the mainstream funding formula spreadsheet submitted to the ESFA). Two of the growing schools were in receipt of funding protection exceeding £2k per pupil, thus comprising more than one third of their total budget shares.
- 3.3 Both of these schools opened in September 2015 and they received a part-year budget for 35 pupils in 2015/16 (ie 7/12ths of 60 pupils). In 2016/17, the ESFA APT data included Minimum Funding Guarantee baseline calculations based on 7/12ths of 35 (ie 20.4 pupils, abating figures that had already been abated.) This had the effect of producing protected funding for each of them at £6,000 per pupil, when the correct figures should have been nearer £3,500. Had the error been spotted and revised figures been input in 2016/17, the current situation would have been averted.

- 3.4 As both schools were growing schools, the anomalous level of protection was overlooked because some diseconomies of scale are to be expected in growing schools. Indeed, the calculations for 2017/18, 2018/19 and the original submission for 2019/20 were all technically correct: they were calculating the correct MFG, based on the relevant per pupil protected amounts. They were, however, anomalous because of the data error in January 2016.
- 3.5 The APT which officers complete is highly controlled by the ESFA with data pre-populated, formulae and formats protected and data input subject to validation. Local scrutiny focuses on ensuring that the values input into the spreadsheet are consistent with local circumstances, decisions of Schools Forum and Cabinet and control totals for funding. Presenting the plans and the outcomes to Schools Forum, the funding sub-group and to all schools through the consultation process is part of the process for ensuring that inputs and outputs match. The ESFA itself carries out validation checks each year and there will always be queries about values that are outside their expected parameters. In spite of all of this, this anomaly was not spotted.
- 3.6 By putting the MFG percentages and £ per pupil into graphs in preparation for this report, it became clear how much these two academies were outliers. Officers contacted ESFA, concerned that we may have been too late to seek a disapplication of the MFG for the two schools in 2019/20. ESFA confirmed that, while they had recouped funding from the LA in accordance with the APT, they had not replicated the error in the level of protection for the two academies in calculating their funding entitlement. They agreed that we could resubmit the APT for 2019/20 with the corrected baselines for the two academies.
- 3.7 This exercise reduced the “standstill” budget for 2019/20 by £0.9m, from £257.2m to £256.3m. With the same overall level of funding available, this meant that the headroom increased by £0.9m, from £0.6m to £1.5m. The Schools Forum and Cabinet papers agreed the principles on which the available funding was to be distributed. Officers resubmitted an APT which had 54 schools with budget shares that were higher than a standstill (22 more than the 32 previously advised). The formula for 2019-20 now goes 2/3rds of the way between the local and NFF values, instead of the previously advised half way.
- 3.8 Officers then asked ESFA if the correction of the anomaly could be backdated, such that the overstatement of the protection for the two schools could be reimbursed from 2016/17 to 2018/19. ESFA readily agreed to this and asked the Authority to submit a formal request. The cumulative value of this backdated adjustment, for the two schools over the three years came to a total of £1.438m. The ESFA confirmed that the full £1.438m protection that was recouped for the two schools for those three years was not passed on to the schools and would be reimbursed in the March 2019 payments to the Authority. This has now happened.
- 3.9 Within three weeks of first alerting the ESFA to a potential problem, they had confirmed the anomaly, permitted a resubmission of the 2019/20 APT to free up

the £0.9m anomalous protection. This £0.9m was redistributed to Bristol schools and the ESFA corrected the backdated anomaly, providing the £1.4m backdated reimbursement to Bristol.

3.10 This is a very unusual set of circumstances. It is to the credit of the ESFA that they corrected this anomaly so quickly. It will improve the outturn position for 2018/19 by £1.438m, all other things being equal, and this is reflected in the budget monitoring position in the DSG Overview report elsewhere on the agenda.

#### 4. Funding available

4.1 Agenda Item 7 on the Schools Block for 2019/20 at the January 2019 meeting set out that there was £259.4m to distribute, of which £1.6m would be retained for expanding schools in September 2019. **Table 1** is the same as that included in that report.

**Table 1: Proposed Schools Block Budget 2019/20**

Cost	£'000	Funding	£'000
Minimum Funding Guarantee (0%) for 54,823 pupils	£237.8m	Pupil-led DSG funding (54,600 pupils)	£248.3m
Rates / Lump sums	£18.5m	Premises led DSG funding	£9.2m
Additional funding for distribution	£1.5m	Growth funding allocation	£3.9m
Growth Fund	£1.6m	Transfer £2m to High Needs Block	-£2.0m
<b>Schools Block Total</b>	<b>£259.4m</b>	<b>Schools Block Total</b>	<b>£259.4m</b>

#### 5. Funding formula

5.1 Schools Forum agreed the principles for the operation of the mainstream formula at its meeting in November 2018, including:

- Appropriate allocations are made for rates;
- At least a Minimum Funding Guarantee of 0%;
- No cap;
- Factor values to be a function of the available funding, with a movement towards NFF values for the pupil-led factors
- The level of de-delegation for maintained primary and secondary schools.

5.2 At the meeting in January 2019, the formula proposals were agreed, but only on the basis of the chair's casting vote. This arose because some members did not believe they were in a position to agree to the formula, as they did not understand sufficiently why the outcomes for individual schools were as they were presented. Officers agreed to provide some training or an opportunity to discuss the details more fully. The Chair and Vice Chairs have a separate item on this agenda where their proposal for such training and knowledge sharing can be discussed. The key issue seemed to be the interaction of the formula

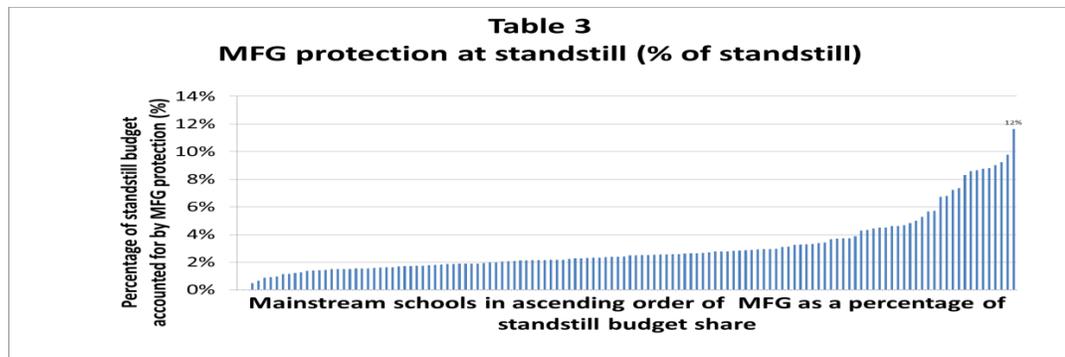
itself and the Minimum Funding Guarantee, which protects levels of per pupil funding for each individual school.

- 5.3 Officers initially calculated what the current local formula would be if every single school were to be funded on the basis of the Minimum Funding Guarantee. As every school's budget is the higher of either the formula allocation or the MFG, all the formula values have to be reduced until we reach a point where every school has a formula allocation that is either at or below the MFG.
- 5.4 This concept has been difficult to convey and the next few paragraphs try to explain it, with reference to Table 2.
- 5.5 We are starting with the position that a school's standstill budget is the same amount of funding per pupil as received in the 2018/19 formula, with the October 2018 pupil numbers plus the lump sum and rates. This produces the same funding as would be awarded by the Minimum Funding Guarantee.
- 5.6 Schools get the higher of their formula allocation or the MFG. So, in a standstill position, we cannot have a situation where any individual school's formula allocation exceeds the standstill (ie the MFG at 0%). The 2018/19 formula values produce a higher amount for many schools, so the values had to be proportionately reduced to get to the optimum position.
- 5.7 If we were to reduce all the formula values to zero (except lump sum and rates), the formula would give £18.5m (for lump sums and rates) and the MFG would be £237.8m.
- 5.8 We can keep increasing the formula allocations and the formula would give more and the MFG would be less, but the total (up to a point) would still be £256.3m.
- 5.9 At a certain point (which we now know to be £247.3m because we have worked it out), the increasing values in the formula will give just one school more than their MFG allocation and the total will exceed £256.3m. By winding back to that point where another £1 in the formula would trigger an amount for 1 school beyond their MFG, we establish what the standstill formula allocations are.

**Table 2: Summary of formula factor allocations 2019/20 APT**

	Standstill budget (all schools at MFG level)	Impact of including £0.6m headroom	Proposed formula 2019/20
	£m	£m	£m
AWPU	181.4	-	£181.4m
Deprivation	24.5	2.7	27.2m
EAL	2.9	0.2	3.1m
Prior attainment	13.2	4.7	17.9m
Lump sum	15.9	-	£15.9m
Split sites	0.6	-	£0.6m
Rates	2.6	-	£2.6m
PFI	6.3	-	£6.3m
<b>total factor funding</b>	<b>£247.3m</b>	<b>+£7.7m</b>	<b>£255.0m</b>
MFG cost	£9.0m	-£6.2m	£2.8m
<b>Total formula funding</b>	<b>£256.3m</b>	<b>+£1.5m</b>	<b>£257.8m</b>

5.10 **Table 2** above is an expanded and updated version of a table that was included in the January 2019 report. It identifies that the standstill position had formula values that would have distributed £247.3m, but protecting every school at 0% meant that the cost of that protection was £9.0m. This assumes that cohorts have not changed since the MFG values were determined. For some schools that would have been the values in the 2018/19 formula, for others, who were protected in 2018/19 by MFG, the protected values will be from a previous financial year. Each school will be in a different position.



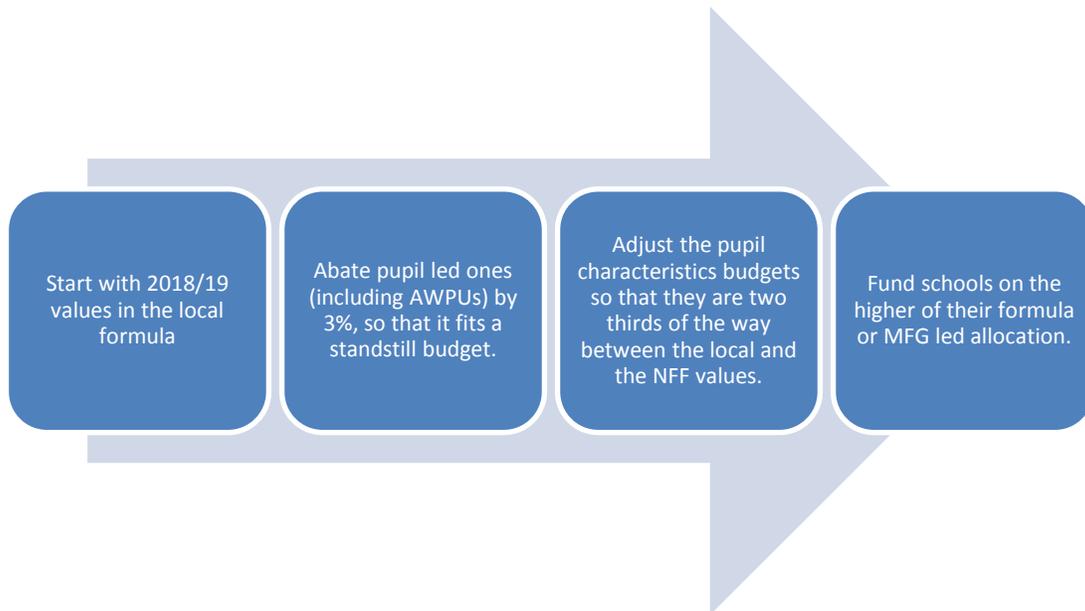
5.11 £9.0m is 3.5% of the total £256.3m standstill budget cost in **Table 2**. but, as each individual school's circumstances are different, the range is very wide. **Table 3** indicates that the lowest MFG is 0% of the overall standstill budget for the single school whose formula allocation at standstill is identical to their MFG driven allocation. The school with the highest MFG proportion has it at 12% of their standstill budget. The one new school that opens in September 2019 cannot have an MFG as they have not had any prior funding level to protect, so anything they receive through the formula forms part of their budget; there is no protection in this first year.

5.12 Schools Forum agreed that the headroom should be distributed according to the National Funding Formula values (as far as was possible within the available resources) for deprivation, English as an Additional Language and

Prior Attainment (referred to as “**NFF pupil characteristics**” from now on). The remaining £1.5m is **not**, and cannot be added to the MFG driven standstill budgets; all available funding must be channelled through the formula and schools get either the higher of their formula allocation **OR** their MFG driven budget.

- 5.13 School Funding Regulations prescribe how funding should be distributed to mainstream schools. If LAs wish to depart in any way from those requirements LAs need to seek a disapplication of the MFG, a process which had to be completed earlier in the autumn, with a full justification of the disapplication, which the Secretary of State would rule on. For the LA to propose such a departure to Schools Forum for agreement, there would need to be clarity on what we were seeking to achieve and whether it would do that.
- 5.14 For a school to have a higher budget than that driven by their MFG, the extra formula they receive through the distribution of the extra £1.5m must exceed the protection that the MFG is giving them. For schools with large MFGs, even large additional amounts in the formula may not get them to a point where they have more than a standstill budget. For schools with low MFGs, even small amounts of additional formula funding will get them beyond a standstill position.
- 5.15 By allocating only £1.5m to all schools through the factors for NFF pupil characteristics, the first iteration would spread that funding so thinly that only schools with very low MFGs would get much money. £1.5m is only 0.6% of the Schools Block DSG amount, so it will take quite a few iterations (ie keep increasing the formula amounts) before the formula allocations produce budget shares that are £1.5m higher in total. **Table 2** indicates that £7.7m extra money needs to be channelled through the formula to reduce the MFG protection by £6.2m to produce that net £1.5m increase.
- 5.16 This £7.7m is comprised of £2.7m more for deprivation, £0.2m for English as an Additional Language and £4.7m for Prior Attainment. Each school has an adjustment to their formula allocation based on the proportionate difference between the local formula values for pupil characteristics used to produce the standstill budget and the Bristol values for the NFF.
- 5.17 **Appendix 1a** sets out how the values for 2019/20 have been calculated. **Table 4** below summarises what has happened. **Appendix 1b** expands on this and shows the impact, school by school.

**Table 4. Summary process for determining school budget shares 2019/20.**



5.18 Whether any individual school gets more money than the standstill budget depends on two things: the amount of additional funding they receive from the NFF based allocations; and the amount of protection afforded them by the MFG at a standstill budget. If the extra funding is less than the MFG protection, they will not get a higher allocation.

5.19 **Appendix 2** breaks down the local formula across the component parts of the formula and the MFG, with pupil number information and a reference to the 2018/19 budget share.

5.20 **Appendix 3** shows the formula, MFG and budget share by school for the local 2018/19 formula, the local 2019/20 formula and the NFF if it had operated in 2019/20. It reiterates that the National Funding Formula would provide lower formula budgets, higher MFG protection and lower budget shares than the current local formula.

5.21 Primary schools would fare worse under the NFF because the Lump Sum reduces from £0.125m to £0.112m and the Primary Age-Weighted Pupil Unit value is lower by £82. This would be partly offset by funding received from pupil characteristics as the NFF distributes more money through those factors.

5.22 Comparing the 2019/20 local formula with the 2019/20 NFF, Primary schools would receive £2.7m less. Minimum Funding Guarantee would protect for most of the loss, but the Lump Sum reduction is outside the MFG, so is not protected. Over time MFG protection would reduce, but over time protection nationally should reduce and the ESFA would be able to increase formula values to distribute the same overall level of funding (ie the reduction in MFG could transfer into higher formula amounts).

5.23 Secondary schools would do better through the NFF. They too would experience a reduction in the Lump Sum, although it usually constitutes a smaller proportion of secondary budgets. Key Stage 3 values would reduce by -£174 per pupil and Key Stage 4 values would increase by +£134 per pupil. Secondary schools would gain from the higher levels of funding distributed through pupil characteristics.

5.24 Comparing the 2019/20 local formula with the 2019/20 NFF, Secondary schools would receive £0.8m more. Minimum Funding Guarantee would have needed to protect schools less than the local formula this year has had to.

5.25 **Table 5** summarises the differences in **Appendix 3**.

**Table 5: Pupil numbers and budgets for 2018/19 and 2019/20 local formula and 2019/20 NFF**

Component	2018/19	2019/20 (local)	2019/20 (NFF)
Pupil numbers	53,808	54,823	54,823
Formula (£'000)	£248,231	£255,027	£253,208
MFG (£'000)	£2,505	£2,818	£3,638
<b>Total budget shares</b>	<b>£250,735</b>	<b>£257,845</b>	<b>£256,846</b>

5.26 **Charts 1 and 2** in the appended papers illustrate the position for every school. **Chart 1** is in MFG order and shows that, while there are net beneficiaries across the range of MFG levels, a lower amount of MFG is helpful and a high level of MFG is unlikely to result in more funding. **Chart 2** looks at schools in descending order of extra formula funding per pupil (ie which schools gain most from moving to the NFF values) and the school with the highest formula gains still gets no more funding because its MFG is already very high.

## 6. Observations how the headroom has impacted on individual schools.

6.1 **NFF pupil characteristic factors are not just about deprivation.** Much emphasis is put on how this is about channelling more money for deprivation, but deprivation was only one part of the requested shift of funding. £2.7m went through deprivation, £0.2m through EAL and £4.7m through prior attainment.

6.2 **Example of high formula gain but no more money.** The school with the highest per pupil gain in the formula (City Academy with £518.98) did not see any increase in overall funding because it's MFG level was higher. This is more an indicator of how much the MFG is protecting schools for all sorts of reasons.

6.3 **Two examples of averagely protected schools with different formula impacts.** Before the allocation of any headroom, Filton Avenue and St Werburgh's Primary Schools each have MFG protection of 3.3% of their budget share. The extra headroom, however, because of the pupil characteristics in each school, provides an extra 3.6% of the budget share to Filton Avenue and 1.9% to St Werburgh's.

- 6.4 For Filton Avenue, the first 3.3% (£134.29 per pupil (pp)) of the extra formula allocation does not give them any more money, because every extra £ they gain in the formula means that their MFG protection reduces by £. Beyond 3.3% (£134.29pp), up to 3.6% (£150.11pp) (ie 0.3% (£15.82pp) of their pre-headroom budget share) translates into £12k extra funding for Filton Avenue. After headroom, they no longer require any MFG in their budget share.
- 6.5 For St Werburgh's, the extra 1.9% (£83.58pp) from the formula headroom is lower than the 3.3% (£143.03pp) protection in their budget share at a standstill. The extra formula funding reduces the amount of protection, £ for £. They still need £20k MFG funding to protect their budget share, so they do not receive any more money after the headroom has been distributed.
- 6.6 **Example of a school with very low MFG.** Luckwell Primary School happens to be the school with the combination of pupil characteristics that produce the same formula budget and standstill budget when all other schools need protection to be at a standstill position. So, at a standstill position, they do not need MFG protection. They will not always be in that position, it might be a different school next year. As they have no MFG, any extra formula allocated will directly benefit them. The extra headroom gives them £252.33 per pupil more and because their MFG is zero, all of that translates into a higher budget share.
- 6.7 **New school.** Trinity Secondary school opens in September 2019. It gains on the standstill position because it does not have a previous budget, so does not have an MFG. The ESFA has included pupil characteristics to apply to Trinity in the Authority Proforma Tool, which we understand they have calculated with reference to sector averages. The allocation of more money through the formula gives them more formula budget. If Trinity's pupil characteristics are wildly inaccurate and this results in them having a protected MFG as a consequence, we may need to be alert to that in future years and be prepared to seek a disapplication of the MFG for them. At this stage it is impossible to know whether that is likely or not.
- 6.8 **Negative impact of NFF.** There are 9 schools who actually lose funding after we move two-thirds of the way towards the NFF values for pupil characteristics. It may not be very much and all of them are protected by the MFG, but not all the NFF values are higher than the local formula. The movement towards NFF values for deprivation, EAL and prior attainment is generally about increases, but some of them are reductions. The introduction of a FSM6 factor is much more beneficial to secondary schools (all of whose pupils could have a full six years during which they might have been eligible for free school meals) than for primary schools (for instance, a Year 2 pupil on roll in October 2018 could only have been on roll in October 2017 (Year 1) and in October 2016 (Reception) ie only 3 out of a possible maximum of 6 censuses.)
- 6.9 Schools with low levels of FSM and FSM6 and with high attainment will not gain much through the formula and any gain will be offset by reduced allocations for IDACI and possibly EAL. Those schools would lose out further when / if we were to move to the NFF rates completely, including the reductions in the lump sums and the reductions in AWPUs for primary and KS3. In the short term, the

MFG will protect them, but in the longer term, the NFF would prevail as we move to that.

**6.10 Wider context of how MFG affects schools' budget shares** Of the 128 schools in the 2019/20 formula:

- 13 have been funded at their MFG level, and not their formula level in every year of the past six years (back to 2014/15)
- 14 have always been funded via the formula, never by way of the MFG; and
- 101 have sometimes been funded by MFG, sometimes by the formula.

6.11 The typical experience, therefore, of Bristol schools is that the MFG will sometimes be the driver for their funding and sometimes the formula will be the driver. If the formula in any given year provides more funding than the MFG, that new per pupil amount becomes the basis for the MFG the following year.

6.12 The MFG is likely to be the driver in times when headroom is low, MFG is 0% (rather than -1.5%) or if either the formula changes to the detriment of schools with their characteristics or the characteristics of their pupils attract less funding through the formula.

6.13 The formula is likely to be the driver in times when headroom exists, the MFG is low (ie -1.5%), or if either the formula changes to the benefit of schools with their characteristics or the characteristics of their pupils attract more funding through the formula.

6.14 The key point that schools get the higher of their formula allocation or their MFG entitlement needs to be borne in mind when considering the formula. The more protection there is for schools, the more MFG is needed to protect schools for their previous characteristics, rather than for their latest ones.

6.15 Schools Forum for 2019/20 asked that MFG be positive. In the end, 0% MFG was agreed. This had the effect of protecting historic budgets, based on previous pupil characteristic cohorts and funding priorities. It served as a brake on the latest formula, moving closer to NFF values, and taking account of October 2018 pupil characteristics. Had MFG been set at -1.5%, this would have protected budgets at 98.5% of their per pupil funding in 2018/19 and it would have created £3.5m more headroom for distribution through the formula. This may be worth considering afresh for 2020/21.

6.16 MFG protection is supposed to be to avoid individual schools experiencing unmanageable reductions in funding either through changes to formula components or because of rapidly changing intakes at the school. The protection is at per pupil level, rather than in absolute terms, so a school with fewer pupils will almost certainly see an overall reduction in funding.

6.17 Anomalies or curiosities are likely to arise, however.

6.18 For growing schools whose first year pupil characteristics are provided by the ESFA on the basis of estimates, they may be protected if the characteristics of the actual pupils who attend the school turn out to be much less generously

funded. Of the schools who opened in the last six years, only one has MFG protection based on the estimated pupil characteristics used in the first year they were funded by the formula. It may be that, in the future, new schools in their second year of the formula are not entitled to MFG protection, if Schools Forum were so minded.

- 6.19 Likewise, schools with low pupil numbers and high level needs could quickly move (in some circumstances) to having higher pupil numbers with lower level needs. Yet, even although they were expanding and getting the benefit of the extra funding provided by having more pupils on roll, all these additional pupils would be funded at the higher level per pupil. Of the 13 schools that have had continuous MFG per pupil protection since 2014/15 (or earlier) 9 of them have higher pupil numbers in 2019/20.
- 6.20 ESFA may not accept some of the requests for disapplication of MFG; they are keen to minimise disruption to individual schools. Nonetheless, there is scope for some scrutiny of this by the sub-group in the coming months to help understand why some schools are protected the way they are, what principles Schools Forum might apply in assessing whether MFG was appropriate or not and to establish whether there are any anomalies that might need to be resolved.

## 7. Glossary

**Authority Pro-forma Tool (APT):** This is the pre-populated spreadsheet provided by the ESFA for the LA to complete in January each year to calculate the budget shares for mainstream (primary, secondary and all-through) schools and academies in Bristol for those in Reception Year through to Year 11.

**Age-Weighted Pupil Unit (AWPU):** The funding formula will provide funding to schools on the basis of pupil numbers. The values may be different for Primary, Key Stage 3 and Key Stage 4 pupils (ie a different weighting for different ages).

**Budget Share:** The funding the school is due to receive, taking account of the funding distributed through the funding factors and any protection due from the Minimum Funding Guarantee. Maintained schools' budget shares would be subject to abatement to account for de-delegated items.

**Dedicated Schools Grant (DSG):** The ring-fenced grant provided by the ESFA to fund schools and pupils in Bristol. It is comprised of 4 blocks: Schools Block (for mainstream schools), School Central Services Block (for activities and functions performed by the local authority), Early Years Block (for free early education for 2, 3 and 4 year olds in maintained and Private, Voluntary and Independent Settings) and High Needs (for special educational needs provision and alternative provision in specialist or mainstream settings)

**Education and Skills Funding Agency (ESFA):** This agency funds local authorities and academies according to policy direction from the Department for Education.

**Formula factors:** Funding is distributed by pupil numbers, but also on the basis of school or pupil characteristics eg a lump sum per school, rates funding at each school. While factors are still determined locally, there is a limited range of factors that may be used, there are some conditions about the minimum amount to be distributed on pupil related factors and the ESFA provide the data to use.

**Minimum Funding Guarantee (MFG):** Mainstream schools are entitled to protection of their previous year per-pupil unit funding. This is calculated on their overall funding, less the amount for the lump sum and rates in their formula. The local authority, within DfE policy limits and in consultation with Schools Forum, determines the level of the Minimum Funding Guarantee. For 2019/20, DfE permitted an MFG of between -1.5% and +0.5% (ie protected per pupil funding of 98.5% of the rate in 2018/19 up to protected per pupil funding of 100.5%). Exemptions (disapplications) from the MFG can be sought for whole schools (for instance, if their circumstances would produce an anomalous outcome if the MFG were allowed to apply to them) or for particular factors (such as in 2018/19, when the significant increase in the PFI factor was removed from the MFG calculations to avoid creating anomalous circumstances for those schools).

**National Funding Formula (NFF):** The DfE has developed a national funding formula which is used to fund Bristol schools as a whole, rather than be used for calculating individual schools' budget shares. This has a set of formula factors and funding values that stand as an alternative to the local set of formula factors and funding values. Plans to use the NFF to fund individual schools have been deferred once or twice and it is not expected that such a change would happen before 2021/22 financial year.

**NFF Pupil Characteristics:** This has been adopted in this report to refer to the three sets of NFF formula factors relating to deprivation, English as an Additional Language and Prior Attainment.

**Schools Block.** One of the 4 blocks in the DSG, which is used to fund mainstream schools and academies.

**Standstill budget:** Funding for a school in 2019/20 that is equivalent to the October 2018 pupil numbers funded at the same per pupil rate as 2018/19, plus the lump sum and the rates allocation. Because the MFG has been set at 0% for 2019/20, the point where every school is funded at the MFG level corresponds to the standstill budget. Had the MFG been higher or lower, that equivalence would not have been there.

How formula values for 2019/20 were calculated

Appendix 1a

Category	Formula unit values	2018-19 Local formula values	Abatement by 3% to fit within standstill budget	Value for standstill budget	Movement towards NFF = 65.86%	Values in actual 2019/20 formula	2019-20 NFF formula values
AWPU	Basic Entitlement (Primary)	2,955.05	-86.80	2,868.25	0.00	2,868.25	2,786.35
AWPU	Basic Entitlement (KS3)	4,215.76	-123.83	4,091.93	0.00	4,091.93	3,918.00
AWPU	Basic Entitlement (KS4)	4,445.92	-130.59	4,315.33	0.00	4,315.33	4,448.66
Deprivation	Free School Meals (Primary)	246.18	-7.23	238.95	136.56	375.52	446.31
Deprivation	Free School Meals(Secondary)	272.58	-8.01	264.57	119.69	384.26	446.31
Deprivation	Free School Meals Ever 6 (Primary)	-	0.00	-	360.74	360.74	547.74
Deprivation	Free School Meals Ever 6(Secondary)	-	0.00	-	524.42	524.42	796.25
Deprivation	IDACI (P F)	352.62	-10.36	342.26	-91.81	250.46	202.87
Deprivation	IDACI (P E)	423.15	-12.43	410.72	-110.17	300.55	243.44
Deprivation	IDACI (P D)	564.19	-16.57	547.62	-120.17	427.45	365.16
Deprivation	IDACI (P C)	705.24	-20.72	684.53	-190.30	494.23	395.59
Deprivation	IDACI (P B)	846.29	-24.86	821.43	-260.42	561.01	426.02
Deprivation	IDACI (P A)	1,410.48	-41.43	1,369.05	-517.54	851.51	583.24
Deprivation	IDACI (S F)	352.62	-10.36	342.26	-31.68	310.58	294.16
Deprivation	IDACI (S E)	423.15	-12.43	410.72	-9.96	400.75	395.59
Deprivation	IDACI (S D)	564.19	-16.57	547.62	-16.62	531.00	522.38
Deprivation	IDACI (S C)	705.24	-20.72	684.53	-76.73	607.80	568.02
Deprivation	IDACI (S B)	846.29	-24.86	821.43	-140.17	681.26	608.60
Deprivation	IDACI (S A)	1,410.48	-41.43	1,369.05	-360.55	1,008.50	821.61
English as an Additional Language	EAL2 (P)	807.62	-23.72	783.90	-783.90	-	-
English as an Additional Language	EAL2 (S)	1,211.43	-35.58	1,175.85	-1175.85	-	-
English as an Additional Language	EAL3 (P)	547.23	-16.07	531.16	-5.78	525.38	522.38
English as an Additional Language	EAL3 (S)	820.85	-24.11	796.74	400.50	1,197.24	1,404.85
Prior Attainment	Low Attainment (P)	706.67	-20.76	685.91	231.00	916.91	1,036.65
Prior Attainment	Low Attainment (S)	1,009.53	-29.65	979.87	390.12	1,369.99	1,572.21
Lump Sum	Lump Sum	125,000.00	0.00	125,000.00	0.00	125,000.00	111,576.30

Funding distributed	Standstill budget 2019/20 £'000	Headroom £'000	Amounts in actual 2019/20 formula
AWPUs	181,367	0	181,367
Deprivation	24,454	2,794	27,248
EAL	2,933	204	3,137
Prior attainment	13,190	4,694	17,884
Lump sum	15,948	0	15,948
Split sites	580	0	580
Rates	2,574	0	2,574
PFI	6,289	0	6,289
<b>total factor funding</b>	<b>247,334</b>	<b>7,692</b>	<b>255,027</b>
MFG cost	8,979	-6,161	2,818
<b>Total formula funding</b>	<b>256,313</b>	<b>1,531</b>	<b>257,845</b>

1. Start with 2018/19 formula values.
2. Abate the values of all by 3%, except the lump sum, to distribute a standstill budget.
3. Adjust all the pupil characteristics factors by an equivalent amount (65.86%) between the local value and the NFF value.
4. Note that the EAL3 was not previously used locally (EAL2 was used), but the adjustment takes account of the same amount going via the local formula to do the equivalent adjustment.
5. Note that not every NFF pupil characteristic value is an increase; some of the IDACI ones reduce because more goes through FSM.
6. Note that no moves have been made to get to the NFF AWPU or lump sum values.

The end position is that we have moved around two-thirds of the way between the local and NFF values for pupil characteristics.

Analysis of how the APT funding allocations for 2019/20 were derived.

Appendix 1b

LAESTAB	Name	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
		Pupil numbers Oct 2017	Pupil numbers Oct 2018	APT 2018/19 £'000	Formula allocations at standstill 2019/20 with all schools at MFG £'000	MFG at standstill 2019/20 with all schools at MFG £'000	TOTAL funding at standstill 2019/20 £'000	Formula allocations with extra £1.5m added £'000	MFG with extra £1.5m added £'000	TOTAL PROPOSED 2019/20 £'000	FORMULA Difference between proposed and standstill £'000	MFG Difference between proposed and standstill £'000	TOTAL Difference between proposed and standstill £'000	Extra formula per pupil from the £1.5m allocated on NFF values. £	£ per pupil MFG at standstill	Was the school, in the final budget, funded by MFG or formula?	Extra £1.5m headroom as %age of Standstill budget share	Standstill MFG as %age of Standstill budget share
8012001	Brunel Field Primary School	414	410	1,558	1,568	32	1,599	1,594	5	1,599	27	-27		£65.27	£77.05	MFG	1.7%	2.0%
8012002	Cheddar Grove Primary School	405	415	1,616	1,627	25	1,652	1,653		1,653	25	-25	1	£61.22	£59.80	Formula	1.5%	1.5%
8012003	Ashley Down Primary School	412	415	1,497	1,473	43	1,516	1,508		1,516	35	-35		£83.77	£103.70	MFG	2.3%	2.8%
8012004	Ashton Gate Primary School	697	723	2,458	2,472	71	2,542	2,516	26	2,542	44	-44		£61.15	£97.62	MFG	1.7%	2.8%
8012006	Nova Primary School	365	364	1,569	1,525	41	1,567	1,579		1,579	54	-41	13	£148.27	£112.96	Formula	3.4%	2.6%
8012018	Broomhill Junior School	189	179	817	775	11	786	809		809	34	-11	23	£192.46	£62.26	Formula	4.4%	1.4%
8012019	St Werburgh's Primary School	302	330	1,335	1,398	47	1,445	1,426	20	1,445	28	-28		£83.58	£143.03	MFG	1.9%	3.3%
8012020	Chester Park Junior School	248	257	1,083	1,101	15	1,116	1,150		1,150	49	-15	34	£191.70	£59.50	Formula	4.4%	1.4%
8012021	Chester Park Infant School	217	186	1,027	887	19	906	885	21	906	-2	2		-£9.42	£104.50	MFG	-0.2%	2.1%
8012023	Hillcrest Primary School	412	408	1,463	1,417	33	1,450	1,453		1,453	35	-33	2	£86.02	£80.59	Formula	2.4%	2.3%
8012027	Shirehampton Primary School	417	425	1,718	1,715	38	1,753	1,744	9	1,753	29	-29		£68.06	£89.08	MFG	1.7%	2.2%
8012028	Two Mile Hill Primary School	575	568	2,209	2,143	41	2,184	2,246		2,246	103	-41	62	£181.12	£72.53	Formula	4.7%	1.9%
8012037	Glenfrome Primary School	361	402	1,534	1,613	79	1,692	1,667	25	1,692	54	-54		£134.91	£197.08	MFG	3.2%	4.7%
8012041	Henleaze Infant School	270	271	995	987	16	1,003	992	11	1,003	5	-5		£16.84	£57.27	MFG	0.5%	1.5%
8012069	St Anne's Infant School	264	248	1,131	1,015	57	1,071	1,026	45	1,071	11	-11		£44.52	£227.95	MFG	1.0%	5.3%
8012073	Sefton Park Infant School	178	178	744	707	27	735	702	32	735	-5	5		-£30.26	£157.52	MFG	-0.7%	3.7%
8012074	Sefton Park Junior School	235	227	862	827	10	837	845		845	18	-10	8	£77.96	£42.14	Formula	2.1%	1.1%
8012079	Southville Primary School	447	502	1,714	1,825	58	1,883	1,851	33	1,883	26	-26		£51.37	£116.36	MFG	1.4%	3.1%
8012081	Summerhill Infant School	261	10	1,115	1,046	10	1,056	1,048	8	1,056	2	-2		£8.49	£41.18	MFG	0.2%	1.0%
8012086	Upper Horfield Primary School	191	178	921	835	40	875	863	12	875	28	-28		£157.59	£226.01	MFG	3.2%	4.6%
8012098	Holymead Primary School	600	605	2,214	2,189	42	2,231	2,272		2,272	83	-42	41	£136.92	£68.95	Formula	3.7%	1.9%
8012109	Brentry Primary School	207	204	908	887	16	903	893	10	903	6	-6		£30.85	£80.19	MFG	0.7%	1.8%
8012115	Broomhill Infant School & Children's Centre	175	157	781	690	26	716	708	9	716	17	-17		£110.98	£167.09	MFG	2.4%	3.7%
8012138	Elmlea Infant School	270	270	1,007	977	30	1,007	990	17	1,007	17	-13		£48.36	£109.48	MFG	1.3%	2.9%
8012139	Cabot Primary School	185	184	1,010	938	73	1,010	951	60	1,010	13	-13		£71.22	£396.49	MFG	1.3%	7.2%
8012299	Hannah More Primary School	367	327	1,790	1,537	72	1,610	1,558	52	1,610	20	-20		£61.88	£221.55	MFG	1.3%	4.5%
8012312	Bishop Road Primary School	803	818	2,781	2,768	61	2,829	2,803	26	2,829	35	-35		£43.10	£74.55	MFG	1.2%	2.2%
8012314	Blaise Primary and Nursery School	398	380	1,729	1,616	42	1,657	1,639	18	1,657	24	-24		£62.39	£109.47	MFG	1.4%	2.5%
8012326	Fair Furlong Primary School	403	410	1,934	1,963	47	2,009	1,974	39	2,009	8	-8		£19.16	£113.55	MFG	0.4%	2.3%
8012327	May Park Primary School	685	604	3,036	2,585	120	2,705	2,666	39	2,705	81	-81		£133.83	£198.52	MFG	3.0%	4.4%
8012328	Whitehall Primary School	499	499	2,016	2,128	65	2,193	2,163	30	2,193	35	-35		£65.12	£121.68	MFG	1.6%	3.0%
8013000	Avonmouth Church of England Primary Scho	198	196	877	841	29	869	852	17	869	12	-12		£59.25	£146.12	MFG	1.3%	3.3%
8013008	Horfield Church of England Primary School	418	413	1,583	1,528	40	1,568	1,562	6	1,568	34	-34		£82.15	£97.18	MFG	2.2%	2.6%
8013010	St Barnabas Church of England VC Primary S	184	149	907	751	17	767	781	14	781	30	-17	13	£202.06	£111.96	Formula	3.9%	2.2%
8013013	St George Church of England Primary School	74	62	418	360	10	370	370		370	10	-10		£162.60	£165.81	MFG	2.7%	2.8%
8013014	St Johns Church of England Primary School, t	477	505	1,717	1,778	32	1,811	1,811		1,811	33	-32	1	£65.15	£63.51	Formula	1.8%	1.8%
8013018	St Michael's on the Mount Church of Englan	171	137	797	662	3	665	673		673	11	-3	8	£79.93	£22.85	Formula	1.6%	0.5%
8013400	School of Christ The King Catholic Primary	210	208	1,058	1,031	18	1,049	1,020	30	1,049	-12	12		-£55.32	£87.27	MFG	-1.1%	1.7%
8013401	Holy Cross RC Primary School	170	199	788	892	8	899	908		908	17	-8	9	£83.37	£38.77	Formula	1.8%	0.9%
8013402	Ss Peter and Paul RC Primary School	209	205	845	827	5	832	836		836	10	-5	4	£46.53	£26.34	Formula	1.1%	0.6%
8013403	St Bernard's Catholic Primary School	200	201	867	856	15	871	853	18	871	-4	4		-£17.86	£74.06	MFG	-0.4%	1.7%
8013405	St Joseph's Catholic Primary School	211	212	903	888	19	907	893	14	907	5	-5		£21.83	£88.81	MFG	0.5%	2.1%
8013412	Our Lady of the Rosary Catholic Primary Sch	212	211	987	957	25	983	954	28	983	-3	3		-£14.57	£119.61	MFG	-0.3%	2.6%
8013413	St Pius X RC Primary School	120	120	693	758	15	773	762	11	773	4	-4		£30.22	£108.50	MFG	0.5%	1.9%
8013415	St Bernadette Catholic Voluntary Aided Prim	204	202	862	842	13	855	841	14	855	-1	1		-£5.37	£63.58	MFG	-0.1%	1.5%
8013417	St Bonaventure's Catholic Primary School	400	402	1,482	1,453	36	1,488	1,478	11	1,488	25	-25		£61.89	£88.54	MFG	1.7%	2.4%
8013433	Stoke Park Primary School	198	202	914	916	21	938	949		949	32	-21	11	£160.88	£105.47	Formula	3.5%	2.3%
8013437	Bridge Farm Primary School	599	623	2,202	2,233	51	2,284	2,259	25	2,284	26	-26		£41.64	£81.61	MFG	1.1%	2.2%
8013438	Knowle Park Primary School	624	616	2,456	2,365	72	2,436	2,390	46	2,436	25	-25		£41.29	£116.55	MFG	1.0%	2.9%
8013439	Sea Mills Primary School	200	204	935	909	43	952	933	19	952	23	-23		£114.66	£209.61	MFG	2.5%	4.5%
8013441	Air Balloon Hill Primary School	809	787	2,960	2,830	54	2,885	2,955		2,955	124	-54	70	£157.89	£69.12	Formula	4.3%	1.9%
8013442	St Peter's Church of England Primary School	415	414	1,825	1,781	47	1,827	1,804	23	1,827	23	-23		£56.65	£112.94	MFG	1.3%	2.6%
8014603	St Mary Redcliffe and Temple School	1,084	1,082	5,391	5,267	114	5,381	5,402		5,402	135	-114	21	£125.23	£105.37	Formula	2.5%	2.1%
8014801	St Bernadette Catholic Secondary School	723	728	3,784	3,704	105	3,810	3,833		3,833	129	-105	23	£176.55	£144.72	Formula	3.4%	2.8%
8012005	Ashton Vale Primary School	198	191	825	788	13	800	807		807	20	-13	7	£102.30	£66.74	Formula	2.4%	1.6%
8012010	Fonhill Primary Academy	200	201	946	916	22	938	939		939	24	-22	1	£116.95	£110.78	Formula	2.5%	2.4%
8012013	Begbrook Primary Academy	570	578	2,179	2,153	55	2,208	2,221		2,221	68	-55	13	£116.80	£94.77	Formula	3.1%	2.5%
8012017	Waycroft Academy	419	410	1,587	1,514	41	1,555	1,549	6	1,555	34	-34		£84.10	£99.87	MFG	2.2%	2.6%
8012022	Cotham Gardens Primary School	511	531	1,910	1,952	28	1,979	2,000		2,000	48	-28	21	£91.23	£51.91	Formula	2.4%	1.4%
8012029	Ilminster Avenue E-ACT Academy	317	310	1,535	1,475	28	1,503	1,499	4	1,503	24	-24		£78.64	£91.68	MFG	1.6%	1.9%
8012030	St Ursula's E-ACT Academy	540	560	1,969	1,980	57	2,037	2,011	26	2,037	31	-31		£55.92	£102.29	MFG	1.5%	2.8%
8012034	Filton Avenue Primary School	755	772	3,122	3,086	104	3,190	3,202		3,202	116	-104	12	£150.11	£134.29	Formula	3.6%	3.3%
8012038	Oasis Academy Connaught	314	356	1,546	1,707	29	1,736	1,732	4	1,736	25	-25		£71.13	£82.19	MFG	1.5%	1.7%
8012040	Henleaze Junior School	383	380	1,354	1,319	25	1,344	1,347		1,347	28	-25	3	£73.83	£66.66	Formula	2.1%	1.9%
8012044	Hotwells Primary School	211	192	819	745	12	757	762		762	17	-12	5	£87.73	£63.71	Formula	2.2%	1.6%
8012055	The Dolphin School	350	358	1,506	1,515	23	1,538	1,526	11	1,538	12	-12		£32.35	£64.32	MFG	0.8%	1.5%
8012056	Oasis Academy Bank Leaze	191	187	942	882	43	925	907	18	925	24	-24		£130.30	£227.36	MFG	2.6%	4.6%
8012061	Parson Street Primary School	406	405	1,717	1,686	28	1,714	1,737		1,737	51	-28	23	£126.72	£69.09	Formula	3.0%	1.6%
8012062	Minerva Primary Academy	281	260	1,302	1,134	82	1,215	1,179	36	1,215	45	-45		£174.68	£314.18	MFG	3.7%	6.7%
8012064	Frome Vale Academy	169	172	815	786	41	827	812	15	827	26	-26		£153.92	£240.17	MFG	3.2%	5.0%
8012067	Fishponds Church of England Academy	407	393	1,691	1,591	47	1,637	1,650		1,650	59	-47	12					

Analysis of how the APT funding allocations for 2019/20 were derived.

Appendix 1b

LAESTAB	Name	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
		Pupil numbers Oct 2017	Pupil numbers Oct 2018	APT 2018/19 £'000	Formula allocations at standstill 2019/20 with all schools at MFG £'000	MFG at standstill 2019/20 with all schools at MFG £'000	TOTAL funding at standstill 2019/20 £'000	Formula allocations with extra £1.5m added £'000	MFG with extra £1.5m added £'000	TOTAL PROPOSED 2019/20 £'000	FORMULA Difference between proposed and standstill £'000	MFG Difference between proposed and standstill £'000	TOTAL Difference between proposed and standstill £'000	Extra formula per pupil from the £1.5m allocated on NFF values. £	£ per pupil MFG at standstill £	Was the school, in the final budget, funded by MFG or formula?	Extra £1.5m headroom as %age of Standstill budget share	Standstill MFG as %age of Standstill budget share
8012110	Hareclive E-ACT Academy	372	378	1,910	1,894	45	1,939	1,891	48	1,939	-3	3	-8.64	£118.42	MFG	-0.2%	2.3%	
8012112	Elmlea Junior School	355	358	1,259	1,253	16	1,268	1,283		1,283	31	-16	15	£85.33	£43.31	Formula	2.4%	1.2%
8012114	St Mary Redcliffe Church of England Primary	409	391	1,656	1,565	24	1,589	1,603		1,603	38	-24	15	£97.94	£60.71	Formula	2.4%	1.5%
8012117	Badocks Wood E-ACT Academy	246	220	1,178	1,022	36	1,058	1,075		1,075	53	-36	17	£240.62	£162.21	Formula	5.0%	3.4%
8012118	Perry Court E-Act Academy	357	338	1,575	1,469	32	1,501	1,520		1,520	51	-32	19	£150.71	£94.18	Formula	3.4%	2.1%
8012119	Luckwell Primary School	218	197	844	774		774	794		794	20		20	£99.69	£0.00	Formula	2.5%	0.0%
8012120	Evergreen Primary Academy (Millpond)	207	185	1,111	919	89	1,008	938	70	1,008	19	-18		£101.62	£479.41	Formula	1.9%	8.8%
8012320	Compass Point Primary School	240	195	1,135	892	54	946	934	12	946	41	-41		£212.07	£275.03	MFG	4.4%	5.7%
8012324	Four Acres Academy	273	289	1,299	1,315	53	1,368	1,347	21	1,368	32	-32		£111.21	£183.59	MFG	2.3%	3.9%
8013003	Christ Church Church of England Primary Sch	368	395	1,331	1,396	22	1,419	1,428		1,428	31	-22	9	£78.88	£56.74	Formula	2.2%	1.6%
8013025	Stoke Bishop Church of England Primary Sch	409	410	1,507	1,478	38	1,516	1,515	2	1,516	37	-37		£89.34	£93.72	MFG	2.4%	2.5%
8013026	Westbury-On-Trym Church of England Acade	418	410	1,496	1,457	13	1,470	1,491		1,491	34	-13	21	£83.40	£32.36	Formula	2.3%	0.9%
8013408	St Nicholas of Tolentine Catholic Primary Sch	195	187	952	905	14	919	918	1	919	13	-13		£69.05	£75.67	MFG	1.4%	1.5%
8013411	St Patrick's Catholic Primary School	209	210	905	892	17	908	899	9	908	8	-8		£37.14	£80.28	MFG	0.9%	1.9%
8013414	St Teresa's Catholic Primary School	211	207	931	894	22	916	901	15	916	7	-7		£33.29	£105.09	MFG	0.8%	2.4%
8013431	Greenfield E-Act Primary Academy	382	402	1,773	1,819	40	1,859	1,826	33	1,859	7	-7		£16.82	£99.02	MFG	0.4%	2.1%
8013432	Little Mead Primary Academy	420	419	1,758	1,719	36	1,755	1,764		1,764	45	-36	9	£106.45	£85.94	Formula	2.5%	2.1%
8013434	Oasis Academy New Oak	206	216	965	917	88	1,005	940	65	1,005	23	-23		£106.15	£407.70	MFG	2.3%	8.8%
8013436	West Town Lane Academy	624	627	2,283	2,235	62	2,298	2,290	8	2,298	54	-54		£86.64	£99.28	MFG	2.4%	2.7%
8013440	Victoria Park Primary School	416	413	1,665	1,585	54	1,640	1,636	4	1,640	51	-51		£122.38	£131.70	MFG	3.1%	3.3%
8014001	Bristol Free School	843	889	4,146	4,215	149	4,364	4,383		4,383	168	-149	19	£188.66	£167.45	Formula	3.8%	3.4%
8014003	Orchard School Bristol	779	837	4,820	4,939	221	5,160	5,277		5,277	337	-221	116	£403.21	£264.38	Formula	6.5%	4.3%
8014007	Oasis Academy Brislington	724	795	4,931	5,088	308	5,396	5,332	64	5,396	245	-245		£307.61	£387.71	MFG	4.5%	5.7%
8014010	The City Academy Bristol	653	714	4,105	4,083	386	4,470	4,454	16	4,470	371	-371		£518.98	£541.02	MFG	8.3%	8.6%
8014011	Ashton Park School	1,070	1,065	5,341	5,108	198	5,306	5,338		5,338	230	-198	32	£216.03	£185.53	Formula	4.3%	3.7%
8014031	Henbury School	626	733	3,929	4,352	220	4,573	4,604		4,604	252	-220	32	£344.16	£300.79	Formula	5.5%	4.8%
8014037	Bedminster Down School	957	1,024	5,754	5,981	162	6,143	6,212		6,212	231	-162	69	£225.53	£158.32	Formula	3.8%	2.6%
8014100	Cotham School	1,076	1,103	5,458	5,516	121	5,637	5,807		5,807	291	-121	170	£263.62	£109.45	Formula	5.2%	2.1%
8014101	Fairfield High School	918	1,029	5,016	5,137	465	5,602	5,423	179	5,602	286	-286		£277.47	£451.89	MFG	5.1%	8.3%
8014602	St Bede's Catholic College	898	934	4,401	4,439	133	4,572	4,536	36	4,572	97	-97		£103.73	£142.72	MFG	2.1%	2.9%
8014627	Redland Green School	1,034	1,077	4,801	4,852	144	4,996	4,951	45	4,996	99	-99		£91.62	£133.48	MFG	2.0%	2.9%
8016907	Bristol Brunel Academy	1,072	1,094	6,904	6,863	181	7,043	7,249		7,249	386	-181	206	£353.06	£165.09	Formula	5.5%	2.6%
8016908	Bristol Cathedral Choir School	634	669	3,162	3,246	83	3,329	3,337		3,337	91	-83	8	£135.94	£124.37	Formula	2.7%	2.5%
8016909	Colston's Girls' School	695	721	3,426	3,452	111	3,563	3,555	8	3,563	103	-103		£142.44	£153.75	MFG	2.9%	3.1%
8016911	Oasis Academy John Williams	845	865	4,805	4,478	443	4,922	4,681	241	4,922	203	-203		£234.31	£512.67	MFG	4.1%	9.0%
8016912	Oasis Academy Brightstowe	765	789	4,670	4,633	179	4,811	4,876		4,876	244	-179	65	£309.11	£226.45	Formula	5.1%	3.7%
8016913	Bristol Metropolitan Academy	875	912	6,198	5,822	631	6,453	6,128	325	6,453	306	-306		£335.47	£691.53	MFG	4.7%	9.8%
8014005	Bridge Learning Campus	941	962	5,623	5,645	98	5,743	5,750		5,750	105	-98	7	£108.91	£101.50	Formula	1.8%	1.7%
8014006	Steiner Academy Bristol	352	367	1,549	1,587	23	1,609	1,663		1,663	76	-23	54	£208.39	£61.33	Formula	4.8%	1.4%
8016910	Merchants' Academy	1,003	1,001	5,635	5,475	150	5,624	5,668		5,668	194	-150	44	£193.63	£149.65	Formula	3.4%	2.7%
8019999	CST Trinity Academy (opens September 2015)	0	70		409		409	427		427	18		18	£252.33	£0.00	Formula	4.3%	0.0%
8012130	Wansdyke Primary School	209	206	879	862	10	872	874		874	11	-10		£55.59	£47.61	MFG	1.3%	1.1%
<b>Totals / Averages</b>		<b>53,808</b>	<b>54,823</b>	<b>251,423</b>	<b>247,334</b>	<b>8,979</b>	<b>256,313</b>	<b>255,027</b>	<b>2,818</b>	<b>257,845</b>	<b>7,694</b>	<b>-6,162</b>	<b>1,530</b>	<b>£140.33</b>	<b>£163.78</b>		<b>3.0%</b>	<b>3.5%</b>

			Formula 2019/20													Total budget share 2019/20 before de-delegation
			Total budget share before de-delegation			Prior								Total	MFG	Total budget share 2019/20 before de-delegation
School number	School name	Sector	Formula Pupils 2018/19	Formula Pupils 2019/20	2018/19 £'000	AWPU 2019/20 £'000	Deprivation 2019/20 £'000	EAL 2019/20 £'000	Attainment 2019/20 £'000	Lump sum 2019/20 £'000	Split sites 2019/20 £'000	Rates 2019/20 £'000	PFI 2019/20 £'000	formula 2019/20 £'000	Protection 2019/20 £'000	before de-delegation £'000
8012001	Brunel Field Primary School	Primary	414	410	1,558	1,176	52	6	81	125	35	119	0	1,594	5	1,599
8012002	Cheddar Grove Primary School	Primary	405	415	1,616	1,190	159	2	166	125	0	11	0	1,653	0	1,653
8012003	Ashley Down Primary School	Primary	412	415	1,497	1,190	48	10	104	125	0	30	0	1,508	8	1,516
8012004	Ashton Gate Primary School	Primary	697	723	2,458	2,074	50	15	141	125	38	73	0	2,516	26	2,542
8012006	Nova Primary School	Primary	365	364	1,569	1,044	222	17	141	125	0	31	0	1,579	0	1,579
8012018	Broomhill Junior School	Primary	189	179	817	513	76	5	72	125	0	18	0	809	0	809
8012019	St Werburgh's Primary School	Primary	302	330	1,335	947	148	36	97	125	34	39	0	1,426	20	1,445
8012020	Chester Park Junior School	Primary	248	257	1,083	737	113	22	117	125	0	36	0	1,150	0	1,150
8012021	Chester Park Infant School	Primary	217	186	1,027	533	86	47	67	125	0	26	0	885	21	906
8012023	Hillcrest Primary School	Primary	412	408	1,463	1,170	37	8	93	125	0	19	0	1,453	0	1,453
8012027	Shirehampton Primary School	Primary	417	425	1,718	1,219	197	15	162	125	6	20	0	1,744	9	1,753
8012028	Two Mile Hill Primary School	Primary	575	568	2,209	1,629	213	33	217	125	0	29	0	2,246	0	2,246
8012037	Glenfrome Primary School	Primary	361	402	1,534	1,153	199	50	122	125	0	19	0	1,667	25	1,692
8012041	Henleaze Infant School	Primary	270	271	995	777	11	12	46	125	0	21	0	992	11	1,003
8012069	St Anne's Infant School	Primary	264	248	1,131	711	57	22	89	125	0	21	0	1,026	45	1,071
8012073	Sefton Park Infant School	Primary	178	173	744	496	15	14	20	125	0	31	0	702	32	735
8012074	Sefton Park Junior School	Primary	235	227	862	651	26	5	38	125	0	0	0	845	0	845
8012079	Southville Primary School	Primary	447	502	1,714	1,440	69	27	111	125	36	44	0	1,851	33	1,883
8012081	Summerhill Infant School	Primary	261	245	1,115	703	88	43	72	125	0	18	0	1,048	8	1,056
8012086	Upper Horfield Primary School	Primary	191	178	921	511	121	18	65	125	0	23	0	863	12	875
8012098	Holymead Primary School	Primary	600	605	2,214	1,735	119	23	198	125	37	35	0	2,272	0	2,272
8012109	Brentry Primary School	Primary	207	204	908	585	111	10	42	125	0	20	0	893	10	903
8012115	Broomhill Infant School & Children's Centre	Primary	175	157	781	450	64	9	42	125	0	18	0	708	9	716
8012138	Elmlea Infant School	Primary	270	270	1,007	774	4	11	67	125	0	9	0	990	17	1,007
8012139	Cabot Primary School	Primary	185	184	1,010	528	163	47	66	125	0	21	0	951	60	1,010
8012299	Hannah More Primary School	Primary	367	327	1,790	938	291	60	128	125	0	16	0	1,558	52	1,610
8012312	Bishop Road Primary School	Primary	803	818	2,781	2,346	51	54	121	125	39	67	0	2,803	26	2,829
8012314	Blaise Primary and Nursery School	Primary	398	380	1,729	1,090	255	23	123	125	0	23	0	1,639	18	1,657
8012326	Fair Furlong Primary School	Primary	403	410	1,934	1,176	406	10	199	125	0	53	0	1,970	39	2,009
8012327	May Park Primary School	Primary	685	604	3,036	1,732	385	72	272	125	0	80	0	2,666	39	2,705
8012328	Whitehall Primary School	Primary	499	535	2,016	1,535	224	42	172	125	0	66	0	2,163	30	2,193
8013000	Avonmouth Church of England Primary School	Primary	198	196	877	562	92	8	53	125	0	12	0	852	17	869
8013008	Horfield Church of England Primary School	Primary	418	413	1,583	1,185	118	13	86	125	0	35	0	1,562	6	1,568
8013010	St Barnabas Church of England VC Primary School	Primary	184	149	907	427	127	22	55	125	0	24	0	781	0	781
8013013	St George Church of England Primary School	Primary	74	62	418	178	27	10	28	125	1	2	0	370	0	370
8013014	St Johns Church of England Primary School, Clifton	Primary	477	505	1,717	1,448	33	25	111	125	36	33	0	1,811	0	1,811
8013018	St Michael's on the Mount Church of England Primary School	Primary	171	137	797	393	72	25	51	125	0	7	0	673	0	673
8013400	School of Christ The King Catholic Primary	Primary	210	208	1,058	597	196	20	81	125	0	2	0	1,020	30	1,049
8013401	Holy Cross RC Primary School	Primary	170	199	788	571	109	22	75	125	0	7	0	908	0	908
8013402	Ss Peter and Paul RC Primary School	Primary	209	205	845	588	32	20	68	125	0	4	0	836	0	836
8013403	St Bernard's Catholic Primary School	Primary	200	201	867	577	60	24	67	125	0	1	0	853	18	871
8013405	St Joseph's Catholic Primary School	Primary	211	212	903	608	69	18	69	125	0	3	0	893	14	907
8013412	Our Lady of the Rosary Catholic Primary School, Bristol	Primary	212	211	987	605	102	36	73	125	0	14	0	954	28	983
8013413	St Pius X RC Primary School	Primary	120	137	693	393	145	6	86	125	0	7	0	762	11	773
8013415	St Bernadette Catholic Voluntary Aided Primary School	Primary	204	202	862	579	67	15	52	125	0	3	0	841	14	855
8013417	St Bonaventure's Catholic Primary School	Primary	400	402	1,482	1,153	65	18	103	125	0	14	0	1,478	11	1,488
8013433	Stoke Park Primary School	Primary	198	202	914	579	111	18	94	125	0	22	0	949	0	949
8013437	Bridge Farm Primary School	Primary	599	623	2,202	1,787	163	1	163	125	0	20	0	2,259	25	2,284
8013438	Knowle Park Primary School	Primary	624	616	2,456	1,767	267	22	176	125	0	34	0	2,390	46	2,436
8013439	Sea Mills Primary School	Primary	200	204	935	585	119	6	63	125	0	34	0	933	19	952
8013441	Air Balloon Hill Primary School	Primary	809	787	2,960	2,257	222	35	257	125	0	58	0	2,955	0	2,955
8013442	St Peter's Church of England Primary School (VC)	Primary	415	414	1,825	1,187	289	3	176	125	0	23	0	1,804	23	1,827
8014603	St Mary Redcliffe and Temple School	Secondary	1,084	1,082	5,391	4,524	449	19	219	125	16	50	0	5,402	0	5,402
8014801	St Bernadette Catholic Secondary School	Secondary	723	728	3,784	3,043	434	10	203	125	0	18	0	3,833	0	3,833
8012005	Ashton Vale Primary School	Primary	198	191	825	548	61	2	70	125	0	2	0	807	0	807
8012010	Fonthill Primary Academy	Primary	200	201	946	577	129	23	84	125	0	3	0	939	0	939
8012013	Begbrook Primary Academy	Primary	570	578	2,179	1,658	163	58	204	125	0	13	0	2,221	0	2,221

			Formula 2019/20														
			Total budget share before de-delegation			Prior								Total		MFG	Total budget share 2019/20
			Formula Pupils 2018/19	Formula Pupils 2019/20	2018/19 £'000	Deprivation 2019/20 £'000	EAL 2019/20 £'000	Attainment 2019/20 £'000	Lump sum 2019/20 £'000	Split sites 2019/20 £'000	Rates 2019/20 £'000	PFI 2019/20 £'000	formula 2019/20 £'000	Protection 2019/20 £'000	before de-delegation £'000		
School number	School name	Sector	2018/19	2019/20	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000			
8012017	Waycroft Academy	Primary	419	410	1,587	1,176	103	10	129	125	0	6	0	1,549	6	1,555	
8012022	Cotham Gardens Primary School	Primary	511	531	1,910	1,523	143	38	129	125	36	5	0	2,000	0	2,000	
8012029	Ilminster Avenue E-ACT Academy	Primary	317	310	1,535	889	326	10	145	125	0	4	0	1,499	4	1,503	
8012030	St Ursula's E-ACT Academy	Primary	540	560	1,969	1,606	133	11	121	125	0	14	0	2,011	26	2,037	
8012034	Filton Avenue Primary School	Primary	755	772	3,122	2,214	430	75	311	125	39	7	0	3,202	0	3,202	
8012038	Oasis Academy Connaught	Primary	314	356	1,546	1,021	384	27	168	125	0	6	0	1,732	4	1,736	
8012040	Henleaze Junior School	Primary	383	380	1,354	1,090	26	5	97	125	0	4	0	1,347	0	1,347	
8012044	Hotwells Primary School	Primary	211	192	819	551	20	13	49	125	0	3	0	762	0	762	
8012055	The Dolphin School	Primary	350	358	1,506	1,027	192	47	125	125	5	4	0	1,526	11	1,538	
8012056	Oasis Academy Bank Leaze	Primary	191	187	942	536	165	12	64	125	0	5	0	907	18	925	
8012061	Parson Street Primary School	Primary	406	405	1,717	1,162	221	28	194	125	0	7	0	1,737	0	1,737	
8012062	Minerva Primary Academy	Primary	281	260	1,302	746	150	32	123	125	0	4	0	1,179	36	1,215	
8012064	Frome Vale Academy	Primary	169	172	815	493	101	20	69	125	0	4	0	812	15	827	
8012067	Fishponds Church of England Academy	Primary	407	393	1,691	1,127	167	35	188	125	0	7	0	1,650	0	1,650	
8012077	Bannerman Road Community Academy	Primary	321	320	1,583	918	234	70	156	125	0	9	0	1,511	67	1,578	
8012078	Henbury Court Primary Academy	Primary	341	336	1,481	964	260	20	105	125	0	5	0	1,479	0	1,479	
8012080	Summerhill Academy	Primary	339	333	1,352	955	135	16	146	125	0	4	0	1,381	0	1,381	
8012082	The Kingfisher School	Primary	128	135	631	387	74	9	70	125	0	3	0	668	0	668	
8012087	Cathedral primary School	Primary	275	337	1,217	967	91	19	74	125	34	16	0	1,326	122	1,448	
8012089	Redfield Educate Together Primary Academy	Primary	255	316	1,148	906	132	50	97	125	0	7	0	1,316	75	1,391	
8012091	Westbury Park Primary School	Primary	421	415	1,460	1,190	20	7	89	125	0	4	0	1,435	6	1,441	
8012092	Oasis Academy Marksbury Road	Primary	177	238	790	683	126	20	37	125	0	9	0	999	19	1,018	
8012093	Fairlawn Primary School	Primary	127	175	598	502	64	15	34	125	0	4	0	744	34	778	
8012094	Oasis Academy Long Cross	Primary	385	409	1,732	1,173	359	16	180	125	0	7	0	1,861	0	1,861	
8012099	Headley Park Primary School	Primary	422	419	1,694	1,202	154	7	145	125	0	6	0	1,638	30	1,668	
8012101	Easton Church of England Academy	Primary	466	452	2,359	1,296	378	114	227	125	0	9	0	2,148	144	2,292	
8012106	Barton Hill Academy	Primary	401	376	2,099	1,078	328	87	176	125	0	3	0	1,798	179	1,977	
8012107	Wicklea Academy	Primary	293	307	1,149	881	96	8	85	125	0	7	0	1,202	0	1,202	
8012108	Woodlands Academy	Primary	169	181	772	519	107	10	72	125	0	3	0	836	0	836	
8012110	Hareclive E-ACT Academy	Primary	372	378	1,910	1,084	468	9	199	125	0	6	0	1,891	48	1,939	
8012112	Elmlea Junior School	Primary	355	358	1,259	1,027	11	2	114	125	0	5	0	1,283	0	1,283	
8012114	St Mary Redcliffe Church of England Primary School	Primary	409	391	1,656	1,121	172	31	139	125	0	15	0	1,603	0	1,603	
8012117	Badocks Wood E-ACT Academy	Primary	246	220	1,178	631	179	19	118	125	0	2	0	1,075	0	1,075	
8012118	Perry Court E-Act Academy	Primary	357	338	1,575	969	255	7	158	125	0	6	0	1,520	0	1,520	
8012119	Luckwell Primary School	Primary	218	197	844	565	25	5	71	125	0	3	0	794	0	794	
8012120	Evergreen Primary Academy	Primary	207	185	1,111	531	132	46	81	125	0	23	0	938	70	1,008	
8012320	Compass Point Primary School	Primary	240	195	1,135	559	121	17	110	125	0	2	0	934	12	946	
8012324	Four Acres Academy	Primary	273	289	1,299	829	277	8	102	125	0	6	0	1,347	21	1,368	
8013003	Christ Church Church of England Primary School	Primary	368	395	1,331	1,133	39	31	98	125	0	2	0	1,428	0	1,428	
8013025	Stoke Bishop Church of England Primary School	Primary	409	410	1,507	1,176	92	9	106	125	0	6	0	1,515	2	1,516	
8013026	Westbury-On-Trym Church of England Academy	Primary	418	410	1,496	1,176	68	6	113	125	0	4	0	1,491	0	1,491	
8013408	St Nicholas of Tolentine Catholic Primary School	Primary	195	187	952	536	154	23	76	125	0	3	0	918	1	919	
8013411	St Patrick's Catholic Primary School	Primary	209	210	905	602	56	29	84	125	0	4	0	899	9	908	
8013414	St Teresa's Catholic Primary School	Primary	211	207	931	594	67	36	77	125	0	2	0	901	15	916	
8013431	Greenfield E-Act Primary Academy	Primary	382	402	1,773	1,153	389	4	150	125	0	4	0	1,826	33	1,859	
8013432	Little Mead Primary Academy	Primary	420	419	1,758	1,202	246	33	154	125	0	4	0	1,764	0	1,764	
8013434	Oasis Academy New Oak	Primary	206	216	965	620	116	7	68	125	0	4	0	940	65	1,005	
8013436	West Town Lane Academy	Primary	624	627	2,283	1,798	163	18	174	125	0	10	0	2,290	8	2,298	
8013440	Victoria Park Primary School	Primary	416	413	1,665	1,185	142	23	156	125	0	6	0	1,636	4	1,640	
8014001	Bristol Free School	Secondary	843	889	4,146	3,703	318	17	194	125	0	26	0	4,383	0	4,383	
8014003	Orchard School Bristol	Secondary	779	837	4,820	3,487	691	61	358	125	0	37	519	5,277	0	5,277	
8014007	Oasis Academy Brislington	Secondary	724	795	4,931	3,317	477	26	324	125	0	55	1,007	5,332	64	5,396	
8014010	The City Academy Bristol	Secondary	653	714	4,105	2,978	688	151	408	125	38	66	0	4,454	16	4,470	
8014011	Ashton Park School	Secondary	1,070	1,065	5,341	4,451	418	11	304	125	0	30	0	5,338	0	5,338	
8014031	Henbury School	Secondary	626	733	3,929	3,056	620	36	279	125	0	34	454	4,604	0	4,604	
8014037	Bedminster Down School	Secondary	957	1,024	5,754	4,274	774	11	355	125	0	39	635	6,212	0	6,212	
8014100	Cotham School	Secondary	1,076	1,103	5,458	4,609	589	76	345	125	17	46	0	5,807	0	5,807	
8014101	Fairfield High School	Secondary	918	1,029	5,016	4,292	577	69	310	125	15	34	0	5,423	179	5,602	
8014602	St Bede's Catholic College	Secondary	898	934	4,401	3,902	301	14	159	125	0	35	0	4,536	36	4,572	

			Formula 2019/20													
			Total budget share before de-delegation 2018/19 £'000	Prior								Total formula 2019/20 £'000	MFG Protection 2019/20 £'000	Total budget share 2019/20 before de- delegation £'000		
School number	School name	Sector		Formula Pupils 2018/19	Formula Pupils 2019/20	AWPU 2019/20 £'000	Deprivation 2019/20 £'000	EAL 2019/20 £'000	Attainment 2019/20 £'000	Lump sum 2019/20 £'000	Split sites 2019/20 £'000				Rates 2019/20 £'000	PFI 2019/20 £'000
8014627	Redland Green School	Secondary	1,034	1,077	4,801	4,494	92	28	150	125	16	45	0	4,951	45	4,996
8016907	Bristol Brunel Academy	Secondary	1,072	1,094	6,904	4,571	684	52	396	125	0	36	1,386	7,249	0	7,249
8016908	Bristol Cathedral Choir School	Secondary	634	669	3,162	2,792	203	6	139	125	48	24	0	3,337	0	3,337
8016909	Colston's Girls' School	Secondary	695	721	3,426	3,011	245	5	122	125	11	36	0	3,555	8	3,563
8016911	Oasis Academy John Williams	Secondary	845	865	4,805	3,612	647	6	251	125	0	40	0	4,681	241	4,922
8016912	Oasis Academy Brightstowe	Secondary	765	789	4,670	3,297	639	22	268	125	0	37	489	4,876	0	4,876
8016913	Bristol Metropolitan Academy	Secondary	875	912	6,198	3,811	597	39	367	125	0	33	1,155	6,128	325	6,453
8014005	Bridge Learning Campus	All-through	941	962	5,623	3,421	1,147	23	327	125	0	62	645	5,750	0	5,750
8014006	Steiner Academy Bristol	All-through	352	367	1,549	1,198	161	17	144	125	0	19	0	1,663	0	1,663
8016910	Merchants' Academy	All-through	1,003	1,001	5,635	3,808	1,192	21	424	125	41	58	0	5,668	0	5,668
8019999	CST Trinity Academy	Secondary	-	70	0	286	42	3	22	73	0	0	0	427	0	427
8014012	Wansdyke Primary School	Primary	209	206	879	591	74	1	70	125	0	13	0	874	0	874
			<b>53,808</b>	<b>54,823</b>	<b>250,735</b>	<b>181,367</b>	<b>27,248</b>	<b>3,137</b>	<b>17,884</b>	<b>15,948</b>	<b>580</b>	<b>2,574</b>	<b>6,289</b>	<b>255,027</b>	<b>2,818</b>	<b>257,845</b>

School number	School name	Sector	Formula Pupils 2018/19	Formula Pupils 2019/20	Formula 2018/19			Formula 2019/20			NFF 2019/20		
					Local	MFG	Total	Local	MFG	Total	NFF	MFG	Total
					Formula 2018/19 £'000	Protection 2018/19 £'000	shares 2018/19 £'000	Formula 2019/20 £'000	Protection 2019/20 £'000	shares 2019/20 £'000	2019/20 £'000	Protection 2019/20 £'000	shares 2019/20 £'000
8012001	Brunel Field Primary School	Primary	414	410	1,558	0	1,558	1,594	5	1,599	1,561	24	1,586
8012002	Cheddar Grove Primary School	Primary	405	415	1,616	0	1,616	1,653	0	1,653	1,619	20	1,639
8012003	Ashley Down Primary School	Primary	412	415	1,497	0	1,497	1,508	8	1,516	1,477	26	1,502
8012004	Ashton Gate Primary School	Primary	697	723	2,458	0	2,458	2,516	26	2,542	2,467	62	2,529
8012006	Nova Primary School	Primary	365	364	1,569	0	1,569	1,579	0	1,579	1,563	0	1,563
8012018	Broomhill Junior School	Primary	189	179	817	0	817	809	0	809	797	0	797
8012019	St Werburgh's Primary School	Primary	302	330	1,325	9	1,335	1,426	20	1,445	1,401	31	1,432
8012020	Chester Park Junior School	Primary	248	257	1,083	0	1,083	1,150	0	1,150	1,134	0	1,134
8012021	Chester Park Infant School	Primary	217	186	1,027	0	1,027	885	21	906	867	25	893
8012023	Hillcrest Primary School	Primary	412	408	1,463	0	1,463	1,453	0	1,453	1,424	13	1,437
8012027	Shirehampton Primary School	Primary	417	425	1,718	0	1,718	1,744	9	1,753	1,711	29	1,740
8012028	Two Mile Hill Primary School	Primary	575	568	2,209	0	2,209	2,246	0	2,246	2,239	0	2,239
8012037	Glenfrome Primary School	Primary	361	402	1,507	27	1,534	1,667	25	1,692	1,647	32	1,679
8012041	Henleaze Infant School	Primary	270	271	995	0	995	992	11	1,003	962	28	989
8012069	St Anne's Infant School	Primary	264	248	1,131	0	1,131	1,026	45	1,071	1,003	54	1,058
8012073	Sefton Park Infant School	Primary	178	173	744	0	744	702	32	735	675	46	721
8012074	Sefton Park Junior School	Primary	235	227	862	0	862	845	0	845	820	4	824
8012079	Southville Primary School	Primary	447	502	1,714	0	1,714	1,851	33	1,883	1,811	59	1,870
8012081	Summerhill Infant School	Primary	261	245	1,115	0	1,115	1,048	8	1,056	1,027	16	1,043
8012086	Upper Horfield Primary School	Primary	191	178	897	24	921	863	12	875	849	13	861
8012098	Holymead Primary School	Primary	600	605	2,214	0	2,214	2,272	0	2,272	2,253	0	2,253
8012109	Brentry Primary School	Primary	207	204	908	0	908	893	10	903	867	23	890
8012115	Broomhill Infant School & Children's Centre	Primary	175	157	781	0	781	708	9	716	692	10	703
8012138	Elmlea Infant School	Primary	270	270	1,007	0	1,007	990	17	1,007	964	29	993
8012139	Cabot Primary School	Primary	185	184	951	59	1,010	951	60	1,010	931	66	997
8012299	Hannah More Primary School	Primary	367	327	1,751	38	1,790	1,558	52	1,610	1,528	69	1,596
8012312	Bishop Road Primary School	Primary	803	818	2,781	0	2,781	2,803	26	2,829	2,741	75	2,816
8012314	Blaise Primary and Nursery School	Primary	398	380	1,729	0	1,729	1,639	18	1,657	1,608	36	1,644
8012326	Fair Furlong Primary School	Primary	403	410	1,934	0	1,934	1,970	39	2,009	1,928	67	1,996
8012327	May Park Primary School	Primary	685	604	2,974	62	3,036	2,666	39	2,705	2,643	48	2,691
8012328	Whitehall Primary School	Primary	499	535	2,016	0	2,016	2,163	30	2,193	2,123	57	2,180
8013000	Avonmouth Church of England Primary School	Primary	198	196	852	25	877	852	17	869	830	26	856
8013008	Horfield Church of England Primary School	Primary	418	413	1,583	0	1,583	1,562	6	1,568	1,530	24	1,555
8013010	St Barnabas Church of England VC Primary School	Primary	184	149	907	0	907	781	0	781	770	0	770
8013013	St George Church of England Primary School	Primary	74	62	409	8	418	370	0	370	357	0	357
8013014	St Johns Church of England Primary School, Clifton	Primary	477	505	1,717	0	1,717	1,811	0	1,811	1,774	23	1,797
8013018	St Michael's on the Mount Church of England Primary	Primary	171	137	797	0	797	673	0	673	656	0	656
8013400	School of Christ The King Catholic Primary	Primary	210	208	1,058	0	1,058	1,020	30	1,049	983	53	1,036
8013401	Holy Cross RC Primary School	Primary	170	199	788	0	788	908	0	908	889	0	889
8013402	Ss Peter and Paul RC Primary School	Primary	209	205	845	0	845	836	0	836	812	7	819
8013403	St Bernard's Catholic Primary School	Primary	200	201	867	0	867	853	18	871	822	36	858
8013405	St Joseph's Catholic Primary School	Primary	211	212	903	0	903	893	14	907	864	29	894
8013412	Our Lady of the Rosary Catholic Primary School, Bris	Primary	212	211	987	0	987	954	28	983	918	51	969
8013413	St Pius X RC Primary School	Primary	120	137	693	0	693	762	11	773	740	19	759
8013415	St Bernadette Catholic Voluntary Aided Primary Sch	Primary	204	202	862	0	862	841	14	855	811	31	842
8013417	St Bonaventure's Catholic Primary School	Primary	400	402	1,482	0	1,482	1,478	11	1,488	1,442	33	1,475

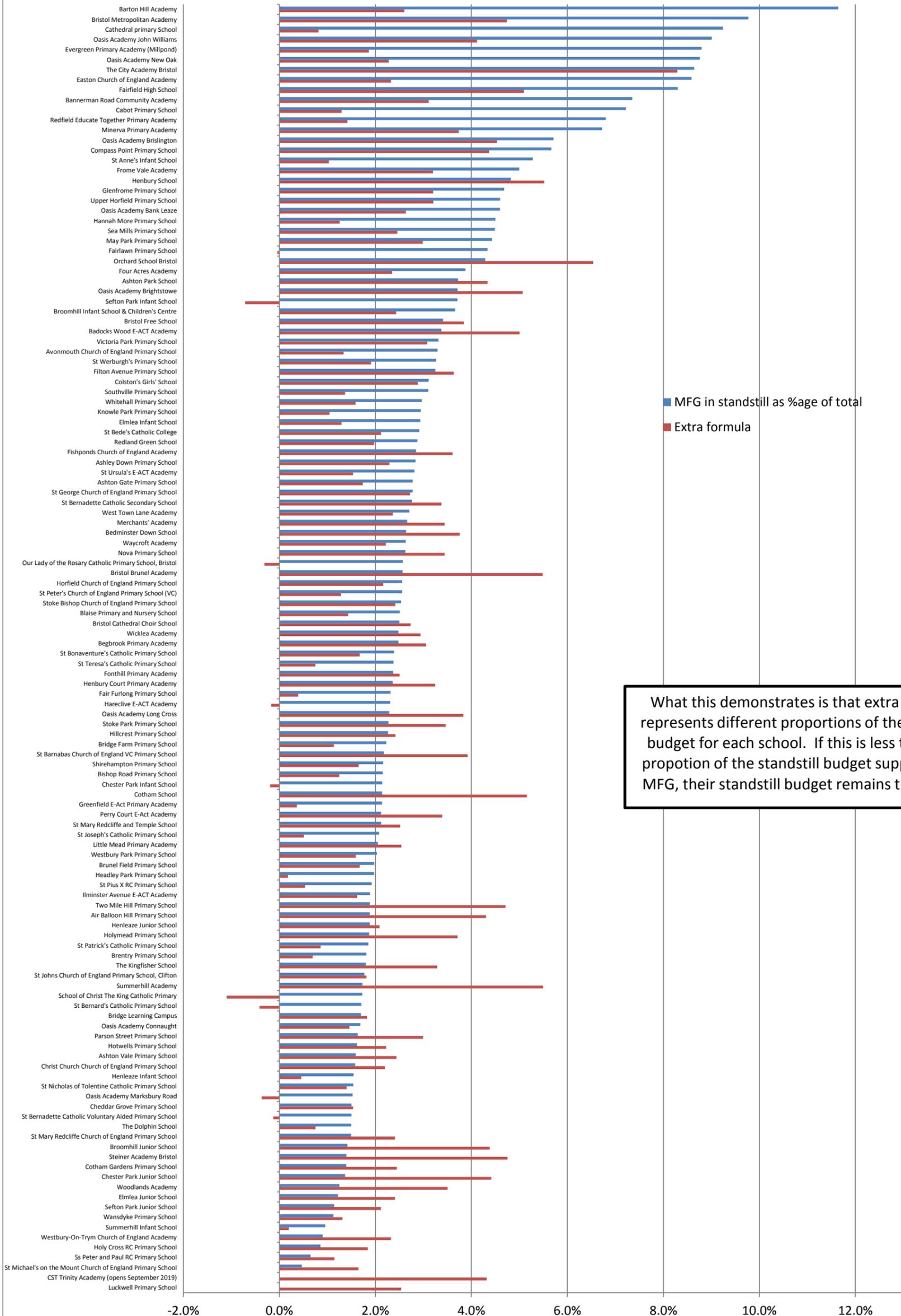
School number	School name	Sector	Formula 2018/19			Formula 2019/20			NFF 2019/20														
			Formula Pupils 2018/19	Formula Pupils 2019/20	Total budget shares 2018/19 £'000	Local Formula 2018/19 £'000	MFG Protection 2018/19 £'000	Total budget shares 2019/20 £'000	Local Formula 2019/20 £'000	MFG Protection 2019/20 £'000	Total budget shares 2019/20 £'000	NFF 2019/20 £'000	MFG Protection 2019/20 £'000	Total budget shares 2019/20 £'000									
8013433	Stoke Park Primary School	Primary	198	202	914	0	914	949	0	949	934	0	934										
8013437	Bridge Farm Primary School	Primary	599	623	2,202	0	2,202	2,259	25	2,284	2,208	62	2,271										
8013438	Knowle Park Primary School	Primary	624	616	2,456	0	2,456	2,390	46	2,436	2,340	83	2,423										
8013439	Sea Mills Primary School	Primary	200	204	915	20	935	933	19	952	916	23	939										
8013441	Air Balloon Hill Primary School	Primary	809	787	2,960	0	2,960	2,955	0	2,955	2,939	0	2,939										
8013442	St Peter's Church of England Primary School (VC)	Primary	415	414	1,825	0	1,825	1,804	23	1,827	1,770	44	1,814										
8014603	St Mary Redcliffe and Temple School	Secondary	1,084	1,082	5,391	0	5,391	5,402	0	5,402	5,399	0	5,399										
8014801	St Bernadette Catholic Secondary School	Secondary	723	728	3,784	0	3,784	3,833	0	3,833	3,847	0	3,847										
8012005	Ashton Vale Primary School	Primary	198	191	825	0	825	807	0	807	789	0	789										
8012010	Fonthill Primary Academy	Primary	200	201	935	11	946	939	0	939	922	3	925										
8012013	Begbrook Primary Academy	Primary	570	578	2,179	0	2,179	2,221	0	2,221	2,195	0	2,195										
8012017	Waycroft Academy	Primary	419	410	1,587	0	1,587	1,549	6	1,555	1,519	23	1,542										
8012022	Cotham Gardens Primary School	Primary	511	531	1,910	0	1,910	2,000	0	2,000	1,965	1	1,966										
8012029	Ilminster Avenue E-ACT Academy	Primary	317	310	1,535	0	1,535	1,499	4	1,503	1,472	18	1,490										
8012030	St Ursula's E-ACT Academy	Primary	540	560	1,969	0	1,969	2,011	26	2,037	1,967	57	2,023										
8012034	Filton Avenue Primary School	Primary	755	772	3,122	0	3,122	3,202	0	3,202	3,183	0	3,183										
8012038	Oasis Academy Connaught	Primary	314	356	1,546	0	1,546	1,732	4	1,736	1,703	19	1,723										
8012040	Henleaze Junior School	Primary	383	380	1,354	0	1,354	1,347	0	1,347	1,316	15	1,331										
8012044	Hotwells Primary School	Primary	211	192	819	0	819	762	0	762	743	1	743										
8012055	The Dolphin School	Primary	350	358	1,506	0	1,506	1,526	11	1,538	1,494	30	1,524										
8012056	Oasis Academy Bank Leaze	Primary	191	187	923	18	942	907	18	925	889	23	911										
8012061	Parson Street Primary School	Primary	406	405	1,717	0	1,717	1,737	0	1,737	1,718	0	1,718										
8012062	Minerva Primary Academy	Primary	281	260	1,241	61	1,302	1,179	36	1,215	1,168	34	1,202										
8012064	Frome Vale Academy	Primary	169	172	815	0	815	812	15	827	797	17	814										
8012067	Fishponds Church of England Academy	Primary	407	393	1,690	0	1,691	1,650	0	1,650	1,635	0	1,635										
8012077	Bannerman Road Community Academy	Primary	321	320	1,503	80	1,583	1,511	67	1,578	1,498	67	1,565										
8012078	Henbury Court Primary Academy	Primary	341	336	1,481	0	1,481	1,479	0	1,479	1,463	0	1,463										
8012080	Summerhill Academy	Primary	339	333	1,352	0	1,352	1,381	0	1,381	1,374	0	1,374										
8012082	The Kingfisher School	Primary	128	135	621	10	631	668	0	668	656	0	656										
8012087	Cathedral primary School	Primary	275	337	1,139	77	1,217	1,326	122	1,448	1,291	143	1,434										
8012089	Redfield Educate Together Primary Academy	Primary	255	316	1,119	29	1,148	1,316	75	1,391	1,286	91	1,377										
8012091	Westbury Park Primary School	Primary	421	415	1,460	0	1,460	1,435	6	1,441	1,400	27	1,428										
8012092	Oasis Academy Marksbury Road	Primary	177	238	789	1	790	999	19	1,018	965	39	1,005										
8012093	Fairlawn Primary School	Primary	127	175	598	0	598	744	34	778	717	48	765										
8012094	Oasis Academy Long Cross	Primary	385	409	1,732	0	1,732	1,861	0	1,861	1,852	0	1,852										
8012099	Headley Park Primary School	Primary	422	419	1,694	0	1,694	1,638	30	1,668	1,592	62	1,655										
8012101	Easton Church of England Academy	Primary	466	452	2,218	140	2,359	2,148	144	2,292	2,123	155	2,278										
8012106	Barton Hill Academy	Primary	401	376	1,888	211	2,099	1,798	179	1,977	1,783	180	1,963										
8012107	Wicklea Academy	Primary	293	307	1,149	0	1,149	1,202	0	1,202	1,178	5	1,184										
8012108	Woodlands Academy	Primary	169	181	772	0	772	836	0	836	823	0	823										
8012110	Hareclive E-ACT Academy	Primary	372	378	1,910	0	1,910	1,891	48	1,939	1,845	80	1,925										
8012112	Elmlea Junior School	Primary	355	358	1,259	0	1,259	1,283	0	1,283	1,257	0	1,257										
8012114	St Mary Redcliffe Church of England Primary School	Primary	409	391	1,656	0	1,656	1,603	0	1,603	1,579	0	1,579										
8012117	Badocks Wood E-ACT Academy	Primary	246	220	1,148	31	1,178	1,075	0	1,075	1,071	0	1,071										
8012118	Perry Court E-Act Academy	Primary	357	338	1,575	0	1,575	1,520	0	1,520	1,506	0	1,506										
8012119	Luckwell Primary School	Primary	218	197	844	0	844	794	0	794	775	0	775										
8012120	Evergreen Primary Academy	Primary	207	185	1,050	60	1,111	938	70	1,008	918	77	995										
8012320	Compass Point Primary School	Primary	240	195	1,078	57	1,135	934	12	946	927	6	933										
8012324	Four Acres Academy	Primary	273	289	1,291	8	1,299	1,347	21	1,368	1,328	27	1,355										

School number	School name	Sector	Formula 2018/19			Formula 2019/20			NFF 2019/20												
			Formula Pupils 2018/19	Formula Pupils 2019/20	Total budget 2018/19 £'000	Local Formula 2018/19 £'000	MFG Protection 2018/19 £'000	Total budget 2019/20 £'000	Local Formula 2019/20 £'000	MFG Protection 2019/20 £'000	Total budget 2019/20 £'000	NFF 2019/20 £'000	MFG Protection 2019/20 £'000	Total budget 2019/20 £'000							
															Formula	Formula	Formula	Formula	Formula	Formula	Formula
															Pupils	Pupils	shares	Protection	Protection	shares	Protection
8013003	Christ Church Church of England Primary School	Primary	368	395	1,331	0	1,331	1,428	0	1,428	1,400	5	1,405								
8013025	Stoke Bishop Church of England Primary School	Primary	409	410	1,507	0	1,507	1,515	2	1,516	1,486	16	1,503								
8013026	Westbury-On-Trym Church of England Academy	Primary	418	410	1,496	0	1,496	1,491	0	1,491	1,462	0	1,462								
8013408	St Nicholas of Tolentine Catholic Primary School	Primary	195	187	952	0	952	918	1	919	897	8	905								
8013411	St Patrick's Catholic Primary School	Primary	209	210	905	0	905	899	9	908	874	21	895								
8013414	St Teresa's Catholic Primary School	Primary	211	207	931	0	931	901	15	916	872	31	902								
8013431	Greenfield E-Act Primary Academy	Primary	382	402	1,773	0	1,773	1,826	33	1,859	1,783	62	1,845								
8013432	Little Mead Primary Academy	Primary	420	419	1,754	4	1,758	1,764	0	1,764	1,739	2	1,741								
8013434	Oasis Academy New Oak	Primary	206	216	906	59	965	940	65	1,005	921	71	992								
8013436	West Town Lane Academy	Primary	624	627	2,283	0	2,283	2,290	8	2,298	2,253	31	2,284								
8013440	Victoria Park Primary School	Primary	416	413	1,663	3	1,665	1,636	4	1,640	1,615	11	1,626								
8014001	Bristol Free School	Secondary	843	889	4,146	0	4,146	4,383	0	4,383	4,390	0	4,390								
8014003	Orchard School Bristol	Secondary	779	837	4,788	31	4,820	5,277	0	5,277	5,368	0	5,368								
8014007	Oasis Academy Brislington	Secondary	724	795	4,931	0	4,931	5,332	64	5,396	5,394	0	5,394								
8014010	The City Academy Bristol	Secondary	653	714	3,925	180	4,105	4,454	16	4,470	4,587	0	4,587								
8014011	Ashton Park School	Secondary	1,070	1,065	5,341	0	5,341	5,338	0	5,338	5,384	0	5,384								
8014031	Henbury School	Secondary	626	733	3,866	63	3,929	4,604	0	4,604	4,675	0	4,675								
8014037	Bedminster Down School	Secondary	957	1,024	5,754	0	5,754	6,212	0	6,212	6,256	0	6,256								
8014100	Cotham School	Secondary	1,076	1,103	5,458	0	5,458	5,807	0	5,807	5,881	0	5,881								
8014101	Fairfield High School	Secondary	918	1,029	4,736	280	5,016	5,423	179	5,602	5,490	99	5,589								
8014602	St Bede's Catholic College	Secondary	898	934	4,401	0	4,401	4,536	36	4,572	4,520	39	4,559								
8014627	Redland Green School	Secondary	1,034	1,077	4,801	0	4,801	4,951	45	4,996	4,921	61	4,982								
8016907	Bristol Brunel Academy	Secondary	1,072	1,094	6,904	0	6,904	7,249	0	7,249	7,369	0	7,369								
8016908	Bristol Cathedral Choir School	Secondary	634	669	3,162	0	3,162	3,337	0	3,337	3,329	0	3,329								
8016909	Colston's Girls' School	Secondary	695	721	3,426	0	3,426	3,555	8	3,563	3,552	0	3,552								
8016911	Oasis Academy John Williams	Secondary	845	865	4,476	329	4,805	4,681	241	4,922	4,722	186	4,908								
8016912	Oasis Academy Brightstowe	Secondary	765	789	4,654	17	4,670	4,876	0	4,876	4,946	0	4,946								
8016913	Bristol Metropolitan Academy	Secondary	875	912	5,725	473	6,198	6,128	325	6,453	6,223	217	6,440								
8014005	Bridge Learning Campus	All-through	941	962	5,623	0	5,623	5,750	0	5,750	5,717	13	5,730								
8014006	Steiner Academy Bristol	All-through	352	367	1,549	0	1,549	1,663	0	1,663	1,659	0	1,659								
8016910	Merchants' Academy	All-through	1,003	1,001	5,635	0	5,635	5,668	0	5,668	5,691	0	5,691								
8019999	CST Trinity Academy	Secondary	-	70	0	0	0	427	0	427	416	0	416								
8014012	Wansdyke Primary School	Primary	209	206	879	0	879	874	0	874	850	9	859								
			<b>53,808</b>	<b>54,823</b>	<b>248,231</b>	<b>2,505</b>	<b>250,735</b>	<b>255,027</b>	<b>2,818</b>	<b>257,845</b>	<b>253,208</b>	<b>3,638</b>	<b>256,846</b>								

**Summary position by sector**

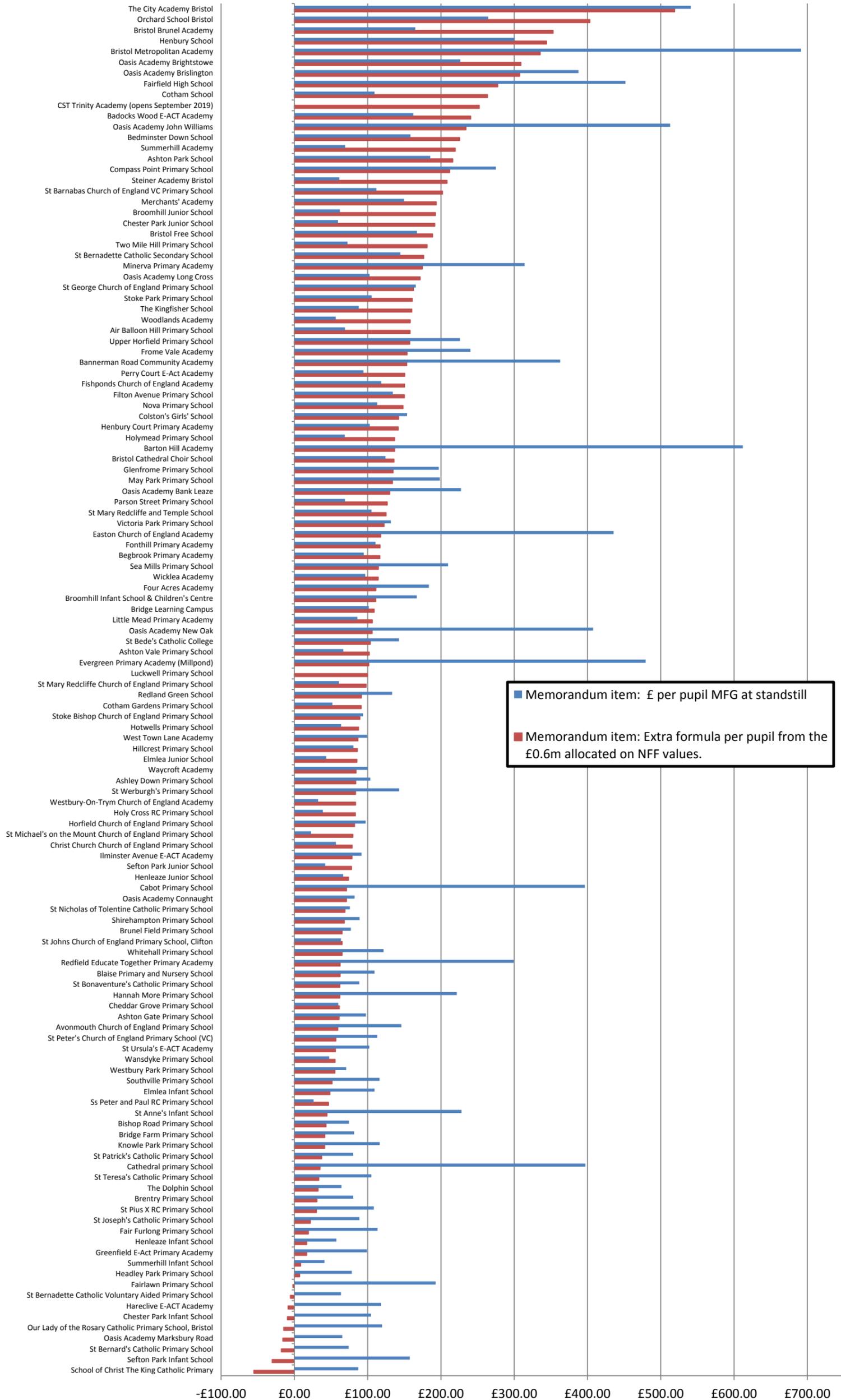
Primary	35,241	35,363	145,756	1,132	146,888	146,141	1,904	148,044	143,474	3,024	146,497
Secondary	16,271	17,130	89,668	1,372	91,040	95,805	914	96,719	96,668	602	97,269
All-through	2,296	2,330	12,807		12,807	13,082		13,082	13,067	13	13,080
	<b>53,808</b>	<b>54,823</b>	<b>248,231</b>	<b>2,505</b>	<b>250,735</b>	<b>255,027</b>	<b>2,818</b>	<b>257,845</b>	<b>253,208</b>	<b>3,638</b>	<b>256,846</b>

# CHART 1: Impact of extra formula (% of standstill), compared to MFG protection at standstill (% of standstill)



What this demonstrates is that extra formula represents different proportions of the standstill budget for each school. If this is less than the proportion of the standstill budget supported by MFG, their standstill budget remains the same.

**CHART 2: £ per pupil for extra formula beyond standstill, compared to £ per pupil for MFG at standstill**



**Bristol Schools Forum**  
**DSG Overview 2019/20**

<b>Date of meeting:</b>	2 <sup>nd</sup> April 2019
<b>Time of meeting:</b>	5.00 pm
<b>Venue:</b>	Writing Room, City Hall

## **1 Purpose of report**

- 1.1 This report provides an update on the 2018/19 DSG position, as at Period 10.
- 1.2 It also updates on the overall 2019/20 DSG position, taking account of the final decisions of Council in February 2019 and the impact of the backdated adjustment to the DSG, explained in the Schools Block paper.
- 1.3 This report does not put forward any new proposals on the use of the DSG; these will be included in the papers for Schools Forum on 15<sup>th</sup> May 2019, which will have details of the final outturn position for 2018/19.

## **2 Recommendation**

- 2.1 **Schools Forum is invited to:**
  - a) **note the 2018/19 financial position as at Period 10 set out in Table 1, which includes:**
    - i. **An improved financial position for Schools Block, because of a reimbursement from Education and Skills Funding Agency (ESFA) of funding for two academies which had been over-recouped since 2016/17; and**
    - ii. **An improved forecast surplus at 31<sup>st</sup> March 2019 of £1.5m.**
  - b) **note the 2019/20 position for the overall DSG, with a revised forecast deficit position of £1.4m, on current funding decisions and known and expected commitments, at 31<sup>st</sup> March 2020.**

## **3 Background**

- 3.1 Schools Forum has been receiving updates on the financial position of the DSG for 2018/19 throughout the financial year. The most recent one was for Period 7 (adjusted), which forecast an overall in-year underspend of £1.4m. Taking account of the overall deficit of £1.0m brought forward, this indicated a forecast cumulative surplus of £0.4m at the end of March 2019.

- 3.2 Schools Forum has also been part of the decision-making process for setting the 2019/20 Schools Budget. Budget proposals that went to Cabinet in January 2019 and Council in February 2019 were first considered through Schools Forum, in the context of funding levels advised by the ESFA and the policy requirements of the Department for Education.
- 3.3 This report provides the Period 10 position for 2018/19 and advises on the latest position for 2019/20, now that Council has agreed the budget for the year.

#### 4 Budget monitoring 2018/19

- 4.1 The previously reported position in November 2018 was a forecast £1.4m in-year surplus on the Dedicated Schools Budget for Period 7 (adjusted) 2018/19. This would have reduced the brought forward deficit on the DSG from £1.0m to a £0.4m surplus.
- 4.2 The latest position overall is an improvement: a forecast £2.5m in-year surplus and a consequent £1.5m cumulative surplus. There have been two major changes affecting the underlying position in Schools Block and High Needs. The position for Early Years does not yet reflect the participation levels reflected in the January 2019 census because the analysis of this is not yet complete.
- 4.3 The Period 10 position is set out in **Table 1** with more detail set out in **Appendix 1**.

**Table 1: Forecast position on overall DSG for 2018/19 at Period 10 (January 2019)**

	Brought forward 2018/19 £'000	Funding 2018/19 £'000	Period 10 Forecast 2018/19 £'000	In-year variance £'000	Carry- forward 2018/19 £'000	Previous (P7 adj) Forecast £'000	Change £'000
Schools Block		254,861	253,423	-1,438	-1,438	0	(1,438)
De-delegation	-357				-357	(357)	0
Schools Central Block		2,262	2,248	-14	-14		(14)
Early Years	-500	36,574	36,121	-453	-953	(985)	32
High Needs Block	2,055	55,454	54,664	-790	1,265	946	319
Funding	-182	-349,151	-348,969	182			0
<b>Total</b>	<b>1,016</b>		<b>-2,512</b>	<b>-2,512</b>	<b>-1,497</b>	<b>(396)</b>	<b>(1,101)</b>

- 4.4 **Schools Block** is expected to underspend by £1.4m because the ESFA has confirmed that the Authority is entitled to a reimbursement of academy recoupment backdated to 2016/17. The circumstances of this issue are explained in more detail in the separate paper on the Schools Block.
- 4.5 **De-delegated resources** is expected to underspend, particularly in the Schools in Financial Difficulties budget, as reported previously.

- 4.6 **School Central Services Block** is forecasting a modest £14k underspend in the cost-centre for Schools Forum activities.
- 4.7 **Early Years** budgets are forecasting an underspend of -£1.0m. The difficulties in finalizing the analysis of the January 2019 Early Years census have meant that no significant update to the previous position is available. Moreover, without that analysis, a separate report on Early Years has not been worthwhile.
- 4.8 The forecast reported in January anticipated that the January 2019 census would reflect participation levels consistent with those in January 2018. Initial analysis of the raw data would suggest that this is broadly the position and that an underspend at year-end of c£1m would arise from that. Nonetheless, there have been difficulties with producing a complete and accurate analysis from the system to validate that conclusion. Until that is available, the forecast on Early Years can only be provisional.
- 4.9 Officers still have a little time to resolve the issues and report to the ESFA. The final position will be known at the next meeting of Schools Forum.
- 4.10 **High Needs** budget has a headline in-year underspend of -£0.8m, an adverse movement of £0.3m since P7 (adjusted). With the brought forward deficit of £2.0m from 2017/18, this produces a forecast cumulative deficit of £1.3m.
- 4.11 Demand continues to put pressure on the High Needs budget. There is a separate report on this agenda which explains the position on the High Needs Budget for 2018/19 and beyond.

## 5 School Funding Arrangements 2019/20

- 5.1 Schools Forum considered the emerging position on the DSG for 2019/20 at its three previous meetings. It agreed, following consultation with schools, that £2.566m could be transferred to the High Needs Block.
- 5.2 The ESFA funding provided through the DSG for 2019/20 was £11.5m more than the 2018/19 allocation known at Period 7 (adjusted) (although £4.1m of that was replacing funding for Private Finance Initiative (PFI) affordability that the Council's General Fund budget had paid for in 2018/19).
- 5.3 The final budget agreed by Council included £0.5m from forecast unspent Early Years DSG for the continuation of the local Maintained Nursery School Supplement. It also included £2.4m of forecast overspend on the High Needs budget, to recognise that there were no planned savings

included in the High Needs budget for 2019/20 and that existing commitments could not be contained within the available resources.

5.4 **Table 2** sets out the calculations for how the agreed Schools Budget for 2019/20 was built for each block. The report to Schools Forum in January 2019 explained each of the components. The table has an updated section on how the agreed budget will be funded, in the context of the budget monitoring position for 2018/19, set out in **Table 1**.

**Table 2: DSG Sub-Block budget build for Schools Budget 2019/20 agreed at Council 26<sup>th</sup> February 2019, with updated funding to take account of Table 1 above.**

DSG Blocks	DSG Budgets 2018/19 (P7) £m	Reversal of one-off transfers in 2018/19 £m	DfE notified changes for 2019/20 £m	Total DSG notified by DfE December 2018 £m	Transfers between blocks 2019/20 £m	Allocations from underspend or future years DSG £m	Proposed Schools Budget 2019/20 £m
Schools block	253.423	-1.400	9.422	<b>261.445</b>	-2.000	0.000	<b>259.445</b>
Central school services block	2.262	+0.566	0.067	<b>2.895</b>	-0.566	0.000	<b>2.329</b>
High needs block	54.471	-3.448	2.191	<b>53.214</b>	2.566	2.407	<b>58.187</b>
Early Years baseline (Provisional)	36,600	0	-0.167	<b>36.433</b>	0	0.517	<b>36.950</b>
<b>Total</b>	<b>346.756</b>	<b>-4.282</b>	<b>11.513</b>	<b>353.987</b>	<b>0.000</b>	<b>2.924</b>	<b>356.911</b>
<b>Funded from</b>							
(UPDATED) Estimated brought forward DSG surplus from 2018/19 (P10 forecast)							<b>-1,497</b>
DSG advised by ESFA up to 19 <sup>th</sup> December 2018							<b>-353.987</b>
Estimated carry-forward <b>DEFICIT</b> at end of 2019/20 (if spend is at budget level)							<b>-1,427</b>
<b>Total</b>							<b>-356.911</b>

- 5.5 **Funding.** This budget would be funded from the brought forward surplus from 2018/19 of £1.497m (see Table 1), the 2019/20 DSG of £353.987m and the advance use of £1.427m of DSG from 2020/21.
- 5.6 By the end of March 2020, if we account for each block separately, these proposals would produce the following balances on each of the blocks, if spend was exactly to budget.
- 5.7 The figures would not work out exactly like this. De-delegated items would spend part of their underspend and Schools Forum are set to decide at year-end whether there is scope to transfer any Early Years funding to High Needs.

**Table 4: Indicative impact of proposed 2019/20 budgets on the cumulative carry forward for each block by March 2020**

	Brought forward 2019/20 £'000	DSG 2019/20 £'000	Spend to budget 2019/20 £'000	In-year variance £'000	Carry- forward 2019/20 £'000
Schools Block	-1,438	259,445	259,445	0	(1,438)
De-delegation	-357				(357)
Schools Central Block	-14	2,329	2,329	0	(14)
Early Years	-953	36,433	36,950	517	(436)
High Needs Block	1,265	55,780	58,187	2,407	3,672
Funding		-353,987	-353,987	0	0
<b>Total</b>	<b>-1,497</b>	<b>0</b>	<b>2,924</b>	<b>2,924</b>	<b>1,427</b>

- 5.8 **Risks – High Needs.** The overall forecast position is still a net deficit by March 2020, with the underlying position for the High Needs budget being a deficit. Without the £2.566m funding transferred from other blocks for 2019/20, the underlying, in-year deficit for High Needs would be exposed as £5m (ie £2.407m + £2.566m).
- 5.9 The adverse movement of £0.3m in the High Needs forecast for 2018/19 between P7 (adj) and P10 suggests more pressure on the High Needs budget for 2019/20. This has not been reflected in the forecast for 2019/20 at this point. Moreover, the outcomes of the High Needs Transformation Programme are likely to impact on the arrangements for top-ups and Early Intervention Bases, but until these projects are complete (including public consultation), the precise impacts (up or down) cannot be known.
- 5.10 **Risks & Opportunities – Early Years.** During the last two years, there have been windfall underspends arising from the tendency for the January census funding basis to benefit LAs with particular patterns of participation during the year. This provides some opportunities to consider how this windfall funding could be used. A risk for Early Years, however, is that there may come a time when the reverse situation may occur if participation levels start to change.

- 5.11 **Risks & Opportunities – Schools Block.** The reimbursement of £1.4m of academy recouplement provides an opportunity to consider how this funding could be used. A future risk is the way that growth is now funded through the funding formula. Even in circumstances where 1,000 more pupils were counted in October 2018, compared to a year earlier, the growth fund allocation in the DSG was driven by a protected amount, which may not be as high in the future.
- 5.12 The risks and opportunities for the 3 main service blocks of the DSG will be explored further in separate reports on Early Years, Schools Block and High Needs, if not at this meeting, then at future ones.

## Appendix 1

### Outturn position for Overall DSG 2018/19 as at Period P10

	Brought forward 1.4.18 £'000	Funding 2018/19 £'000	Outturn (as at Mar 2019) 2018/19 £'000	In-year movement £'000	Carry forward 31.3.19 £'000
Maintained Schools		(85,654)	85,654	0	0
Academy Recoupment		(166,621)	165,183	(1,438)	(1,438)
Growth Fund		(2,586)	2,586	0	0
<b>Schools Block</b>	<b>0</b>	<b>(254,861)</b>	<b>253,423</b>	<b>(1,438)</b>	<b>(1,438)</b>
<b>De-delegation Services</b>	<b>(357)</b>	<b>0</b>	<b>(0)</b>	<b>0</b>	<b>(357)</b>
Admissions		(461)	461	0	0
Centrally Retained		(1,800)	1,786	(14)	(14)
<b>Schools Central Services</b>	<b>0</b>	<b>(2,262)</b>	<b>2,248</b>	<b>(14)</b>	<b>(14)</b>
National Formula		(26,900)	28,136	1,236	1,236
Funding Accrued		(1,034)	0	(1,034)	(1,034)
2 Year Old Funding		(4,576)	3,896	(679)	(679)
Pupil Premium (EYPP)		(366)	366	0	0
Additional Support Services		(1,081)	1,087	6	6
SEN Top up		(913)	983	70	70
Staffing		(1,607)	1,555	(52)	(52)
Disability Access Fund		(97)	97	0	0
Committed reserve	(500)	0	0	0	(500)
<b>Early Years Block</b>	<b>(500)</b>	<b>(36,574)</b>	<b>36,121</b>	<b>(453)</b>	<b>(953)</b>
Commissioned Services		(2,440)	2,955	515	515
Core Place Funding		(8,315)	8,452	137	137
Staffing		(895)	860	(35)	(35)
Top Up		(21,640)	22,856	1,216	1,216
Placements		(8,556)	9,022	466	466
Pupil Support		(314)	617	303	303
Schools in Financial Difficulty		(307)	364	57	57
HOPE Virtual School		(236)	234	(1)	(1)
Committed reserve	2,055	0	0	0	2,055
Planned funding for historic deficit		(3,448)	0	(3,448)	(3,448)
Academy Recoupment		(9,305)	9,305	0	0
<b>High Needs Block</b>	<b>2,055</b>	<b>(55,454)</b>	<b>54,664</b>	<b>(790)</b>	<b>1,266</b>
<b>Early Help Project funding (allocated to High Needs)</b>	<b>(182)</b>	<b>0</b>	<b>182</b>	<b>182</b>	<b>0</b>
<b>Total</b>	<b>1,016</b>	<b>(349,151)</b>	<b>346,638</b>	<b>(2,513)</b>	<b>(1,496)</b>



**Bristol Schools Forum**  
**High Needs Block 2018-2019**

<b>Date of meeting:</b>	2 <sup>nd</sup> April 2019
<b>Time of meeting:</b>	5.00 pm
<b>Venue:</b>	City Hall, Writing Room

**1. Purpose of report (FOR INFORMATION)**

- 1.1 To update Schools Forum on the period 10 2018/2019 forecast position.
- 1.2 To set out the proposed 2019/2020 High Needs Budget position.
- 1.3 To provide an update to Schools Forum on the High Needs Block project plans and transformative work started for academic year 2018/2019.

**2. Recommendations**

- 2.1 **To note the 2018/2019 High Needs budget position as at Period 10;**
- 2.2 **To note the 2019/2020 High Needs Budget which currently forecasts a cumulative deficit of £3.672m by March 2020;**
- 2.3 **To note the progress made with the High Needs Transformation Project Planning, and comment.**

**3. Summary and Context**

- 3.1 Schools Forum are aware of the ongoing pressures on the High Needs budget. The decision in November 2018 to support transfers of £2.566m into the High Needs Block for 2019/20 is recognition of this.
- 3.2 This paper provides an update on the latest 2018/19 budget position, which documents an adverse change in the forecast of £0.319m on the previously improved position.
- 3.3 Bristol's growth in HNB demands/needs reflects national trends and the extent to which high needs spending has been supported by additional funding from the Schools Block. Published data reflects 15.4% of Bristol school age pupils have been receiving SEN support which is higher than the national average of 14.9%. Bristol has a higher percentage of children and young people with EHCP's than statistical neighbours (0.94%), is on a par with the core city average but lower than the England average (2.6%).

4. **Budget Monitoring Position for Period 10 2018/2019.**

4.1 **Table 1** sets out the Period 10 forecast for 2018/2019.

**Table 1: High Needs Block budget forecast at Period 10 2018/19**

<b>Component</b>	<b>Period 7 Forecast 2018/19</b>	<b>Period 10 Forecast 2018/19</b>	<b>Change (Adverse = +ive)</b>
1. Places only	15,469	15,602	133
2. SEN Top-ups	23,802	23,929	127
3. AP Top-ups	806	923	117
4. Other SEN provision	6,307	6,043	-264
5. Other AP provision	4,815	5,006	191
6. Services	3,146	3,162	16
<b>Total Commitment</b>	<b>54,346</b>	<b>54,665</b>	<b>319</b>
Brought Forward	-2,055	-2,055	0
DSG Funding (gross) *	55,454	55,454	0
<b>Total Funding</b>	<b>53,399</b>	<b>53,399</b>	<b>0</b>
<b>Overspend (cumulative)</b>	<b>946</b>	<b>1,265</b>	<b>319</b>

4.2 **Places only (£0.133m adverse)** following a review of current commissioned placements there has been an increase £133K. Places continue to be monitored through 6 weekly review cycles, forecasted 12 months as well as 5 years in advance and are dependent on the local area's needs, as well as having regard to parental preference.

4.3 **2. SEN Top-Up (£0.127m adverse)** The increase was due to a combination of small increase in pupil numbers in receipt of top up across settings and adjustments to existing top up bands the net result of which is an increase of 127k.

4.4 **3. AP Top-up (£0.117m adverse):** The demand for Pupil Referral Unit places has increased but it has also been identified that the accuracy and timeliness of information between the PRU's and the Local Authority, to ensure top up is paid accurately, needs to be improved. Steps have been taken to address this issue to ensure accurate data sharing and financial scrutiny.

- 4.5 **Other SEN Provision (-£0.264m improvement):** Improvement seen as a result of Post 16 placements reducing or contingency cases not being placed in independent non maintained provisions as anticipated. Work continues to closely monitor all INM placements to ensure value for money and progress seen for CYP placed in these provisions.
- 4.6 **Other AP Provision (+£0.190m adverse).** This increase is due to increase demand for spot purchases in alternative provisions.
- 4.7 **SEN services (+£0.016m adverse).** The increase seen this period is as a result of continuing demands on services to support children and young people's needs (e.g. therapy and assessment) but this has been offset by a reduction in HNB staff team – due to vacancies and increased income. There will be no vacancies in the HNB staffing team from May 2019.

## 5. High Needs assessed financial position for 2019/20

- 5.1 **Table 2** sets out the anticipated High Needs Budget position for 2019/20. This shows an unchanged gross spend of £58.187m from the last Schools Forum update in November 2018, includes the agreed transfers from other DSG blocks in 2019/20 as well as the transfer of funds from DSG for 2020/21 as agreed at January 2019 Schools Forum.
- 5.2 The forecasted deficit from **Table 1**, period 10 of £1.265m has been reflected in **Table 2**.

**Table 2: High Needs Budget position for 2019/20**

<b>Component</b>	<b>Budget 19/20 £'000</b>	<b>Forecast 2019/20 £'000</b>	<b>Change (Adverse = +ive) £'000</b>
1. Places only	16,942	16,942	0
2. SEN Top-ups	25,714	25,714	0
3. AP Top-ups	1,039	1,039	0
4. Other SEN provision	6,568	6,568	0
5. Other AP provision	4,624	4,624	0
6. Services	3,300	3,300	0
<b>Total Net Expenditure</b>	<b>58,187</b>	<b>58,187</b>	<b>0</b>
DSG Funding 2019/2020	53,214	53,214	0
Transfers from other DSG blocks 2019/2020	2,566	2,566	
DSG Funding 2020/21 or beyond	2,407	2,407	
<b>Total Funding</b>	<b>58,187</b>	<b>58,187</b>	<b>0</b>
<b>In year movement</b>			
Brought forward @ 31/3/2019	946	1,265	319
In year overspend/use of future year funding	2,407	2,407	0
<b>Carry forward @31/3/2020</b>	<b>3,353</b>	<b>3,672</b>	<b>319</b>

## 6. High Needs Transformation Project Work Reflecting these Pressures

6.1 The local authority has identified four High Needs project-based reviews which will be carried out in a co-produced and collaborative approach throughout this academic year to continue to drive improvements and deliver transformation plans that are aligned with Social Care and the CCG. Schools Forum as well as Local Authority Governance Boards will continue be updated throughout the process. A progress report is detailed in **Appendix 1**.

6.2 As requested by Schools Forum a detailed update is provided below:

## 7.0 Top Up Process and Funding

- 7.1 **Background information:** For mainstream schools, Bristol City Council ran twice yearly Top Up Peer Moderation panels to review and agree any Top Up funding request for children and young people with an SEN support plan or an education, health and care plan until May 2018; these usually took place in November and May each academic year. Historically there have been around 600 applications a year. Schools attend these full day panels (usually Head teachers, Deputy Heads or SEN Coordinators) bringing along with them 3 paper copies of all the supporting documentation, as well as the Top Up application form; resulting in a paper heavy review exercise.
- 7.2 For those attending early years settings, general further education provisions, resource bases, special schools and pupil referral units, top up is agreed monthly through internal BCC decision pathways/panels; thereby demonstrating an inconsistent approach across 0-25 years.
- 7.3 Top Up funding is requested in line with the Bristol Universal Descriptors (BUDS)  
([https://www.bristol.gov.uk/search?p\\_p\\_id=webworxxsearch\\_WAR\\_webworxxportlet&p\\_p\\_lifecycle=0&webworxxsearch\\_WAR\\_webworxxportlet\\_keepFilters=true&webworxxsearch\\_WAR\\_webworxxportlet\\_searchKeyword=bristol+universal+descriptors&searchTerm=bristol+universal+descriptors](https://www.bristol.gov.uk/search?p_p_id=webworxxsearch_WAR_webworxxportlet&p_p_lifecycle=0&webworxxsearch_WAR_webworxxportlet_keepFilters=true&webworxxsearch_WAR_webworxxportlet_searchKeyword=bristol+universal+descriptors&searchTerm=bristol+universal+descriptors)), which identify the level of children and young people's (CYP) needs according to a banding system; and funding is allocated to each of these depending on the provision they attend and successful applications moderated at Panel.
- 7.4 In October 2018 and whilst the 2018/2019 review has been underway an 'interim' panel process has been in place for mainstream schools, meeting every term during 2018/2019 academic year but with no changes to the funding available.
- 7.5 **Top Up process review:** An engagement survey went live on the 30<sup>th</sup> November 2018 until 13<sup>th</sup> January 2019, which resulted in 252 responses to the whole survey and 129 additional comments under the topic of top up. BCC social media also had over 5500 hits on the survey post too.
- 7.6 The results of the survey highlighted that:

- The current process was not seen as fair and transparent
- 2 panels a year were not enough
- The current panel day set up was seen as an ineffective way of allocating top up funding
- Parent/ carers did not feel included in the support or funding allocated for their child/ young person.

7.7 The survey was then followed up with two initial stakeholder events where over 100 professionals from education, health and social care as well as Bristol Supportive Parents and Bristol Parent Carer groups shared their views and ideas for the future. The Inclusion in Education Group (IEG) reviewed all the feedback/ views and through two further working groups with stakeholders designed the following documentation, which was then further scrutinised at the March 2019 SENCO Conference:

- A new 'Bristol Graduated Guidance' to support inclusion, quality first teaching and a graduated response throughout Bristol regardless of location or education establishment. This has been coproduced with education, health and social care professionals as well as SENDIAS service and Bristol parent carer forum.
- A new quality assured process for applying for Top Up funding on a monthly basis, including an appeals process.

7.8 The new proposed process will remove the need for additional paperwork when applying for top up funding so that the child or young person's Bristol SEN Support Plan or EHCP is used for identifying the provision required rather than the quality of the funding application form.

7.9 The next steps in the design process will involve reviewing and developing a funding matrix which flows from the new documentation and the relative needs of children and young people in different settings.

7.10 Work continues on these documents, which will include training material and once completed by IEG, they will be made available for public consultation for an eight week period.

## 8.0 Early Intervention Base (EIB) Service Review

8.1 **Background information:** Bristol's three Early Intervention Bases were set up as part of a pilot scheme to provide primary age children, at risk of permanent exclusion, with the support and guidance to address their complex needs. Research has shown that without the right support early in children's lives, the challenges and costs only grow over time. Without early intervention, especially in deprived areas and for troubled families, where there are relatively high levels of family breakdown, mental health issues and deprivation, a perfect storm of challenges exists for schools, parents and children. These challenges have an impact on educational attainment as well as leading to a rise in antisocial behaviour. Both of these factors impact on the local community and wider society. Short term targeted intervention is an effective way of building self-esteem and addressing many of the complex needs of these complex young people.

8.2 Over the last four years, primary school exclusions in Bristol have risen.

**Table 3: City of Bristol All Permanent Exclusions**

### City of Bristol Permanent Exclusions (PEX)

PEX Table by School Year from 2013/14

PEX	2017/18	2016/17	2015/16	2014/15	2013/14
Total PEX	38	43	112	91	68
Primary PEX (OLA schools)	15	20	8	3	1
Secondary PEX (inc OLA schools)	23 (18 OLA secondary)	23 (15 OLA secondary)	104 (17 OLA secondary)	88 (9 OLA & 1 SpSch)	67 (7 OLA secondary)
Bristol Sec PEX	5	8	87	78	60
Bristol Pri Pop	36,052	35,237	34,332	33,053	31,903
Bristol Sec Pop	17,566	17,047	16,526	16,221	15,944

The table indicates a significant increase in primary PEX from 2013/14 (1) to 2016/17 (20). A slight reduction in the number of PEX in 2017/8 (15) can be attributed to the work of the EIBs as well to the functioning of Bristol's Primary Fair

Access Protocol, which works to move pupils on from EIB settings and back into school placements.

**8.3 EIB Review:** Two stakeholder events took place at the start of March 2019 and in order to ensure parents and children had a voice in the process, a LA officer visited the EIB's to talk to parents and children to gain their views too which was taken up by a few. Feedback collated raised the following points:

- EIBs provide a valuable and necessary service.
- EIBs should provide a uniform core offer to include outreach as well as in-reach support.
- EIBs could also offer a specialist service
- EIB's would benefit from a secure funding model for 5 years which is linked to clear performance indicators
- A need for more specialist places which will allow EIBs to function in their original intended format

8.4 Issues identified within the review were:

- EIBs are experiencing a shortage of spaces due to places being in high demand.
- Although the Fair Access Panel has supported children in moving back into mainstream classes, 10 of the 14 children interviewed have been attending an EIB for more than 26 weeks. 9 of the 14 children did not know how long they would be at an EIB or where they would be going after.
- The shortage of specialist provision has resulted in pupils being "stuck" at the bases, having nowhere to move onto. This in turn has impacted on the bases ability to support more pupils. The number of specialist provision will need considered before the EIBs can return to their original and intended purpose of short term, intensive intervention.
- Funding for places is currently uncertain. The EIBs have been funded under a pilot scheme but now require a clear long term funding plan to be able to continue their work with appropriately skilled staff.

8.5 A detailed piece of work will now commence, working collaboratively with the EIB's, other education provisions and parent/carer groups in reviewing this feedback and providing a recommended way forward with, if appropriate a new detailed service specification to meet the needs of Bristol's children for the next 5+ years.

## 9.0 Sensory Support Service Review

- 9.1 Background information:** The Sensory Support Service provides educational support to children and young people with hearing impairment (HI), visual impairment (VI) or multi-sensory impairment (MSI), their families and educational settings. The service covers CYP with sensory impairment from birth to 25. This service is a pooled budget service, originally set up with a contract in 2004 and shared between Bath & North East Somerset, North Somerset, South Gloucestershire and Bristol with Bristol being the host local authority.
- 9.2 The total budget is approximately £1.6m annually, shared on a formula basis between the Local authorities and dependent upon use. Bristol's contribution, funded through the High Needs Block is approximately £689,285 annually.
- 9.3 Planning appropriate provision for CYP with sensory impairment is challenging as it is a low incidence need and is not spread evenly across geographical areas and a wide range of specialist skills are required to support CYP effectively.
- 9.4 CYP are supported from the time of diagnosis (often from when the children are young babies) visiting at home to ensure that their parents understand how to promote their child's development, monitor progress and carry out assessments and advise on how to best meet needs, etc. The support required by different CYP with SI is extremely varied, ranging from advice to educational staff and regular assessments to a high level of direct input to teach specialist skills. This requires input from specialist teachers and other staff with the required skills to ensure they are able to meet the needs of CYP with sensory impairment.
- 9.5 The majority of CYP with sensory impairment attend mainstream schools and do not have an EHCP (Education, Health and Care Plan). However, even a mild sensory impairment has a negative impact on learning which is not easily recognised by educational settings' staff. CYP with sensory impairment can have additional SEND (50% for VI, 20% for HI, often very high for MSI) and the sensory impairment may not be their primary need which means that national data from DfE underestimates the number of CYP with sensory impairment (by about 40-50%).

Table 5 : Current numbers of CYP which Sensory Support Service support by local authority

VI/HI/MSI	BANES	BRISTOL	N SOM	S GLOS	Out of County	Total
HI	147	394	163	248	6	958
VI	86	201	85	104	1	477
MSI	10	32	19	21	1	83
<b>Total</b>	243	627	267	373	8	1518

### 9.6 Sensory Service review:

- Stakeholder events have taken place in each local authority Initial online survey with one version for parents/families, another for CYP and another for professionals – this survey finished in October 2018. Ideas/suggestions from this have been used to identify changes and improvements
- A Joint Operational Group (JOG) was established - this includes parents/carers, voluntary organisations, commissioners, health and social care and representations .Regular meetings with members of the JOG were organised for co-production of surveys, work on different models of provision, etc.
- Stakeholders continue being involved in shaping the models being considered and a second public consultation will take place in April / May 2019 for comments on the proposed new model.

### 10. Bristol Hospital Education Service review

Due to the lack of project management availability across the four local authorities involved in the Sensory Support Service redesign, BCC resource has been re-assigned to the SSS review as the contract expires in December 2019. It is proposed that this will be rescheduled for January 2020.

## 11. Conclusions

- 11.1 The consequences of increasing demand and cost pressures have significant implications for the already overspent High Needs Block. Mitigating actions, as agreed at the last Schools Forum and outlined in the High Needs Strategy and Transformation Programme mean that after taking account of the 2019/20 High Needs DSG, the forecast overspend from 2018/19 and the transfers from other blocks for 2019/20, the headline **cumulative deficit by the end of March 2020 would be £3.672m.**
- 11.2 Work continues on the High Needs Transformation Programme work streams and the outcomes will be reported to Schools Forum as well as go through public consultation.

## Glossary of Terms

**City Outcome:** *What is the proposed outcome for the city and how does this contribute to the Corporate Plan?*

- **Empowering and Caring:** Safeguarding and promoting the welfare of children and young people with SEND and equipping the children and young people in our care with the skills and tools to live fulfilling, successful, and rewarding lives.
- **Fair and Inclusive:** Demonstrating due regard to the need to eliminate discrimination, advance equality of opportunity and continue to improve outcomes across education, health and social care for children and young people with Special Educational Needs and/ or Disabilities aged 0-25 years. To ensure everyone has access to a high quality education with appropriate levels of support and resources. Reducing in the gap between disadvantaged pupils (including pupils with special educational needs, disability and children in care) and the Bristol Average at Key Stage 4. An increase in the proportion of young people who have experience of work/apprenticeship by school age 16.
- **Well connected:** Supporting social inclusion and community cohesion for children and young people with SEND, and their families.
- **Wellbeing:** Children and young people with SEND aged 0-25 years and their families will have access to appropriate support for their needs from birth and will be better able to co- ordinate support around the child, achieve better outcomes and make firm plans for their future. Encourage life-long learning in environments where both academic and emotional development are understood and delivered together and increase overall educational performance.

**Health Outcome summary:** not applicable

**Sustainability Outcome summary:** not applicable

**Equalities Outcome summary:** No savings are planned and therefore these proposals and processes employed aim to minimize any impact on protected groups

within the next financial year. All project work streams have completed equalities checks and draft initial Equalities Impact Assessments that will evolve as each project progresses.

**Impact / Involvement of partners:** consultation with schools as well as wider stakeholders and partners is indicated in the report

**Consultation carried out:** This report is part of the engagement with schools and other partners prior to this matter being considered by Cabinet and Council.

**Legal Issues:**

**Financial Issues:** The underlying operational High Needs expenditure is running around £5m more each year than the annual High Needs DSG. Funding has been transferred from other DSG blocks in 2019/20, but the forecast for the end of March 2020 is that a cumulative deficit of £3.6m will exist. There are no planned savings in the High Needs budget.

The 3-pronged strategy for the High Needs budget is to a) Lobby government for more DSG; b) Transform services to get better value for money; and c) Transfer funding to High Needs where the opportunity arises.

This strategy will need to be kept under review and adapted as necessary. The risk would be that these measures are insufficient to close the gap and address the cumulative High Needs deficit. Until firm proposals on the Transformation Programme are available and the Spending Review nationally is announced, the extent to which this strategy will help cannot be known.

## Appendix 1: High Needs Transformation Programme

**Bristol's approach to raising aspirations and achieving improved outcomes for children & young people who have Special Education Needs and or Disabilities (SEND) and High Needs.**

**Outcome:** Children and Young People (CYP) who have SEND and high needs are appropriately supported, safe from harm, have high quality learning opportunities and have the skills for life leading to meaningful paid employment and fulfilment in their independent lives.

Why promote inclusion?	Outputs of successful inclusion	Activities: what do we need to do to get there?	March 2019 progress review
<ul style="list-style-type: none"> <li>Improve Early Years, Schools Age and Post 16 educational provision for children and young people who have SEND and high needs</li> <li>Improve educational attainment and outcomes for children and young people who have SEND and high needs</li> <li>Improve attendance and reduce persistent absence as well as fixed term exclusions for children and young people who have SEND and high needs</li> <li>Improve life opportunities for children and young people who SEND on leaving education</li> <li>Ensure Preparation for Adulthood is planned from the earliest years</li> <li>Improve pathways into employment or meaningful adult activity for children and young people who have SEND and high needs</li> <li>Ensure that the views and aspirations of all children and young people who have SEND and those of their families are understood and is central to person-centred planning</li> </ul>	<ul style="list-style-type: none"> <li>Children and young people who have SEND can attend their nearest most appropriate local education setting</li> <li>Consistent standard and approach to identifying and supporting children and young people who have SEND and high needs at SEN Support level using the Bristol SEN Support Plan and appropriate Multi-Agency involvement</li> <li>Early Years, School Age and Post 16 education settings confidently and successfully support children and young people who have SEND and high needs and that the impact of support is evidence by improved personal progress</li> <li>Consistent standard and approach to reviewing SEN Support Plans</li> <li>Transparent approach to awarding high needs funding for identified needs and those who have the highest needs</li> <li>Consistent standard and approach to issuing high quality personalised EHC Plans</li> <li>Consistent standard and approach to reviewing EHC Plans</li> <li>Fewer out of area education and social care placements</li> <li>Increased choice &amp; control through using personal budgets</li> <li>Empowered children, young people &amp; parent carers – emphasis on hearing, understanding and acting on views and aspirations</li> <li>Ensure that the children and young people who need it most are prioritised for Top Up funding which is focused on meeting their individual needs</li> <li>Parents, carers, young people and professionals have a clear, shared understanding of how all children and young people, including those who have SEND and the highest needs, should be supported by the education settings they attend, and the additional support available across the Local Area</li> </ul>	<p><b><u>'Investing in our high needs children and young people' initial engagement survey.</u></b>  <a href="https://bristol.citizenspace.com/adults-children-and-education/high-needs-children-and-yp-2018/">https://bristol.citizenspace.com/adults-children-and-education/high-needs-children-and-yp-2018/</a></p> <p><b><u>Top Up Funding</u></b></p> <ul style="list-style-type: none"> <li>Review the Bristol Universal Descriptors, so that all education settings from 0-25 have clear guidance on Quality First Teaching, Graduated Approach, early identification and early intervention of special educational needs which may require an EHC Needs Assessment and or Education Health and Care plan.</li> <li>Review the process of application, panelling and funding of Top Up for all mainstream and specialist Early Years, School Age and GFE/ Post 16 Top Up arrangements for all education providers.</li> </ul> <p><b><u>Early Intervention Base Review</u></b></p> <ul style="list-style-type: none"> <li>Review of the EIB Pilot which ended in July 2018, considering the impact of EIBs and Alternative Provision help the children or young people they support as well as whether they provide effective short-term therapeutic support, impact and value for money for both the council and schools. Key areas to include whether attending EIBs or alternative provision helps to reduce fixed term exclusions and persistent absence, improves academic achievement and improves school attendance.</li> </ul> <p><b><u>Hospital Education Service Review</u></b></p> <ul style="list-style-type: none"> <li>Review service to see how BHES is helping the individuals it supports to make progress despite their medical conditions and identify any areas for improvement to delivery.</li> </ul>	<ul style="list-style-type: none"> <li>Engagement Survey on four key High Needs transformation areas went live 30/11/18 and closed on 13/01/2019: 5574 BCC social media hits, 252 responses and 129 additional comments for 'Top Up' questions alone.</li> <li>Top Up Stakeholder Engagement Events ran on 15<sup>th</sup> &amp; 16<sup>th</sup> January 2019, with 100 local area professionals attending including education, health, social care, finance and parent/carer groups.</li> <li>Early Years SEN rates will be considered as part of this work.</li> <li>Inclusion in Education Group were updated on 31/01/19 on the Top Up survey and engagement event findings.</li> <li>IEG held a workshop on the 5<sup>th</sup> February to design a new framework for the BUDS and panel process.</li> <li>Stakeholders engaged in further development work on the 26<sup>th</sup> Feb 2019.</li> <li>SENCO conference was used to obtain further feedback and views on work to date on the 6<sup>th</sup> March.</li> <li>All involved wanted to make sure sufficient time was spent to meet the needs as ascertained through engagement feedback and so Public consultation is projected to now commence in May/June 2019 and will run for 8 weeks with alternative formats available and events held.</li> <li>EIB Stakeholder Engagement Event taking place on 1<sup>st</sup> March 2019 with other education providers.</li> <li>Parents were invited but due to low numbers 1:1 discussions took place on 26<sup>th</sup> Feb at each EIB.</li> <li>Children's feedback was collated from each EIB on 26<sup>th</sup> Feb.</li> <li>Inclusion in Education Group were updated on 31/1/19 on the survey and engagement event findings.</li> <li>Further developmental work now required to ensure a new service specification meets the needs of the city for the next 5+ years.</li> <li>Public consultation will then take place &amp; proceed to full cabinet.</li> <li>Due to resourcing issues across the four local authorities involved in the Sensory Support Service review, BCC resource has been re-assigned to the SSS review as the contract expires Dec 2019. BHES review will be delayed until 2020.</li> </ul>

		<p><b><u>Sensory Support Service Redesign</u></b></p> <ul style="list-style-type: none"><li>• We need to ensure that children and young people with hearing impairments, visual impairments or dual/ multi-sensory impairments get the best possible support from Local Area services across Bristol, North Somerset, South Gloucestershire and BANES so that higher numbers of these individuals are successfully prepared for adulthood, experience authentic inclusion in mainstream education as well as the public sector in order to go on and successfully complete further or higher education, training and employment.</li></ul>	<ul style="list-style-type: none"><li>• Options appraisal went to the Joint Operational Group and four commissioners on 28<sup>th</sup> January 2019 and further meeting was held to work on detailed options on 26<sup>th</sup> Feb 2019.</li><li>• Inclusion in Education Group were updated on 31/1/19 on the survey and engagement event findings.</li><li>• Schools Forum will receive full update April 2019.</li><li>• Public consultation will take place in April/ May 2019.</li><li>• Proposal and recommendations will go through Bristol, North Somerset, South Gloucestershire and BANES governance pathways in July 2019, along with a full management of change.</li><li>• Workforce development will take place between September and December 2019 across the four local authorities, ready for a new service start in January 2020.</li></ul>
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DRAFT

**Bristol Schools Forum**  
**School Places, Capital and Growth**

<b>Date of meeting:</b>	2 April 2019
<b>Time of meeting:</b>	5.00 pm
<b>Venue:</b>	City Hall

**1. Purpose of report (FOR INFORMATION)**

1.1 To update Schools Forum on school place planning across Bristol..

**2. Recommendation**

2.1 That Schools Forum note the contents of this report.

2.2 That the Funding sub-group consider the effects of falling primary schools rolls.

**3. Summary**

3.1 The city is experiencing a substantial rise in demand for secondary school places. A significant amount of work has already been undertaken to ensure all pupils continue to be offered a school place. Further places are planned through the provision of new free schools.

3.2 Offers of places at secondary schools were made on 1st March. 72% were offered their 1st preference school and 90% were offered one of their 3 preferences. This is very similar to 2018.

3.3 Numbers requiring places at primary schools are now falling and places will need to be managed to avoid large numbers of empty places.

**4. Context**

4.1 Bristol has previously seen a dramatic rise in primary school pupil numbers. Reception admissions peaked in 2016 and since then numbers have been falling, mainly due to falling birth rates.

4.2 These higher primary school numbers are now impacting on secondary schools. A number of schools have already been expanded and other schools are taking more pupils than their Published Admissions

Number (PAN). Taking more pupils than the capacity is not sustainable in the longer term.

- 4.3 National Offer Day for secondary school places was 1st March 2019. Although all pupils were offered a place, this was only possible as some schools agreed to offer above their PAN. 72% were offered their first preference. 10% were made an offer that not one of their preferences.
- 4.4 A total of 4,354 places were offered in Bristol schools, an increase from 4,243 in 2018. Only 199 of these were for pupils living outside Bristol (a reduction from 207 in 2018). After offers were made there were 38 places remaining (compared to 71 in 2018), all of these in south Bristol.
- 4.5 Pupil projections are prepared annually for the DFE School Capacity Survey. These projections are used to allocate capital funding ('Basic Need') and also contribute towards decisions to approve the opening of new 'Free Schools'.
- 4.6 Birth rates are the main factor used in the pupil projection, with factors such as the effect of new housing and historical trends of gain/loss as pupils move through the school years being incorporated. The projections also take account of net 'loss' of pupils to schools in neighbouring local authority areas and to independent schools.
- 4.7 In addition to expansion of existing schools there is a need to provide additional places through the provision of new schools. The Department for Education (DFE) has approved the establishment of 3 new schools. The first of these, CST Trinity is due to open in Lockleaze in September 2019 and the Funding Agreement has now been completed.
- 4.8 Further new Free Schools are planned to serve the East Central and South areas, with planned opening dates of 2021 and 2022. These schools should ensure there are sufficient secondary places for the short to medium term growth from primary school numbers and the longer term needs created by new housing developments. Officers are working with the Department for Education and Oasis Community Learning on detailed arrangements, including how admissions for these schools will work. As the schools are being established to meet local demand it is not anticipated that they will admit pupils from outside Bristol.
- 4.9 There will be very few available places in Year 7 in September for pupils moving into the city or requiring a change of school but there is likely to be at least one school in each area with some places.
- 4.10 Admissions for 2020 are likely to be very difficult as the new Oasis

Temple Quarter free school will not have opened and Trinity will not have the full PAN. Projected demand is estimated to be around 4,300 with 4,120 places within PAN. There will be a need therefore to once again ask schools to admit over PAN to ensure every pupil receives an offer. These schools are likely to be the same schools as have agreed to admit above PAN in the last few years and should not, therefore, require additional commitments from the Growth Fund.

- 4.11 The planned new schools will provide an additional 600 Year 7 places. CST Trinity will provide 180 places, Oasis Temple Quarter 240 and 180 places at Oasis South Bristol. The table below shows pupil projections based on October 2018 census data and the number of Year 7 places following the opening of the new schools.

**Table 1: Year 7 pupil forecasts and capacity 2018 - 2023**

Year	2018 Oct Census Data Projection	Year 7 Capacity
2018/19	4,122	4,115
2019/20	4,342	4,235
2020/21	4,353	4,235
2021/22	4,511	4,421
2022/23	4,695	4,715
2023/24	4,745	4,715

Includes 120 places at Trinity from 2019 and additional 60 from 2021.

- 4.12 Pupil Projections indicate there will be demand for around 4,745 places by 2022/23, a projected in demand of around 400 places between 2019/20 and 2022/23. This is equivalent to around 14 forms of entry. Demand is projected to start to fall after 2023, in line with primary school numbers and it is unlikely that further additional places will be required in the medium to longer term.
- 4.13 Planning for secondary school place requirements is carried out using 3 geographical Planning Areas. Pupil projections for each area are included in appendix 1.
- 4.14 The significant issue facing primary schools in the short to medium term is over-provision. Changes to school funding have made the issue of surplus places particularly challenging. Officers have been working with schools to reduce the PAN at some schools where there is insufficient demand. This does not remove the places permanently but makes it easier for the schools to plan staffing levels with more certainty.
- 4.15 Reception admissions peaked in 2016 when 5,581 children started school. It is estimated that the Reception for September 2019 will be around 5,200. There are currently around 5,800 Reception places.

4.16 Previously, when pupil numbers were falling there was a scheme to provide some protection for schools with falling rolls. This was withdrawn. The Schools in Financial Difficulty fund may be a source of support for schools in this position, but this only applies for maintained primary schools and not academies (or maintained secondary schools). It may be appropriate for the Funding Sub-Group to consider and report to Forum on this.

## 5. Financial Implications

5.1 This report is combining information on school place planning and the capital available to address the consequent pressures. The capital information is summarised in **Appendix 1**.

5.2 There will also be financial consequences for the Growth Fund. **Appendix 2** sets out the current and future number of forms of entry that are expected to have a financial implication. This would either be through the mainstream formula for new and growing schools, or it would be through the Growth Fund for expanding schools. Either way, the funding received through the Schools Block DSG for growth would be the main source to pay for this.

5.3 The forecast numbers are based on existing plans and average costs for primary and secondary pupils. Actual costs will vary school by school. Actual numbers of pupils will depend on whether new expansions occur at the expected time and if actual pupil numbers account for the expected full forms of entry. Delays to expansions or variations to actual pupil demand will affect these figures. These numbers are very high level and are less easy to predict the further in the future they relate to.

5.4 Broadly, the current Growth Fund, combining new and growing schools and expanding schools has a budget of £2.6m for 2019/20. Existing commitments would point to a spend of £2.2m, with some contingency in hand for late variations. Future years would peak at £5.6m in 2021 and then revert to £2.1m by 2023. All of the new expansions are in secondary schools and academies.

**Table 2: Forecast extra forms of entry and cost to Schools Block 2019-2023**

Type of Growth	Sep-19	Sep-20	Sep-21	Sep-22	Sep-23
<b>TOTAL number of forms of entry (ie classes of 30)</b>	<b>28</b>	<b>26</b>	<b>31</b>	<b>27</b>	<b>24</b>
<b>Forecast cost (£'000)</b>	<b>£2,168</b>	<b>£2,064</b>	<b>£2,565</b>	<b>£2,334</b>	<b>£2,075</b>

5.5 It is clear that Bristol will need to provide for growth for many years to come.

- 5.6 The report also refers to falling rolls in primary because of a falling birth rate. Schools with falling rolls often experience difficulties in managing the consequent loss of funding. The mainstream funding formula operates on a lagged basis, so a school that had fewer pupils in October, would not bear the loss of any funding for another two terms, at the start of the financial year (or three terms, in the case of academies). Any consideration of a Falling Rolls Fund would need to recognize that this would be a call on Schools Block funding. The report suggests that this be a matter for the Funding Sub-Group to consider further.

### **Appendices:**

Appendix 1: Capital Update

Appendix 2: Future Growth Fund forecasts

## Appendix 1

### Schools Capital Funding

The table below demonstrates the capital budget from 2017/18 to current.

The majority of capital funding from this period has been allocated to the secondary sector in order to meet the demand of additional places that had previously been seen in the primary sector. Key projects include:

- Council construction of CST Trinity 6FE secondary school in Lockleaze – ring fenced grant from the DfE from the Free Schools Programme
- Redland Green 1FE expansion
- Bristol Free School 2FE expansion
- Bristol Cathedral Choir School 1FE expansion
- Cotham 1FE expansion
- St Bede's 1FE expansion

The ESFA are currently in the process of delivering 2 new free schools approved by the DfE:

- Oasis Enterprise Zone School 8FE to cater for young people from East and Centre – target opening date 2021 (in temporary accommodation)
- Oasis South – On the site of The Park in Knowle West. Likely opening date 2022.

The capacity now within both the primary and secondary sector (subject to the ESFA delivering the Free Schools) is such that there is currently no requirement for new schools or physical expansions of existing primary or secondary schools for the medium to long term.

The table demonstrates that there is currently £11,275m unallocated Basic Need Grant Funding within the education capital programme. A review is currently underway considering how best to allocate this. Considerations are primarily around SEND sufficiency and how best the Council can deliver its statutory responsibility in this sector,

### Summary of capital grants 2017/18 to 20120/21

EDUCATION CAPITAL GRANTS (£'000)	2017/18 £'000	2018/19 £'000	2019/20 £'000	2020/21 £'000	TOTAL £'000	Grant Purpose
Basic Need (2020/21 grant confirmed as zero)	3,197	5,114	10,998	0	19,309	Pupil place sufficiency (statutory responsibility).
SEND Capital	0	841	2,600	841	4,281	Capital to improve special provision for children & young people with education, health and care (EHC) plans.
School Condition Allocation (for LA maintained schools)	2,716	2,271	0	0	4,987	Capital to improve and maintain school estate at LA schools.
Healthy Pupils Grant (from the Soft Drinks Industry Levy)	0	207	0	0	207	Investment in facilities for physical activity, healthy eating, mental health, wellbeing & medical conditions.
ESFA Ring-fenced grant ring-fenced for 4 Early Years projects	2,229	0	0	0	2,229	Ring-fenced for the expansion of 4 specific early years settings
Devolved Formula Capital - LA schools (excludes VA)	596	540	0	0	1,136	Funding for LA maintained schools (excl.VA) to maintain their buildings & fund small capital project (or can be pooled across the LA with the schools' agreement). 2019/20 onwards not yet known.
ESFA ring-fenced Grant for Cathedral Trust Schools Trinity Academy	0	215	22,161	0	22,375	Ring-fenced for the construction of the new Cathedral Trust School, Trinity Academy.
<b>TOTAL KNOWN FUNDING RECEIVABLE 2017/18 TO 2020/21</b>	<b>8,738</b>	<b>9,187</b>	<b>35,758</b>	<b>841</b>	<b>54,524</b>	

ALLOCATION OF GRANTS	£'000	Comment
Ring-fenced and devolved funding	25,740	£22.4m Trinity + £2.2m Early Years + £1.1m Devolved Capital
Allocated SEND Grant	3,899	ABW Service AED in education capital programme
Unallocated SEND Grant (Cabinet report on SEND strategy with proposals pending June 2019)	382	
Allocated to projects in the Education Capital Programme	13,228	of which £8.2m for secondary expansion, £1.4m for SEN, £2.1m for Primaries, £0.5m for Early Years, £0.8m for project scoping/OR's/feasibilities
Unallocated (Cabinet report on SEND strategy with proposals pending June 2019)	11,275	of which £10.2m is 2019/20 basic need grant, see red text below.
<b>TOTAL ALLOCATIONS</b>	<b>54,524</b>	

## Appendix 2

### High Level forecast of Growth Fund for next 5 years

Type of Growth	Sector	School	Additional Forms of Entry				
			Sep-19	Sep-20	Sep-21	Sep-22	Sep-23
Growth Fund	Primary	Ashton Gate	1	1	1	0	0
Growth Fund	Primary	Colstons Primary	1	1	1	0	0
Growth Fund	Primary	Fair Furlong	0	0	0	0	0
Growth Fund	Primary	Southville	2	2	0	0	0
Growth Fund	Primary	St Bernards	0	0	0	0	0
Growth Fund	Primary	St Werburghs	1	0	0	0	0
Growth Fund	Primary	Whitehall	1	1	1	0	0
Growing school APT	Primary	Redfield	1	1	0	0	0
Growing school APT	Primary	Marksbury	1	1	1	0	0
Growing school APT	Primary	Fairlawn	1	1	1	0	0
Growth Fund	Primary	Chester Park I	1	0	0	0	0
Growth Fund	Primary	Chester Park J	1	0	0	0	0
Growth Fund	Secondary	Bristol Free Sch	1	1	0	0	0
Growing school APT	Secondary	Cathedral	1	1	1	0	0
Growth Fund	Secondary	Fairfield	1	1	1	0	0
Growth Fund	Secondary	Redland Green	2	2	1	0	0
Growth Fund	Secondary	John Williams	1	1	1	0	0
Growth Fund	Secondary	Bristol Brunel	2	2	2	1	1
Growth Fund	Secondary	Bristol Met	1	2	2	2	2
Growth Fund	Secondary	Colston Girls	2	2	2	2	1
Growth Fund	Secondary	Cotham	1	1	1	1	0
Growth Fund	Secondary	St Bedes	1	1	1	1	0
Growth Fund	Secondary	Ashton Park	0	0	0	0	0
Growing school APT	Secondary	Trinity	4	4	6	6	6
Growing school APT	Secondary	Oasis Temple Q	0	0	8	8	8
Growing school APT	Secondary	Oasis S Bristol	0	0	0	6	6
<b>TOTAL number of forms of entry (ie classes of 30)</b>			<b>28</b>	<b>26</b>	<b>31</b>	<b>27</b>	<b>24</b>

Type of Growth	Sector	Average amount for 7/12ths of year	Sep-19	Sep-20	Sep-21	Sep-22	Sep-23
Growth Fund	Primary	£2,115	8	5	3	0	0
Growing school APT	Primary	£2,115	3	3	2	0	0
Growth Fund	Secondary	£2,882	12	13	11	7	4
Growing school APT	Secondary	£2,882	5	5	15	20	20
<b>TOTAL number of forms of entry (ie classes of 30)</b>			<b>28</b>	<b>26</b>	<b>31</b>	<b>27</b>	<b>24</b>

<b>Forecast cost (£'000)</b>	<b>£2,168</b>	<b>£2,064</b>	<b>£2,565</b>	<b>£2,334</b>	<b>£2,075</b>
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