

Notice of Meeting

Schools Forum

Martin Gocke (Pupil Referral Unit Representative (Governor))
(Chairman)
Stuart Matthews, Academy School Representative (Headteacher)
(Vice-Chairman)
Liz Cole, Primary School Representative (Headteacher)
Jane Coley, Academy School Representative (Headteacher)
Karen Davis, Primary School Representative (Headteacher)
Neil Davies, Primary School Representative (Headteacher)
Peter Floyd, Special School Representative (Governor)
Keith Grainger, Secondary School Representative (Headteacher)
Roger Prew, Primary School Representative (Governor)
Leslie Semper, Academy School Representative (Headteacher)
Phil Sherwood, Primary School Representative (Headteacher)
Debbie Smith, Secondary School Representative (Headteacher)
Richard Stok, Primary School Representative (Governor)
Greg Wilton, Teacher Union Representative



Also Invited:

Councillor Dr Gareth Barnard, Executive Member for Children,
Young People & Learning

Thursday 22 October 2020, 4.30 - 6.30 pm
Microsoft Teams Meeting

Agenda

Item	Description	Page
1.	Apologies for Absence/Substitute Members	
	To receive apologies for absence and to note the attendance of any substitute members. Reporting: ALL	
2.	Declarations of Interest	
	Members are asked to declare any disclosable pecuniary or affected interests in respect of any matter to be considered at this meeting. Any Member with a Disclosable Pecuniary Interest in a matter should withdraw from the meeting when the matter is under consideration and should notify the Democratic Services Officer in attendance that they are withdrawing as they have such an interest. If the Disclosable Pecuniary Interest is not entered on the register of Members interests the Monitoring Officer must be notified of the interest within 28 days. Any Member with an affected Interest in a matter must disclose the interest to the meeting. There is no requirement to withdraw from the meeting when the interest is only an affected interest, but the Monitoring Officer should be notified of the interest, if not previously notified of it, within 28 days of the meeting. Reporting: ALL	

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3.	Minutes and Matters Arising	3 - 10
	To approve as a correct record the minutes of the meeting of 16 July 2020. Reporting: ALL	
4.	High Needs Block Sub-Group Minutes	11 - 20
	To receive the minutes of the meetings of the High Needs Block Sub-Group held on 10 September and 8 October 2020. Reporting: Paul Clark	
5.	Update on the High Needs Block Budget for 2020-21 and 2021-22	21 - 80
	To provide an update on the increasing budget difficulties being experienced on the 2020-21 High Needs Block (HNB) element of the Schools Budget, the significant medium term budget deficit now being forecast and the monitoring and intervention arrangements being put in place by the Department for Education (DfE). Reporting: Paul Clark	
6.	2021-22 Budget Preparations for the Schools Block Budget and Other Finance Matters	81 - 100
	To provide an update in respect of information currently available in respect of the 2021-22 Schools Budget for mainstream schools together with other relevant finance related matters. Reporting: Paul Clark	
7.	Dates of Future Meetings	
	The next meetings of the Forum are scheduled for 19 November and 10 December 2020. Reporting: Joanna Gibbons	

Sound recording, photographing, filming and use of social media is permitted. Please contact Derek Morgan, 01344 352044, derek.morgan@bracknell-forest.gov.uk, so that any special arrangements can be made.

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**SCHOOLS FORUM
16 JULY 2020
4.30 - 5.35 PM**

Present:

Martin Gocke, Pupil Referral Unit Representative (Governor) (Chairman)

Schools' Members

Liz Cole, Primary School Representative (Headteacher)
Karen Davis, Primary School Representative (Headteacher)
Neil Davies, Primary School Representative (Headteacher)
Peter Floyd, Special School Representative (Governor)
Keith Grainger, Secondary School Representative (Headteacher)
Stuart Matthews, Academy School Representative (Headteacher) (Vice-Chairman)
Phil Sherwood, Primary School Representative (Headteacher)
Debbie Smith, Secondary School Representative (Headteacher)
Greg Wilton, Teacher Union Representative

Observer:

Councillor Dr Gareth Barnard, Executive Member for Children, Young People & Learning (Observer)

Apologies for absence were received from:

Jane Coley, Academy School Representative (Headteacher)
Roger Prew, Primary School Representative (Governor)
Leslie Semper, Academy School Representative (Headteacher)
Richard Stok, Primary School Representative (Governor)

139. Declarations of Interest

Karen Davis, Neil Davies and Phil Sherwood declared an affected interest in respect of Item 7 (2019-20 Balances held by Maintained Schools).

Debbie Smith declared an affected interest in respect of Item 9 (Arrangements for Additional Financial Support to Schools).

140. Minutes and Matters Arising

RESOLVED that the minutes of the meeting of the Forum held on 16 January 2020 be approved as a correct record.

Arising from minute 133, Chris Taylor had prepared a PowerPoint presentation to update on the schools which had at least 10% forecast surplus places. Chris Taylor advised that he had undertaken to meet with all those schools. Of those schools, College Town and Harmans Water did not require a meeting. The meeting with New Scotland Hill was cancelled and was due to be reconvened. The meetings with Ascot Heath and Wooden Hill were outstanding.

The information provided to the schools included the School Places Plan (SPP) Forecast Methodology which had previously been shared with The Forum. They were also given detailed numbers on roll (NOR) by year group and the Published Admission Number (PAN) as well as the numbers of babies born in each designated area (the latter was new data). Chris had also been able to correlate the NOR with parental preference. Each school was given a designated area analysis.

Potential income based on forecasts was provided by Bracknell Forest Council (BFC) Finance to all schools, not just those with greater than 10% forecast surplus places. This enabled schools to plan contingency budgets.

The School Places Plan 2020-24 was approved by the Executive on 28 January 2020. The strategy included the following:

- Harmans Water reducing their PAN by one Form of Entry (FE) from September 2021;
- Great Hollands and Sandy Lane were considering a PAN reduction (Neil Davies clarified that Sandy Lane were not considering a PAN reduction whilst in lockdown due to the Coronavirus pandemic);
- Crown Wood were monitoring the impact of Harmans Water reduction in PAN and considering a PAN reduction;
- Kings Academy Binfield deferred their one FE expansion by one year to September 2022; and
- Garth Hill College and Easthampstead Park would reduce their PAN by one FE from September 2021.

Chris Taylor highlighted that the forecasts for the September 2020 Intake Year were highly accurate at 99.0% of primary and 99.4% for secondary.

The Forum noted that the data showing 2019-20 funding allocations to schools experiencing significant in-year growth in pupil numbers (Annex 2 of the report for Agenda Item 8) highlighted how important it was for forecasts to be more accurate. The Forum thanked Chris Taylor and the team for the work that had been done to provide more local analysis.

The Forum queried how long-term planning regarding staffing would be affected by reductions in pupil intake. Chris Taylor explained that the forecast was that there would be a reduction in the number of primary-aged children and a rise in the number of secondary-aged children followed by a decline. The number of staff employed would be related to that which is why Chris Taylor had provided the information to schools. It was expected that each school would address this predicament differently.

Also arising from minute 133, Paul Clark advised that there had been no responses from the questionnaire which had been circulated to other local authorities to establish a benchmark for the test of reasonableness in relation to allocation of funding to new schools.

141. **Coronavirus Pandemic – Initial Financial Considerations**

The Forum considered a report which outlined the initial key financial considerations on schools arising from the Coronavirus pandemic.

Annex 1 of the report provided a summary of Covid-19 grant claims from schools. There was a large amount of expenditure not covered by the grant including loss of income and furloughed staff. Paul Clark has discussed with schools the different ways of completing claims. Claims were needed to be completed by 21st July 2020.

The Forum asked what the budgets were expected to look like by the end of the year and whether there were any forecasts relating to deficits. Paul Clark advised that it was too early to say but he shared the concerns of the Forum and had been in discussions with the Department for Education (DfE).

The Forum noted that this was likely to influence the work of the Forum over the course of the year.

Councillor Barnard advised that he appreciated the situation and that there was no clear end date. Councillor Barnard had spoken to the MP for Bracknell about this as well as making the point that there would be additional premises costs. Furthermore, the lost income couldn't be clawed back which was expected to have a significant impact. Councillor Barnard believed the DfE was trying to help schools by helping with home to school transport; however, this had no effect on school budgets.

Paul Clark highlighted that the Coronavirus pandemic has had a significant impact on the work of the Forum on its plan to review provisions around support services. The expectation was for £1.2m of savings in 2020-21 but it was unclear if any savings would be made. There was a concern that there could be a higher deficit than forecast.

The Forum noted that school budgets were precarious and expressed frustration that schools were kept in a loop going back and forth between BFC and the DfE. The Forum did not feel that it was right to expect the schools just to soak up the losses.

The Forum thanked Paul Clark for his work in preparing the report and for the support he was providing to the schools.

142. Improving Leadership and Governance over Special Educational Needs Support and the High Needs Funding Block

The Forum considered a report which sought to update on the proposal to deliver the Intervention Hub and present the outcomes recorded for the Hubs held during the Autumn 2019 and Spring 2020 terms.

Kashif Nawaz explained that the need for a platform to gain access to short term emergency high needs funding, particularly to reduce risk of permanent exclusions, remained across the year. Concerns have been raised by primary schools about a lack of viable options to refer young people to specialist support services.

There was a total of 47 referrals received for the Intervention Hub over the period but not all referrals were presented at Hub. The reasons why some referrals were not presented at Hub were set out in paragraphs 5.3.1 and 5.3.2 of the report.

In terms of impact, paragraph 5.3.9 of the report showed that there was a significant reduction in the risk of exclusions for young people referred. Most of the initial outcomes received were shared during the Spring Term. However, follow-up analysis has not been possible due to the Coronavirus pandemic.

There were three referrals made where the school said that there was no clear impact from the Intervention Hub. BFC has continued to work with those schools through different forums to better understand the context around the young people concerned.

Regarding the financial analysis, Kashif Nawaz highlighted the lack of science behind some of the allocations made within the High Needs Block (HNB). Paragraph 5.3.6 of

the report provided further evidence of the true cost of those interventions. These costs would be fed into the proposals for the HNB which would be reported to the Forum later in the Autumn Term.

Action: Kashif Nawaz

Kashif Nawaz highlighted that BFC would be consulting with schools and partners on the establishment of a formal Intervention Fund to support schools to more rapidly access resources, training and specialist support for children and young people who do not have an Education, Health and Care Plan (EHCP). It was expected that this would improve the speed of response and lower the incidence of EHCPs being necessary to meet needs.

RESOLVED to NOTE:

1. the findings of the project and the outcomes recorded for the pupils supported through the Intervention Hub; and
2. the proposal for going forward (paragraph 5.4 of the report).

143. 2019-20 Provisional Outturn on the Schools Budget and Initial View on the 2021-22 Budget

The Forum considered a report which sought to inform of the provisional outturn on the 2019-20 Schools Budget, including the allocation of balances and the use of Earmarked Reservice. Those funds were ring-fenced for the support of schools and pupils.

Paul Clark advised that this was an annual paper which was building on information previously reported to the Forum through updates on budget monitoring and budget construction. There were significant financial difficulties last year which included an overspend on the HNB. Whilst the government provided additional funding to all Local Authorities (LAs), this was insufficient to cover the increased pressures. There were some underspends on the budget but there was still a net £2.446m over spend for which there were insufficient funds in the overall balances to fully finance, and there was now a deficit for the first time at £0.141m. This would need to be addressed over the next three to four years.

Regarding the 2021-22 budget, Paul Clark explained that there would usually have been an update from the DfE, but this has not happened yet. Therefore, the most recent update was the September 2019 announcement of the three-year funding settlement. This was expected to remain in place and represented a £2.6bn increase for 2020-21. The next two years would be similar increases but slightly reduced. Paul Clark advised that in normal times we would be cautiously optimistic, but additional risks were in place around the funding of the Coronavirus pandemic.

Paul Clark highlighted that the Ascot Heath Primary School amalgamation had coincided with a large reduction in pupil numbers and cost reductions occurring at a slower rate than expected. The LA was seeking to request additional financial support from the DfE. There would be a one-year lag in receiving that support but there would have been no overall financial impact on the school budget over those two years.

The Forum queried whether, unlike the increase in primary per pupil funding, as secondary minimum funding was not being changed, that would mean some schools would not receive an increase in funding. Paul Clark replied that it was dependant on how much money overall was going into secondary education. However, all that was known was that secondary minimum per pupil funding rates were staying the same,

so it is possible that some schools would not experience an increase, but the basis on which funding would be filtered into the schools was not known.

The Chair noted that the high needs review was on hold but there were still issues to be addressed. The Chair asked whether there was a plan to get back on track. Kashif Nawaz replied that it would be the collective effort of the Forum and partners. It has not remained stagnant and there has been parallel planning. There has been a willingness of all partners to put in more resources proactively to stop needs emerging and there was a range of expertise available. Health colleagues including Occupational Therapists, Speech and Language Therapists and Physiotherapists had been proactive in reviewing their offer. BFC was the lead commissioner for the Integrated Therapies contract with Berkshire Health and there was an urgent need to review how that service was commissioned. This came under the Commissioning Plan which would be reported to the Forum in the Autumn Term.

Action: Kashif Nawaz

The Chair asked whether the Sub Group would be restarted in the Autumn. Kashif Nawaz replied that it was planned to reconvene in September. The Forum asked for the dates to be provided as soon as possible. Kashif Nawaz advised that the dates would be finalised by the end of July.

Action: Kashif Nawaz

RESOLVED

1. to NOTE:

- i. that the outturn expenditure for 2019-20, subject to audit, shows net spend of £3.404m which represents an overspending of £2.529m before allocation of reserves and balances (paragraph 6.6 of the report);
- ii. that after transfers to and from earmarked reserves, the Schools Budget over spent by £2.446m (paragraph 6.7 of the report);
- iii. the main reasons for budget variances (paragraph 6.8 of the report);
- iv. as at 31 March 2020, the aggregate surplus on balances and Earmarked Reserves within the Schools Budget amounts to £2.865m which reduces to £1.824m when school balances are excluded (paragraph 6.9 of the report); and
- v. the £0.141m deficit balance held in the Schools Budget General Reserve (paragraph 6.13 of the report); and

2. to AGREE:

- i. the proposed transfers to and from Earmarked Reserves (paragraph 6.12 of the report); and
- ii. to support a request to the Department for Education for a further year of fixed lump sum transitional funding for the recently amalgamated Ascot Heath Primary School (paragraph 6.21 of the report).

144. 2019-20 Balances held by Maintained Schools

The Forum considered a report which provided an update on the level of balances held by maintained schools as at 31 March 2020 and how those compared to the previous financial year. The report also considered whether any significant surplus balances needed to be subject to claw-back and reinvested within the overall Schools Budget.

Paul Clark advised that there was a significant reduction in aggregate school balances in 2019-20 which now stood at an average surplus of 1.9% of annual income compare to the target of 3%. Annex C of the report set out the medium-term

change in final budget positions from 2017-18 onwards. This showed a difference between primary and secondary. There had been both a significant increase in deficit balances and a reduction in surplus balances for primary schools. For secondary schools, there was an improvement in terms of the deficit being reduced over three years, but it had still not moved into a surplus.

Within the overall total a small number of schools held significant surplus balances. The Forum had agreed that, where significant balances were not being held for a valid purpose, the claw-back scheme would be applied. There was a responsibility to challenge schools with significant surpluses as to why more was not being spent on the educational needs of pupils. However, a range of valid purposes have been agreed that permit school to retain significant surplus balances above the threshold (5% for secondary and 8% for primary) as long as they were not exceeding 10% for secondary and 16% for primary. Most schools holding significant balances were doing so to maintain staffing levels in the short term in anticipation of financial challenges next year.

RESOLVED

1. to NOTE the key performance information on school balances, as set out in paragraph 6.6 of the report, and in particular that:
 - i. aggregate surplus balances have decreased by £0.629m to £1.099m;
 - ii. the value of surplus balances has reduced by £0.655m to £2.202m;
 - iii. the value of deficit balances has decreased by £0.026m to £1.103m and needs to be carefully monitored;
 - iv. significant surplus school balances have decreased by £0.450m to £0.250m (64%);
 - v. at 1.9%, average balances are considered to be below the minimum level required for working balances to safely cover unforeseen circumstances; and
 - vi. the three-year average change shows net balances in:
 - a. primary schools deteriorated by £0.898m to £1.049m (46%);
 - b. secondary schools improved by £0.238m to £0.296m deficit (45%); and
 - c. specialist providers significantly increased in 2018-19 as both provisions filled up and remained fairly static in 2019-20; and
2. to AGREE that the entire significant surplus balances held by schools has been assigned for relevant purposes as set out in the approved scheme and should not be subject to claw back (paragraph 6.15 of the report).

145. 2019-20 Funding Allocations to Mainstream Schools from Budgets Centrally Managed by the Council

The Forum considered a report that presented information on the in-year allocation of funds to mainstream schools through School Specific Contingencies and other budgets that were funded from the Dedicated Schools Grant (DSG) and, in the first instance, centrally managed by BFC. It also presented the opportunity to amend existing funding policies.

The Forum had no comments or questions and made no suggestions for changes.

RESOLVED

1. to NOTE the following funding allocations to schools, made in accordance with approved policies:
 - i. £0.067m for significant in-year increases in pupils (paragraph 6.9 of the report);
 - ii. £0.101m for schools required to meet the Key Stage 1 Class Size regulations (paragraph 6.13 of the report);
 - iii. £0.565m for new and expanding schools (paragraph 6.16 of the report);

- iv. £0.030m for schools with a disproportionate number of SEN pupils (paragraph 6.22 of the report);
 - v. £0.198m for schools in financial difficulty (paragraph 6.28 of the report); and
 - vi. no allocations were made from the general schools contingency (paragraph 6.30 of the report); and
2. to AGREE that no changes are made to the current funding policies (paragraph 6.32 of the report).

146. **Arrangements for Additional Financial Support to Schools**

The Forum considered a report which sought agreement from the Forum in respect of proposals for additional financial support to schools. In particular, approval was sought for new or amended applications for licensed deficit arrangements. The report also updated on progress of previously agreed financial support arrangements.

Paul Clark explained that a deficit could be provided where it would have been unreasonable to expect the school to make immediate savings compromising their school improvement targets.

Paul Clark highlighted that the same schools were requiring support. This shows that there were no new schools needing support which was felt to be positive in the current climate.

Paul Clark advised that BFC would usually have undertaken more work with the schools in financial difficulty, but this had been made difficult due to the Coronavirus pandemic. Schools had been as accommodating as they could be but there had not been as much progress as would ordinarily have been expected. This meant that further work was needed over the course of the year to set out repayment schedules with Ascot Heath, The Pines, Winkfield St Mary's and Easthampstead Park.

There had been a general improvement in the overall level of required deficits, but it was recommended that some amendments be made to Sandhurst Secondary School and Harmans Water's licensed deficit agreements.

Deficits stood at 32% of aggregate balances which was approaching the 40% cap currently prescribed in the scheme. The drawdown of balances to finance the 2019-20 over spending had resulted in the figure being much closer to the limit than would otherwise be the case. This would need to be looked at but was not an immediate issue as the focus needed to be on the four schools needing repayment schedules.

RESOLVED to AGREE:

1. subject to the school governors confirming the financing schedule and compliance with the associated terms and conditions of the deficit scheme, that the following existing licensed deficits be amended as follows:
 - i. Sandhurst Secondary School's licensed deficit agreement be amended to a maximum deficit of £0.260m, for full repayment by 31 March 2023 (paragraph 6.16 of the report); and
 - ii. Harmans Water Primary Schools receives a licensed deficit of up to £0.115m for full repayment by 31 March 2023 (paragraph 6.17 of the report); and
2. that the council continues to work on repayment schedules with the following schools, and that subject to the school governors confirming the financing schedule and compliance with the associated terms and conditions of the deficit scheme, that maximum deficits are as follows:
 - i. Ascot Heath Primary School receives a licensed deficit of up to £0.220m;
 - ii. The Pines Primary School receives a licensed deficit of up to £0.150m;
 - iii. Winkfield St Mary's receives a licensed deficit of up to £0.020m; and

iv. Easthampstead Park receives a licensed deficit of up to £0.300m.

147. **Date of Next Meeting**

The next meeting of the Forum was due to be held on 17 September 2020 commencing at 4:30pm. Paul Clark advised that there may not have been any useful information by that date. The need for a meeting in September would be considered nearer the time and communicated to the Forum.

Action: Paul Clark / Martin Gocke

CHAIRMAN

MINUTES

MEETING: **Sub Group: Schools Forum**

MEETING DATE AND TIME: 8th September 2020, 4.25pm

INVITEES: Kashif Nawaz, Head of Children Services (KN)
 Angela Fright, Finance (AF)
 Paul Clark, Business Partner (PC)
 Debbie Smith, Sandhurst (DS)
 Keith Granger, Garth Hill (KG)
 Karen Davies, Whitegrove (KD)
 Marion Bent, College Hall (MB)
 Gareth Barnard, Councillor (GB)
 Martin Gocke, College Hall (MG)
 Stuart Matthews, Edgbarrow (SM)
 Jane Coley, Brakenhale (JC)
 Jenny Baker, Kennel Lane (JL)
 Liz Cole, Owlsmoor (LC)
 Emma Ferry, SEN Consultant, (EF)

Apologies Phil Sherwood, Uplands
 Brian Poxon, Garth Hill
 Neil Davies, Sandy Lane
 Richard Stok Governor @ Meadow Vale (RS)
 Gaynor Styer, SENCo

1.	<p>Welcome and Apologies KN: Update on current position and activities over the summer term ('20) shared. Reference to planned consultation with partners on revised ToR's for the SEN Panel and introduction of the new SIF panel highlighted. Update on funding allocations for SPCF bids shared by PC.</p>	
2.	<p>Handover to Emma Ferrey who has taken over the role from Jonathan Wilding on leading to specific elements of the SEN Commissioning Plan.</p> <p>Details around inviting expressions of Interest to develop (primary) school based resource provision for pupils with ASC shared with the sub group as well as development of SLA's with specialist resources. Focus on partnership working across commissioning, SEN, social care, schools, parents/carers and young people. EF to contact KG to discuss SLA arrangements.</p> <p>Commissioning Team to be invited at the next Sub Group meeting to share updates on the Integrated Therapies project.</p> <p>KN to share the timeline for the consultation program on SEN processes at the next sub group meeting as well as action plan to deliver immediate priorities.</p>	
3.	AOB: None	

Priorities for the next meeting

SM/MH	Update on the Integrated Therapies project
KN/EF	Details of the Expression of Interest process and timeline
KN	Update on the timeline for consultation on SEN processes
KN	Action plan for immediate priorities



SEND Commissioning
Plan 2020-22.pptx

Dates for future Sub Group Meetings (all via Teams and 1600 – 1730 hrs)

- 8th October 2020
- 5th November 2020
- 3rd December 2020
- 7th January 2021
- 4th February 2021
- 4th March 2021

MINUTES

MEETING:	Sub Group: Schools Forum
MEETING DATE and TIME:	8 th October 2020, 4pm
VENUE:	MS Teams
INVITEES:	Kashif Nawaz, Head of Children Services (KN) Emma Ferry, SEN Consultant, (EF) Paul Clark, Business Partner (PC) Debbie Smith, Sandhurst (DS) Karen Davies, Whitegrove (KD) Marion Bent, College Hall (MB) Gareth Barnard, Councillor (GB) Martin Gocke, College Hall (MG) Jenny Baker, Kennel Lane (JL) Liz Cole, Owlsmoor (LC) Richard Stok Governor @ Meadow Vale (RS) Roger Prew, Governor @ Binfield (RP)
APOLOGIES:	Gaynor Styer, SENCo Phil Sherwood, Uplands Brian Poxon, Garth Hill Neil Davies, Sandy Lane Stuart Matthews, Edgbarrow (SM) Jane Coley, Brakenhale (JC) Keith Granger, Garth Hill (KG) Angela Fright, Finance (AF)

1.	Welcome and Apologies	1600 hrs
2.	<p>Action Plan for short/medium term priorities: discussion</p> <p>Comments made about simplifying the layout to achieve improved clarity.</p> <p>Question: is the objective for reviewing the funding matrix to redirect existing funding or create new arrangements?</p> <p>The need to manage expectations through the development phase highlighted where the work of the sub-group would need to balance the change programme with the difficult financial position.</p> <p>The role of the sub-group discussed against short/medium priorities highlighted within the action plan: Funding matrix: input needed from schools, schedule for focus at the next sub-group meeting</p>	1600 – 1625 hrs
3.	<p>Expressions of Interest process: discussion</p> <p>The proforma has been shared with the parent/carer forum and initial feedback has been received which has been very positive.</p> <p>Any final comments/feedback from the sub group to be shared with EF by close of</p>	1625 – 1650 hrs

	Monday the 12 th October 2020. NOTE: To speed up decision making, the sub group can agree to decisions that need to be made without the need to go to schools forum which would be updated through the presentation of sub-group minutes. This does not include financial decisions which are still subject to the usual decision-making process. To be factored into the work plan moving forward.	
4.	Update on the Integrated Therapies project Introduction to the work being led by BF Commissioning on reviewing the therapies contract with BHFT. The objectives are to achieve better outcomes from the service, improved contract monitoring and oversight of what we are receiving for the contract. Comment: RS offered support to the review process from Meadowvale and its specialist teachers.	1650 – 1715 hrs
5.	AOB	1715 hrs
	Reassurance needed to ensure the priorities identified are going to be delivered – ongoing concerns at the pace of development highlighted.	

Priorities for the next meeting

EF/KN	Funding matrix: input needed from schools, schedule for focus at the next sub group meeting
EF/KN	Schedule meetings with KLS and CH with EF: funding matrix (continue from where it stopped with JW)
EF/KN	Update the format of the action plan

Dates for future Sub Group Meetings (all via Teams and 1600 – 1730 hrs)

5th November 2020
3rd December 2020
7th January 2021
4th February 2021
4th March 2021

SEND Improvement - Action Plan to September 2021

Deadline	Action	Lead
19 October 2020	All documents for Expression of Interest (Eoi) process have been developed in partnership with parent/carers and schools	EF
2 November 2020	Eoi published and bids invited	KN/EF
	Meet with schools with existing and newly developed SRPs to discuss SLA	KN/ EF
	Consultation begins on SEN processes including: <ul style="list-style-type: none"> - SEN Moderating Group - Introduction of My Support Arrangements - SEND Intervention Fund 	KN
	Phase Transfer process	KN
27 November 2020	Deadline for expressions of interest from schools	EF
30 November 2020	Consultation ends on SEN processes	KN
11 December 2020	Selection & award of successful bidders. Selection will be based on: <ol style="list-style-type: none"> 1. Staffing 2. Facilities (the physical environment) 3. Admissions process 4. Overlap between SRP & main school 5. Locality & partnership focus 6. Approach to inclusion 7. Financial Implications 	KN/PC/EF
	Draft new funding matrix circulated for consultation	KN/PC/EF

11 January – 5 February 2021	4 week statutory consultation process for selected schools <i>NB. Academies and maintained schools follow different guidance but are broadly on the same timescale</i>	EF/ schools
	New funding matrix issued	KN/PC/EF
12 February 2021	Post-consultation review and decision	KN/PC/EF
	Options appraisal drawn up regarding complex placements, including possible collaborations Review of health provision (for 0-19years)	KN/EF/ Commissioning
April 2021	SLAs in place for existing and newly developed SRPs	KN/EF
	Options appraisal for development of an East Berkshire Integrated Therapies Service.	Commissioning
22 February – July 2021	Implementation: <ul style="list-style-type: none"> • Potential adaptations or minor capital works • Staff recruitment & development of policies and procedures 	EF
	Feasibility for new SEMH school completed.	KN/EF
19 April – 2 September 2021	Launch dates to be confirmed Transition planning to commence after Easter 2021	EF/ schools

1. Development of Specialist Resourced Provisions (SRPs)

As part of the SEND Improvement Strategy 2020-2022, it was agreed that more SRPs should be developed for pupils with autism, particularly across the primary phase. Post-lockdown, work on this is now continuing apace. Please see timeline above.

2. Service Level Agreements (SLA) for all Specialist Resource Provisions

All new SRPs, as set out in the timeline above, will be subject to a standard service level agreement which will set out the roles and responsibilities of the local authority and of the school(s) involved in each SRP.

In line with this, all those schools currently hosting an SRP and in those in the process of agreeing to host an SRP, will be consulted on the introduction of the standard Service Level Agreement (SLA). This document will be helpful for all schools in clarifying funding arrangements, admissions criteria and expectations, as well as setting out the support schools can expect from the local authority.

Schools with SRPs should expect to hear from Emma Ferrey within the next few weeks to discuss this further.

3. Explore effective routes to market for complex placements (led by Strategic Commissioning)

- a. Engage with Health and Social Care colleagues locally to review current arrangements and explore options and appetite for collaboration
- b. Engage with Berkshire LAs to explore options and appetite for collaboration
- c. Develop options appraisal exploring frameworks, sub-regional models, block contracts etc.
- d. Review the approach for commissioning SEMH placements outside the borough.

4. Develop a jointly agreed and co-produced approach to commissioning services, across health, social care and education reflecting best practice

- a. Review and develop Bracknell's 0-19 health provisions
- b. BFC to lead a joint project to explore the development of an East Berkshire Integrated Therapies Service (Speech & Language Therapy, Occupational Therapy and Physiotherapy). Review current contractual arrangements and explore future model options.

5. Revision of funding matrix

Work on the funding matrix has been continuing over the summer. Responsibility for progressing this now sits with Emma, working with the Schools' Forum Sub-Group, and will pick up where Jonathan's work ended.

It is expected that the matrix will be re-developed and re-issued, broadly within the timeline set out above for the development of Primary phase SRPs.

6. Address gaps in local provision – including SEMH

The SEND Improvement Strategy sets out the ambition to ensure Bracknell Forest has a flexible range of local provision which meets local need.

- a. One of the first priorities will be to complete a feasibility study for the development of a dedicated SEMH provision for the borough
- b. SEN will be working closely with Strategic Commissioners to strengthen existing provision and develop new provision, ensuring that we can meet need across the continuum.
- c. Identify areas for cost avoidance and opportunities to 'invest to save' within a framework of improving outcomes and closing the gap in achievement. This work will build on the revision of the funding matrix and will continue into 2021

If you would like more information to discuss any aspect of these developments, please contact Emma Ferrey, SEND Project Management Consultant on 07932 660092 or at emma.ferrey@tillian.co.uk.

Emma's working days are Thursdays and Fridays. She is contactable Monday-Wednesday but may not be able to action queries at these times.

The Local Authority will engage in a consultation process with key stakeholders to share a proposed re-design of elements of the current Special Educational Needs and Disabilities (SEND) processes: which includes a phase transfer process for children/young people with EHC plans, revision of the SEN Moderating Group and SEND high needs funding (SEND Intervention Fund – SIF) allocation processes.

Consultation will also focus on the content of a High Needs Funding Guide, which will provide an overview of the new SEND funding system, including revised levels of resourcing and support for pupils of statutory school age with SEND in mainstream/special and specialist settings. This will be supported by a proposed SEND profiles of Need and Banding Matrix, which will set out the descriptors for different levels of need and recommended funding levels.

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TO: SCHOOLS FORUM
DATE: 22 OCTOBER 2020

UPDATE ON THE HIGH NEEDS BLOCK BUDGET FOR 2020-21 AND 2021-22 **Executive Director of People and Director of Resources**

1 PURPOSE OF REPORT

- 1.1 To provide an update on the increasing budget difficulties being experienced on the 2020-21 High Needs Block (HNB) element of the Schools Budget, the significant medium term budget deficit now being forecast and the monitoring and intervention arrangements being put in place by the Department for Education (DfE).

2 EXECUTIVE SUMMARY

- 2.1 The HNB grant is allocated to LAs by the DfE through a national formula and is intended to fund support for children and young people with the most challenging educational requirements (SEND). It is the most complex part of the school funding framework.
- 2.2 Whilst the total cash increase for the 2020-21 Bracknell Forest (BF) HNB will be 8% per pupil to £17.008m (+9.5% cash), this is insufficient to meet the demands forecast and despite an ambitious improvement and savings programme, a £1.677m in-year deficit was estimated for 31 March 2021. This was forecast to rise to £4.761m by 31 March 2023 due to the estimated circa £1.5m per annum underlying funding gap.
- 2.3 During the year, work was planned to continue in partnership with the HNB sub-group of the Schools Forum to develop further service improvements and cost reductions to remove the remaining underlying funding gap. This was however expected to present challenges to what are sensitive budgets.
- 2.4 The financial challenges being experienced are not unique to BF with many LAs having to set deficit budgets. As expected, the coronavirus pandemic is having a significant impact on delivering the intended savings programme, which is compounded by significant staff turnover which has resulted in delays in providing up to date data for both financial monitoring and forecasting and service planning purposes through the changes set out in the SEND Commissioning Plan.
- 2.5 The current position has deteriorated, with the August budget monitoring cycle now reporting a £2.856m overspend for 2020-21, meaning a £4.533m in-year over spending (27% of budget) when the overspend built into the budget is also taken into account. There remains a degree of uncertainty in the accuracy of forecasts until all reconciliations are complete.
- 2.6 Taking account of the latest available information, and the expectation that the plans now in place to support SEND pupils are of a medium to long term nature the deficit now being forecast on HNB budget at 31 March 2023 has increased from £4.761m to £12.686m. There is now an estimated underlying annual funding gap of around £4.2m.

- 2.7 Whilst the majority of budgets supporting SEND are held within the ring-fenced Dedicated Schools Grant (DSG)¹, LAs retain responsibility for Education Psychology and the SEND assessment and monitoring process. As indicated above, pressures have increased on these Teams through increased demand and staff turnover with the 2019-20 accounts overspending by £0.102m and a £0.245m overspend currently forecast for 2020-21. These budgets are an LA funding responsibility.
- 2.8 In response to the continuing growth in deficits on HNB budgets, in January 2020, the DfE updated the status of the DSG ring-fence to make clear that any deficit must be carried forward to the Schools Budget in the next financial year or future financial years. This is intended to confirm that no liability for a deficit will fall onto an LAs General Fund.
- 2.9 The DfE has also strengthened their financial monitoring arrangements and interventions with those LAs experiencing the most significant difficulties. By moving to a deficit on the HNB element of the DSG, as well as experiencing a substantial reduction to the overall surplus in the DSG account, the council can expect some form of intervention from the DfE which could range from additional returns to detailed recovery planning with DfE officials. Precise requirements have yet to be confirmed although a Deficit Recovery Plan is expected to be required.
- 2.10 With the significantly deteriorating financial position, the council is proposing to support work to help bring the HNB budget closer to balance through allocation of resources from the Council's Transformation team to assist with the delivery of the key elements of the SEND Commissioning Plan and in short-term investments in SEND specialists. These specialists are estimated to cost up to £0.150m and will be an expense against the HNB budget.

3 RECOMMENDATIONS

3.1 That the Forum NOTES:

- 1 the current update on the HNB Budget and its medium-term financial plan which now projects a £12.686m deficit at 31 March 2023**
- 2 the expectation that the DfE will require completion of their HNB Deficit Recovery Plan template, which will be shared with the Forum in advance of submission**
- 3 the additional resources being applied to the delivery of the key elements of the SEND Commissioning Plan**

4 REASONS FOR RECOMMENDATIONS

- 4.1 To ensure the Forum is aware of the significant financial challenges being experienced in the HNB Budget and that a clear plan of action is being put in place.

¹ The HNB Budget is funded by the DfE through a ring-fenced grant (the Dedicated Schools Grant) that uses a national funding formula of actual and proxy SEND factors to ensure a consistent approach to funding LAs. It can only be spent on the purposes prescribed by the DfE. Any under or overspending must also be ring-fenced and applied to a future Schools Budget. See Annex 1.

5 ALTERNATIVE OPTIONS CONSIDERED

- 5.1 A range of options will be considered with the HNB sub-group as the recovery plan is developed.

6 SUPPORTING INFORMATION

Funding Responsibilities

- 6.1 The HNB element of the DSG is allocated to LAs by the DfE through a national formula to support pupils with SEND and is intended to fund a continuum of provision for relevant pupils and students from 0-24. LAs in general commission services from providers. In-house arrangements are made in a relatively small number of areas. This is a ring-fenced grant on provisions that LAs have no funding responsibility for.

More information on the scope of the HNB and the determination of LA funding is set out in Annex 1.

- 6.2 In terms of LA funding responsibilities through the General Fund, these are defined as education psychology, undertaking the identification, assessment and monitoring of provision for children that require an Education Health Care Plan (EHCP)², parental guidance and dispute avoidance and resolution. The council has allocated budget of £0.816m for these services in 2020-21.

2020-21 budget context

- 6.3 The key information and data available when the 2020-21 budget were being considered are as follows:
- Significant cost pressures are being experienced, which is a national issue, and not just limited to BF, with the number of pupils with a statement or EHCP having increased in the 2 years to March 2019 by 11.9%. The change in BF shows a steeper increase of 17.7%.
 - Taking account of the increasing use of private, voluntary and independent (PVI) sector providers, costs are expected to increase by 27.3% during which time grant from the DfE has increased by 4.8%.
 - The government spending review confirmed an 8% increase in per head funding on relevant factors for BF for 2020-21 (9.5% cash increase after applying data updates in the national funding formula). This amounts to a £1.472m increase and total retained HNB DSG income of £17.008m.
 - Uncertainties remained around two key elements of the HNB funding formula: the basic entitlement factor of pupils in SEN institutions; and the import/export adjustment that ensures appropriate funding is moved between LAs to reflect cross-border movements of students, both of which would need to be estimated and subject to change in-year. The £17.008m reported income is therefore subject to change.

² An EHCP is a legal document that describes a child or young person's special educational, health and social care needs. It explains the extra help that will be given to meet those needs and how that help will support the child or young person.

- The HNB national funding formula is being introduced on a phased basis. This is designed to ensure that those areas losing money have time to adjust their spending patterns and there is a funding “floor” to prevent losses in income. This approach has significantly benefitted BF as the council will receive additional transitional funding protection in 2020-21 of £2.5m which amounts to 13% of total income compared to the LA average of 2%. There is a risk that over time the funding “floor” money will be lost.
- The 3-year medium term financial forecast **with no interventions** predicted a cumulative £11.590m overspend at 31 March 2023.
- To reduce forecast costs and widen choice and improve services, a range of developments were supported by the Schools Forum that focussed on maintaining pupils in mainstream schools, including making financial contributions as necessary in order to avoid the significant cost implications when pupils move to specialist providers and improving commissioning. These developments identified the potential to effect cost reductions of £6.829m resulting in a revised cumulative deficit at 31 March 2023 of £4.761m.

6.4 Taking this background information into account, as well as the most up to date intelligence available at the time, the 2020-21 budget build and 3-year medium term financial forecast included the following assumptions:

- Reflecting on the ordinary expectation that support to SEND pupils will remain in place over the medium to long term, the £2.599m forecast overspend from 2019-20 would continue and be added as a pressure to the on-going cost base
- Demand would continue to increase at the average 3-year rate of 7.5% per annum (54 extra places a year would be required)
- Price inflation on fees would on average be 1.5% per annum.
- Income from the DfE would increase by the confirmed 8% in 2020-21 and 4% per annum thereafter, equivalent to the 2020-21 increase in per pupil funding rates paid by the DfE for mainstream schools.
- A programme of efficiencies and improvements would be introduced that were estimated to deliver cost reductions of £1.2m in 2020-21, a further £1.2m in 2021-22 and another £0.7m in 2022-23, aggregating to £3.2m of on-going savings after 3 years.
- The net effect of this medium-term plan was a projected cumulative deficit at 31 March 2023 of £4.761m, with a remaining underlying annual deficit of around £1.5m.

Medium-term financial forecast

6.5 Since the 2020-21 budget was set there have been a number of changes that will have different financial implications from those originally expected which in turn will impact on the medium-term financial forecast, the most significant of which are:

1. 2019-20 actual outturn performance
2. Performance against the above Key Service Developments, including impact of coronavirus pandemic
3. 2020-21 budget monitoring information

4. 2021-22 funding announcements from the DfE

2019-20 outturn

- 6.6 Being a ring-fenced grant, any accumulated under or overspending on the HNB budget would need to be included within the medium-term budget plan. The final 2019-20 accounts reported a £3.220m in-year overspending, £0.621m greater than the amount forecast when the budget was set.
- 6.7 Whilst there were also additional balances available at year end in the centrally managed Schools Budget, these were insufficient to prevent the Reserve moving to a deficit in the value of £0.141m. This is £0.041m greater than anticipated when the 2020-21 budget was set.
- 6.8 Once put in place, the general expectation is that support to SEND pupils will remain in place over the medium to long term, meaning that much of the £0.621m increased overspend from 2019-20 will roll forward into the on-going 2021-22 cost base. Over 3 years, this is therefore expected to add around £1.5m to the original cumulative deficit forecast.

Update on Key Service Developments – reflecting coronavirus pandemic

Original developments

- 6.9 In setting the original budget, a significant amount of change in service delivery was agreed with the Schools Forum and approved by the Executive Member. However, a number of factors have impacted the ability to make the changes as originally intended including:
1. The coronavirus pandemic. This has diverted priorities within the council and schools away from the HNB developmental projects
 2. Capacity to take forward the range of immediate developments needed.
 3. Lack of opportunities to collaborate with key partners.
 4. The Annual Reviews and Placement Monitoring officer took up post at the start of August. Although a recent appointment, developments are needed to develop a more robust approach to annual reviews particularly for the post 16 cohort. Initial forecasts suggest that at least 10% of plans could cease as a result of this approach potentially saving £0.150k per annum. Equally important would be the precedent that would be set by establishing this approach to manage processes and expectations for future years.
 5. The SEN finance officer formally started at the start of August. An operating model needs to be developed linked to placement decisions as set out in the Code of Practice.
- 6.10 The current assessment of anticipated progress against the financial savings indicates that £0.286m of the £1.287m will now be achieved, a shortfall of £1.001m. Whilst there is a significant deterioration in the savings in the first year, across the 3 year plan they are expected to remain close to the original cumulative £3.2m amount (£1.7m per annum in year 3), mainly as a result of additional SEN Unit places now expected to be open at BF schools.

Annex 2 provides more information on the service developments planned for 2020-21, including the original and current expectations. For some of the proposals,

capital funding has yet to be agreed, in particular for a potential Social, Emotional and Mental Health assessment and direct provision facility, although a significant source of S106 funding has been identified.

New initiatives

- 6.11 The original developments to HNB services and budgets were always the first step towards significant change, with the following section setting out anticipated plans. Financial implications have yet to be calculated for these proposals.
- 1) Review current governance and decision-making around the current SEND panel processes, intervention hub and high needs funding allocation:
 - a) Formal consultation with stakeholders regarding proposed changes to SEND decision-making processes / intervention hub / high needs funding levels and governance to be completed by November 2020.
 - b) Refine and develop the proposals based on feedback from consultation to develop a final set of proposals to be implemented from January 2021.
 - 2) Developing the market for SEND / Alternative Provision (AP) & Support:
 - a) Develop a process to invite Expressions of Interest (EOI) for primary age ASC specialist resourced provision during Autumn term 2020.
 - b) Review residential placements for complex needs including those for children and young people under Child Protection or who are looked after by September 2021.
 - 3) Joint Commissioning:
 - a) Develop a jointly agreed and co-produced approach to commissioning across health, social care and education reflecting best practice.
 - b) Explore effective routes to market for complex placements in partnership with BF commissioning, social care and health.
 - c) Review and explore options for the development of an East Berkshire Integrated Therapies service engaging with service users to develop the service specification.

HNB Budget Current position (provisional August monitoring cycle):

- 6.12 For the (provisional) August monitoring cycle, the majority of required data has now been made available following recruitment to the SEND Data and Finance post. Further updates are expected in the coming months once full reconciliations have been made and this may result in further significant changes. Based on the updates set out in this report, HNB services are now forecast to overspend the approved budget by £2.856m, which after adding the £1.677m overspend included in the budget, indicates a forecast in-year over spend of £4.533m.

Summary of key impacts on the in-year over spending to budget

- 6.13 The majority of significant budget variances are occurring on payments to BF schools and external providers for additional support needs and the cost of placements. These can be separated into:
- 1) Extra places purchased: +£1.291m

The budget assumed purchased places in 2019-20 would increase by the 3 year average of 7.5% to 778. The current forecast is for 841 places (+16%).

- 2) Increase in average price of place: +£0.547m
The forecast average placement cost of £19,761 is now expected to be £20,464 (+3.6%).
- 3) Under achievement against savings: +£1.001m
The most significant savings plan items have slipped (see Annex 2)
- 4) Other budgets: £0.017m

A number of services are reporting relatively small variances

Annex 4 sets out the forecast financial performance of the Schools Budget based on provisional information available at the end of the August reporting cycle.

2021-22 funding announcements from the DfE

6.14 The DfE have confirmed the following elements of funding for next year:

- The funding floor is set at 8% so each LA will see an increase of at least 8% per head of their 2 to 18 population (as estimated by the ONS).
- The gains cap is set at 12%, allowing LAs to see gains up to this percentage increase under the formula, again calculated on the basis of per head of population.

6.15 As expected, with BFC benefitting from significant financial support through the funding “floor” – 14% of the HNB allocation to BF (£2.857m) is through the funding floor, compared to an LA average of 2%, placing BF the 6th most reliant LA for this factor NB 58 LAs do not receive any funding protection - the basic funding allocation will increase by the minimum 8%, which equates to a further £0.681m compared to the original assumption of a 4% increase.

Updated HNB Budget Medium term financial forecast

6.16 Table 1 below sets out a summary of the revised medium-term financial forecast, reflecting the changes set out above. It continues to assume that placement numbers will increase by the 3 year average to 2019-20 of 7.5% rather than the 16% expected in 2020-21. The current expectation is that the original £1.5m per annum underlying over spend will increase to an average of around £4.2m – over 20% of the annual grant allocation - with the forecast deficit at 31 March 2023 now at £12.686m.

Annex 3 sets out more detail on the anticipated expenditure and Annex 2 for the planned interventions.

Table 1: HNB Budget: Medium term financial forecast after interventions

Item	2019-20 £m	2020-21 £m	2021-22 £m	2022-23 £m
HNB DSG income to BFC	15.464	17.008	18.369	19.104
Anticipated change		1.545	1.361	0.735
Change (cash)		9.5%	8.0%	4.0%
Forecast spend - no interventions	18.684	21.828	23.445	25.105
Change		4.819	5.076	6.001
		16.8%	7.4%	7.1%
<u>Anticipated funding gap:</u>				
Annual	3.220	4.678	5.076	6.001
DSG reserve 31/3/20	-3.079	0.141		
Cumulative	0.141	4.819	9.895	15.896
<u>Planned interventions:</u>				
SEND support stage		-0.054	-0.068	-0.068
Reducing demand for EHCP		-0.082	-0.585	-0.997
Review PAN at specialist providers		-0.150	-0.200	-0.200
Reducing reliance on external providers		0.000	-0.041	-0.064
Improved commissioning		0.000	-0.197	-0.290
Central Services:		0.000	-0.084	-0.130
Forecast impact of interventions		-0.286	-1.175	-1.749
Cumulative		-0.286	-1.461	-3.210
<u>Funding gap after interventions</u>				
Annual		4.533	3.900	4.252
Cumulative		4.533	8.434	12.686

LA Staffing Budgets

- 6.17 The Education Psychology Service (EPS) budget is under considerable pressure due to limited capacity to meet the increased demand (both statutory and traded) in service.

Statutory assessments continue to increase year on year nationally and each assessment requires Educational Psychologist input.

At the end of the 2019 calendar year, Bracknell Forest EPS was under capacity when a Senior EP and the Principal EP both left the service. At this point Bracknell entered

a contract with Innovate Services to address the limited leadership capacity within the service and also some of the key challenges.

The EPS previously had undelivered on the traded offer that was launched in April 2019 and there was 'roll-over' that needed to be fulfilled in this financial year (increasing demand). Additionally, there was a back-log of statutory assessment work that had not been completed and needed addressing. The EPS statutory timeframe adherence has risen from 22% in April 2020 to over 90% for June and July 2020.

Currently the service has 3.0 fte vacancy and also 0.6fte on maternity leave. Leaving only 3.60fte educational psychologists in post.

Key outputs expected from the service provided by Innovate include:

- Provide strategic overview for the EPS
- Improve and maintain high standards for the EPS statutory assessment timeframe
- Complete the backlog of statutory assessments that had built up and where already beyond the required timeframes (all assessments completed and up-to-date)
- Liaise with the head teacher forum to communicate the traded offer that had been purchased would not be delivered in full during the financial year (due to capacity and limited planning by previous EPS leadership)
- Ensure the previous EPS traded offer that had not been delivered in full and the new traded offer (April 2020 onwards) would be delivered to schools
- Develop and implement an EHCP quality assurance system across Bracknell Forest

To deliver on the traded service offer and the statutory demands of the service, Bracknell Forest are having to utilise locum / agency EP staff to increase their capacity. There is a national shortage of EPs and despite 3 recruitment cycles Bracknell Forest EPS have received no applications for the EP permanent posts advertised.

Innovate Services have been commissioned to the end of December with £0.0146m currently expected to be spent of securing professional management and leadership of the Team and £0.149m on the services of locum workers.

Similarly, the SEN budget faces on-going pressure mainly due to a continued increase in the number of statutory requests for assessments the LA receives and the proportion of plans that are issued. The previously established SEN Team had been in place since at least 2014 to address the transfers from statements to plans. This process was completed in March 2018. Around the same time, the LA experienced an increase in the proportion of plans held by Bracknell Forest and has continued to increase by at least 10% each year. The scale of this increase has led to staffing pressures and a change in the way key SEN functions are delivered. The Team now has a flat structure of SEN Officers led by an Assistant Team Manager (maternity cover currently in place).

The Service Lead for SEN has remained vacant since September 2019 and despite 3 recruitment cycles, we have not been able to make an appointment to this key position.

Furthermore, and as mentioned above, the lack of appropriate local placements has continued to place significant pressures to specialist independent, out of borough placements which come at a high cost.

The SEN Team now has an Annual Review officer in post and a robust placement monitoring and review process is being developed to identify transition opportunities for children and young people from out of borough settings to be located more closer to home where is appropriate to do so.

Paragraphs 6.9 to 6.11 above outlines the measures in place and being developed to address SEN pressures.

The following are in place to address EPS pressures:

- Sought funding from social care to jointly fund specialist EP posts that will create attractive positions and aim to attract applications (adverts are live now). This will reduce locum / agency spend and address capacity issues.
- Schools have been contacted to highlight the community support that was provided by the EPS in the summer term (during school closures through COVID-19) to highlight that there will be a reduction in EPS delivery (pro-rata) to account for this (alleviating some demand pressures that a 'backfill' would have created)
- Job description and person specification written for permanent Principal EP post with advert to go out. This will provide leadership support from January 2021 and the Innovate Services contract can cease from December 31st 2020 (reducing financial pressures).
- Clear infrastructure in place and long term plan to develop the traded EP service to increase income generation and ensure it is a 'self-sustaining' offer with no financial impact on the LA (providing a front line early intervention service that funds itself and aims to reduce statutory demand, so making the LA a saving by providing this service).

DfE monitoring and interventions

HNB budgets

- 6.18 In response to the continuing growth in deficits on HNB budgets, in January 2020, the DfE updated the status of the DSG ring-fence to make clear that any deficit must be carried forward to the Schools Budget in the next financial year or future financial years. This is intended to confirm that no liability for a deficit will fall onto an LAs General Fund. In addition, LAs are no longer permitted to use their General Fund income to fund the Schools Budget without express permission of the Secretary of State.
- 6.19 Under the DSG conditions of grant for 2020-21, any LA with a DSG deficit of any size, or that is likely to fall into a DSG deficit in the near future, should have a plan for managing its DSG account going forward, and must keep its Schools Forum regularly updated about its plan, including high needs pressures and potential savings. It must also respond to enquiries from the DfE about the plan.
- 6.20 The DfE recognises that there may be some LAs which will not be able to pay off their historic deficit from the DSG over the next few years. In these cases, the DfE expects

to work together with the LA to agree a plan of action to enable the LA to pay off its deficit over time.

- 6.21 As part of an appropriate agreed package of measures, the DfE will, if necessary, make funds available from within the overall total of DSG so that the local authority can pay off its deficit over time. The DfE will need convincing evidence from the LA that it would be impracticable to pay off a historic deficit from the DSG it would expect to receive in future years.
- 6.22 Additionally, the DfE expects to approach selected LAs to begin discussions with them during 2020. These discussions are likely to be detailed, and in order to make this process manageable it will be necessary to limit discussions during 2020-21 to a fairly small number of authorities. The DfE expects to expand the discussions to other LAs during 2021-22 and subsequent years.

Overall DSG account

- 6.23 In 2020-21, the DfE extended the rules under the DSG conditions of grant so any LA with an overall deficit on its DSG account – includes HNB, Early Years funding and general Schools Budget - at the end of the 2019-20 financial year, or whose DSG surplus has substantially reduced during the year, must co-operate with the DfE in handling that situation by:
- providing information as and when requested by the DfE about its plans for managing its DSG account in the 2020-21 financial year and subsequently
 - providing information as and when requested by the DfE about pressures and potential savings on its high needs budget
 - meet with officials of the DfE as and when they request to discuss the local authority's plans and financial situation
 - keep the Schools Forum regularly updated about the local authority's DSG account and plans for handling it, including high needs pressures and potential savings

Potential Impact in BF

- 6.24 By moving to a deficit on the HNB element of the DSG, as well as experiencing a substantial reduction to the overall surplus in the DSG account, the council can expect some form of intervention from the DfE which could range from additional returns to detailed recovery planning with DfE officials.
- 6.25 Whilst precise requirements of BF have yet to be confirmed, the DfE has recently issued a management plan template to help LAs to manage their DSG and provide the DfE with the initial required information. The template is designed to help LAs:
- comply with DfE requirements of providing a recovery plan where the DSG is in a deficit or has experienced a substantial reduction to the overall surplus
 - monitor how DSG funding is being spent
 - compare data on high needs spend between LAs
 - highlight areas where LAs may wish to review spending

- form evidence-based and strategic future plans for the provision of children and young people with SEND
- present complex funding information simply to schools forums and other external stakeholders
- provide a consistent reporting format to help LAs share best practice and initiatives

6.26 The template is being reviewed and will be presented to either the November or December Schools Forum meeting for comment.

National context

6.27 Despite the DfE attempting to clarify that HNB budgets need to be funded from DfE grant, there is increasing nervousness in the s151 officer community about costs potentially falling on the General Fund. The main concern being a significant deficit should not be present in LA accounts without having some way of addressing it.

Next Steps

6.28 Following co-production with key partners, a robust SEND Commissioning Plan has been developed with the action plan now being finalised. This sets out the details and steps to be taken from 2020 – 2022 to address not only the current budget pressures arising but also the range of strategic and operational changes needed to readdress the balance between available resources and provision. More information is set out in paragraph 6.11, with Annex 5 setting out the SEND Commissioning Plan and Annex 6 the associated Action Plan.

6.29 The council has recognised the HNB budget position as a significant concern and has agreed that additional resources are required to progress the Action Plan and in particular:

1. That the HNB Budget difficulties are recognised as a specific project within the council's Transformation Programme, with appropriate resources allocated to facilitate progress.
2. That the HNB budget sets aside up to £0.150m in order to
 - Appoint a Lead Commissioning Officer to take forward the implementation priorities set out within the SEND Commissioning Plan and Action Plan (annex 4 and 5). These priorities have been determined following a robust sufficiency analysis.
 - Increased resource for data management and analysis
 - Develop and implement an improved annual review process and placement decisions process

7 ADVICE RECEIVED FROM STATUTORY AND OTHER OFFICERS

Borough Solicitor

7.1 As set out in the report High needs funding is provided to local authorities through the high needs block of the dedicated schools grant (DSG). Local authorities must spend

that funding in line with the associated conditions of grant, and School and Early Years Finance Regulations.

Director of Finance

- 7.2 The financial implications anticipated at this stage confirm the expected significant deterioration in the financial position of the HNB budgets. A number of developments are planned that may make a contribution to cost reductions. However, a funding gap remains, and the budget is heading towards an unsustainable position.

Equalities Impact Assessment

- 7.3 The budget proposals ensure funding is targeted towards vulnerable groups and therefore an EIA was not required.

Strategic Risk Management Issues

- 7.4 There are strategic risks around ensuring all schools remain financially stable as well as pupils with SEND receive timely and appropriate support for their education. A failure to develop a plan for a sustainable HNB budget will place at risk the need to make more drastic changes at a later date.

8 CONSULTATION

Principal Groups Consulted

- 8.1 Schools, the Schools Forum, including the HNB sub-group and the People Directorate Management Team.

Method of Consultation

- 8.2 Formal consultation and written reports.

Representations Received

- 8.3 Incorporated into this report.

Background Papers

None.

Contact for further information

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Overview of the HNB Budget

1. The HNB element of the DSG supports pupils with special educational needs and disabilities (SEND) and is intended to fund a continuum of provision for relevant pupils and students from 0-24. LAs receive funding for these provisions from the DfE and in general commission services from providers. In-house arrangements are made in a relatively small number of areas.
2. The DfE has determined that where the cost of provision is above £10,000 it will be classified as high needs. In such circumstances, a “place-plus” approach to funding will generally be used which can be applied consistently across all providers that support high needs pupils and students as follows:
 - a. **Element 1 or “core education funding”**: equivalent to the age-weighted pupil unit (AWPU) in mainstream schools, which the DfE has stated the national average is around £4,000.
 - b. **Element 2 or “additional support funding”**: a budget for providers to deliver additional support for high needs pupils or students with additional needs of up to £6,000.

Specialist and Alternative Providers (AP), such as special schools and Pupil Referral Units (PRUs) only cater for high needs pupils and therefore receive a minimum £10,000 (Element 1 funding plus Element 2) per agreed place.
 - c. **Element 3, or “top-up funding”**: funding above elements 1 and 2 to meet the total cost of the education provision required by an individual high needs pupil or student, as based on the pupil’s or student’s assessed needs. This element is paid to all provider types, for pupils with assessed needs above the £10,000 threshold.
3. Additionally, HNB DSG is also intended to be used where high needs provisions are not arranged in the form of places e.g. specialist support for pupils with sensory impairments, or tuition for pupils not able to attend schools etc.
4. The statutory regulatory framework requires the council to decide on the arrangements to be put in place for the HNB and associated resources and for the Forum to comment on their appropriateness. The current approach in BF is to develop the services during the year in partnership with schools and has therefore created a sub-committee of the Forum to gather views and help shape arrangements. Final budget decisions are taken in March each year by the Executive Member for Children, Young People and Learning.

DfE Reforms

5. A new National Funding Formula (HNB NFF) was introduced in April 2018 to replace a system that largely allocated funding based on historic spending decisions. The core elements of funds distribution to LAs now comprises:
 1. **Basic entitlement** (initially £4,000 per pupil / student that the LA is responsible for educating that is attending an SEN institution)
 2. **Historic spend** (50% of 2017-18 baseline amount agreed with each LA)
 3. **Population** (Share of national budget allocation based on projected 2-18 year olds at the relevant mid-year as a proportion of all 2-18 year olds)

4. **Free school meals** (Share of national budget allocation based on resident pupils eligible to FSM as a proportion of all pupils eligible to FSM)
5. **Income Deprivation Affecting Children Index** (Share of national budget allocation based on number of 2-18 year olds in IDACI bands A-F as a proportion of all pupils in IDACI bands A-F)
6. **Bad health** (Share of national budget allocation based on number of resident children aged 0-16 in bad or very bad health in the general population census as a proportion of all projected children in bad or very bad health)
7. **Disability** (Share of national budget allocation based on number of resident children aged 0-16 for whom parents are eligible to disability living allowance (DLA) as a proportion of all eligible DLA families)
8. **Key Stage 2 low attainment** (Share of national budget allocation based on number of resident pupils who did not attain level 3 in reading tests plus those that did not attain a scaled score in reading test or were not entered as a proportion of all relevant children)
9. **Key stage 4 low attainment** (Share of national budget allocation based on number of resident pupils who did not attain 5 GCSEs at grades A* to G as a proportion of all relevant children).
10. **Hospital education** (LA specific funding based on budgeted spend)

6. One of the key outcomes for the DfE from these reforms is to ensure that any change in the amount of funding allocated to individual LAs must be introduced slowly to allow those areas facing reductions time to adjust to the new amounts. This is because expenditure is mainly incurred on educational fees and these generally remain unchanged throughout the course of each pupil's time in the relevant institution which often presents commitments for over 10 years. Therefore, in addition to the core factors set out above, there will be further adjustments to each LAs HNB funding as follows:

1. An initial funding floor adjustment to add the cash amount difference where the normal operation of the HNB formula does not deliver at least a 0.5% increase in per head (2-18 year old population) funding compared to the baseline amount of expenditure. The protection is not calculated on elements of the formula that are subject to later updates and are in proportion to estimated population changes (so a projected decrease in population will result in a lower overall cash percentage increase, subject to a cash protection).

There is a net £174m cost to the Funding Floor in 2020-21, which amounts to 2.1% of total funding and illustrates the importance of moving to the new formula in a measured way.

For LAs experiencing a reduction in population, there will be a second funding floor adjustment to ensure total cash funding does not fall below the baseline amount. Note, the funding floor adjustment is not applied to the basic entitlement factor i.e. current numbers of high needs pupils and students or the import / export adjustment (see note 2. directly below) as the DfE want to ensure that year on year changes in these factors are reflected in a LAs funding.

2. An import / export adjustment so those LAs sending out more pupils to other LAs lose £6,000 per pupil funding to reflect the requirement of the resident LA to finance all place funding in the SEN institutions in their area, irrespective of which LA places the student. This amount is added to the £4,000 per pupil / student funding included in the main formula to achieve the £10,000 place

funding cost. This is a lagged adjustment. LA funding allocations are adjusted from January census data, but actual places purchased will generally be based on actual student numbers taking up places during the year.

This removes some of the unfairness in the previous funding system where LAs did not generally contribute to Element 1 and 2 costs for their students in institutions in other LAs.

7. An area cost adjustment will be applied where relevant (7.4
8. % uplift for BFC) to all factors other than historic spend as this will already reflect local cost variations. This recognises additional costs in some areas, most notably enhanced salary payments in and around London, and follows the same approach adopted by the DfE in the funding reforms introduced for mainstream schools. The HNB area cost adjustment comprises 2 elements: one for non-teaching staff; and another for teaching staff. As the ratio of teaching to non-teaching staff in special schools is different from that in mainstream schools, this calculation is different to that used in the School NFF (where the BFC area cost adjustment is 5.6%).
9. The new HNB NFF will deliver significantly less funding to BF than the current arrangements. The draft 2021-22 HNB DSG update from the DfE indicates £2.857m funding protection for BFC, which is around 14% of total funding which clearly illustrates the importance of the funding floor adjustment from a BF perspective. On average, LAs receive 2.1% of their HNB funding through this factor.

HNB Budget – medium term savings summary

Item	Original Plan comments and 20-21 budget impact		Current status	Plan comments and 20-21 budget impact at September 2020	
	£m			£m	
<u>Planned changes:</u> <u>SEND support stage</u> SEN hub	-0.054	Assumes 10 more students retained in mainstream schools with additional support in each of the next 3 years. Savings arise from lower cost top up funding in mainstream schools compared to permanent external placement / AP support.	Achieved	-0.054	14 students were referred to the Hub. 4 referrals led to a transfer to a specialist setting - the remaining 10 students were able to continue in their mainstream setting.
<u>Reducing demand for EHCP</u> New SEN units - Phase 1	-0.689	Following bids from interested schools, capital funding has been allocated for the development of 5 in-school units to cater for pupils at risk of requiring an EHCP or with an EHCP that can be maintained in a mainstream school with additional specialist interventions. Up to 85 new places are expected to become available by September 2021. Maintained schools and the HNB will contribute to the operating costs which will result greater numbers of pupils being retained in BF schools.	Will not achieve in 2020-21	0.000	The development of the first phase of SPCF projects was delayed due to the lockdown at the end of Mar '20. Additionally, finance struggled to collect the data required from schools which significantly delayed progress. Progress resumed over the summer term and these units are now complete. The next stage is to engage with the settings and establish individual SLA's in time for pupil admissions by Sept '21.

Item	Original Plan comments and 20-21 budget impact		Current status	Plan comments and 20-21 budget impact at September 2020	
	£m			£m	
New SEN units - Phase 2	0.000	Further development of in-school units that will be rolled out to additional schools subject to suitable bids and capital funding. Potential extension yet to be determined, but assumed at around half existing known plans at 40 places, commencing on a phased basis from September 2021.	On target for original September 2021 opening	0.000	Confirming SPCF allocations for bids submitted as part of phase 2 has been delayed due to Covid and arising pressures. Progress has now resumed and final allocations on 2 of the 4 projects will be made by end of Sept' 20. The remaining two are expected to be finalised by the end of the Autumn Term '20. Once settings have been allocated their funding, SLA's will be established enabling pupil placements to be made from Sept '21.
Savings from BLV primary unit	0.000	Assumes new SEN Unit opens in September 2021 to 3 pupils (opening delayed 1 year), with similar number of admissions thereafter. Specialism for admission yet to be agreed.	In progress	0.000	Assumes new SEN Unit opens in September 2021 to 3 pupils (opening delayed 1 year), with similar number of admissions thereafter. Specialism for admission yet to be agreed.
3 Spare places at Meadow Vale Unit	-0.029	The SEN Provision at Meadow Vale has 3 vacant places. The funding has been withdrawn.	Achieved	-0.029	
SEMH assessment and direct provision facility	0.000	Feasibility study to commence to create a 30 place SEMH assessment and 40 place provision on an existing school site with spare capacity. Potential for phased opening from September 2021 with planned return to the borough for suitable students currently placed in similar, external provision.	In Progress	0.000	Suitable site identified and is going through due process to establish feasibility and development of relevant of business plan. Unlikely to be occupied before Sept 2022

Item	Original Plan comments and 20-21 budget impact		Current status	Plan comments and 20-21 budget impact at September 2020	
	£m			£m	
Savings from Rise ASD Secondary Resource provision	-0.053	Assumes 5 BF students are admitted each September at reduced cost to savings arising from older students leaving education at alternative specialist provider until Unit reaches capacity at September 2021. Future option to consider scope for post-16 provisions / collaboration with B&W College.	Achieved	-0.053	There were 39 BF pupils placed at The Rise in Sept' 20 compared with 20 in Sept '19.
<u>Review PAN at specialist providers</u>					
Extra 5 in-house AP places at College Hall PRU	-0.050	Increase the number of funded places by 5 from April 2020 and again in April 2021. The extra £25k per place will be offset by savings of around £10k per place compared to other AP providers	Achieved	-0.050	number on NoR at College Hall? What was it Sept' 19
39 Extra 10 places at KLS	-0.100	Increase the number of funded places by 10 from April 2020. The extra £25k per place will be offset by savings of around £10k per place compared to other similar specialist providers.	Achieved	-0.100	There were 182 pupils on roll at KLS in Jan'19 (<i>school census</i>) which had moved to 195 for Jan'20 (<i>school census</i>).
<u>Reducing reliance on external providers</u>					
Increase BF placements at KLS	0.000	Ensure 4-5 BF students replace OLA students at KLS each year to ensure better value high quality placements. Deferred 1 year.	In progress	0.000	Currently developing placement planning process including KLS. On target for impact in subsequent years

Item	Original Plan comments and 20-21 budget impact		Current status	Plan comments and 20-21 budget impact at September 2020	
	£m			£m	
Replace no top up pupils at KLS with higher needs pupils	0.000	Ensure that as the 11 relatively low level need students without top up funding leave KLS that they are replaced with higher need students that currently need to travel out of area due to shortage of places. Assumes 2-3 movers, with new top up cost of circa £15k (no place funding to pay) with circa £20k per pupil net saving. Deferred 1 year	In progress	0.000	On target for impact in subsequent years
<u>Improved commissioning</u>					
Inflation management	-0.077	Assumes save 0.5% per annum on care inflation assumption	Will not achieve in 2020-21	0.000	to manage inflation below 1%
Block contracts	-0.070	Economies from prices as providers received guaranteed income.	Will not achieve in 2020-21	0.000	Priority set out within the SEN Commissioning Plan and being led by the LA's commissioning Team. Project timeline currently being confirmed.
Price negotiation with providers	-0.060	Undertake individual negotiation with providers admitting 4 or more students to secure price discounts.	Will not achieve in 2020-21	0.000	Priority set out within the SEN Commissioning Plan and being led by the LA's commissioning Team. Project timeline currently being confirmed.
<u>Central Services:</u>					
- Reviews to be completed	-0.105	A range of services will be reviewed for quality, impact and value for money.	Will not achieve in 2020-21	0.000	QA matrix in place to determine benefit of relevant SLA's. Review of services and support functions to be scoped for financial viability.
Forecast impact of interventions	-1.287			-0.286	

HNB Budget – medium term cost summary

Item	2019-20 £m	2020-21 £m	2021-22 £m	2022-23 £m	Comment
<u>Income:</u>					
1 Current HNB DSG	15.790	15.537	17.008	18.369	
2 BFC academy places deduction	0.326				
3 Anticipated change		1.472	1.361	0.735	2022-23 change assumed at 4% in line with 2019-20 increase in school NFF. 2020-21 and 2021-22 estimated actuals.
4 Total DSG income to BFC	15.464	17.008	18.369	19.104	
5 Change (cash)		9.5%	8.0%	4.0%	
<u>Expenditure:</u>					
6 Base budget / cost forecast	15.464	18.684	21.828	23.445	Builds in prior year over spend as an ongoing pressure. 2020-21 base includes £1.677m additional funds for forecast over spending.
7 Actual over spend	3.220				
8 Provision for inflation			0.327	0.352	Assumed at 1.5% per annum
9 Other pressures		3.144	1.289	1.309	Current growth trend on placements
10 - <i>estimated growth in demand</i>			54	54	Retains 7.5% growth assumption from 3 year average. 2019-20 was 16%.
11 Forecast spend - no interventions	18.684	21.828	23.445	25.105	
12 Change		3.144	1.617	1.660	
		16.8%	7.4%	7.1%	
<u>Net funding gap:</u>					
13 Annual	3.220	4.678	5.076	6.001	
14 DSG reserve 31/3/20	-3.079	0.141			
15 Cumulative	0.141	4.819	9.895	15.896	

**2020-21 PROVISIONAL BUDGET MONITORING STATEMENT FOR THE
SCHOOLS BUDGET AS AT THE END OF AUGUST 2020**

Service Area	Approved Budget			Estimated Variance			Note
	Spend	Income	Net	Under spending	Over spending	Net variance	
	£000	£000	£000	£000	£000	£000	
Schools Block							
<u>Delegated and devolved funding:</u>							
Delegated Mainstream School Budgets	85,169	0	85,169	0	0	0	
School Grant income	0	-12,313	-12,313	0	0	0	
Schools Block	85,169	-12,313	72,856	0	0	0	
<u>LA managed items:</u>							
Retained de-delegated Budgets:							
<i>Behaviour</i>	253	0	253	-21	14	-7	
<i>Schools in Financial Difficulty</i>	201	0	201	0	0	0	
<i>Official Staff Absences</i>	350	0	350	0	0	0	
<i>English as an Additional Language</i>	104	0	104	-11	17	6	
<i>PRC / Licence Fees / FSM checking</i>	495	0	495	0	2	2	
Combined Service Budgets:							
<i>Education Attainment and School Transport for LAC</i>	176	0	176	-7	0	-7	
<i>Family Intervention Project / Domestic Abuse</i>	106	0	106	-4	0	-4	
<i>CAF Co-ordinator</i>	42	0	42	-3	3	0	
<i>SEN Contract Management</i>	33	0	33	0	0	0	
<i>Education Health / Sport</i>	48	0	48	0	0	0	
Statutory and Regulatory Duties	501	0	501	0	0	0	
Other Schools Block provisions and support services	768	0	768	-12	0	-12	
LA managed items:	3,077	0	3,077	-58	36	-22	
Sub total Schools Block	88,246	-12,313	75,933	-58	36	-22	
High Needs Block							
Delegated Special Schools Budgets	4,486	0	4,486	0	97	97	
Maintained schools and academies	4,459	0	4,459	-103	1,042	939	
Non Maintained Special Schools and Colleges	6,133	0	6,133	0	1,457	1,457	
Education out of school	1,690	0	1,690	-2	411	409	
Other SEN provisions and support services	1,917	0	1,917	-96	50	-46	
Sub total High Needs Block	18,685	0	18,685	-201	3,057	2,856	
Early Years Block							
Free entitlement to early years education	7,191	0	7,191	-6	17	11	
Other Early Years provisions and support services	370	1	371	-19	0	-19	
Sub total Early Years Block	7,561	1	7,562	-25	17	-8	
Dedicated Schools Grant	0	-100,503	-100,503	0	0	0	
Contribution from BFC	253	0	253	0	0	0	
TOTAL - Schools Budget	114,745	-112,815	1,930	-284	3,110	2,826	
<u>Note on Unallocated Schools Budget balance:</u>							
Opening unringfenced balance on Schools Budget						141	
Budgeted over spending on the HNB						1,536	
2020-21 forecast in-year net variance						2,826	
Net forecast deficit at 31 March 2020						4,503	

**SEND Commissioning Plan for
Children and Young People**

2020-2022



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Summarising our Priorities

An evidence base has provided the foundation for our priorities. These are intended to significantly change the landscape of strategic commissioning of SEND provisions for Bracknell Forest children and young people. The full priorities are outlined on page 14 in the key areas of:

- Early intervention and information availability.
- Targeted support for alternative provision and school access to provisions.
- Specialist support for complex placements and children looked after.
- Comprehensive pathways for increasingly prevalent needs: Autism Spectrum Disorder (ASD) and Social, Emotional and Mental Health (SEMH).

Overlapping areas of work

Since 2015, NHS England has asked Clinical Commissioning Groups (CCGs) to develop local transformation plans for Children and Young People's Mental Health (CYPMH). Through this work there has and continues to be additional investment in resources to improve children and young people's mental health and wellbeing across the "whole system" including Child and Adolescent Mental Health Services (CAMHS).



The Plan

This commissioning plan will clearly set out our strategic intentions to achieve effective commissioning for children and young people with Special Education Needs and Disability (SEND) and their families and carers. Children with SEND require support from a range of agencies and so Bracknell Forest Council has developed this plan through workshops and consultation. Included were representatives across children's services, adults and children's social care, schools and critically, our health partners in the East Berkshire Clinical Commissioning Group. Parents, carers, children and young people have all been vital in developing our understanding of provisions and establishing our priorities for action.

This plan is based on a foundation of evidence including a SEND needs and sufficiency analysis and alternative provision review. It is further guided by the requirements of the SEND Code of Practice: 0-25 years and the Children's and Families Act. Our ambitious priorities provide a clear direction for the activities of the commissioning team over the next two years.

This plan aims to:

- Provide an **evidence based** approach to identifying and prioritising the key commitments for commissioning.
- Provide a framework for **effective joint working** across education, health and social care at all stages of the commissioning cycle.
- Identify practical **targets and actions** to develop SEND provisions and commissioning practice across all levels of support.

Our vision for children with SEND is the same as for all children and young people – that they achieve well in their early years, at school and in college, and lead happy and fulfilled lives. This means that they fulfil their ambitions and the best possible educational and other outcomes, including employment and independent living where possible.

Principles

In 2014, the new SEND Code of Practice and Children and Families Act was introduced. Both emphasise the importance of joint planning and commissioning as well as the involvement of young people and their families. These requirements are reflected in the principles of our approach to commissioning provisions for SEND.

Our commissioning principles are to:

1. **Involve** children and young people and their families to develop inclusive services in line with the SEND Strategy.
2. Be **outcome focused** to drive greater value for money, choice, quality and capacity of SEND provisions within Bracknell Forest, helping to reduce out of borough placements.
3. Encourage **inclusion** in a range of settings for all children and young people.
4. Ensure that services are available to support children and young people through all **transitions** points including the pathways to adulthood and independence.



Context

Commissioning in Bracknell Forest

Commissioning is the process of understanding the local needs and resources, sourcing the most appropriate provisions and monitoring this in a structured way. Commissioning at Bracknell Forest Council is evolving with a newly created People Commissioning Service. This has provided dedicated capacity to developing a robust approach to commissioning. The service has teams for Children's and Adults strategic commissioning as well as Integration.

The ambition is to be outcomes focused, to provide a range of high quality services and to deliver value for money. At all stages of commissioning, the inclusion of service users is central to delivering the outcomes. The focus on all life stages is key on helping to ensure good transitions throughout pathways.

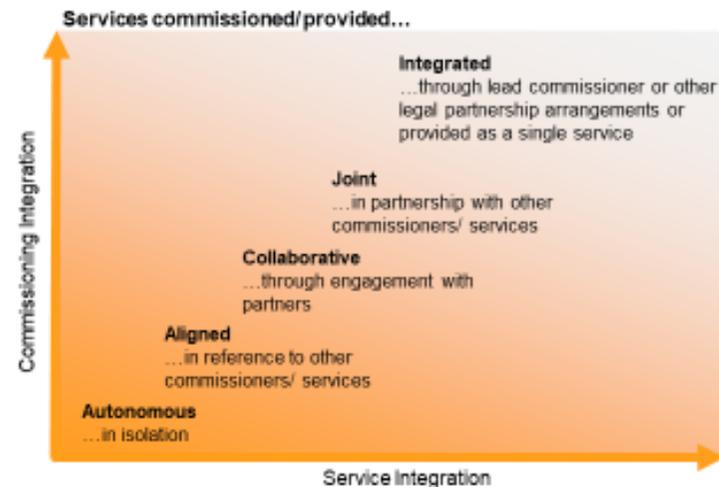
SEND support and placements are currently commissioned in a range of ways:

- Across the East Berkshire locality for services such as occupational therapy
- Spot purchased educational residential placements
- Jointly commissioned across partners e.g. Sensory needs and equipment
- The children's community 0-19 service commissioned by Public Health

Our Ambition for Commissioning Integration

Our ambition is to commission jointly, where appropriate, across partners and stakeholders in education, health and social care to deliver our vision. Services in Bracknell Forest are currently delivered and commissioned in a range of ways and this plan helps us to set out joint priorities and provide a route-map for how we will further develop through collaboration and joint working. This shows a recognition and support for integrated pathways and services that ensure the right care is offered at the right time and place.

As part of strengthening our approach to SEND services we are working with partners to develop our governance. This will provide the framework for delivering improvements to SEND commissioning.



Joint Working and Engagement

Joint Working

Working jointly with health, education and social care partners is vital to delivering comprehensive SEND provisions. This ensures the most effective response to a child's needs can be identified. It allows us to better understand the needs and the market to maximise the impact of our resources. Through working jointly and commissioning services together, we aim to develop a holistic approach to supporting children or young people, and to develop more efficient and effective service provisions.

A SEND Joint Working Agreement has been developed to outline the working relationship between the NHS East Berkshire Clinical Commissioning Group (CCG) and the local authority. The agreement operates across East Berkshire. This will add strength to the future joint working arrangements.

Engagement has taken place with a variety of partners and service users at different stages of the plan development. Outlined are the participants involved and the subsequent outcomes that have supported in the creation of this plan.

	Groups	Outcomes
Evidence for Plan	Data was provided from specific teams for exclusion information, financial trends and through the specialist provisions at College Hall and Kennel Lane School. Nationally validated data was also used where possible, sourced from the SEN2 return and the schools census.	Key areas of growing demand were identified. Further detail is provided in the following pages however the key themes were the growing pressure on services for children and young people with: <ul style="list-style-type: none"> • ASD; Autism Spectrum Disorder • SEMH; Social Emotional and Mental Health needs • Alternative Provision needs
Providers Engagement	During the early development of this plan we sought to understand the current experience of sourcing SEND provisions. Participating groups were also asked to consider how commissioning could better support their work. These discussions took place with the following groups: <ul style="list-style-type: none"> • Internal teams such as education services, adults and children's social care. • Headteachers through the Schools Forum • The CCG 	A number of priorities were identified including: <ul style="list-style-type: none"> • Increasing consistency for sourcing and monitoring placements, particularly for out of borough placements. • Increasing the scope of provisions available, particularly for more specialist needs such as SEMH. • Improving clarity for available provisions and how these can be commissioned. • Developing locally available provision including improving the opportunity to place primary school pupils at specialist provisions such as Kennel Lane School, College Hall or suitable alternatives.
User Engagement	We worked with the Parent Carer Forum, mainstream and special school pupils and young people with the CCG to understand the experience of children and young people and their views on what is important to them about the support that they receive. This helped us to identify further gaps in provision and will inform how future provisions are established.	We identified the following as some of the most important things to children and young people and their parents and carers: <ul style="list-style-type: none"> • Focusing on early intervention for needs. • To have choices and be involved in decisions as an equal. • To have all the information available and accessible including information for suitable provisions, transport policy, exclusions etc. Further extracts are provided in appendix A and B.

Currently Commissioned Services

A range of services are available to children and young people with SEND. These are commissioned by Bracknell Forest and partners to provide comprehensive support across different levels of need.

The next section of this plan identifies the currently available provisions at each level of need. It includes an overview of the services provided with further details in appendix C.

Universal services are available to the whole population. Targeted support and early intervention describes provisions available to children and young people who have some additional needs. Specialist support describes the available provisions for those with diagnoses or complex needs.



Commissioning responsibility for children's health and care services is currently fragmented which is why an integrated approach is being developed to reduce confusion, ensure oversight and provide assurance for all services for children and young people with SEND.

Current commissioning responsibilities are summarised as follows:

CCG	Bracknell Forest Council	NHS England
<ul style="list-style-type: none"> Anxiety and Depression Clinic (Reading University) Community Paediatric Nursing Services Community Paediatrics Continuing Health Care Specialist Community Nursing Service Health Needs of Looked After Children** Occupational Therapy* Physiotherapy Specialist Child and Adolescent Mental Health Services (CAMHS) Speech and Language Therapy* Wheelchair provision 	<ul style="list-style-type: none"> 0-19 Public Health Nursing Service Alternative Provision Approaching Adulthood Team Autism Outreach Services Behaviour Support Team Child Development Centre Children and young people sexual health services Children's centre provision Commissioning placements Occupational Therapy* Sensory Needs Support Short Breaks Speech and Language Therapy* Support for Learning Youth Health Champions 	<ul style="list-style-type: none"> Health Services for Young Offenders – Forensic CAMHS, Liaison and diversion. Immunisation and vaccination Specialist paediatric care Tier 4 CAMHS
Collaborative Commissioning <ul style="list-style-type: none"> Autism and ADHD pre/post assessment support CAMHS (early intervention – Getting Help Teams, in place April 2020 – fully operational September 2020) Digital online emotional health support and counselling Youth Counselling Bracknell Forest Information, Advice and Support Service (IASS) 		

*Part commissioned by the LA and NHS East Berkshire Clinical Commissioning Group (see appendix C)

**Health needs of Children Looked After are also provided via school nurses and commissioned through Public Health

Universal Commissioned Support



In Bracknell Forest there are many services which are part of the Local Authority offer for Universal Support to Children and Young People and their families with SEND. The in-house services include Family Hubs and these are critical to providing early identification and support for early years. However, there are additional services that are commissioned, these provide information, advice and guidance and there is a particular focus on emotional well-being and mental health. Many of these are commissioned through Public Health and NHS East Berkshire Clinical Commissioning Group and include a comprehensive 0-19 offer as well as a developing digital offer for emotional wellbeing and mental health.

These Universal Services include:

0-19 Public Health Nursing Service

The health visiting service includes health and development reviews, screening, immunisations, social and emotional development, support for parenting and health promotion. The school health service works in partnership with children, young people and their families across schools and community settings to ensure their physical and mental health needs are supported. An enhanced support is offered for those most in need working closely with other services. (This service is provided by BHFT)

Digital Online Emotional Health Support and Counselling *

There is an online counselling and emotional wellbeing platform for those aged 11 to 19 years jointly commissioned between the Local Authority and the NHS East Berkshire Clinical Commissioning Group (CCG). By April 2019 over 3,300 children and young people had registered to this service since April 2015. (This service is provided by Kooth).

THRIVE! is a new children and young people's health and wellbeing website that brings together information on children and young people's physical, mental and social health and wellbeing.

Youth Counselling*

The youth counselling service provides confidential one-on-one, face-to-face counselling in the community in Bracknell Forest for children and young people aged 12–19. In addition, the service works with a small number of young adults up to the age of 25 and with parents, carers and those who support young people in different ways. (This service is provided by Youthline)

Autism and ADHD Pre/Post Assessment Support*

The Autism and ADHD Pre/Post Assessment Support provides a range of elements of support covering early signs, pre and post assessment of Autism and ADHD for children and young people age 0-25. The service will provide a range of opportunities including a navigating/signposting role, support workshops for families and contributing to the development and updating of an autism toolbox. Bracknell Forest also offer support to Adults post-diagnosis.

Youth Health Champions

The Youth Health Champions programme is accredited by the Royal Society of Public Health. The lead for the organisation is Bracknell Forest Council Public Health and this is currently delivered in 3 Bracknell Forest schools, by September 2020 this will be delivered to all Bracknell Forest schools.

The project aims to:

1. Deliver a young people's led peer education emotional wellbeing programme
2. Form a co-production network to support peer engagement, communication and service design and commissioning

* Some of these services will expand into Early Intervention work

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Early Intervention and Targeted Support



The commissioning of early intervention and targeted support is currently complex across education, health and social care. There are a range of established services for children whose needs range from mild and moderate SEN through to those that may have EHCPs and includes short breaks, our equipment services and sensory needs consortium. There is an ambition to develop a more integrated approach with commissioning here across education and health – particularly around therapies and emotional well-being and mental health through our ambitious Local Transformation Plan.

Our Early Intervention and Targeted Support Services include:

Child Development Centre

The service supports children under 5 years old with additional needs. Services are tailored to meet the need of the child and family and include assessments, parent/carer groups, parent workshops, home visits and advice and guidance. Approximately 150 children access the service per year. Training for early years practitioners is also delivered, some co-delivered with health colleagues.

Sensory Needs Support

This service supports children and young people with sensory impairment to attend their local school. During the 2018-19 academic year, 98 Bracknell Forest pupils received support from the Sensory Consortium Service.

Short Breaks

Play and Leisure Scheme - A targeted Saturday and Holiday Club is provided for children and young people, aged 8-18, who have moderate to high needs and require significant support. Kids Play and Leisure Scheme organise 20 Saturday sessions and 40 Holiday sessions a year. From April 2019 - September 2019 a total of 49 children and young people attended at least one Saturday session and 85 children and young people attended holiday sessions.

Inclusion Fund - This service provides funding for 1:1 support at mainstream activities. It is available for children up to the age of 18 who reside in Bracknell Forest and would otherwise be prevented from taking part.

Getting Help Teams

Across Bracknell Forest through the Local Transformation Plan for Children and Young People's Mental Health (CYPMH) we are developing a more comprehensive CAMHS offer and investing additional funding into providing support earlier through dedicated mental Health Practitioners – through Getting Help Teams. These teams are employed by Berkshire Healthcare but will form part of the Early Help offer through Bracknell Forest Council.

The teams will offer interventions, advice and signposting, and supporting children, young people and families with getting help with emerging mental health difficulties. It will also help link families, professionals and local communities to risk support and getting more help from specialist mental health services when difficulties are acute, severe and/or enduring. The teams will be in place April 2020 and will be fully-operational by September 2020.



Specialist Services



Some specialist services are provided in-house, some are statutory through social care such as the Children's Behaviour Support Team. However there are other services commissioned that are not provided in-house which include:

Occupational Therapy

The community paediatric occupational therapy (OT) service is delivered across East Berkshire. This service has seen a large increase in referrals between 2014 and 2018 leading to longer waiting times for assessment. The increase in demand has been particularly prevalent for referrals as part of the EHC assessment process. (This service is provided by Berkshire Healthcare NHS Foundation Trust)

Physiotherapy

Specialists assess and treat children and young people who have difficulties that affect movement and physical development. The service is goal focused to develop gross motor skills, and provides advice on postural needs, mobility (including walking) and specialist equipment such as seating, standing equipment, mobility aids and splints. (This service is provided by Berkshire Healthcare NHS Foundation Trust)

Speech and Language Therapy

The service is based on an early intervention and a whole school approach. All schools receive training and input from the speech and language therapy services for speech, language and communication approaches. During the 2018-19 financial year, 257 children attended drop-in sessions at early help centres across the borough. (This service is provided by Berkshire Healthcare NHS Foundation Trust)

Future Integrated Therapy Arrangements

Therapies commissioning is complex and fragmented in parts with significant waits for some children and young people. There is a commitment across all East Berkshire partners to review and explore the development of an Integrated Therapies service across East Berkshire to modernise service delivery, improve quality and outcomes. Bracknell Forest Council is showing its commitment to this joint work by providing the lead resource to this project.

Specialist CAMHS

Berkshire Healthcare provide specialist child and adolescent mental health services. These include support, advice, guidance and treatment for children and young people (aged up to 18) with moderate/severe mental health difficulties, whose symptoms have a significant impact on their day-to-day lives. Usually, these symptoms will have been occurring over several months and will not have responded to interventions from prevention and early intervention services, such as youth counselling and behaviour support, evidence-based parenting or treatment from primary mental health practitioners. Children and young people (CYP) being seen by Berkshire Healthcare CAMHS will often need ongoing support from these and other services provided by the LA, alongside more specialist mental health care.

The Specialist CAMHS are made up of the following :

- Children, Young People and Families (CYPF) Health Hub (CAMHS Common Point of Entry, or CPE)
- CAMHS rapid response team (RRT) (crisis care)
- ADHD pathway
- Autism assessment team
- CBT service for anxiety and depression
- Community early intervention in psychosis (EIP) service
- Community eating disorders service (BEDS CYP)
- Locality specialist community team for young people with complex mental health difficulties

Dietetic Service

Specialist dietitians offer advice on feeding and nutrition for children who might not be able to eat all the nutrients they need. The service is commissioned by the Clinical Commissioning Group.

Alternative Provision



Alternative Provision

Alternative provision supports the duty that all children and young people have a right to 25 hours of education per week. It is education arranged by local authorities for pupils who, because of exclusion, illness or other reasons, would not otherwise receive suitable education. This takes place outside of mainstream settings.

A review was completed and to understand the current needs and practice for using alternative provisions within the borough. A wide range of actions were suggested within the review to develop provisions, this has been used to inform the commissioning priorities outlined in this plan.

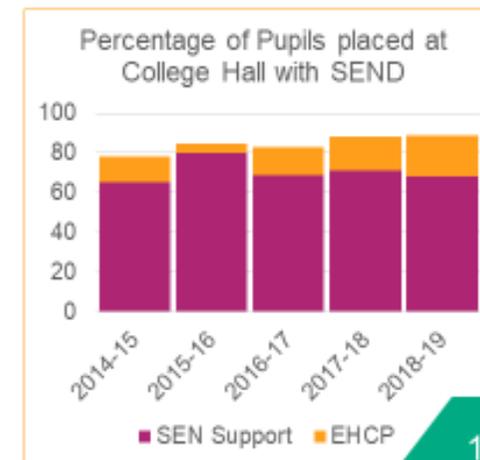
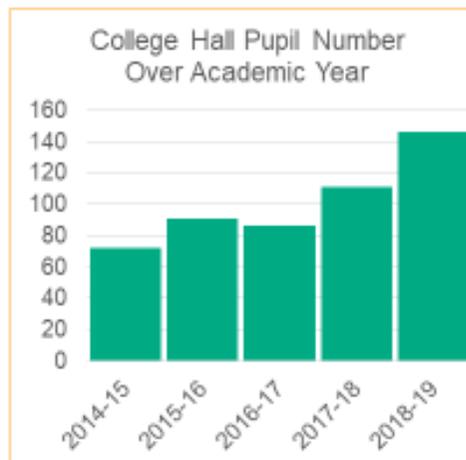
Several pressures on alternative provisions were identified including that College Hall is the only pupil referral unit within Bracknell Forest. Pupils were most likely to be referred for support in a managed move to prevent permanent exclusion. Mental health was also a likely reason for referral. 70% of placements at College Hall lasted between one term and three terms, with 30% of placements lasting more than four terms.

- Some of the key challenges identified for alternative provisions are:
- The rising demand for College Hall places
 - The lack of timely access to mental health support
 - The limited support for pupil reintegration
 - The increasing number of exclusions
 - The lack of specialist provision for children and young people with Social, Emotional and Mental Health needs
 - The current offer for support services from the council

Recommendations

The report identified the following actions as priorities across education and commissioning:

- Developing coherent Social, Emotional and Mental Health pathways
- Identifying needs early and consistently for SEN Support
- Understanding the changing needs of the cohorts to meet future demand
- Developing provisions for nursery and early years
- Developing post 16 provisions and pathways
- Developing relationships with other agencies such as health services/ CAMHS
- Reviewing the Published Admissions Number (PAN) for College Hall and relationship with Social, Emotional and Mental Health provisions



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Needs Analysis: EHCP Placements



SEND Needs and Sufficiency Analysis

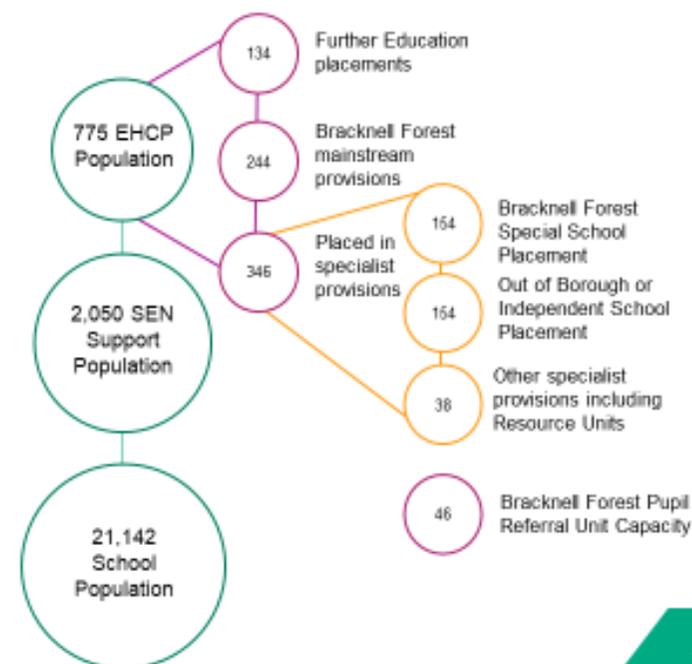
An analysis was completed to develop the understanding across the organisation and with our partners for the profile of SEND within the borough and the current placements of our children. The whole school population was considered in relation to SEND including children and young people with EHCPs, those who have recognised SEN but no formal assessment and the wider cohorts that may require alternative provision during their education. The [full analysis](#) can be accessed through our Local Offer page.

This identified a number of trends for areas of growth and cost increases resulting in several themes highlighted as particular pressures. These formed the basis for our commissioning priorities. A summary of the data within these key themes are:

EHCP Population	Autism Spectrum Disorder (ASD)	This group are proportionally larger in Bracknell Forest than the national average. There are no specialist resource provisions for primary school ASD. There are 25 children and young people living in other boroughs with ASD who attend Bracknell Forest schools.
	Social, Emotional and Mental Health (SEMH)	This group are proportionally larger in Bracknell Forest than the national average. Of children looked after pupils with an EHCP, half have the primary need of SEMH, increasing the complexity of need. Spend on SEMH provisions has increased by 83% in the last three years.
	Out of Borough	ASD and SEMH are the most common needs to be placed outside the borough. More than 50 pupils with an EHCP are placed across three out of borough schools. Spend has significantly increased along with associated transport costs.
SEN Support	SEN Support	Pupils identified for SEN support are disproportionately like to be excluded from their mainstream provisions. Specific Learning Difficulties (SPLDs i.e. dyslexia) are the most common secondary school need. Speech, Language and Communication Needs (SCLN) are the most common primary school need.

Summary of current SEND placements.

Children and young people with an EHCP are placed where the most appropriate level of support can be provided. The majority are located in specialist provisions. Limited provisions within the borough mean that many placements are commissioned externally.



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Needs Analysis: Placement Spend

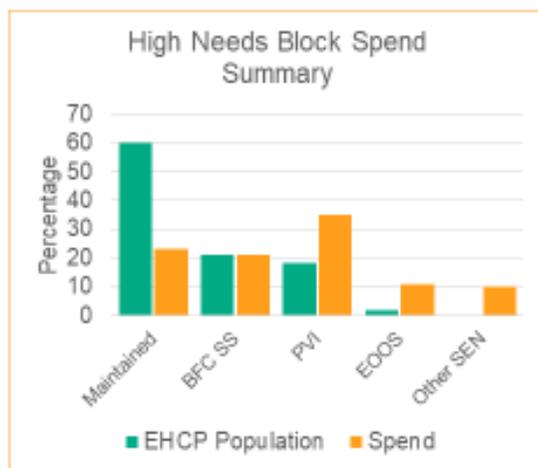
*Average expected placement cost based on provision type for EHCP children and young people in 2019-20



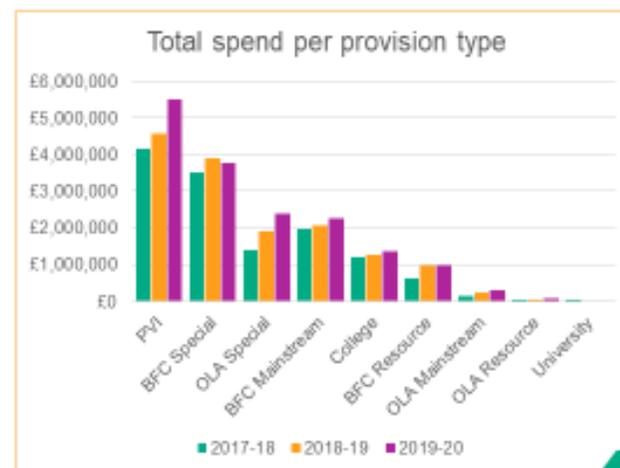
Understanding the costs for current provision

A large proportion of SEND services are funded through the High Needs Block. The High Needs Block is funding dedicated to education, support and services for Children and Young People with SEND. It covers the cost of placements for children and young people with an EHCP in addition to a range of services including for those who have been excluded, alternative provisions, home tuition and hospital education. It can also be used as "top-up" funding for children and young people with SEND as requested by mainstream schools.

The largest proportion of this spend is for placements at non maintained and independent special schools. These include many of the out of borough specialist placements. For each of these placements there is also an associated transport cost.



Bracknell Forest	Average cost per placement*
Mainstream	£11,300
Resource	£22,200
Special School	£24,400
Other Local Authority	
Mainstream	£10,900
Resource	£15,500
Special School	£29,900
Other providers	
Private, Voluntary and Independent	£53,200
Higher Education College	£13,300



Maintained: Maintained schools and academies

BFC SS: Bracknell Forest Special School

PVI: Non-maintained special schools or independent school

EOOS: Education Outside of School

Other SEN: and support services (usage numbers for EHCP population are not recorded)

See Glossary (Page 15) for acronyms

Next Steps for Commissioning

The data collected in the previous section has provided an overview of current provisions and needs which enables the identification of the new priorities. The priorities set out the direction for developing strategic commissioning over the next two years.

In order to deliver these priorities, the governance arrangements have also been considered. This will allow the effective delivery and monitoring of the priorities. An action plan will now be developed in consultation with key partners to prioritise resources.



Commissioning Priorities

Across all levels of support, we will deliver on our principles to establish clear transition planning for pathways to adulthood and post 16 placements. Services will be commissioned inclusively with the voice of children and young people.
 We will work with providers to create greater choice, value for money, quality and capacity of SEND provisions. Our contracts will be reviewed to ensure they align with the 0-25 age range defined in the SEND Code of Practice. The monitoring data received will be further developed to understand local services.

Universal Support

We will work collaboratively within Bracknell Forest Council and with partners to:

- Improve the information for families and schools on available provisions through the local offer webpage and through the commissioned information, Advice and Support Service (IASS).
- Review and develop our 0 - 19 health provisions.

We will work with providers to:

- Improve access, coverage and quality provision across universal services.

Early intervention and Targeted Support

We will work collaboratively within Bracknell Forest Council and with partners to:

- Develop commissioning to better equip schools with the skills to help SEN Support children and young people, working to promote inclusion and reduce escalation of needs.
- Review the information available to schools about the mechanisms for commissioning alternative provisions (AP).
- Review and explore options for the development of an East Berkshire Integrated Therapies service.
- Develop short breaks service and future commissioning.
- Develop the early help offer through provisions including the family hubs.

We will work with providers to:

- Develop a mixed market of provisions and expand the choice of AP providers for all age groups.
- Establish specifications with AP providers with clear routes for reintegration of children and young people to mainstream settings where appropriate
- Identify best practice for preventative and early support services.

Specialist Support

We will work collaboratively within Bracknell Forest Council and with partners to:

- Review residential placements for complex needs including those for children and young people under Child Protection or who are looked after.
- Review the transport arrangements and associated high costs for children primarily with EHCPs and support the work of the new Dynamic Purchasing system.

We will work with providers to:

- Develop the residential and support market in response to the emerging needs identified including SEMH and ASD.
- Explore effective routes to market for complex placements.

Defining new 0-25 pathways

Specific service pathways will be developed across all tiers for needs identified with significantly increasing prevalence and high placement costs.	Social, Emotional and Mental Health (SEMH)	This will include developing options for early help and specialist support for Children Looked After. The approach for commissioning SEMH placements outside the borough will be reviewed. Commissioning will support the development of in-borough specialist provisions for SEMH where currently there are none.
	Autism Spectrum Disorder(ASD)	This will include developing support for families and schools prior to a diagnosis or EHCP. Developing additional capacity for primary school ASD provisions will be explored, meeting the existing gap. The approach for commissioning the high number of ASD placements outside the borough will be reviewed.

Glossary

Term	Definition	Term	Definition
AP	Alternative Provision	OLA	Other Local Authority
ASD	Autism Spectrum Disorder	PD	Physical Disability
BFC	Bracknell Forest Council	PMLD	Profound and Multiple Learning Difficulty
CAMHS	Child and Adolescent Mental Health Services	PVI	Private, Voluntary and Independent [schools]
CCG	Clinical Commissioning Group	SEMH	Social, Emotional and Mental Health
EHCP	Education, Health and Care Plan	SEND	Special Educational Needs and Disability
EOOS	Education out of School	SLCN	Speech, Language and Communication Need
HI	Hearing Impairment	SLD	Severe Learning Difficulty
MEDICAL	Medical Needs (i.e. diabetes)	SPLD	Specific Learning Difficulty
MLD	Moderate Learning Disability	VI	Visual Impairment

Appendix A – Extracts of Feedback from Children and Young People



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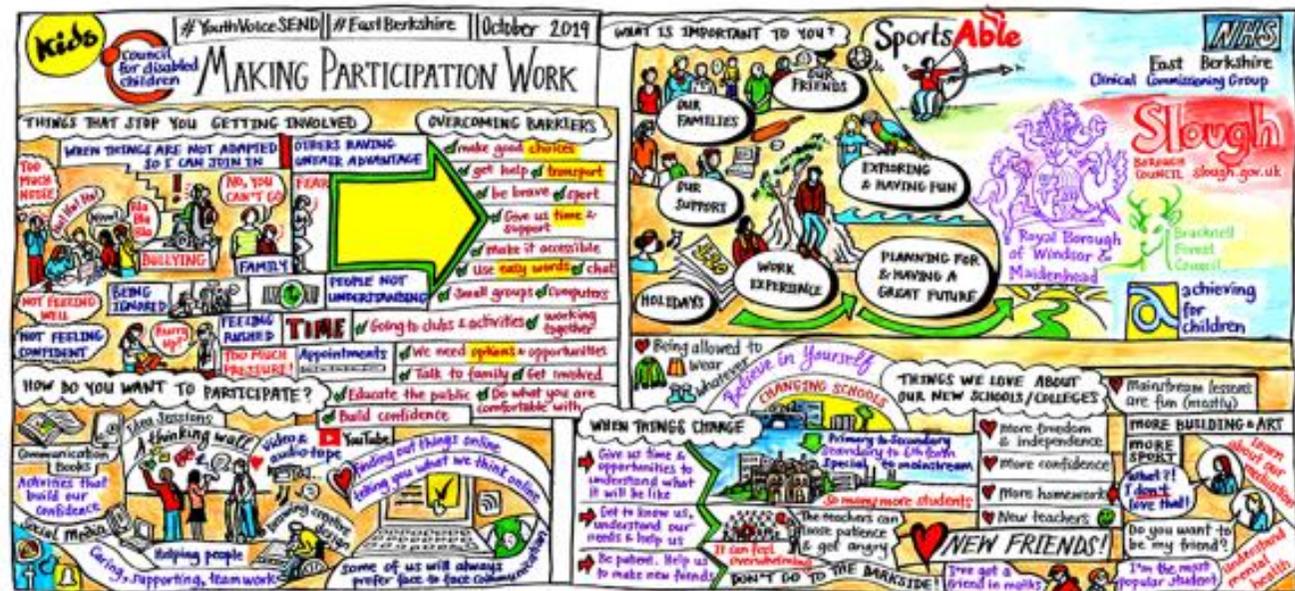
Appendix B – Joint SEND Participation Event Outcomes

October 2019

Local young people with Special Educational Needs and Disabilities (SEND) came together, supported through their schools to attend a local event planned by Young Event Makers, who are local young people that are really passionate about helping other young people from schools really grasp the idea of participation and voicing change.

The event was facilitated by the children's charity Kids and the aim of the event was to gather feedback from SEND young people on how they'd like to shape services and policy decisions. A number of local professionals from across health and local authorities were also present to listen to views of the young people.

The event was hosted by NHS East Berkshire Clinical Commissioning Group working in partnership with Bracknell Forest Council, Achieving for Children (Royal Borough of Windsor and Maidenhead), Slough Borough Council and Berkshire Healthcare NHS Foundation Trust.



Making Participation Work in East Berkshire, Achieving for Children, Kids, Council for Disabled Children, SportsAble, October 2019. Graphic facilitation by www.pernmentonca.com @MendoncaPen

As a result of this event NHS East Berkshire has set up a participation-leads network which will meet biannually and allow all the respective leads to share plans in relation to participation to ensure a more joined-up approach across the system. This includes professionals who are the leads for Bracknell Forest Youth Council, Children in Care Council, Young Health Champions, Berkshire Healthcare NHS Foundation Trust.

Appendix C – Current Commissioned Pathway for 0-25 Services

Jointly Commissioned Services

	0-5 years (Early Years)	5-19 Years (Mainstream School)	Special Schools	Home Schooled and Independent Schools	Delivered by
Occupational Therapy 0-19 years	Initial assessment and various packages of intervention according to individual need.	Initial assessment and various packages of intervention according to individual need.	Whole school approach	Independent School Service - one off initial assessment, advice and strategies. Home Schooled Service for 0-19 years	Berkshire Healthcare (NHS) Foundation Trust
Speech and Language 0-25 years	Drop-ins at Children's Centres. Speech and Language Therapy post in-house to deliver training to Early Years staff. BHFT Early Communication Team and BHFT Complex Needs Team	Whole school approach for list of named mainstream schools and resources (up to 25 years)	Kennel Lane School – whole school approach	Independent School Service - one off initial assessment, advice and strategies	Berkshire Healthcare (NHS) Foundation Trust

		Ages covered	Delivered by
0-19 Public Health Nursing Service (Health Visiting 0-5 years and School Nursing 5-19 years)	<ul style="list-style-type: none"> Mandated health visiting checks for the mother and child in line with the healthy child programme and the use of evidenced based tools and assessments. Core school nursing service – routine screening, health needs assessments, targeted support School nurse offer includes Pupil Referral Unit provision. A school nurse is co-located within the Youth Offending team. 	Ages 0-19 years	Berkshire Healthcare (NHS) Foundation Trust
Digital Online Emotional Health Support and Counselling	<ul style="list-style-type: none"> Online self-referral access to counselling and wellbeing support. 	Ages 11-18, up to 25 for people with SEND and Care Leavers	Kooth (Xenzone)
Youth Counselling	<ul style="list-style-type: none"> The youth counselling service provides confidential one-on-one, face-to-face counselling in the community in Bracknell Forest for children and young people 	Ages 12-25	Youthline
Bracknell Forest Information, Advice and Support Service (IASS)	<ul style="list-style-type: none"> Provides information, advice and support to children and young people and their parents/carers about matters relating to SEND. The service is free and confidential which is run at arms-length from the Local Authority and Clinical Commissioning Groups. Jointly commissioned by Education, Health and Social Care. Part funded by Council for Disabled Children. 	Ages 0-25	Bracknell Forest Council



Appendix C – Current Commissioned Pathway for 0-25 Services

CCG Commissioned Services

The main services can be seen below, however there is a more comprehensive list on page 5.

	0-5 years (Early Years)	5-19 Years (Mainstream School)	Special Schools	Home Schooled and Independent Schools	Delivered by
Physiotherapy 0-19 years	Initial assessment and various packages of intervention according to individual need.	Initial assessment and various packages of intervention according to individual need.	Kennel Lane School - whole school approach	Independent School Service - one off initial assessment, advice and strategies. Additional Home Schooled Service	Berkshire Healthcare (NHS) Foundation Trust

		Ages covered	Delivered by
Specialist CAMHS	<ul style="list-style-type: none"> Children and young people psychological liaison can support under 5s in an acute setting. A range of specialist services support children, young people and adults up to age 25. This can also include acute settings. 	0-25 years	Berkshire Healthcare (NHS) Foundation Trust
Specialist Children's Nursing Service	<ul style="list-style-type: none"> This service provides care and support for children and young people with complex health needs and learning difficulties. The provide respite care, community paediatricians and specialist nursing services. The team also support, advise, and provide training for parents and carers to meet the needs of their child at home, in respite and in educational settings. 	0-19 years	Berkshire Healthcare (NHS) Foundation Trust
Specialist Dietetic	<ul style="list-style-type: none"> Support pupils who have a range of issues affecting their eating and drinking; as well as their families, carers and school staff. 	0-19 years	Berkshire Healthcare (NHS) Foundation Trust

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Appendix C – Current Commissioned Pathway for 0-25 Services

Bracknell Forest Services

		Ages covered	Delivered by
Approaching Adulthood Team	<ul style="list-style-type: none"> Assessment of social care support required for adulthood and appropriateness for adults services. 	14-19 years	Bracknell Forest Council
Autism Outreach Service	<ul style="list-style-type: none"> Advisory Support Service from specialist staff. 	5-19 years	Bracknell Forest Council
Behaviour Support Team	<ul style="list-style-type: none"> Access to Specialist consultation, training and direct work with pupils. 	5-19 years	Bracknell Forest Council
Child Development Centre	<ul style="list-style-type: none"> Support for families through multi-professional assessments, support groups, workshops, home learning and advice. 	0-5 years	Bracknell Forest Council
Sensory Need Support	<ul style="list-style-type: none"> Access to a range of sensory specialist skills and expertise including resource base Special Schools have access to Visiting Teacher Service with half termly visits from HI and VI Specialist Teacher. 	0-19 years	Sensory Consortium Service – hosted at RBWM
Short Breaks	<ul style="list-style-type: none"> Inclusion fund to support attendance at mainstream activities. Leisure scheme for children and young people with complex needs. 	3-18 years	Inclusion fund: Various Providers Leisure Scheme: Kids
Support for Learning	<ul style="list-style-type: none"> The Support for Learning Service provides a team of specialist teachers who are available to assess and directly teach children with special educational needs. 	5-19 years	Bracknell Forest Council

SEND Commissioning Action Plan – 2020-22

1 VERSION: 2.0 (UPDATED SEPTEMBER 2020)

2 SUMMARY OF SEND COMMISSIONING PLAN PRIORITIES

PRIORITY	TASKS
1. Review governance and decision-making around the current SEND panel processes, intervention hub and high needs funding allocation	<ul style="list-style-type: none"> a) Formal consultation with stakeholders regarding proposed changes to SEND decision-making processes / intervention hub / high needs funding levels and governance b) Refine and develop the proposals based on feedback from consultation to develop a final set of proposals c) Gain appropriate approvals and proceed towards phased implementation of the agreed proposals from September 2021
2. Developing the market for SEND / Alternative Provision (AP) & Support	<p>SEND Provision</p> <ul style="list-style-type: none"> d) Launch Expression of Interest (EOI) for primary age ASD specialist resourced provision e) Launch Statutory Consultation Process for approved sites f) Implementation– primary age ASD specialist resourced provision g) Start-Up phase – Launch new provisions <p>Alternative Provision (AP):</p> <ul style="list-style-type: none"> h) Establish specifications with AP providers with clear routes for reintegration of children and young people to mainstream settings where appropriate i) Review the information available to schools about the mechanisms for commissioning alternative provisions (AP)

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	<ul style="list-style-type: none"> j) Review residential placements for complex needs including those for children and young people under Child Protection or who are looked after k) Explore effective routes to market for complex placements
<p>3. Creating a level playing field for inclusion & Supporting Continuing Professional Development</p>	<ul style="list-style-type: none"> l) Develop commissioning to better equip education providers with the skills to help SEN Support children and young people, working to promote inclusion and reduce escalation of needs m) Improve access, coverage and quality provision across universal services n) Define new 0-25 pathways - Develop new provision to fill identified gaps in the market in response to the emerging needs identified including Social Emotional & Mental Health difficulties (SEMH) and Autism Spectrum Disorders (ASD)
<p>4. Preparation for Adulthood</p>	<ul style="list-style-type: none"> o) Work with multi-agency partners develop a wider range of robust Preparation for Adulthood pathways, including improved access to health, independent living and supported employment options to ensure young people with SEND make successful transitions to adult life
<p>5. Joint Commissioning</p>	<ul style="list-style-type: none"> p) Develop a jointly agreed and co-produced approach to commissioning services, across health, social care and education reflecting best practice <ul style="list-style-type: none"> i. Review and develop Bracknell's 0 - 19 health provisions ii. Review and explore options for the development of an East Berkshire Integrated Therapies service
<p>6. Early Help & Short Breaks</p>	<ul style="list-style-type: none"> q) Identify best practice for preventative and early support services r) Develop the early help offer through provisions including the family hubs s) Develop short breaks service and future commissioning

1 BRACKNELL FOREST - SEND COMMISSIONING ACTION PLAN

7. SEND Local Offer & Information, Advice and Support Service (IASS)

t) Improve the information for families and schools on available provisions through the local offer webpage and through the commissioned Information, Advice & Support Service (IASS)

3 SEND COMMISSIONING PLAN ACTIVITIES

1. Review & Reform governance and decision-making around the current SEND panel processes, intervention hub and high needs funding allocation

PRIORITY	ACTIVITIES	LEAD / KEY STAKE-HOLDERS	TIMETABLE & MILESTONES	OUTCOMES
a) Formal consultation with stakeholders regarding proposed changes to SEND decision-making processes / intervention hub / high needs funding levels and governance	See detail in embedded document here:  High Needs Funding Reform	Service Lead: SEN and Inclusion & Paul Clark	Autumn 2020 to Spring 2021	Final set of proposals with consensus and agreement on adoption
b) Refine and develop the proposals based on feedback during consultation to develop a final set of proposals for presentation to Schools Forum	Circulation of suite of documents as above accompanied by workshops / meetings / online consultation to capture feedback leading to further refinement of proposals	Service Lead: SEN & Paul Clark	April 2021	Final set of proposals with consensus and agreement on adoption
c) Proceed towards phased implementation of the agreed proposals	Indicative allocations against new high needs bandings issued to Providers New Banding System comes into force – Transitional Protection arrangements* for Special Schools / PRU / Specialist Settings	Service Lead: SEN and Inclusion & Paul Clark	April 2021 September 2021	Final approved BFC model of SEND decision making, high needs funding matrix, panel and placement processes and agreed timescales for implementation

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1 BRACKNELL FOREST - SEND COMMISSIONING ACTION PLAN

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2. Developing the market for SEND / Alternative Provision (AP) & Support				
PRIORITY	ACTIVITIES	LEAD / KEY STAKE-HOLDERS	TIMETABLE & MILESTONES	OUTCOMES
2f) SEND Development Programme				
d) Launch Expression of Interest (EOI) for primary age ASD specialist resourced provision	<ul style="list-style-type: none"> Publication of EOI - 9th October 2020 Schools / Academies submission of bids – Deadline 20th November 2020 Selection & award of successful bidders – by 4th December 2020 	Emma Ferrey Kashif Nawaz Schools Finance	Autumn Term 2020	Sites and schools identified for new SEN Resourced Provision
e) Launch Statutory Consultation Process for approved sites	<ul style="list-style-type: none"> Following DfE guidelines for prescribed alterations if maintained school, similar process if academy - 6 week consultation period – 11th December to 22nd January (allowing 2 week break over Xmas) Post consultation review and decision – early February 2021 SLA awarded and signed by end of February 2021 	Emma Ferrey	Spring Term 2021	Consultation complete and SLAs awarded
f) Implementation & Launch	<ul style="list-style-type: none"> Potential adaptations or minor capital works Staff recruitment & development of policies and procedures Launch dates tbc – potential for transition planning to commence after Easter 2021 Opening dates no later than September 2021 	Emma Ferrey	Launch by September 2021	Sites prepared and ready to open by September 2021
g) Start-Up	<ul style="list-style-type: none"> Provide start-up support and advice to settings opening the 	Mandy	Between	Schools setting up

1 BRACKNELL FOREST - SEND COMMISSIONING ACTION PLAN

<p>phase – Launch new provisions</p>	<p>new SEN / AP provisions as set out in the Service Level Agreement / Contract</p> <ul style="list-style-type: none"> ○ Start-up support to continue for 12 months from initial opening. 	<p>Wimbush/E PS</p>	<p>September 2021 to July 2022 - Depending on individual project timetable</p>	<p>new SEND provision feel well supported and confident in the process.</p>
<p>2g) Developing the market for SEND / Alternative Provision (AP) & Support</p>				
<p>h) Establish specifications with AP providers with clear routes for reintegration of children and young people to mainstream settings where appropriate</p>	<ul style="list-style-type: none"> ○ Build on the work of the AP review to establish the Quality Assurance framework for AP provision in use by the area's schools ○ Development of the SEMH Hub to inform best practice and enhance the offer of outreach to the area's schools 	<p>TBC</p>	<p>2020-21</p>	<p>Increased clarity around support service offer between schools and from the council.</p> <p>Improved success rates around pupil reintegration to mainstream.</p>
<p>i) Review the information available to schools about the mechanisms for commissioning alternative provisions (AP)</p>	<ul style="list-style-type: none"> ○ Continue to develop and enhance the AP commissioning Framework building on the existing 'Can-Do' structures 	<p>TBC</p>	<p>Autumn Term 2020</p>	<p>Ensure more consistency across BF for pupils accessing AP and minimise use of provision not on QA framework</p>

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<p>j) Review residential placements for complex needs including those for children and young people under Child Protection or who are looked after</p>	<ul style="list-style-type: none"> ○ Finalise EHCP Annual Review process with regards to LA involvement and monitoring and quality assurance of provision for the most vulnerable learners ○ Agree prioritisation matrix for EHCP Annual Reviews to identify the most vulnerable pupils including LAC and CYP under Child Protection) ○ Develop integrated approach incorporating feedback from EHCP annual reviews into commissioning cycle to inform transition planning and development of provision 	<p>AR and placement monitoring officer</p>	<p>Spring Term 2021</p>	<p>Establish improved integrated approach to EHCP Annual Reviews for complex placements to ensure these provide VFM and the best outcomes for CYP</p>
<p>k) Explore effective routes to market for complex placements</p>	<ul style="list-style-type: none"> ○ Engage with Health and Social Care colleagues locally to explore current arrangements as well as plans / options and appetite for collaboration ○ Engage with Sub-Regional partners (neighbouring LAs) to explore plans and options and appetite for collaboration ○ This will include an options appraisal regarding provider frameworks including sub-regional models, Dynamic Purchasing Systems as well as block contracts with volume providers ○ The approach for commissioning SEMH placements outside the borough will be reviewed. ○ The approach for commissioning the high number of ASD placements outside the borough will be reviewed 	<p>TBC</p>	<p>Spring Term 2021</p>	<p>Establish improved integrated commissioning approach to complex placements to ensure these provide VFM and the best outcomes for CYP. Reduction in volume of inappropriate placement in independent sector</p>

3. Creating a level playing field for inclusion & Supporting Continuing Professional Development				
PRIORITY	ACTIVITIES	LEAD / KEY STAKE-HOLDERS	MILESTONES	OUTCOMES
l) Develop commissioning to better equip education providers with the skills to help SEN Support children and young people, working to promote inclusion and reduce escalation of needs & m) Improve access, coverage and quality provision across universal services	Launch of new SEND system including Provision Matrix (under priority activity 1) as part of wider changes to SEND system setting out expectations as to what schools in Bracknell Forest offer to learners with Special Educational Needs and Disabilities (SEND). The document sets out what is available at: <ul style="list-style-type: none"> i. Universal Provision ii. Targeted Provision (SEN Support) iii. High Needs Provision Providing a foundation for all stakeholders ensuring consistency and transparency across BF. 'My Support Plan' will be implemented Autumn 2020 to support early identification and ensure support is provided and outcomes monitored	Service Lead: SEN Mandy Wimbush	Autumn Term 2020	~The document will help parents understand what schools will be doing and help SENCOs in schools think about what extra support might be relevant for learners who are not progressing at the rate they would expect. ~Clarity for all stakeholders as to what schools and other settings should provide.
n) Defining new 0-25 pathways - Develop new provision to fill identified gaps in the market in response to the emerging needs	<ul style="list-style-type: none"> o SEMH Pathway <ul style="list-style-type: none"> ▪ Work with Intervention Hub panel and other stakeholders including Clinical Commissioning Group to identify emerging themes in good practice and areas for development. ▪ Review existing CAN DO platform and outreach 	Principal Educational Psychologist (PEP)	Development process: Autumn 2020 - Spring 2021 Pathway	~Clear SEMH Pathway established with appropriate provision and support in place to

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3. Creating a level playing field for inclusion & Supporting Continuing Professional Development				
PRIORITY	ACTIVITIES	LEAD / KEY STAKE-HOLDERS	MILESTONES	OUTCOMES
identified including SEMH and ASD.	<p>offers from College Hall and Behaviour Support Team to identify strengths, weaknesses gaps and duplication</p> <ul style="list-style-type: none"> ▪ Factor in proposed offer from new Getting Help Teams (CAMHS), starting in January 2021 ▪ Plan development of SEMH Hub to complement and enhance current offer ▪ Identify models of good practice from elsewhere ▪ Draw these elements up into a draft SEMH pathway proposal and consult with stakeholders. ▪ Review feedback and implement 		<p>launch: Summer 2021</p> <p>SEMH Hub launch September 2021</p>	<p>minimise the proportion of learners facing exclusion or requiring specialist placements.</p> <p>~Reduction in proportion of inappropriate independent sector placements for EHCP learners</p>

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3. Creating a level playing field for inclusion & Supporting Continuing Professional Development				
PRIORITY	ACTIVITIES	LEAD / KEY STAKE-HOLDERS	MILESTONE S	OUTCOMES
(n) - As above.	<ul style="list-style-type: none"> o ASD Pathway <ul style="list-style-type: none"> ▪ Work with stakeholders including Autism Support Team and The Rise to identify emerging themes in good practice and areas for development. ▪ Engage with colleagues in Clinical Commissioning Group to explore appetite for development of a more integrated offer. ▪ Review existing outreach offers from Kennel Lane School and Autism Support Team to identify strengths, weaknesses gaps and duplication ▪ Identify examples of good practice from elsewhere including jointly commissioned neurodevelopmental pathways ▪ Draw these elements up into a draft ASD pathway proposal and consult with stakeholders. ▪ Review feedback, update model accordingly and implement 	Mandy Wimbush	Development process: Autumn 2020 - Spring 2021 Pathway launch: Summer 2021	~Clear ASD Pathway established with appropriate provision and support in place to minimise the proportion of learners requiring specialist placements. ~Reduction in proportion of independent sector placements for EHCP learners

4. Preparation for Adulthood				
PRIORITY	ACTIVITIES	LEAD / KEY STAKE-HOLDERS	MILESTONES	OUTCOMES
o) Work with multi-agency	<ul style="list-style-type: none"> • Explore options regarding developing post 16 provisions and pathways 	Service Lead: SEN	TBC	~Improved access to support

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4. Preparation for Adulthood				
PRIORITY	ACTIVITIES	LEAD / KEY STAKE HOLDERS	MILESTONES	OUTCOMES
partners develop a wider range of robust Preparation for Adulthood pathways, including improved access to health, independent living and supported employment options to ensure young people with SEND make successful transitions to adult life	<ul style="list-style-type: none"> Engage with current providers to understand the current offer and appetite for diversification, expansion and collaboration Engage with colleagues in Adult Services and Health (providers and commissioners) regarding transition pathways and protocols in order to clarify and improve access to services for the most vulnerable 			services (health and social care) for young adults aged 19-25 ~Wider range of post 16 options available to young people with SEND in Bracknell Forest

5. Joint Commissioning				
PRIORITY	ACTIVITIES	LEAD / KEY STAKEHOLDERS	MILESTONES	OUTCOMES
p) Develop a jointly agreed and co-produced approach to commissioning services, across health,	<ol style="list-style-type: none"> Review and develop Bracknell's 0-19 health provisions Review and explore options for the 	BFC's Commissioning Team	TBC	<ul style="list-style-type: none"> Joint commissioning arrangements will mean that gaps are identified and resources targeted CYP and families will

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5. Joint Commissioning				
PRIORITY	ACTIVITIES	LEAD / KEY STAKEHOLDERS	MILESTONES	OUTCOMES
social care and education reflecting best practice	development of an East Berkshire Integrated Therapies service - Bracknell Forest Council is providing the lead resource to this joint project.			<p>experience services that reflect their identified needs and are more joined-up.</p> <ul style="list-style-type: none"> • Assessments will happen more quickly and pathways of support will be clear to CYP and families. • CYP and their families will have a positive experience of the pathways with access to services improved so that support is provided at the point it is needed. • Improved timeliness of access to mental health support; • Wider range of specialist provision for CYP with SEMH.

6. Early Help & Short Breaks				
PRIORITY	ACTIVITIES	LEAD / KEY STAKEHOLDERS	MILESTONES	OUTCOMES
q) Identify best practice for	~Options exploration - Identify and	TBC	TBC	<ul style="list-style-type: none"> • Refreshed early

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<p>preventative and early support services</p> <p>And:</p> <p>r) Develop the early help offer through provisions including the family hubs</p>	<p>collate exemplars of best practice in early help nationally in relation to SEND;</p> <p>~Options Appraisal - Determine which of these has most practical and effective applicability to the BF context.</p> <p>~Drawing on options appraisal determine commissioning priorities for Early Help and implement these.</p> <p>~Clarify the early help offer, what is available currently and how is it accessed?</p> <p>~Publish the information on the Local Offer website</p>	<p>Led by Children's Social Care</p>		<p>help offer with clear linkages to SEND offer is promoted and widely understood by schools, settings and parent / carers</p>
<p>s) Develop short breaks service and future commissioning</p>	<p>~Review current Short Breaks offer through co-production with parents and young people</p> <p>~Drawing on co-production determine commissioning priorities for Short Breaks and implement these</p>	<p>Children with Disabilities Social Care Team</p>	<p>TBC</p>	<p>Refreshed Short Breaks offer and access criteria is promoted and widely understood by parent / carers and other stakeholders.</p>

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7. SEND Local Offer & IASS				
PRIORITY	ACTIVITIES	LEAD / KEY STAKEHOLDERS	MILESTONES	OUTCOMES
<p>t) Improve the information for families and schools on available provisions through</p>	<ul style="list-style-type: none"> Review SEND Local Offer web-pages and IASS including comparisons with best practice elsewhere and feedback from service users 	<p>TBC</p> <p>Family Information Service Lead</p>	<p>TBC</p>	<ul style="list-style-type: none"> Bracknell's SEND Local Offer web-pages provide an improved offering Benchmarking performance is shaped by

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the local offer webpage and through the commissioned Information, Advice & Support Service (IASS)	<ul style="list-style-type: none">• Identify strengths of current services as well as any issues and challenges experienced by service users• Identify actionable improvements to address shortcomings of current offer			feedback from service users (including website analytics)
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APPENDICES

4 APPENDIX 1 – CURRENT CAPITAL PROPOSALS (AS AT AUGUST 2020)

PROJECT / PROPOSAL	CAPITAL FUNDING SOURCE	STATUS
a. The Harmanswater Primary Intervention Unit provision is now open (up to 10 places for pupils at Harmanswater).	Special Provision Capital Fund (& LA Funding)	This project is complete and opened on January 13 th 2020. Some aspects of governance will need to be retrospectively introduced for the benefit of all parties under yet to be confirmed Service Level Agreements.
b. Bracknell Open Learning Centre, Rectory Lane, Bracknell, RG12 7GR	Special Provision Capital Fund	This project is complete and opened on January 13 th 2020 creating a new learning kitchen to teach 19-25 year olds pupils in groups of 4 the skills they need to be independent in adulthood Some aspects of governance will need to be retrospectively introduced for the benefit of all parties under yet to be confirmed Service Level Agreements.
c. Brakenhale Secondary on their SEND Transition Classroom and Support project (up to 20 places)	Special Provision Capital Fund	Work has commenced on building adaptations - Due to be completed by April 2020.
d. Jennett's Park Primary Sensory and Dance Studio (up to 30 places).	Special Provision Capital Fund	Due to be completed by April 2020.
e. The Pines Primary SEN Unit (up to 15 places) is in development	Special Provision Capital Fund	Due to be completed by April 2020.
f. Fox Hill Primary Adaptations to the Nurture Group (up to 10 places)	Special Provision Capital Fund (& LA Funding)	This will commence once the pre-school has been relocated from the school site and suitable accommodation becomes available. This will be facilitated through the council's capital programme, with the new facility planned to be completed for September 2020.
g. The "Oasis" project – in partnership with Bracknell Parent Carer Forum	Special Provision	Funding agreed to develop a base for young people 19-25 with complex needs who cannot attend Bracknell /Wokingham College,

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PROJECT / PROPOSAL	CAPITAL FUNDING SOURCE	STATUS
	Capital Fund	Berkshire College of Agriculture or Reading College as part of wider proposals for 'Preparation for Adulthood' offer.
h. New SEMH / AP Hub	LA Funding	Agreement in principle reached for development of an SEMH Hub providing some on-site places alongside a proactive specialist outreach offer to support mainstream schools with maintaining placement of pupils with SEMH needs.

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5 APPENDIX 2 – RISK REGISTER

RISK	LIKELIHOOD	IMPACT	SEVERITY OF RISK 1 = Low 25 = Very High	MITIGATION
<p>Lack of clear written specification regarding levels of need / criteria for entry / admissions process for SEN provision may lead to dispute with School Leadership / Governing Bodies at a later stage, potentially delaying implementation or preventing settings from being fully utilised without conflict.</p> <p>In a worst case scenario this could lead to a school refusing to admit pupils and walking away from the agreement to host the provision and potentially lead to SPF capital being wasted. Given the potential for changes of school leadership such changes of strategic direction are likely.</p>	4	5	20	<p>Publish and consult on draft Service Level Agreement for Resourced Provision at the earliest opportunity, including descriptors of admission criteria, governance around admissions process, financial aspects of agreement, etc (as set out under Stage1.iii of the Capital Programme above).</p> <p>The approval process set out in the capital programme above requires all such details to be published as part of the statutory consultation process for each individual provision, which ensures that the proposals are widely understood and agreed and that the statutory protections for designated SEND provision become enforceable thus minimising any risks of dispute or difficulties around admissions.</p>
<p>Implementation of project plans prior to statutory consultation process presents a risk that at a later stage parents (or Governors) at the host school could raise reasonable objections to the development of the provision having not had the opportunity to express their views regarding its development. These objections could potentially gain local and political support and lead to widespread objections to the provision being opened again potentially leading to SPF capital being wasted.</p>	3	5	15	<p>Capital plans for some of the provisions listed under Appendix 1 are at an advanced stage of development and it may not be cost effective to delay implantation at this stage, but it is critical that the process set out under Stage 2.iv of the Capital Programme above is implemented at the earliest opportunity to minimise future risks.</p> <p>Any projects not a the implementation stage should wherever possible be delayed until the statutory consultation process is complete and approved through the appropriate governance set out above.</p>
<p>Schools establishing new SEN provision struggle in the early stages of</p>	3	4	12	<p>Ensure that specialist support for new settings is commissioned as part of the support offer in the start-</p>

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RISK	LIKELIHOOD	IMPACT	SEVERITY OF RISK 1 = Low 25 = Very High	MITIGATION
implementation leading to challenges around placements or reputational damage at an early stage.				up phase of the new SEN provision in the delicate early stages. Ensure that new placements are staggered to ensure that the provision has the opportunity to grow organically and staff have time to find their feet as the first cohort are admitted.

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TO: SCHOOLS FORUM
DATE: 22 OCTOBER 2020

**2021-22 BUDGET PREPARATIONS FOR THE
SCHOOLS BLOCK BUDGET AND OTHER FINANCE MATTERS**
Executive Director: People

1 PURPOSE OF REPORT

- 1.1 To provide an update to the Schools Forum in respect of information currently available in respect of the 2021-22 Schools Budget for mainstream schools together with other relevant finance related matters.
- 1.2 Whilst the Department for Education (DfE) has yet to provide the final data that must be used to calculate individual school budgets, information is emerging that allows for updates to be provided on some key matters which will aid the finalisation of the budget which must be presented to the DfE by the statutory deadline of 21 January 2021.

2 EXECUTIVE SUMMARY

- 2.1 The release of preliminary 2020-21 budget information by the DfE has allowed for schools to be provided with an initial update on the potential financial implications and for early budget preparations to commence. In accordance with the agreed local funding strategy, these calculations have as far as possible replicated the DfE's National Funding Formula (NFF)¹ at an individual Bracknell Forest (BF) school level.
- 2.2 With the coronavirus pandemic, there has inevitably been some delay to the timeframe, including gathering views from schools through the annual financial consultation with schools which is currently underway, rather than the usual summer term circulation.
- 2.3 As expected, the previously announced 3-year high-level financial settlement continues to deliver a better outcome for schools than was received in the recent past, although at this stage the average increase in per pupil funding is estimated at 4.2% for primary schools and 3.1% for secondaries – 3.7% overall average - compared to the average 6.9% in 2020-21. After making initial calculations for local cost pressures – the most significant of which relates to diseconomy funding for new schools - and adjustments that inevitably arise from a funding system that uses lagged data, there is a funding gap on school budgets of £0.429m (meaning 99.5% of NFF funding rates can be afforded) and £0.080m on centrally managed budgets. The 2020-21 budget for BF schools was agreed with a funding shortfall of £0.144m and units of resource at 99.8% of NFF rates.
- 2.4 The options available to manage the indicated budget shortfall, with a decision needing to be made no later than December are:
1. Draw down funds from the Reserve created by the council to help finance the additional costs of new and expanding schools
 2. Draw down funds from the Reserve created in the unallocated Schools Budget to support the additional costs of new and expanding schools
 3. Fund schools at a scaled percentage of the NFF rather than the full amount.

A combination of these options can also be used.

¹ The NFF distributes funding based on schools' and pupils' needs and characteristics and uses the same factor values for all schools across the country. The exception to this being an area cost adjustment (ACA) uplift which is paid to areas with high costs. BF receives a 5.7% uplift.

- 2.5 These are relatively high-level calculations which will be subject to change as more information becomes available. However, they do present a sound starting point for budget planning and early decision making where appropriate.
- 2.6 There are 3 further scheduled meetings of the Forum before the DfE deadline that will consider budget proposals from the council as more information and data emerges.
- 2.7 For the High needs Block, more information is presented on a separate paper on this agenda. For the Early Years Block, 2021-22 budget setting information has yet to emerge from the DfE.
- 2.8 Furthermore, the DfE are requiring more information to be provided by maintained schools in terms of their medium-term financial planning. From April 2021, 3-year budget plans will need to be submitted by all schools, with those holding deficits in excess of 5% of budget required to submit a recovery plan. Practical requirements of schools on these new conditions are being considered.
- 2.9 Concerns remain relating to financial support provided to schools from the government from the coronavirus pandemic and information will continue to be requested from schools to collate robust information on the implications to help inform actions.

3 RECOMMENDATIONS

To AGREE:

- 3.1 **That subject to consideration of school responses to the annual financial consultation and general affordability, the approach to setting the 2021-22 budget should be as set out in this report, and in particular:**
1. **That there should be no change to the current budget strategy of:**
 - a. **replicating the NFF at individual BF school level;**
 - b. **setting minimum per pupil increases between financial years at the highest amount permitted by the DfE;**
 - c. **meeting the diseconomy costs at new and expanding schools in a measured way from a combination of council reserves, Schools Budget reserves, and funding allocated for the relevant year from the DfE.**
 2. **That a centrally managed Growth Fund should be maintained for in-year allocation to qualifying schools (Table 2).**
 3. **On-going central retention by the Council of the existing Central School Services Block items (Annex 1).**

To NOTE:

- 3.2 **The latest update on the School and Education Spending review and the impact anticipated for BF at this time.**
- 3.3 **The areas where schools are being asked to comment on through the annual financial consultation, to inform later decision making.**
- 3.4 **The 3.7% average increase in per pupil funding that would be received by BF schools if the NFF is 100% implemented compared to the national average of 3.1%.**

3.5 The new financial requirements of schools

3.6 The current estimated funding gaps at Table 3 of:

- 1. £0.429m on school budgets, meaning 99.5% of NNF rates can be financed, and**
- 2. £0.080m for the CSSB where options are being considered by the council.**

3.7 That an update on the estimated financial impact from the coronavirus pandemic will be presented to the Forum when sufficient new information is available.

4 REASONS FOR RECOMMENDATIONS

- 4.1 To ensure that the Schools Block (SB) and Central Schools Services Block (CSSB) elements of the Schools Budget are developed in accordance with the views of the Schools Forum and governors, the anticipated level of resources and the statutory funding framework, including the requirement to submit summary details of individual school budgets to the DfE by 21 January 2021.

5 ALTERNATIVE OPTIONS CONSIDERED

- 5.1 These are set out in the supporting information.

6 SUPPORTING INFORMATION

Overview

- 6.1 This report concentrates on the SB and CSSB elements of the Schools Budget which are intended to fund delegated school budgets and the small number of services that the DfE allows LAs to manage centrally on behalf of schools, where agreed by the local Schools Forum.
- 6.2 The introduction of the current funding framework, including the structure of the Schools Budget commenced in April 2018 and elements of transitional funding protection remain in place to reduce the impact of financial turbulence from the policy change on both schools and LAs.
- 6.3 The DfE has yet to release any financial information in respect of the Early Years Block, and with the expectation that BFC will not be proposing any changes to existing local, discretionary arrangements, there is no update to present at this time.
- 6.4 For the High Needs Block, this is dealt with under a separate agenda item.

Provisional budget position for 2021-22

DfE announcements

- 6.5 This section on *DfE announcements* sets out information that has in general already been provided to schools to help them with their initial preparations for next financial year. The section on the CSSB is the only new addition.

Schools Budget:

Overview

1. There will be no significant changes to the way school and education related funding is allocated next year with:
 - a. The DfE using the same separate formulae to allocate funding to LAs for Schools, Central School Support Services, High Needs pupils and Early Years provisions.
 - b. The DfE will continue to use the NFF to calculate each school's individual budget with no changes in the factors used. The NFF distributes funding based on schools' and pupils' needs and characteristics and uses the same factor values for all schools across the country. The exception to this being an area cost adjustment uplift which is paid to areas with high costs, such as those paying London Weighting to staff salaries. BF receives a 5.7% uplift.
 - c. LAs will continue to receive funding based on the DfE running each school's data (mainly October 2019 census, so lagged) through the NFF at 2021-22 factor values and aggregating together every school's allocation to determine the amount to be paid to that area. This is then converted to an average primary and secondary per pupil funding value which with final October 2020 pupil numbers will be used to calculate each LAs 2021-22 funding for their schools.
 - d. The DfE place a ring-fence on funding provided to LAs for schools and education. This means it can only be used for the purposes defined by the DfE and cannot be diverted to fund other costs.
 - e. LAs will continue to be responsible for allocating funding to schools in their areas although the government are working towards directly managing the whole process in the very near future with limited LA involvement. Proposals on this are expected later this year.
 - f. Whilst LAs have responsibilities to set funding allocations for their schools, they must work within parameters set by the DfE which very closely follow the NFF and other national priorities.
 - g. In allocating funds to schools, LAs must use pupil and other relevant data provided by the DfE which is generally made available at the end of the autumn term.
2. There are only a small number of changes to the national process to allocate funds.
 - a. Funding from the teachers' pay grant and the teachers' pension employer contribution grant, including the supplementary fund, has been added to schools' NFF allocations from 2021-22. This replaces the specific grant funding approach which will discontinue at 31 March 2021.
 - b. The 2019 update to the Income Deprivation Affecting Children Index (IDACI)² has been incorporated so that deprivation funding allocated through the formulae is based on the latest data.

² IDACI uses post code data to calculate the probability of a family with children living in that area being eligible to income support benefits. The higher the probability, the higher the funding top-up, within bandings determined by the DfE.

- c. Following the cancellation of assessments in summer 2020 due to the coronavirus pandemic, funding allocations to schools for low prior attainment will use 2019 assessment data as a proxy for the 2020 reception (primary schools) and year 6 cohort (secondary schools).

National funding decisions for 2021-22

Note: all amounts quoted for BFC in this section are provisional and subject to update as budget calculations progress and the final data is released by the DfE.

3. 2021-22 is the second year of a three-year funding settlement that will see core school funding increase by £2.6bn in 2020-21 compared to 2019-20, and by a further £2.2bn and £2.37bn in 2021-22 and 2022-23 respectively. In addition to this, there is around a further £2bn to fund additional teachers' pay and pension costs previously separately funded by grant.
4. School funding through the NFF is increasing by 3.8% in cash terms which is equivalent to 3.1% per pupil. The main features are:
 - a. The key factors in the NFF will increase by 3%. The exceptions being funding for pupil eligibility to a FSM which will increase by 2.2% to reflect the expect cost increase in providing a free meal, and the factor values of some of the IDACI bands by more than 3.0% to ensure that the average funding per eligible pupil allocated through IDACI increases by 3.0%, to reflect the lower IDACI scores being recorded on the updated census.
 - b. The minimum per pupil funding levels (MPPFL)³ will ensure that every primary school receives at least £4,000 per pupil (£3,750 in 2020-21), and every secondary school at least £5,150 per pupil (£5,000 in 2020-21).
 - c. Provisional data indicates that 14 BF primary and 2 BF secondary schools will be funded at these MPPFLs.
 - d. Where the normal operation of the NFF does not allocated at least 2% more pupil-led funding per pupil compared to its 2020-21 NFF baseline, top-up funding is added to meet this rate of increase. Provisional data indicates that 5 primary and 1 secondary school receive this funding top-up.
 - e. Additionally, on average, primary schools will receive a further £180 and secondary £265 per pupil respectively to cover additional teachers' pay and pension costs previously funded through the separate grants. These amounts increase the MPPFL to £4,180 and £5,415 respectively.
 - f. Additional funding is to be provided for small and remote schools in 2021-22, with primary schools now attracting up to £45,000, compared to £26,000 previously. This is a first step towards expanding the support the NFF provides for such schools from 2022-23. No BF schools qualify on the eligibility criteria which requires primary schools to have less than an average of 21.4 pupils per year group and be at least 2 miles away as the crow flies from the second nearest compatible school. For secondary schools the thresholds are an average of 120 pupils per year group and be at least 3 miles away as the crow flies from the second nearest compatible school.

³ The NFF includes MPPFLs that are applied equally to all primary and secondary schools (£4,180 and £5,415 respectively in 2021-22). LAs must also apply these minimum rates in their local funding formula. The only factors not included in per-pupil funding for the purpose of the MPPL calculation are premises e.g. business rates, split site factor and growth funding.

5. Using this initial data indicates that average per pupil funding for BF primary schools will increase by 4.2% to £4,069 and secondary schools by 3.1% to £5,404. To enable a proper like-for-like comparison, these rates are quoted before adding the £180 and £265 for the teachers' pay and pensions' grant additions (£190 and £280 respectively for BFC after reflecting the 5.7% area cost uplift). These increases are intended to ensure that BFC can closely replicate the allocations in the NFF and pay their schools at the same values as calculated by the DfE although this may not be the case where there are local factors to consider that are not reflected adequately in the NFF.

CSSB:

6. The ongoing responsibilities element of the CSSB, which funds all LAs for central functions they have to deliver for all pupils in maintained schools and academies, is paid to LAs as an amount per pupil. There is a protection to ensure no LA sees losses of greater than 2.5% per pupil, compared to 2020-21. BF received this funding protection as it has historically spent above the per pupil funding limits now set by the DfE in their funding formula.
7. The historic commitments element of the CSSB, which funds some LAs for commitments they made prior to 2013-14 that support the most vulnerable pupils is being reduced by 20% per annum from LAs funding, commencing in 2020-21. This equates to around £0.081m per annum in BF and £0.406m over the 5-year period.
8. The Forum agreed to fund the £0.146m funding shortfall in place at 2020-21 from both these deductions.

Financial consultation with schools

- 6.6 The annual financial consultation with schools ordinarily takes place in the summer term in order for the Forum to consider the outcomes early in the autumn as budget planning commences. With the coronavirus pandemic, this was deferred and is now underway with responses requested by 23 October.
- 6.7 There are 5 questions on the consultation, all of which are regularly asked of schools as follows:
 1. Should funds continue to be allocated to mainstream schools as closely as possible to the way the DfE allocates funds to the council?
 2. Should we aim to set the minimum per pupil funding increase from 2020-21 at the highest permitted rate of 2% for all school types i.e. mainstream and special?
 3. Should schools receiving the highest increases in per pupil funding finance the cost of ensuring all schools receive a minimum increase in per pupil funding from 2020-21?
 4. Should funds from maintained mainstream schools continue to be "de-delegated" back to the council on permitted budgets where there are strategic, risk sharing or cost-effective benefits to gain?
 5. Should maintained schools continue to make a financial contribution to the education related statutory and regulatory duties required of the council that are no longer financed through a grant from the DfE?

Views from schools on the same questions are necessary as the Schools Forum is required to decide each year on some budget matters and therefore needs to be confident that these are taken in the light of current opinions. Responses to the consultation are expected to be reported to the Forum at the next meeting on 19 November.

Initial budget planning

- 6.8 It is important that budget planning now commences, and whilst there is not the level of certainty in some areas as usual for this meeting, work has been undertaken to model the potential impact on the BF Schools Budget to enable the Forum to consider whether the right approach is being taken and to consider some early conclusions.

Estimated Schools Block Dedicated Schools Grant (DSG)⁴, income to be paid to BFC

- 6.9 The Forum will be aware that to determine an LAs SB DSG funding, the DfE applies the same uniform NFF factors and values to every school in the country, using lagged pupil number and other data e.g. FSM, test results. The resultant individual primary school budgets for an LA are then aggregated together and divided by total primary pupil numbers to determine an LAs standard primary per pupil funding rate – called the Primary Unit of Funding (PUF). The same calculation is also made for secondary schools to determine the Secondary Unit of Funding (SUF). Each LA is then funded at these per pupil funding rates on the most recent October census data.
- 6.10 For next year, the DfE will calculate the PUFs and SUFs against the confirmed 2021-22 NFF units of resource and the 2019 census data, so on a partially lagged basis. This approach is taken to provide schools and LAs key budget data at an early stage of the budget setting process as the most up to date October 2020 census data is not validated and provided to LAs until December 2020. Waiting for actual data would mean a release date of around a month before budgets must be finalised and approved through the local democratic process.
- 6.11 The DfE has now confirmed the PUFs and SUFs that will be used to calculate 2021-22 DSG allocations and these will be £4,253.32 for the BF PUF and £5,681.78 for the BF SUF and reflect the addition of the funding previously paid separately through the Teachers' Pay and Pension Grants which will in future be included within main school budgets. Adjusting for the effect of the additional Teachers' Grants, this equates to a 3.4% increase in the per pupil funding rate for primary aged pupils and 3.2% for secondary and an average 3.3% increase in per pupil funding on a like for like basis. Including the extra funding for Teachers' Pay and Pension Grants shows a cash increase in per pupil funding of 8.4%
- 6.12 Based on there being no change in the 16,280 pupils recorded on the actual October 2019 school census data, this would deliver £78.381m of SB DSG income, a cash increase of £6.044m.
- 6.13 The DfE has also confirmed the separate funding allocations to LAs for non-pupil-based school expenses. This is mainly intended to finance the cost of business rates and other specific costs agreed with individual LAs. Funding for these costs will be £1.870m and is allocated based on 2020-21 actual spend and for BFC comprises:
1. £1.626m for business rates
 2. £0.075m for split site costs (Warfield Primary)
 3. £0.169m for additional lump sum payments, generally for 1 year only, to schools that amalgamated in 2019 (at Ascot Heath and Holly Spring)

As with all funding that is received on a lagged basis, there will be differences in the amounts received by BFC and what is then provided to individual schools as this must use the most up to date data.

⁴ The DSG is the ring-fenced grant allocated by the DfE through a formula to LAs to fund most of their expenditure on school and education related services.

- 6.14 In terms of the Growth Fund⁵, the DfE will continue to use the existing formula which measures pupil growth between the two most recent October census points across small geographical areas to allocate funding where there is a net increase in numbers, with no net-off against areas that experience a reduction.
- 6.15 The greatest cost pressure to BF in the Growth Fund relates to diseconomy funding payments to new schools.
- 6.16 The DfE has recently released limited data to assist LAs in calculating potential Growth Fund DSG income, which for BF, using provisional October 2020 pupil numbers, suggests around £0.900m of DSG for this purpose.
- 6.17 Therefore, at this stage, the overall income for the SB is estimated at £81.152m, an overall increase from last year of £6.156m. Table 1 below sets out a summary of the change in funding from each element of the SB DSG.

Table 1: Forecast SB DSG for 2021-22

	Total £'000	Total £'000
Total DSG for 2020-21		74,996
<u>Forecast changes for 2021-22:</u>		
Effect of 3.3% increase in DSG funding rates	2,372	
Effect of Teachers' Pay and Pensions Grant	3,672	
Change in business rates funding	-53	
Change in school amalgamation funding	57	
Change in Growth Fund	108	
Total forecast change		6,156
Total forecast DSG for 2021-22		81,152

Update on budgets for schools and council managed Schools Block items

- 6.18 The SB base budget approved at the January 2020 meeting of the Schools Forum amounted to £75.103m, of which £74.850m was funded by SB DSG income and £0.253m was added from the council as part of a 4-year funding plan to contribute £1m to the extra costs arising from new schools. The 2020-21 budget process agreed to transfer £0.146m to the CSSB budget to meet the cost pressures and funding reductions being experienced on services that support the most vulnerable pupils (see Annex 1).
- 6.19 The final 2020-21 budget delegated to schools equated to 99.8% of the NFF values. This is £0.144m below the full amount and reflected the agreed, affordable level to draw down from reserves of £0.253m in order to part fund the additional expenditure arising from local cost pressures.

⁵ The Growth Fund comprises 3 elements: funding for significant in-year increases in pupil numbers at existing schools; allocations to schools requiring additional financial support to meet Key Stage 1 Infant Class Size Regulations; and pre-opening, diseconomy and post opening costs for new schools.

Provisional update for 2021-22

Change in pupil numbers

- 6.20 The current budget planning assumption is that and change in pupil numbers from the October 2020 census that will drive 2021-22 school budgets will have a broadly cost neutral effect when compared to the consequential change in DSG funding, and are therefore excluded at this stage from potential budget adjustments.

Teachers' Pay and Pensions Grant

- 6.21 As set out above in paragraph 6.5 2.a, the funding shortfall in school budgets for the September 2018 Teachers' pay award and the 7.2% increase in employers contribution to Teachers' Pension Fund, effective September 2019, which were previously paid as separate grants to schools, will in future be included within main school budget allocations. The DfE have allocated £180 per primary aged pupil and £265 for each secondary school pupil in the NFF through the basic per pupil funding factor (AWPU). With replicating the NFF to the affordable level being the agreed funding strategy in BF, the same approach will be adopted, although after adding the 5.7% ACA uplift, the values here will be £190 and £280 respectively which are considered sufficient to cover estimated costs.

Update to IDACI (deprivation measure) data

- 6.22 The 2019 update to the Income Deprivation Affecting Children Index has been incorporated into the data set by the DfE so that deprivation funding allocated through the formulae is based on the most up to date measures. This shows that a reduction in overall deprivation has occurred which equates to £0.043m less funds being allocated to schools.

Growth Fund - Impact from new / expanding schools and other criteria

- 6.23 Forum members will be aware that the SB Budget is experiencing a significant medium-term pressure from the additional cost of new schools. The amount of additional support to be provided is set out in the *Start-up and Diseconomy Funding Policy for New and expanding schools* of which the most recent update was approved in December 2019. The agreed policy can be viewed at item 129 of the following link:

<http://democratic.bracknell-forest.gov.uk/ieListDocuments.aspx?CId=187&MId=9035&Ver=4>

- 6.24 No changes are proposed for 2021-22, although in accordance with the policy, some of the factor values will need to be updated to current prices, in particular to reflect the new values of the MPPFLs which are a key element of the funding policy calculations.
- 6.25 In recognising that the financial impact arising from new schools is not being fully funded through the Growth Fund element of the SB DSG, the council's Executive agreed to provide £1m of funding over a 4-year period from the council's reserves as part of a medium-term budget strategy that was agreed by the Forum. This strategy also utilises the £1m held in the earmarked New School Start-up / Diseconomy Reserve of the Schools Budget that was created for this purpose and part of the annual increase in SB DSG.
- 6.26 In the absence of the October 2020 census, only a broad estimate of likely costs arising from new schools can be established. Similarly, the budget provision for Growth Fund responsibilities managed by BFC in existing schools will also be reviewed once the census data is available to assess the amount of funds that are likely to be required.

- 6.27 Table 2 below summarises the estimated financial implications for 2021-22 which indicates a £0.071m (6.3%) cost increase.

Table 2: Proposed financing and associated budget for the Growth Fund (provisional)

	Primary £'000	Secondary £'000	Potential 2021-22 £'000	Budget 2020-21 £'000	Indicated Change £'000
<u>New schools:</u>					
Diseconomy costs	198.9	910.1	1,109.0	1,038.0	71.0
	198.9	910.1	1,109.0	1,038.0	71.0
<u>Retained Growth Fund</u>					
Start-up costs	0.0	0.0	0.0	0.0	0.0
Post opening costs	15.0	0.0	15.0	15.0	0.0
In-year pupil growth	150.0	150.0	300.0	300.0	0.0
KS1 classes	50.0	0.0	50.0	50.0	0.0
	215.0	150.0	365.0	365.0	0.0
Total estimated costs	413.9	1,060.1	1,474.0	1,403.0	71.0
<u>Costs by school:</u>					
KGA - Oakwood	158.5	0.0	158.5	157.8	0.8
KGA - Binfield	55.4	910.1	965.5	895.3	70.2
Total estimated costs	213.9	910.1	1,124.0	1,053.0	71.0

- 6.28 Clearly, the funding plan will need to be kept under review. For the longer-term expectations, September 2023 is the latest point that KGA Binfield Secondary school will be resourced through the new school funding policy. At the point funding moves to the BF Funding Formula and overall costs of the new schools are forecast to reduce by £0.5m from the relevant September, and £0.9m in a full year. Costs are therefore expected to significantly reduce from 2023-24.

Impact from business rates revaluation

- 6.29 Forum members are aware that there was a business rates revaluation at April 2017 of which the outcome was a cost increase to most schools. However, the full financial impact is being phased in through a 5-year transitional protection scheme. There is also an annual uplift to charges levied through the business rates scheme, currently estimated at 2.0%. Taking account of the latest available information, including the changing school estate, there is estimated to be a net cost reduction to school rates of £0.021m which will be subject to update.

Split site schools

- 6.30 Warfield Primary school operates on 2 sites with a walking distance of 1.167 miles which presents unique issues and after two years' experience of managing the split site school, the school had identified a number of additional costs that needed to be incurred as a result of the site configuration for which there is no additional funding allocation.
- 6.31 The Headteacher has continued to monitor the additional costs being incurred and with no substantial changes to the characteristics of the school considers the current funding allocation remains the valid amount. No change is therefore proposed to the current base budget for this item.

- 6.32 The DfE has agreed to fund this cost, with additional income being received at the £0.075m payment made to the school. As a consequence, there is no financial effect on the Schools Budget from the split sire factor.

School amalgamations

- 6.33 2 school amalgamations occurred in September 2019 which resulted in additional funding being allocated to the relevant schools in 2020-21 to allow for more time to implement change towards a reduced on-going budget allocation. The School Funding Regulations provide for amalgamated schools to ordinarily receive a 1-year budget uplift. The £0.168m funding allocated through the current budget will therefore be removed in 2021-22 resulting in an equivalent amount of saving.
- 6.34 Governors at Ascot Heath Primary School have raised concerns that cost reductions arising from the 2019 amalgamation are occurring at a slower rate than expected and have requested that enhanced funding continues for a second year. As any additional funding allocation would have to be specifically agreed and provided by the DfE, albeit on a lagged basis, the Forum agreed that a request should be made. Information has been provided by the school and an application has now been made to the DfE. Until a determination is received, the budget preparations assume that the maximum additional £0.050m spend will be approved.
- 6.35 Therefore, the net financial implication currently anticipated on the 2021-22 budget from school amalgamations is a saving of £0.119m.

Meeting DfE per pupil funding requirements

- 6.36 After LAs have calculated school budgets through their local Funding Formula, there are 2 mandatory checks required by the DfE to ensure that each individual school budget has received the minimum levels permitted relating to:

1. the amount of per pupil funding received for the year i.e. the MPPFL, and
2. the increase in per pupil funding from the previous year i.e. the MFG

MPPFL

- 6.37 The DfE has set mandatory MPPFL of £4,180 for primary aged pupils and £5,415 for secondary. These are the minimum per pupil funding rates that an LA must pay their schools unless specifically agreed by the DfE. The provisional calculations made at this stage indicate additional payments of £0.793m, with 14 primary schools receiving £0.737m in aggregate with 2 secondaries receiving £0.056m. This is an increase of £0.484m compared to 2020-21 when 5 primary schools received £0.205m and 2 secondary schools £0.105m.
- 6.38 This reflects the greater proportionate increase in MPPFL at 6.7% for primary and 3% for secondary compared to the ordinary 3% increase in NFF factor values. For areas like BF that are relatively lowly funded, and with the primary MPPFL very close to the amount of DSG received in BF through the specific PUF (£4,253 compared to £4,180), there will be a large number of primary schools receiving funding top-ups to achieve the minimum permitted level.

MFG

- 6.39 To limit turbulence between financial years at individual school level, the MFG must be applied to each school's per pupil funding rate. Where the normal operation of the local Funding Formula does not deliver the necessary change, an appropriate top-up is paid. For 2021-22, the DfE requires each LA to set their MFG at between +0.5% and +2.0%.

- 6.40 Reflecting on the additional funding included in the NFF, the council considers that subject to affordability, the maximum +2.0% increase is applied, and this is one of the questions included in the financial consultation with schools. MFG top-up payments are ordinarily financed from capping gains above the MFG at other schools and are therefore self-financing. Schools receiving top-ups to the MPPLF values are excluded from contributing to the cost of the MFG. The potential impact from a +0.2% MFG level has not been estimated at this stage as it is a volatile calculation and is best undertaken once the provisional October 2020 census data is available.
- 6.41 The DfE recognise that there can be circumstances when the normal operation of the MFG can result in unexpected outcomes and LAs can therefore make a request for a “disapplication” of the MFG.
- 6.42 MFG disapplication requests have been approved previously where “the normal operation of the MFG would produce perverse results for very small schools with falling or rising rolls”. Indeed, the DfE approved a request from BFC for 2020-21 for the scenario being faced at Kings Academy Group schools of Binfield and Oakwood where the diseconomy funding model results in a reduction in per pupil funding between years as the significant increase in pupil admissions each year result in a lower per pupil funding allocation as the significance of diseconomy funding top-ups reduce.
- 6.43 The same issue is again faced in 2021-22 requiring an MFG disapplication request to again be made to the DfE.

The Central School Services Block

- 6.44 The central school services block has been created to ensure LAs can continue to carry out their important role in supporting the provision of excellent education for all children of compulsory school age. It covers pre-defined service budgets, with the local Schools Forum holding the statutory decision-making responsibility for agreeing the amount of funds that can be spent on each budget.
- 6.45 It covers two elements which are treated differently within the national funding formula: ongoing responsibilities and historic commitments. On-going responsibilities, where an existing budget has previously been agreed by the BF Schools Forum, and comprises school admissions, servicing of the Schools Forum, places in independent schools for non-SEN pupils, contribution to responsibilities that local authorities hold for all schools and boroughwide initiatives (capped at up to 0.1% of the total Schools Budget).
- 6.46 Historic commitments, which generally support the most vulnerable children, have an educational benefit and link to other programmes funded by the Council which together result in better, more effective use of resources with improved outcomes for children than if provided and managed independently. Amongst other things, the funding is used to support the Family Intervention Project, Virtual School for Looked After Children, Young People in Sport and Education Health Partnerships.
- 6.47 Funding for ongoing responsibilities to LAs is distributed 90% according to a per-pupil factor and 10% of funding according to a deprivation factor. Both elements are adjusted for area costs. The DfE has implemented transitional funding arrangements to limit losses at individual LA to no more than 2.5% per annum. The new formula results in a 10.7% funding reduction for BFC through the per pupil funding element and will therefore be receiving funding reductions.
- 6.48 The baseline set by the DfE for funding historic commitments is 2013. No new commitments have been allowed since then and neither have budget increases, with the DfE introducing a 20% funding cut at the start of this financial year, which will be extended by further 20% reductions in each of the next 4 years.

- 6.49 As well as facing funding reductions, like most services, those held within the CSSB are also facing significant cost pressures, in particular in respect of pay and pensions. Reflecting on these circumstances, the Schools Forum agreed to fund the aggregate 2020-21 funding shortfall of £0.146m through a funding transfer from the SB, and this budget update assumes the continuation of this approach.
- 6.50 In respect of the funding reduction to be applied to the CSSB in 2021-22, this is estimated at a further £0.080m. The council is currently examining ways to manage this cost increase outside of the Schools Budget and an update will be provided to a future Forum meeting.
- 6.51 Annex 1 sets out the services included in the CSSB, showing the 2020-21 base budget and the provisional funding for 2021-22.

Illustrative 2021-22 individual school budgets

- 6.52 In order to prepare this budget update, individual school budgets have been modelled in accordance with the overall budget strategy of reflecting the NFF funding rates in the BF Funding Formula and incorporating all of the potential budget changes that are set out above. At this stage all calculations use October 2019 information for pupil numbers and all of the other pupil characteristics used for funding purposes other than IDACI where the new data is used, such as FSM eligibility, test results etc. Final budgets will be calculated against October 2020 data.
- 6.53 Using these key assumptions, the following headline data is available for illustrative school budgets (NB in this context, per pupil funding is calculated on the MPPFL methodology of the whole school budget excluding business rates, with comparisons between years being made on the basis that the Teachers' Pay and Pensions grant were included in school budgets in both 2020-21 and 2021-22):
- 1 Primary schools would receive an average increase in per pupil funding of 4.2%, and secondaries 3.1%. The average increase for all schools is 3.7%.
 - 2 The highest per pupil increase in a primary school would be 6.4%, with 3.4% in secondary. The lowest increases would be 2.0% and 2.8% respectively.
 - 3 The average increase for 1 FE schools is 3.5%, for 2 FE it is 4.0%, for 3 FE schools it is 5.2% and for Secondary schools it is 3.1%.
 - 4 The MPPFL level amount has increased by 6.4% for primary with the secondary rate increasing by 2.8%.
 - 5 The average per pupil funding amount for a primary school would be £4,249 and £5,669 for secondary.

Reasons why the NFF budget will not be delivered in BF

- 6.54 There are a number of reasons why despite the DfE fully funding the NFF, individual LAs are not always able to replicate the budgets locally. These include:
1. Differences between the lagged data sets used for funding purposes for LAs and the current year data that LAs must use to fund schools.
 2. Differences between DfE funding formula used for supporting the cost of new schools, business rates etc compared to the actual costs funded at a local level.
 3. Differences in the calculation of funding protection between years through the locally set rate of MFG and the 2% threshold used in the NFF.

Summary of proposed changes

6.55 Based on provisional budget data, a series of changes have been detailed above that could be applied in the 2021-22 budget. The Forum is recommended to agree this approach, with further updates planned to be presented at the November, December and January Forum meetings. At this stage, there is a £0.509m funding shortfall: £0.429m on the Schools Budget and £0.080m on the Central School Services Block. Table 3 below provides a summary of the estimated financial implications.

Table 3: Summary initial budget proposals for 2021-22

Para Ref.	Item	Schools Block		Central	Total
		Delegated school budgets	Growth Fund - LA Managed	Services Schools Block	
		1	2	3	4
		£'000	£'000	£'000	£'000
	2020-21 Schools Block budget	74,738	365	1,084	76,187
	2020-21 base budget	74,738	365	1,084	76,187
	Provisional 2021-22 DSG funding	80,787	365	858	82,010
	On-going contribution to CSSB pressures	-146	0	146	0
	2021-22 forecast income	80,641	365	1,004	82,010
	+Surplus of income / - Deficit of income	5,903	0	-80	5,823
	<u>Changes for 2021-22 to deliver the NFF</u>				
	Add: Teachers' Pay and Pension Grants	3,672	0	0	3,672
	Initial impact from data changes (IDACI)	-43	0	0	-43
	New schools - 2021-22 change in cost pressure	71	0	0	71
	Rates: revaluation and inflation	-21	0	0	-21
	School Amalgamations - impact on lump sum	-119	0	0	-119
	Cost of new year NFF funding rates at circa +3%	2,772	0	0	2,772
	Total core changes required for 2021-22	6,332	0	0	6,332
	Shortfall to DSG Funding	-429	0	-80	-509

Managing the shortfall to DSG funding

6.56 There has always been a funding gap between what is allocated by the DfE and the assessed local budget requirement. For 2020-21, school budgets were funded at 99.8% of the NFF, equivalent to £0.15m and this has been managed through:

1. A draw down funds from the Reserve created by the council to help finance the additional costs of new and expanding schools (current balance is £0.409m).
2. A draw down funds from the Reserve created in the unallocated Schools Budget to support the additional costs of new and expanding schools (current balance is £0.746m).
3. Fund schools at a scaled percentage of the NFF rather than the full amount.

- 6.57 A combination of these options can also be used, and funding proposals will be presented when there is greater certainty on the final budget requirement. In considering a draw down from Reserves, this will need to take account of the £1.154m available amount and the expected duration of additional support, which will remain close to current levels for 3 more years. To allow some flexibility for costs to exceed the current estimated amount, a drawdown of up to £0.250m in each of the next 3 years is considered a reasonable approach to take. This would suggest a similar 99.8% funding of NFF rates in 2021-22 as was approved for 2020-21.
- 6.58 An update to the HNB budget is presented on another agenda item, and this sets out that funding for the Schools Budget is not an LAs responsibility and General Fund money should not be used for this purpose. The Secretary of State has the power to grant exemptions to this, and such a request will need to be made to allow for a financial contribution to be made by the council towards the additional cost of new schools. Such a request is expected to be approved.

Summary of Per Pupil funding rates

- 6.59 It is recognised that School Funding uses a considerable amount of jargon and that many different values are quoted for per pupil funding rates, each of which have subtle, but important differences. The mainstreaming of Teachers’ Pay and Pension Grants into school budgets for the first time adds to the complication and the number of figures being presented. To provide a comprehensive update to the Forum, his report necessarily reflects these issues, and the following table has been included in an attempt to summarise key data and implications into one section.

Table 4: Summary of key per pupil funding values

	Section 1		Section 2		Section 3	
	Allocation to BFC from DfE (PUF/SUF)		Minimum per pupil funding for a school (MPPFL) as prescribed by DfE		Estimated average allocation to BF schools if 100% NFF values affordable	
	Amount	Change	Amount	Change	Amount	Change
Primary	£4,253.32	3.4%	£4,180	6.4%	£4,249	4.2%
Secondary	£5,681.78	3.2%	£5,415	2.8%	£5,669	3.1%

To ensure a proper like for like comparison, change in Table 4 is quoted after uplifting the 2020-21 data to include the funding received separately through the Teachers' Pay and Pension Grants.

- 6.60 Some key points from per pupil funding amounts in the above Table are:
1. The estimated average funding to be allocated to primary aged pupils should the NFF values be affordable (Section 3 of the Table) is only 1.7% above the MPPFL (Section 2). This means a large proportion of BF schools are likely to require top ups to achieve the MPPFL as the normal operation of the NFF delivers funding below this level. These increases will be up to 6.4% from 2020-21 funding levels.
 2. The estimated average funding to be allocated to secondary aged pupils should the NFF values be affordable (Section 3) is 4.7% above the MPPFL (Section 2), meaning a lower proportion of schools require top ups to achieve the MPPFL.
 3. The estimated average allocation to BF schools at Section 3 is likely to be reduced in final budgets as the current calculations assume NFF values are

affordable which is only likely to be possible through use of a significant proportion of the surplus balances.

Issuing 2021-22 budgets to schools

- 6.61 Publication of 2021-22 individual school budgets will follow last year's timeline, with provisional budgets issued in early January 2021 and final budgets in March 2021. The expectation is that the January provisional budgets will reflect the October 2020 verified census data (subject to this being provided by the DfE no later than mid-December) and the final budget decisions of the Schools Forum and will therefore be very close to final allocations.

New Financial requirements of schools

- 6.62 Forum members will be aware that LAs are required to publish schemes for financing schools that set out the statutory financial relationship between them and the schools they maintain. The Secretary of State may by a direction revise LA schemes and notification has been received of 2 significant changes that will come into effect from April 2021 as follows.
- a. schools must submit a 3-year budget forecast each year, by 30 June
 - b. schools must submit a recovery plan to the local authority when their revenue deficit rises above 5% at 31 March of any year. Local authorities may set a lower threshold than 5% for the submission of a recovery plan if they wish.

- 6.63 These changes are therefore mandatory for all schools. The council will be considering the practical implications arising from these changes and will provide more comment in due course

Update on current year financial impact from coronavirus pandemic

- 6.64 Whilst the financial implications of the coronavirus pandemic on schools are not yet known, it is expected to be significant and is therefore something to be monitored and analysed. Schools have therefore been requested to assist with termly data collections.
- 6.65 At the Forum's previous meeting, an update paper was presented on provisional summer term financial implications, including initial information on the estimated costs to schools and the funding bids made to the DFE exceptional costs associated with coronavirus (COVID-19)_grant. The key points from the arrangements in place at that time were:
- 1 Funding by schools would be capped (£25k to schools with the least pupils, raising to £75k to those with the most) and could only be claimed for:
 - i. Increased premises costs from keeping schools open in holidays
 - ii. Support for FSM eligible children not attending school
 - iii. Additional cleaning from confirmed or suspected coronavirus cases
 - iv. Exceptional costs that could be bid for and would be considered on a case by case basis
 - 2 Information collected from mainstream schools by 30 June indicated:
 - i. Average available grant to claim is £36,304
 - ii. Average initial grant claim is £8,176 equivalent to 23% of potential funding
 - iii. £188k of eligible grant spend has been spent, with 44% associated with premises costs, 32% FEM and 24% cleaning
 - iv. There is a potential £663k shortfall between costs and the amount of income that can be claimed for

- v. At £436k, loss of income is the largest, single unfunded item.
- vi. Schools have identified £152k of possible cost reductions

6.66 As the DfE has yet to determine the outcomes from school bids for exceptional costs (paragraph 6.65 1iv above), it is not possible to provide a meaningful update at this time. However, of the 15 schools that did not make an exceptional cost claims, DfE has completed payments and the average receipt has been £12,909 or 31.2% of maximum amount ordinarily available. Whilst the percentage achieved has increase significantly, which is attributable to the Bursar workshop facilitated by the council, it remains significantly below the maximum amount available.

6.67 The council is continuing to request schools retain records of their extra expenditure in order to be in a position to provide reliable information on costs in order to help evaluate the true financial impact and also to determine whether any further actions should be taken. A number of other grants have subsequently been announced to help schools, most of which come into effect from September and financial information will also be requested on these. The initial overview already provided to schools is presented again here.

- a. Coronavirus (COVID-19) catch-up premium. This is aimed at helping pupils catch up from the disruption from coronavirus and is divided into 2 elements:
 - ii. Universal catch-up premium funding. Which will be paid to all state-funded mainstream and special schools, and alternative provision. Schools' allocations will be calculated on a per pupil basis, providing each mainstream school with a total of £80 for each pupil in years reception through to 11. Special, AP and hospital schools will be provided with £240 for each place. These are academic year funding amounts and will be paid in 3 tranches with £46.67 and £140 respectively to be received in 2020-21 financial year. Schools have the flexibility to spend their funding in the best way for their cohort and circumstances.
 - iii. National Tutoring Programme. This is targeted support for those children and young people who need the most help. The programme will comprise of at least 2 parts in the 2020 to 2021 academic year, including:

1. a 5 to 16 programme that will make high-quality tuition available to 5 to 16 year olds in state-funded primary and secondary schools from the second half of autumn term 2020

Schools will be able to use their catch-up premium to cover the subsidised cost of the programme.

Details of funding eligibility and allocations have yet to be released.

2. a 16 to 19 fund for school sixth forms, colleges and all other 16 to 19 providers to provide small group tutoring activity for disadvantaged 16 to 19 students whose studies have been disrupted as a result of coronavirus (COVID-19).

This funding is ring-fenced for 16 to 19 small group tuition only and will be allocated by the DfE proxy measure for disadvantage: learners with low prior attainment, meaning those who did not have a GCSE grade 4 or above in English and / or maths at age 16 in the value of £150 per student (pro rata for part time students).

Providers must accept or decline the extra funding and confirm that they will be able to spend this effectively and in line with the guidance.

- b. High value courses for school and college leavers: a one-year offer for 18 and 19-year-olds: This is a short-term funding for an additional programme of study of high value level 2 and 3 qualifications for up to a year from September 2020 if they cannot find employment or work-based training. A £400 uplift will be paid once per learner to cover the costs of putting on additional courses at short notice, recruiting extra students, and preparing staffing and facilities
- c. School and college responsibility for autumn exams: guidance. Schools should pay fees for all students who were due to sit exams in the summer, rather than passing the cost on to students or their families. The DfE has established an Exam Support Service to provide funding if needed to ensure that schools do not incur a net loss, taking their autumn fees and any rebates/credit notes they receive in respect of summer exams together.
- d. Alternative provision (AP): year 11 transition funding: This one-off funding is intended to fund additional transition support provided by AP settings for year 11 pupils from now to the end of the 2020 autumn term. This cohort are considered vulnerable and at greater risk of becoming not in education, employment or training (NEET) than their peers. AP settings will receive up to £750 for each year 11 pupil. The grant only covers the additional costs actually incurred, up to the limits. Claims will need to be submitted.
- e. Exceptional costs associated with coronavirus (COVID-19): There will be a second period for schools to claim additional costs arising from the coronavirus pandemic. This follows on from the claims process that covered the period April-July 2020. The DfE has yet to publish eligibility criteria and period for which this funding round will operate.

Conclusion and Next steps

- 6.68 Due to the historic low funding levels, BF schools are in general gaining from the national funding reforms. However, there are local budget pressures that are not adequately resourced by the DfE that result in an overall gap to meeting the NFF and CSSB requirements, currently estimated at £0.509m.
- 6.69 Further updates will be provided to the Forum in November, December and January as more information emerges which will allow for budget decisions to be considered.

7 ADVICE RECEIVED FROM STATUTORY AND OTHER OFFICERS

Borough Solicitor

- 7.1 The relevant legal provisions are addressed within the main body of the report.

Director of Finance

- 7.2 Included within the supporting information.

Equalities Impact Assessment

- 7.3 A decision on the need for an EIA will be taken when the final budget proposals are confirmed.

Strategic Risk Management Issues

- 7.4 Whilst the funding reforms and financial settlement in general result in schools receiving additional funds, a number of strategic risks exist, most significantly:
1. Insufficient funding to cover anticipated pay and price inflation and changes in contributions to the Pension Funds for schools receiving the lowest increases.
 2. The ability of schools with licensed deficits to manage their repayments. Two secondary schools and four primary schools have significant deficits that need to be managed during a period of financial change.
 3. Managing the additional revenue costs arising from the new / expanded schools programme and increased number of high needs pupils.
 4. The ability of schools to achieve school improvement targets.
- 7.5 These risks will be managed through support and assistance to schools in the budget setting process which is a well-established programme. It has ensured that schools develop medium term solutions to budget shortfalls and draws on funding retained to support schools in financial difficulty or through the allocation of short to medium term loans. There remains a de-delegated budget of £0.190m (after academy deduction) to support maintained schools in financial difficulties that meet qualifying criteria – subject to on-going agreement to the funding.

8 CONSULTATION

Principal Groups Consulted

- 8.1 People Directorate Management Team. School governors, head teachers, Schools Forum and other interested parties will be consulted throughout the budget setting process.

Method of Consultation

- 8.2 Written reports to People Directorate Management Team and Schools Forum; formal consultation with schools.

Representations Received

- 8.3 Included in body of the report.

Background Papers

None:

Contact for further information

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Doc. Ref:[https://bfcouncil.sharepoint.com/sites/fina/bpm/FIBPSCB-FIN9.6/Schools Forum/\(99\) 221020/2021-22 Schools Budget Preparations](https://bfcouncil.sharepoint.com/sites/fina/bpm/FIBPSCB-FIN9.6/Schools%20Forum/(99)221020/2021-22%20Schools%20Budget%20Preparations) v2.docx

Central School Services Block

Item	2020-21 Budget	2021-22	Change
<u>Budgets</u>			
<u>Combined Services Budgets:</u>			
Family Intervention Project	£100,000		
Educational Attainment for Looked After Children	£133,590		
School Transport for Looked After Children	£42,890		
Young People in Sport	£18,050		
Common Assessment Framework Co-ordinator	£42,470		
Domestic Abuse	£6,000		
Education Health Partnerships	£30,000		
SEN Contract Monitoring	£32,680		
<u>Miscellaneous (up to 0.1% of Schools Budget):</u>			
Forestcare out of hours support service	£5,150		
Borough wide Initiatives	£28,930		
Support to Schools Recruitment & Retention	£7,920		
<u>Statutory and regulatory duties:</u>			
'Retained' elements	£275,830		
<u>Other expenditure:</u>			
School Admissions	£186,690		
Schools Forum	£22,740		
Boarding Placements for Vulnerable Children	£62,470		
Central copyright licensing	£89,030		
Central School Services Total Budget	£1,084,440		
<u>Funding</u>			
Historic commitments	£324,544	£259,635	-£64,909
On-going responsibilities	£614,057	£598,711	-£15,346
Total Funding	£938,601	£858,346	-£80,255
Assumed transfer from Schools Budget (2020-21 amount)	£145,770	£145,770	
Central School Services Total Funding	£1,084,371	£1,004,116	-£80,255

* Combined Service Budgets funded by the DSG generally support vulnerable children, have an educational benefit and link to other programmes funded by the Council which together result in better, more effective use of resources with improved outcomes for children than if provided and managed independently.