

Notice of Schools Forum



Date: Monday, 23 September 2024 at 10.00 am

Venue: Royal Hampshire Committee Room, BCP Civic Centre, Bournemouth
BH2 6DY

Membership:

Chairman:

Geoff Cherrill Maintained Special

Vice-Chairman:

Patrick Earnshaw	Academies - Secondary
Kate Carter	Academies - Primary
Esther Curry	Academies - Primary
Kate Curtis	Academies - Primary
Sean Preston	Academies - Primary
Heather Spring	Academies - Primary
VACANCY	Academies - Primary
Vacancy	Academies - Primary
Mark Avoth	Academies - Secondary
P Gray	Academies - Secondary
M Dyer	Academies - Secondary
J Sankey	Academies - Secondary
Natasha Ullah	Academies - Secondary
Ben Doyle	All Through Academies
Jon Webb	Special Academies
Russell Arnold	Alternative Provision Academy
Brigid Hincks	Maintained Primary (Governor)
Chris Barnett	Maintained Secondary
Phillip Gavin	Mainstream PRU
Vicky Peters	Early Years
Linda Duly	Early Years
Vacancy	14-19 Provision
Vacancy	Catholic Diocese
Richard Wharton	C of E Diocese Representative

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

Members of the public may attend this meeting in person at the venue listed above. Papers can be found at the following link:

<https://democracy.bcpCouncil.gov.uk/ieListDocuments.aspx?MIId=5770>

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

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

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

GRAHAM FARRANT
CHIEF EXECUTIVE

13 September 2024

DEBATE
NOT HATE



Available online and
on the Mod.gov app

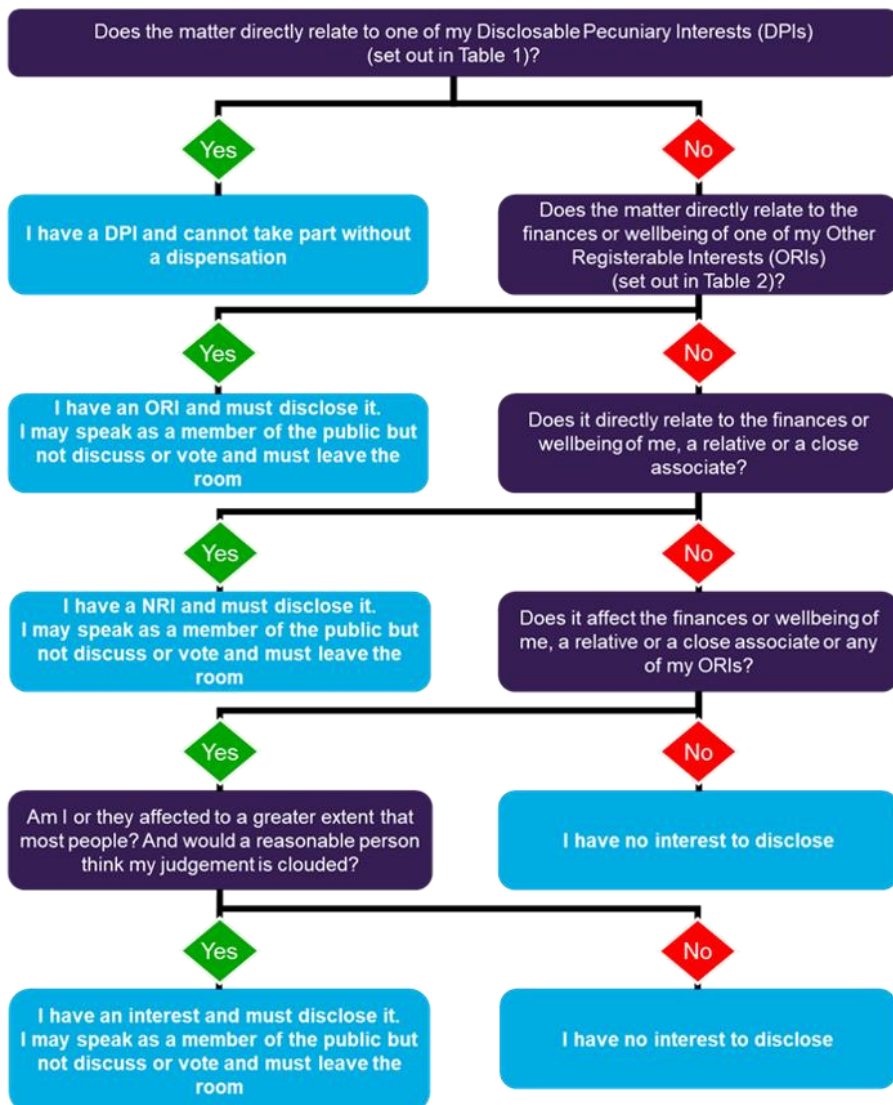


Maintaining and promoting high standards of conduct

Declaring interests at meetings

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

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



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

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

Bias Test

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

Predetermination Test

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

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

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

Selflessness

Councillors should act solely in terms of the public interest

Integrity

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

Objectivity

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

Accountability

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

Openness

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

Honesty & Integrity

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

Leadership

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

AGENDA

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

1. Apologies for Absence

To receive any apologies for absence.

2. Declarations of Interest

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

3. Election of Chair

To Elect a Chair of the Forum.

4. Election of Vice-Chair

To elect a Vice-Chair of the Forum.

5. Minutes of the Previous Meeting

7 - 10

To confirm the minutes of the previous meeting, held on 6 February 2024, as a correct record.

6. DSG 23-24 Outturn

11 - 16

The report considers the end of year position for the DSG budget 2023-24 at a net in-year deficit of £27.7 million. This is against a budgeted deficit of £27.1 million.

The £0.6 million overspend is largely due to the increasing high needs budget (£1.3 million), offset by savings in the school block and early years block.

The accumulated deficit has grown as a result from £35.8 million to £63.5 million at March 2024, with this required to be carried forward and recovered from future DSG allocations.

7. Quarter 1 Budget Monitoring and High Needs Update 2024-25

17 - 28

The BCP Local Area SEND system has significantly changed for the better over the last academic year. This follows the creation of a new SEND Improvement Plan developed to meet the Local Authority's DfE Statutory Direction Notice to Improve. The improvement work which has taken place over the last 10 months has now addressed all historic backlogs and improved the servicing of new assessments and Education Care and Health Plans into the system.

BCP's timeliness in servicing new assessments at 20 weeks is 97% which is near the statutory expectation of 100%. This is a much-needed improvement from the previous year's activity which stood at 0% in August 23 and August 2022 at just 5.6%.

Reported to Cabinet in September, an unexpected further increase in new EHCP requests since January 2024 has led to a £15.9 million further increase in the annual funding gap budgeted of £28 million (£43.9 million annual funding gap in total)

The cumulative deficit at 31 March 2025 is projected to be £107.4 million.

8. Forward Plan

29 - 30

To consider and note the Forward Plan

9. Dates of Future Meetings

The Forum is asked to note the previously agreed dates:

- 18 November 2024
- 13 January 2025
- 23 June 2025

And to agree its future meeting dates as outlined below:

- 29 September 2025
- 24 November 2025
- 19 January 2025
- 22 June 2025

10. Any Other Business

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

No other items of business can be considered unless the Chairman decides the matter is urgent for reasons that must be specified and recorded in the Minutes.

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SCHOOLS FORUM

TUESDAY, 6TH FEBRUARY, 2024

Present:

Geoff Cherrill (Maintained Special) – **Chairman**
Patrick Earnshaw (Academies - Secondary) – **Vice-Chairman**

Kate Carter, TEACH Academies Trust, Academies - Primary
Esther Curry, Coastal Learning Partnership, Academies - Primary
Kate Curtis, Talbot Primary School, Academies - Primary
Sean Preston, Hamwic Multi-Academy Trust - Chief Financial Officer, Academies - Primary
Heather Spring, Twynham Primary, Academies - Primary
Mark Avoth, Bourne Academy - Principal, Academies - Secondary
Paul Gray, Poole High School - Head Teacher, Academies - Secondary
James Sankey, Corfe Hills School, Academies - Secondary
Natasha Ullah, Magna Academy - Principal, Academies - Secondary
Ben Doyle, Principal - St Peter's School, All Through Academies
Jon Webb, Special Academies
Russell Arnold, The Quay School - Headteacher, Alternative Provision Academy
Brigid Hincks, Chair of Governors - St Joseph's Primary School, Maintained Primary (Governor)
Chris Barnett, Deputy Head - St Edward's School, Maintained Secondary
Phillip Gavin, Christchurch Learning Centre - Headteacher, Mainstream PRU
Vicky Peters, Priory View Preschool, Early Years
Linda Duly, Cuddles Day Nursery, Early Years
Dr Dorian Lewis, Headmaster, 14-19 Provision
Richard Wharton, C of E Diocese Representative

Also in Attendance:

Cllr R Burton, Portfolio Holder for Children's Services

Officers in attendance:

Amanda Gridley, Early Years Services Manager
Jo Collis-Heavens, Finance Manager Children's Services
Steve Ellis, Management Accountant Education Services
Tanya Smith, Head of School Planning and Admissions
Nicola Webb, Assistant Chief Financial Officer
Sharon Muldoon, Interim Director of Education
Luana Girling, Lead for Education Interventions, Assurance and Safeguarding

23 Apologies for Absence

Apologies were received from secondary Academy Representative Michelle Dyer.

24 Declarations of Interest

There were none on this occasion.

25 Minutes of the Previous Meeting

The minutes of the meeting were reviewed by the Committee and were approved as a correct record.

26 Looked After Children Pupil Premium Arrangements 2024-25

The Lead for Education Interventions, Assurance and Safeguarding presented a report, a copy of which had been circulated to each Member and a copy of which appears as Appendix 'A' to these Minutes in the Minute Book. The report accompanied the document called the BCP Pupil Premium (PP+ and PP+ post 16) policy April 2024 to March 2025. The policy was presented in draft format and aimed to inform the forum of the intention to spend the grant funding provided by the DfE, including allocation to schools and central retention. The Forum was advised that the final settlement was yet to be received but the terms and conditions had not changed dramatically from the previous year. It was expected that it would only be around £40k per local authority in comparison to the previous year which was £146k.

There was some discussion around the allocation of funding per pupil and the funding provided for pupils in early years settings. It was resolved:

That the Schools Forum note that report and that Schools Forum members share the report with the group colleagues and that any feedback is provided by 1 March.

27 Early Years Single Funding Formula 2024-25

The Early Years Team Manager presented a report, a copy of which had been circulated to each Member and a copy of which appears as Appendix 'B' to these Minutes in the Minute Book. The Forum was advised that a new Early Years Single Funding Formula (EYSFF) for BCP was required for April 2024 and consultation with the early years sector had now concluded. The DfE notified local authorities of their funding agreement on 29 November 2023, with substantial changes from 2023-24. A group of provider representatives helped to shape the proposal and indicated that their preference was to avoid consulting with the sector during or just before the Christmas break, which Children's Services agreed to.

It was noted that the government's biggest expansion of childcare entitlements would begin this year and the proposed EYSFF included funding rates for the children of working parents aged 9-36 months for the first time. These changes, along with a revision to the way children with SEND were funded, introducing a Deprivation Supplement to support our most disadvantaged 9-36-month-old children, a significant uplift in the Council's central functions and the introduction of a contingency fund formed the proposed EYSFF.

The Forum was informed that 31% of providers engaged with the consultation which ended on 22 January and were, overall, supportive of the proposed EYSFF. The consultation response was made available in Appendix A to the report.

In response to a query, it was noted that it was highly unlikely that there would be an underspend this year but if there was this would be brought back to forum and there would hopefully be agreement around this being ringfenced to the early years sector.

It was noted that many Councils were taking a 5 percent automatic top slice. The Early Years Sub-Group had supported a 2.5 percent retention. The Team Manager recorded their thanks to the Sub-Group for their work.

RESOLVED

That the proposed 2024-25 EYSFF be recommended to Cabinet for approval.

Voting: Unanimous

28 Forward Plan

It was noted that the next Schools Forum meeting was not scheduled until June. It was noted that conversations were ongoing outside of the Forum regarding Safety Valve and it was requested that information on this be shared regularly as required.

29 Dates of Future Meetings

24 June 2024

30 Any Other Business

There was none on this occasion.

Duration of the meeting: 10.00 - 10.25 am

**Chairman at the meeting on
Tuesday, 6 February 2024**

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SCHOOLS FORUM



Subject	Dedicated Schools Grant (DSG) Outturn 2023-24
Meeting Date	23 rd September 2024
Executive Summary	<p>The report considers the end of year position for the DSG budget 2023-24 at a net in-year deficit of £27.7 million. This is against a budgeted deficit of £27.1 million.</p> <p>The £0.6 million overspend is largely due to the increasing high needs budget (£1.3 million), offset by savings in the school block and early years block.</p> <p>The accumulated deficit has grown as a result from £35.8 million to £63.5 million at March 2024, with this required to be carried forward and recovered from future DSG allocations.</p>
Recommendations	To note the contents of the report.
Reasons for Recommendations	To update schools forum on the DSG financial position
Portfolio Holder(s):	Councillor Richard Burton – Children and young People
Corporate Director	Cathi Hadley
Report Author (s)	Steve Ellis, Management Accountant email: steve.ellis@bcpcouncil.gov.uk
Wards	Council-wide
Classification	For Information

Summary DSG Outturn 2023-24

1. The DSG in-year deficit for 2023-24 is £27.7 million (£0.6 million more than the £27.1 million budgeted). This is in addition to the cumulative £35.8 million deficit brought forward to give an overall cumulative deficit at 31 March 2023 of £63.5 million.
2. The growing deficit continues to be the result of unfunded pressures in high needs. The change from the forecast position in quarter 3 was largely due to an underestimate of the cost of alternative provision packages for pupils with an EHCP.
3. The early years block was underspent by £0.6 million this year, which was despite a £0.2 million pressure on the SEN inclusion element of the formula. Of this, £0.3 million was due to a larger adjustment to the funding received for 2023-24 than was provided.
4. The table below summarises the DSG outturn for 2023-24

Table 1: Summary DSG Outturn 2023-24

			Funding	Spend	Net
Early Years	Budget	£000's	-21,866	21,866	0
	Actual	£000's	-21,444	20,870	-575
	Variance	£000's	421	-996	-575
School Block	Budget	£000's	-251,100	250,915	-185
	Actual	£000's	-251,100	250,736	-365
	Variance	£000's	0	-179	-179
Central School Services Block	Budget	£000's	-1,965	1,965	0
	Actual	£000's	-2,024	2,013	-11
	Variance	£000's	-58	48	-10
High Needs Block	Budget	£000's	-59,240	86,519	27,279
	Actual	£000's	-59,162	87,781	28,619
	Variance	£000's	78	1,262	1,340
Total DSG	Budget	£000's	-334,172	361,265	27,093
	Actual	£000's	-333,731	361,399	27,668
	Variance	£000's	441	135	576

DSG Income 2023-24

5. A net reduction in funding of £0.4 million in the early years block is largely the result of the reduced take-up of the free entitlements from the falling birth rate. There was no adjustment made in the accounts last year as the usual adjustment after the end of the financial year in July each year was expected to be small based on the available data.
6. The central school services block allocation was increased by £0.058 million after the funding for historical commitments was restored following the provision of evidence to the DfE for unavoidable costs.
7. As previously reported, the high needs block allocation was reduced in year by £0.054 million due to the recalculation of the import / export adjustment based on data from the January 2023 census.
8. School block funding is fixed from the start of the year.

DSG Expenditure 2023-24

9. Expenditure for each block is detailed in the appendix with further analysis provided in the paragraphs below.

Early Years Block Spend

10. Overall, the funding payments to early years providers are significantly less than budgeted due to demographic changes. The net £0.3 million over-estimate of the prior year adjustment has added to the surplus for 2023-24. The ongoing pressure in the high needs element of the formula reduced the overall surplus. Table 2 below shows the revised funding allocation and spend to show the detailed budget variances.

Table 2: Breakdown of early years block spend against funding 2023-24

Early Years Expenditure	Funding	Spend	Variance
2 year olds	£2,169,628	£2,108,515	£61,112
3 & 4 year olds	£17,307,771	£16,854,413	£453,357
SEND	£1,123,317	£1,356,778	£233,461
Central expenditure	£183,903	£166,115	£17,787
Previous year adjustment	£351,509	£46,752	£304,757
Disability Access Fund	£118,404	£111,833	£6,571
EY Pupil Premium	£189,935	£225,420	£35,485
Total	£21,444,466	£20,869,827	£574,639

11. The pressure on the SEND element of the formula continues and the pupil premium allocations were greater than funding in 2023-24 but these have been offset by underspends on the main formula elements. Despite this significant underspend, the overall position on the early years block since BCP was formed (table 3) demonstrates the percentage of funding passed to providers remains high (99% over 5 years)

Table 3: Historic early years position since BCP formed.

	£ millions	2019-20	2020-21	2021-22	2022-23	2023-24	Since BCP
A	DSG (Early Years Block)	£20.310	£20.879	£19.829	£19.997	£21.444	£102.459
B	Transfers(in/Out)	£0.200			£0.400		£0.200
C	Spend	£20.257	£20.663	£20.268	£20.512	£20.870	£102.570
	In Year Surplus / Deficit	£0.147	£0.216	£0.439	£0.115	£0.575	£0.090
D	Central Spend	£0.209	£0.185	£0.163	£0.203	£0.166	£0.926
D/A	% of EY Block	1.0%	0.9%	0.8%	1.0%	0.8%	0.9%
(C-D)/A	% passed to providers	99%	98%	101%	102%	97%	99%

Schools Block Spend

12. The mainstream schools funding formula was paid to mainstream schools and recouped by the ESFA as per the formula set in January 2023.
13. Growth funding payments were £25,000 more than budgeted. Rates bills were £205,000 less than budgeted due to a change in DfE methodology. The ESFA no longer require local authorities to include the inflationary pressure of rates bills in their budget and any costs are covered centrally.

Central Schools Services Block Spend

14. The overspend on the central schools block expenditure is matched by the restoration of the historic commitments funding to the DSG allocation. The additional funding was spent against ex-ESG services. In addition, spend was re categorised between school admissions and EX-ESG services. The schools forum budget remains largely unused.

High Needs Block Spend

15. The overspend in the high needs block (and the movement since the forecast in the January 2023 report) is largely the result of funding more alternative / bespoke packages than expected. Fewer children were placed in INMSS than budgeted but average costs were much higher. The overall full time equivalent (FTE) for EHCPs was close to budget but there was a surge in the later part of the year where the larger share of costs falls into future years.

16. Table 3 below summarises the high needs variances:

Table 3: High Needs Block Variances

Expenditure Area	2023-24 (under) / overspend		
	FTE	Cost £	Average Top-Up £
Total Independent & Non-Maintained (INMSS)	(146.6)	(4,104,103)	11,499
Total Post 16	(142.5)	(313,825)	5,625
Special Schools	116.0	937,823	(1,009)
Total Mainstream and Special Units	236.6	2,661,947	828
Other (AP / therapies and bespoke packages / Pre-school)	(41.2)	803,488	1,930
Teachers Pay & Pensions Grant & SSG*		(1,739,953)	
Costs relating to previous year		608,708	
Total EHCPs	22.2	(1,145,915)	(104)
Centrally commissioned SEN services / places		445,218	
Total SEN Expenditure		(700,697)	
AP Expenditure	53.9	1,963,001	
TOTAL High Needs Block Spend Variances		1,262,304	
Funding reduction in-year **		78,000	
NET VARIANCES		1,340,304	

* supplementary school grant **import / export adjustment

17. In total 22.2 more FTE plans were funded than budgeted. The average top-up across all provisions was also within £104 of the figure budgeted, but INMSS and post -16 cost more on average than budget.

18. Action to remove the backlog of EHCPs and improve timeliness has increased spend significantly moving forward. Work is underway to revise forecasts for the new financial year and an update will be brought to the next schools forum.

19. Underspends on Independent placements, with state schools spend overspending continues to demonstrate progress in restricting the trends forecast through the DBV work and starting to improve the proportion of placements made in the state sector.

20. Centrally commissioned contracts such as SALT, HVSS, and place funding were £0.4m more than budgeted, due to the HVSS contract being over budgeted (£0.2m). In addition, £0.3m place funding was spent on the creation of new places. There were small underspends on central functions offsetting these.

Legal Implications

21. It is a requirement of the Council to monitor budgets during the financial year and for schools forum to be informed of the DSG outturn.

Background Papers

Previous schools' forum papers are available at the link below:

[http://ced-pri-cms-02.ced.local/ieListMeetings.aspx?Committeed=149&\\$LO\\$=1](http://ced-pri-cms-02.ced.local/ieListMeetings.aspx?Committeed=149&LO=1)

Appendix

Presentation of detailed DSG outturn budget variances for 2023-24.

Appendix – DSG Outturn 2023-24

Budget Monitoring	Early Years £000's	Schools £000's	Central Services £000's	High Needs £000's	Total Budget £000's	Actual	
						Outturn £000's	Variance £000's
DSG 2 year olds NFF	-2,424				-2,424	-2,323	101
DSG 3 year olds NFF	-19,146				-19,146	-18,461	684
DSG Pupil Premium	-177				-177	-190	-13
DSG Disability Access Fund	-118				-118	-118	0
DSG Prior Year					0	-352	-352
DSG NFF School Block		-247,599			-251,100	-251,100	0
DSG Premises		-1,705				0	0
DSG Growth Fund NFF (final)		-1,796				0	0
DSG High Needs Block				-59,240	-59,240	-59,162	78
DSG Central School Services Block			-1,965		-1,965	-2,024	-58
Total Funding	-21,866	-251,100	-1,965	-59,240	-334,172	-333,731	441
Providers - 2 year olds	2,296				2,296	1,880	-416
Providers - 3 and 4 Year olds	17,967				17,967	17,115	-851
Providers SEN top up grants	1,123				1,123	1,350	227
Early Years Pupil Premium	177				177	233	56
Disability Access Fund	118				118	112	-7
Early Years LA duties	184				184	179	-5
Mainstream Schools Formula		250,448			250,448	250,244	-204
Growth Fund - budget		467			467	492	25
School Admissions			387		387	387	0
Servicing Schools Forum			10		10	0	-10
Ex ESG Services (all schools)			999		999	1,040	41
Commitments - Premature retirements			17		17	17	0
Commitments - ASD Base / other			275		275	292	17
Licences Purchased by DfE			277		277	277	0
Place Funding				13,794	13,794	14,334	540
Top up Funding - State Sector				23,448	23,448	27,212	3,764
Top up Funding - Independent/NMSS				28,384	28,384	24,380	-4,004
Top up Funding - Post Schools				7,073	7,073	6,729	-344
Top up Funding - Pre schools				152	152	143	-9
Top up Funding - Excluded Pupils/AP				1,492	1,492	3,357	1,865
Commissioned Services including Outreach				1,427	1,427	1,428	1
Hospital Education Top up				100	100	26	-74
Bespoke SEN /Therapies				5,589	5,589	6,700	1,111
Support for Inclusion				146	146	101	-45
Special Schools Teachers Pay & Pension Grants				830	830	1,790	960
Spend relating to supplementary grant				2,700	2,700	0	-2,700
School block surplus				0	0	0	0
Early Years Central SEN support				626	626	646	20
Sensory Impaired Service				758	758	935	177
Total Expenditure	21,866	250,915	1,965	86,519	361,265	361,399	135
In-year (Surplus) / Deficit	0	-185	0	27,279	27,093	27,668	576
(Surplus) / Deficit brought forward					35,844	35,844	
(Surplus) / Deficit carried forward					62,937	63,512	



BOURNEMOUTH, CHRIST CHURCH, and POOLE SCHOOLS FORUM

Subject	Quarter 1 Budget Monitoring and High Needs Update 2024-25
Meeting Date	23 September 2024
Report Author (s)	Sharon Muldoon, Interim Director for Education and Skills Steve Ellis, Management Accountant, Education Finance
Status	Public
Classification	For information
Executive Summary	<p>The BCP Local Area SEND system has significantly changed for the better over the last academic year. This follows the creation of a new SEND Improvement Plan developed to meet the Local Authority's DfE Statutory Direction Notice to Improve. The improvement work which has taken place over the last 10 months has now addressed all historic backlogs and improved the servicing of new assessments and Education Care and Health Plans into the system.</p> <p>BCP's timeliness in servicing new assessments at 20 weeks is 97% which is near the statutory expectation of 100%. This is a much-needed improvement from the previous year's activity which stood at 0% in August 23 and August 2022 at just 5.6%.</p> <p>Reported to Cabinet in September, an unexpected further increase in new EHCP requests since January 2024 has led to a £15.9 million further increase in the annual funding gap budgeted of £28 million (£43.9 million annual funding gap in total)</p> <p>The cumulative deficit at 31 March 2025 is projected to be £107.4 million.</p>
Recommendations	To note the contents of the report.
Reasons for Recommendations	Budget monitoring is an important element of current year financial management and budget planning for future years.

Background

1. The DSG budget for this year was set with a funding gap of £28.0 million, specifically relating to the high needs block. This budget was set after work in November 2023 to produce a 15-year plan to balance the high needs block position in year by the end of that timeframe. This was considered to be challenging but achievable given the trends at the time. However, demand in the system has increased significantly since the plan was developed and has resulted in the overspend forecast for 2024-25 at £15.9million on top of the budgeted funding gap of £28m (total high needs funding gap of £43.9m). Therefore, it is anticipated that the accumulated deficit at March 2025 will reach £107.4m.
2. The new government is being urged to find a solution to the national DSG deficits as a priority and conversations are on-going with representatives of the DfE and Ministry of Housing Communities and Local Government (MHCLG) in seeking an immediate solution to the drain on the council's cash flow and cash balances in funding the DSG shortfall. A solution to avoid the need to borrow for revenue purposes, which is not permitted for councils, must be in place by February 2025 to enable the council to set a balanced general fund budget for 2025-26. A longer-term solution must be in place before the statutory override (which keeps the accumulated DSG deficit out of the general fund) falls away on 1 April 2026.

High Needs Forecast 2024-25

3. The council's DSG deficit management plan is in the process of being updated to reflect the most recent position.

High Need Forecast

Expenditure Area	2023-24 (under) / overspend		
	FTE	Cost £	Average Top-Up £
Total Independent & Non-Maintained (INMSS)	40.4	£7,681,469	£13,103
Total Post 16	(153.6)	(£2,285,498)	£3,259
Special Schools	(68.1)	£14,261	£1,151
Total Mainstream and Special Units	(101.5)	(£1,435,813)	(£365)
Other (AP / therapies & bespoke packages / Pre-school)	429.8	£9,516,886	£10,828
Teachers Pay & Pensions Grant & SSG*		(£23,985)	
Costs relating to previous year		£493,456	
Total EHCPs	147.1	£13,960,777	£4,388
Centrally commissioned SEN services (including places)		£176,398	
Total SEN Expenditure		£14,137,175	
AP Expenditure		£1,715,950	
TOTAL High Needs Block Spend Variances		£15,853,125	
Funding reduction in-year (import/export adjustment)		(£141)	
NET VARIANCES		£15,852,984	

Reasons for Spend Changes

4. In July 2023, the Local Area Partnership's progress against its SEND Written Statement of 2021 was reviewed by the Department for Education (DfE). This identified that insufficient progress had been made with regards to the service provision and associated outcomes for children and young people accessing this service. [Written Statement of Action Dec 21](#) [BCP Statutory Direction Apr 22](#)

5. A Statutory Direction was issued to the Local Authority that directed the organisation to improve the quality and timeliness of its services to meet statutory expectations. A new SEND Commissioner was appointed, alongside the development of a new SEND Improvement Plan; this was signed off by the DfE in February 2024. A key thrust of this plan was to ensure that no children in Academic Year 23/24 would experience a delay and that all historic assessments or plans requiring actions would be met. [SEND Statutory Direction Feb 24 SEND Improvement Plan](#). Positively, this requirement has now been met.
6. ECHP assessments - in July 2023 there was a back log of 192 assessments waiting more than 30 weeks for assessment, with a service average time of assessment completion at 44.5 weeks. It should be noted that the statutory expectation is that all assessments are completed within 20 weeks. In July 2023, 0% of assessments were being managed within the statutory timescales. By July 2024, through the SEND improvement programme the Local Authority has achieved 97%, with a much-improved average process time now standing at 21.4 weeks. The service has now completed all historic backlog ECHP assessments. This progress has been positively received by all stakeholders.
7. Annual Reviews - every child or young person with an EHCP is by law entitled to and expected to have an Annual Review whereby their needs are reviewed and where accordingly their plans are amended. In July 2023, there was an Annual Review backlog of 2,453 (representing 68% of the EHCP cohort) which had not been completed or amended in time. As at July 2024, all the historic delayed Annual Reviews (2,453) have been processed, furthermore in year timeliness for academic year has significantly improved. There are currently 769 outstanding Annual Reviews for academic year 23/24 (representing 18% of total EHCP cohort). It is hoped by end of spring term all Annual Reviews will be met within the statutory requirements.
8. A new SEND Service restructure is currently being progressed as part of the SEND Improvement Plan. This restructure fundamentally changes the service profile to ensure continued timeliness against statutory time limits; positively, this has been designed within the existing current staff budget. A key focus of this new service design will be to provide greater focus on the quality of plans and to ensure that the use of independent mainstream specialist provision is reduced where possible. The table below shows the current unit cost profile for the different types of provision.

Annual cost of current EHCPs	£ 000's
Independent Schools	83.4
NMSS	57.7
Colleges	3.7
Specialist Colleges (SPI)	61.8
Independent Colleges	54.8
Special Schools	20.2
Mainstream	9.5
Independent mainstream	23.7
Mainstream Bases	16.0
Medical / Therapies	5.0
Bespoke	35.3
Pre-School	18.0
Average	21.5

9. The historic backlog of a total of 2,645 assessments and/or plans resulted in delayed costs being factored into the SEND forecast system i.e. plans not being serviced in statutory timeliness impacts or hides the real financial profile and the associated costs being

unclear/uncertain in its predicted forecasts. This has now been addressed through a revised and improved operational processes.

10. In October 2023, the Local Authority, working with the DfE in its Safety Valve programme submitted a revised budget for the SEND System. This plan was developed with DfE Advisors. It was established by looking at the previous 3 years of activity within the SEND system and making assumptions around the profile of new activity in the system to reduce the key financial pressure. A key focus of this was to reduce the use of costly independent specialist provision; to promote earlier support through earlier intervention and to ensure that more children with EHCPs access their education in local mainstream provision.
11. These assumptions included the previous 'yes to assess' levels i.e. the number of assessments that were over the last 3 years found to meet statutory thresholds (for an assessment) and the onward run rate of EHCPs. These assumptions have now been proven to have materially changed, resulting in a significant variance to budget as outlined below.

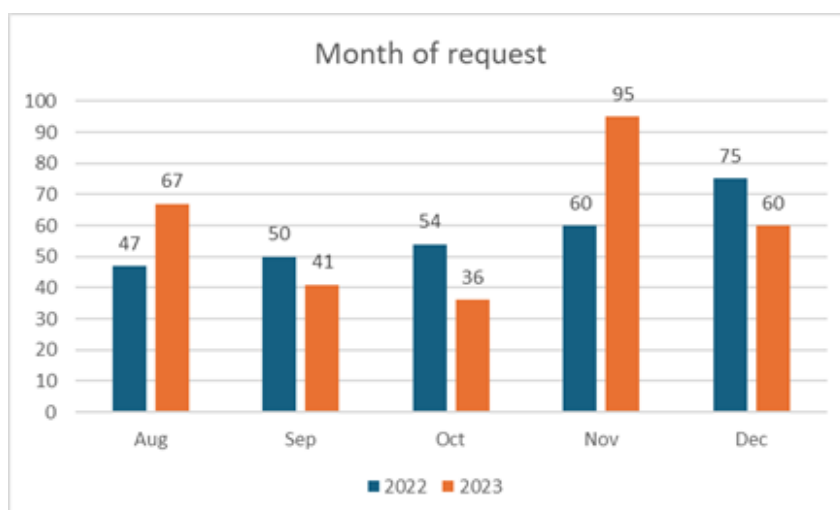
Calendar Years-'yes to assess' figures:

BCP	2020	2021	2022	2023
yes to assess	322	494	619	628
%	66.9	83.4	74.0	69.5

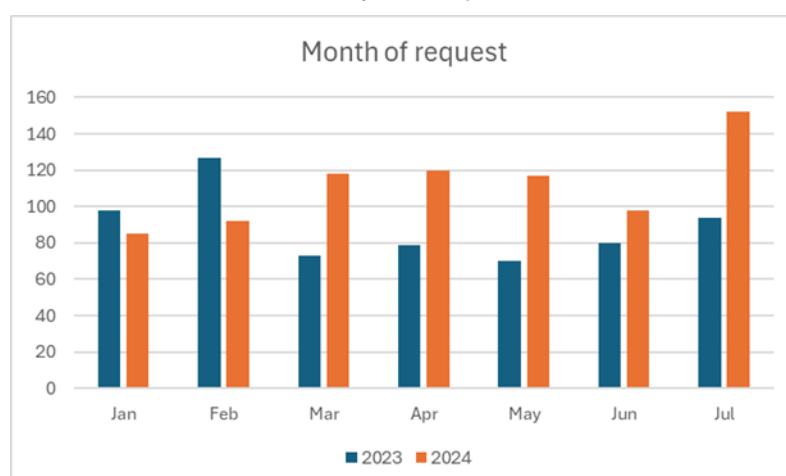
12. All improvement work has been overseen by the Department for Education's nominated Peer Support provider, Bedford Council. Each month audits are carried out by Bedford Council ensuring oversight of the Local Authority's decision processes. For the year ending March 24 BCP's yes to assess stood at 71%. Work continues to monitor decisions each month.

BCP	National	South West	Statistical Neighbours
69.5% (2023)	67% (2023)	64% (2023)	64% (2023)

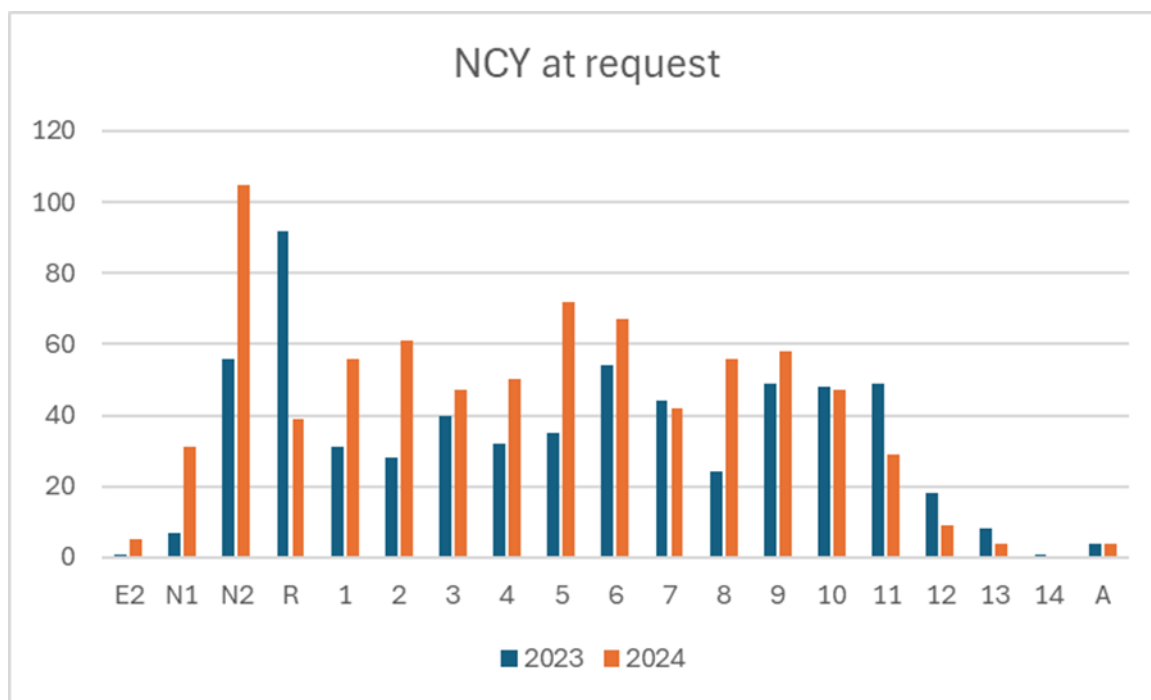
13. This year's budget was built as part of the safety valve discussions and the resulting 15-year DSG management plan was set with a series of ambitious aims to reduce the number of new assessments into the system to 30 per month. This assumption was made based on data available in November 2023 (up to the end of October 2023) and is shown in the table below. Requests in October were 36 with only 24 being taken forward for assessment and likely to lead to a plan. It was always recognised that this was ambitious to maintain, but achievable through the wider SEND Improvement Plan, needs would be supported at SEN Support level and not result in escalations to EHCPs. This was also the opinion of supporting officers from CIPFA and the DfE.



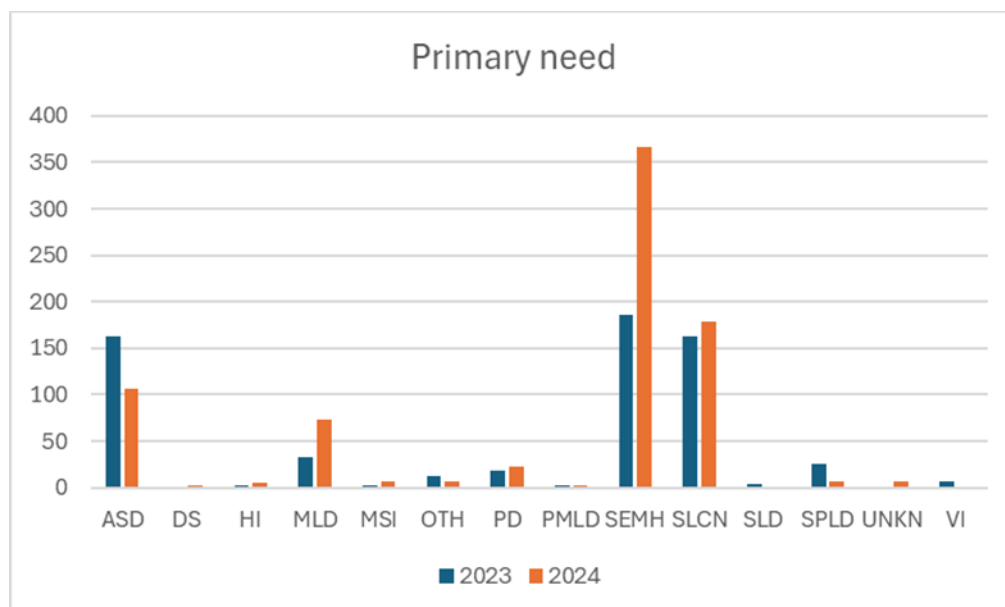
14. Since the management plan was submitted to the DfE, there has been a significant increase in demand. Data from January onwards demonstrates a continuing and substantial increase in requests superseding our expectation of an average of 30 requests per month by at least double every month. This follows a number of high profile events held with schools following Safety Valve discussions and local activity in the press and social media.



15. In addition to the volume of requests, the local area is witnessing a change in the profile in new requests. It is seeing an increase in requests for children and young people in their Early Years Foundation Stage (EYFS to Key Stage 1). This is significant for the budget as it results in a longer period of support required within an educational setting and in some cases a substantial increase in funding in relation to specialist provision where appropriate. The table below provides an overview of new assessment requests by National Curriculum Year (NCY) comparing Jan-Jul 23 with Jan-Jul 24.



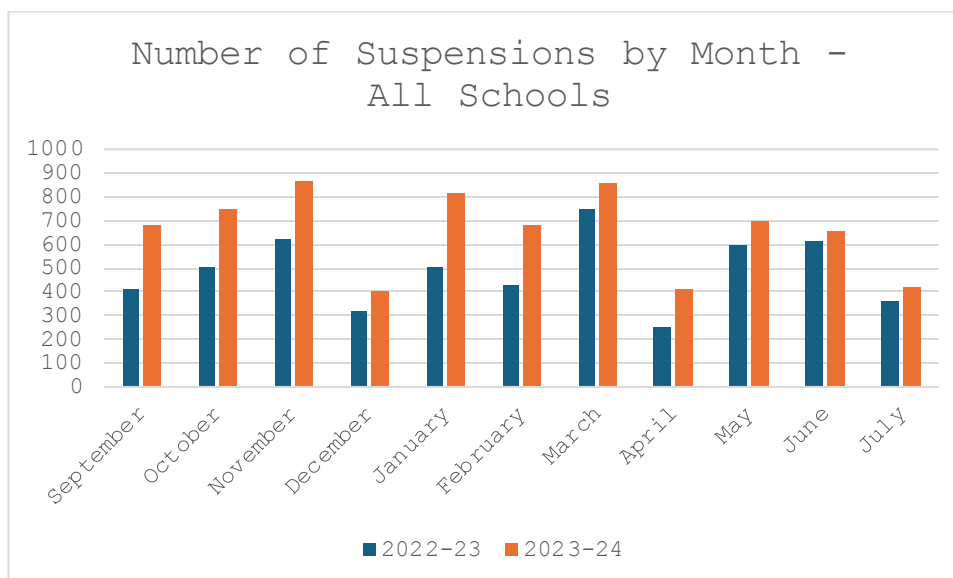
16. Further analysis of the change in the SEND system evidences there has also been a change in primary need in relation to requests received. In particular, the shift from children and young people with an Autistic Spectrum Condition diagnosis to Social, Emotional and Mental Health needs, requiring more specialist and sometimes bespoke packages to support their education journey. Listed below is the profile of primary need for the Jan-Jul 23 period compared with Jan-Jul 24. This will need to be analysed and understood and will be the subject of further work.



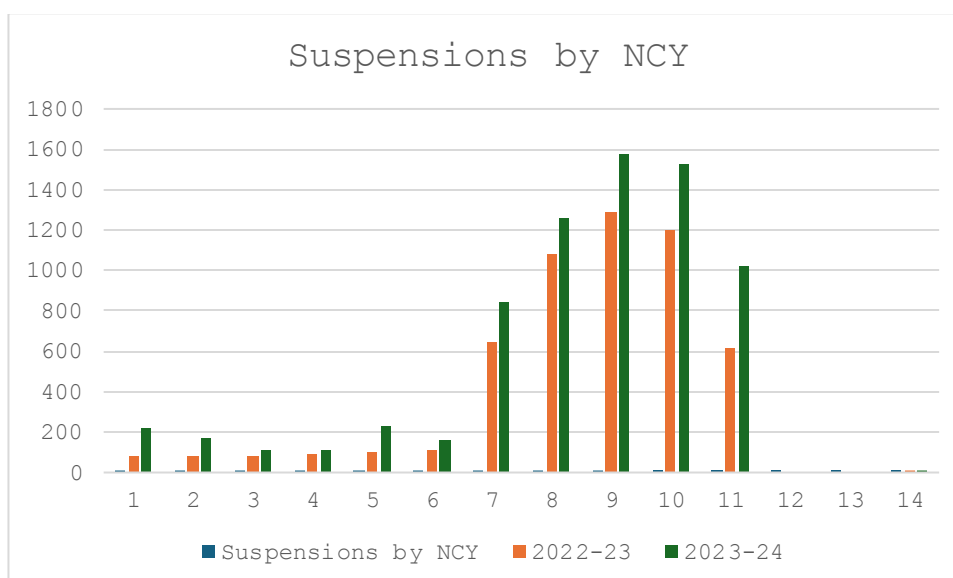
17. BCP's percentage of children with an EHCP as at Jan 2024 stands at 4.4% of the total school population, which is broadly in line with the national average of 4.7%, South West average of 4.8% and Statistical Neighbour level being 4.8%. As at July 2024 there are 4,321 EHCPs in the BCP system. If we were at national comparator level, there would be expected to be **4,713 EHCP's in place**, which is an additional 392 EHCPs.
18. Alongside changes in SEND provision an area of further and particular concern with some direct links to the EHCP trends seen above, is the changing profile across a number of

school inclusion measures. The information detailed below set out these changes with a summary of their impact at the end of the charts.

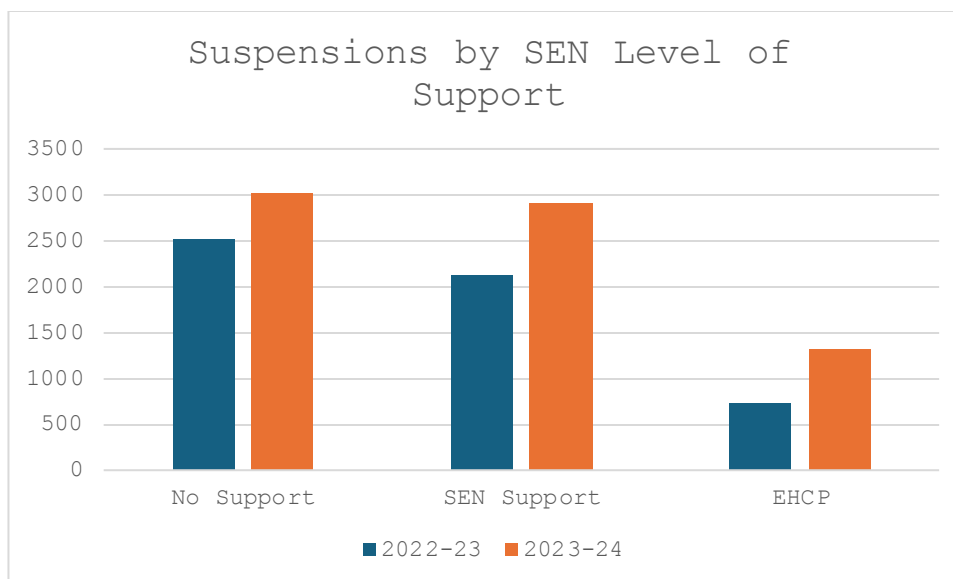
19. The use of school suspensions across the system is accelerating at an alarming rate. 2023-24 figures in the tables below will not be completed until the School Census figures are received in December 2024, but already far exceed the 2022-23 figures, increasing from 5374 separate suspensions to a current total of 7240 – an increase of 34.7% in one year.



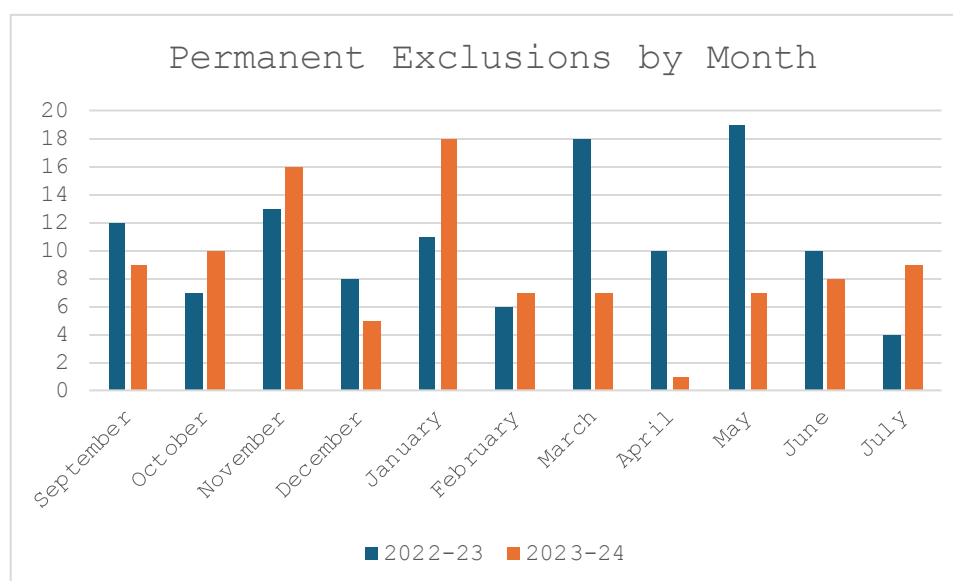
20. A breakdown of suspensions by National Curriculum Year (NCY) shows an increase across every NCY group from Year 1 to Year 11. While actual numbers have been, and remain, significantly lower in Primary compared to Secondary, the increase in Primary suspensions is 87% compared to 29% in Secondary.

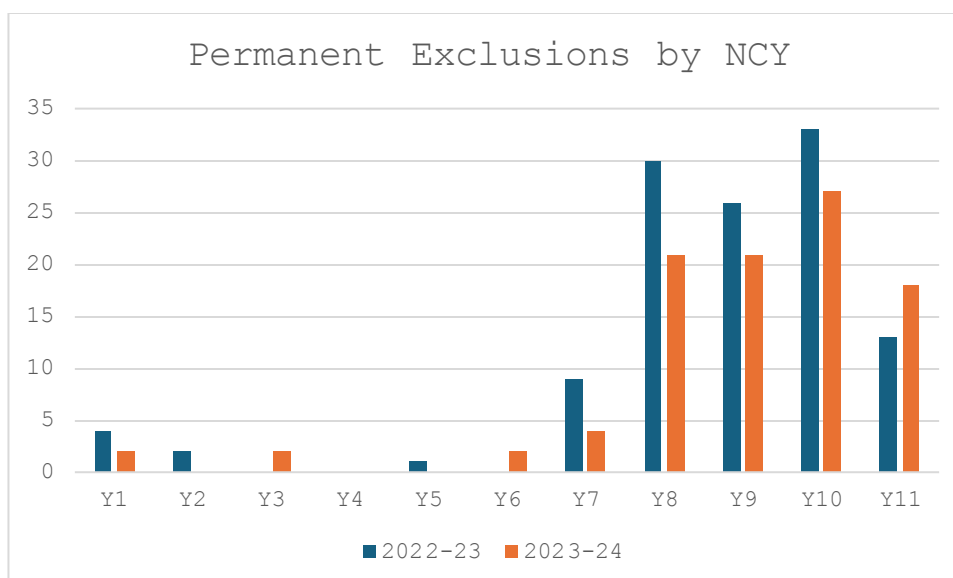


21. Of particular concern, linked to SEND and EHCPs are the increases in suspensions for those on Special Education Needs (SEN) support and with EHCPs compared to those pupils without SEN. Percentage increases across the three areas between 2022-23 and 2023-24 are as follows: (again with complete figures for 23-24 not expected until Dec 2024).
22. The BCP area has seen an increase of 19% for those children currently without SEN Support, for those with SEN Support and increase of 38% and alarmingly, for those with an EHCP an increase of 80%.



23. In relation to permanent exclusions, overall permanent exclusions have reduced year on year from 118 in 2022-23 to 97 in 2023-24, a drop of 18%. The behaviours in the system demonstrate a shift in reduction of exclusions but an alarming increase in the number of suspensions occurring across the system.





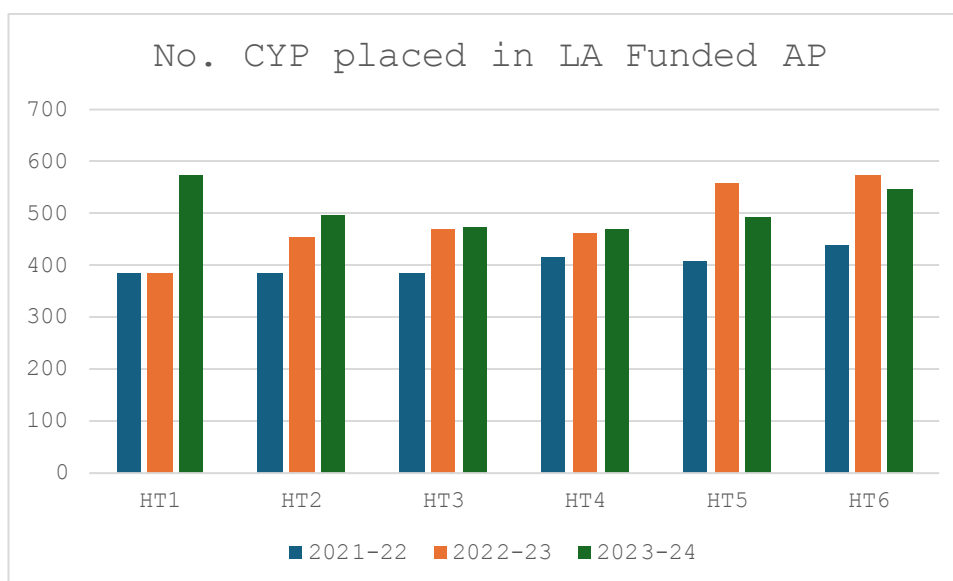
24. However, linking again to SEND and EHCPs the proportion of permanent exclusions for children with SEN and EHCPs has increased in comparison to those without Special Education Needs. This activity will then potentially drive an increase in Alternative Provision for these children and young people, driving further cost into the system.

Permanent Exclusions by SEN Status

By SEN Status	2022-23	Percent of total	2023-24	Percent of total
EHCP	6	5.10%	6	6.20%
SEN Support	49	41.50%	45	46.40%
No SEN Support	63	53.40%	46	47.40%
Total	118		97	

25. The two indicators of suspensions and exclusions, whilst not exhaustive, provide clear evidence of a significantly distressed mainstream system, particularly with regard to meeting the needs of children and young people with SEND. Exclusions are reducing more slowly and suspensions rising significantly more quickly for this cohort of children compared to those without SEND.
26. This evidence runs consistently with the qualitative feedback received by BCP Council officers in Headteacher Forums and SENCO meetings, that mainstream schools are struggling to meet pupils' needs and manage behaviours.
27. As a result, requests for Education, Health and Care Needs Assessments (EHCNAs) are continuing to rise as evidenced in earlier sections of this report. In addition, schools are continually seeking to have pupils placed in Alternative Provision (AP) placements instead of attending their mainstream setting. This will have contributed to the avoidance of some permanent exclusions where a pupil has instead been moved to an AP setting, however this places further cost strain on the High Needs Budget with an increase in the use of Alternative Provision packages for children with SEN Support or EHCPs.
28. The two tables below share the current profile of use of AP versus the last 2 academic years. Associated financial outlay is set out in the subsequent section.
29. The first table presents snapshots of the number of CYP attending AP at the end of each half term. Due to reporting restrictions, it does not demonstrate how many CYP have been in AP across the period in total, only how many are there on the day the snapshot is taken.

30. While 2022-23 and 23-24 therefore present as similar levels, it should be caveated that the numbers do not represent the total number of placements across the entire year. The snapshots do demonstrate a particular rise however from the snapshots in 2021-22, i.e. HT 6 snapshot rises from 439 in 2021-22 to 573 in 2022-23 and 546 in 2023-24



31. The next snapshot table below represents a cohort that are a sub-group of the first table, namely CYP with EHCPs who are in AP due to an EHCP and are also not on roll at a registered school. In HT6 of 2023-24, this figure is 151 compared to 56 in 2021-22
32. This rise is a direct impact from the increased number of EHCPs and the improvements made in the system. We are now seeing the real-time impact of EHCP demand on the placement system as a whole.
33. 70 of the 151 are only in AP while they wait for a specialist school placement to become available for them. Without this 70, the figures would be much closer to the 2021-22 levels.

The Councils Financial position

34. It should be noted that whilst the local authority deficit continues to grow, in contrast, schools' reserves are increasing overall from £13.9million, after the end of the first year of BCP, to £37.6million at the most recent published data (end March 24 for maintained schools and end August 2023 for academies)
35. The appendix shows how school and academy balances have increased over the past 5 years, almost 3 times what they were in 2019-20. The current year funding for each school has been set out and a surplus balance calculated at school level against 8% or 5% (depending on phase). Below the school by school figures a summary by trust has been given. This does not allow for trust balances or other schools within the trust outside of the BCP area.
36. This is referenced by way of highlighting that whilst it is the behaviour across the whole SEND system in the local area driving the pressure, this is only reflected overall within the financial position of the local authority.
37. Given this position, the local authority is planning to continue to request a transfer of funding from the schools funding allocations (1% according to the current DSG management plan to support the innovation fund). This will be subject to consultation with schools as normal and require the approval of the Secretary of State.

Summary of financial implications

38. The forecast does have an immediate implication in the cost to the Local Authority in servicing this deficit. It is forecast that the cost of servicing the DSG deficit this year will be circa £5.4million a £1.4million increase from the £4million included in the budget.
39. The impact on the accumulated deficit is summarised below.

Dedicated Schools Grant	£m
Accumulated deficit 1 April 2024	63.5
Budgeted high needs funding shortfall 2024/25	28.0
High needs overspend 2024/25	15.9
Projected accumulated deficit 31 March 2025	107.4

40. The forecast for future years based on the updated trends and data is underway.

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Bournemouth, Christchurch and Poole Schools Forum

Forward Plan

23 September 2024

- Quarter 1 Budget Monitoring and High Needs Update 2024-25
- DSG Outturn
- Forward Plan and dates for 2025/26

18 November 2024

- Quarter 2 DSG Budget monitoring 2024-25
- DSG Settlement 2025-26
- Draft High Needs Budget 2025-26
- Forward Plan

13 January 2025

- DSG Management Plan
- Mainstream School Funding and High Needs Transfer
- LAC Pupil Premium Arrangements
- Maintained School Services and Central retention

First 2 Weeks of February (provisional Meeting)

- Early Years Single Funding Formula 2025-26

23 June 2025

- DSG Outturn 2024-25
- High Needs Block Update
- Forward Plan

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