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To: The Chair and Members
of the Devon Education
Forum

County Hall
Topsham Road
Exeter
Devon
EX2 4QD

Date: 12 March 2024

Contact: Fiona Rutley 01392 382305

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DEVON EDUCATION FORUM

Wednesday, 20th March, 2024

A meeting of the Devon Education Forum is to be held on the above date at 10.00 am at Committee Suite - County Hall to consider the following matters.

Donna Manson
Chief Executive

A G E N D A

PART I - OPEN COMMITTEE

1 Apologies for absence

2 Declarations of Interest

To receive any declarations of interest.

3 Minutes (Pages 1 - 10)

Minutes of the meeting held on 24 January 2024, attached.

4 Items Requiring Urgent Attention

Items which in the opinion of the Chair should be considered at the meeting as matters of urgency.

5 Matters Arising from the Last Meeting and Report back on Issues Raised with Cabinet/f40

To consider any matters arising from the last meeting where not otherwise covered on this agenda and to report on items considered at the Cabinet.

6 Membership

SPECIFIC AGENDA ITEMS

7 Deputy Director and Head of Education Update (Pages 11 - 24) (10.10am)

Report of the Director of Children and Young People's Futures (DEF/24/07), attached.

8 Special Education Needs & Disabilities (SEND) Transformation Programme Update (Pages 25 - 28) (10.35am)

Report of the Director of Children and Young People's Futures (DEF/24/08), attached.

ITEMS FOR DECISION

9 Finance (11.00am)

- a Schools Finance Group (SFG) Minutes (Pages 29 - 32)
Minutes of the meeting held on 6 March 2024, attached.

Also available at

[Schools Finance Group \(SFG\) – Education and Families \(devon.gov.uk\)](https://www.devon.gov.uk)

- b High Needs Funding Sub Group Minutes (Pages 33 - 36)
Minutes of the meeting held on 4 March 2024, attached.

- c Finance Update (Pages 37 - 48)
Joint Report of the Director of Children and Young People's Futures and Director of Finance and Public Value (DEF/24/09), attached.

STANDARD AGENDA ITEMS

ITEMS FOR DEBATE AND INFORMATION

10 Standing (and other) Groups (Pages 49 - 54) (12.00pm)

To review action and receive minutes for the Forum from its standing groups (excepting Schools Finance Group and the High Needs Funding Sub Group, at set out above) and to receive summary/minutes from other groups:-

(a) Standing Groups School Organisation, Capital and Admissions (SOCA)

Minutes of the meeting held on 5 March 2024, attached

Also available at

[School Organisation, Capital and Admissions Group \(SOCA\) – Education and Families \(devon.gov.uk\)](https://www.devon.gov.uk/education-and-families/soca)

(b) Other Groups

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11 Correspondence

12 Dates of Future Meetings

Meetings at 10am. Please check venue/arrangements

<https://democracy.devon.gov.uk/mgCalendarMonthView.aspx?GL=1&bcr=1>

Wednesday 19 June 2024

Wednesday 20 Nov 2024

Wednesday 22 Jan 2025

Wednesday 19 March 2025.

Members are reminded that Part II Reports contain exempt information and should therefore be treated accordingly. They should not be disclosed or passed on to any other person(s). They need to be disposed of carefully and should be returned to the Democratic Services Officer at the conclusion of the meeting for disposal.

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Declarations of Interest for Members of the Council

It is to be noted that Members of the Council must declare any interest they may have in any item to be considered at this meeting, prior to any discussion taking place on that item.

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Induction Loop available



DEVON EDUCATION FORUM

24 January 2024

Present:-

Schools Members

Primary Headteachers

Mrs R Saim	Cedar Tree Federation
Mr C Tribble	Honiton Primary
Mr G Chown	Ventrus MAT (Academy)
Mr P Walker	First Federation Trust (Academy)

Primary Governors

Ms K Brimacombe	Whitchurch Primary, First Fed'n (Academy)
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Secondary Headteachers

Ms F Bowler	Exeter St Peter's CE Aided, Substitute
Mr G Hill	West Exe School, Ted Wragg MAT (Academy)

Secondary Governors

Mr A Hines	Education SW Trust (Academy)
Mrs J Larcombe	Uffculme Academy Trust (Academy) Substitute
Mr A Walmsley	The Ted Wragg Multi Academy Trust (Academy)

Nursery School

Mrs S Baker	Westexe
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Special Governor

Mrs F Butler	Marland School (Chair)
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Alternative Provision

Ms G Boyden	Wave MAT
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Non-Schools Members

Mrs B Alderson	Teachers Consultative Committee (TCC)
Ms G Rolstone	Early Years, Private & Voluntary Independent
Ms S Lockwood	RC Diocesan Schools, Plymouth (Faith)

Observers

Councillor A Leadbetter	Cabinet Member for Children's Services and Schools
Councillor L Samuel	Cabinet Member – SEND Improvement

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DEVON EDUCATION FORUM

24/01/24

Apologies:-

Mrs S Crook, Ms N Warner, Mr R Gasson

112 Minutes

DECISION:

That the minutes of the meeting held on 22 November 2023 be signed as a correct record.

113 Items Requiring Urgent Attention

There was no item requiring urgent attention.

114 Matters Arising from the Last Meeting and Report back on Issues Raised with Cabinet/f40

There was no item raised from the last meeting.

115 Membership

DISCUSSION:

The following membership change was noted:-

Ms N Warner (Newton Abbot, Decoy): Primary Maintained Governor

ACTION:

Director of Legal and Democratic Services (Fiona Rutley)

116 Deputy Director and Head of Education Update

DISCUSSION:

The Chair welcomed Mr Ceri Morgan, newly appointed, Deputy Director Education and Learning.

The Deputy Director introduced himself to the group and he welcomed his new role. He invited the Forum to give their views on what they wished for him to include in future reports.

117 Special Education Needs & Disabilities (SEND) Transformation Programme Update

DISCUSSION:

The Forum considered the report of the Director of Children & Young People's Futures (DEF/24/04) on a new approach agreed in September 2023 to deliver improvements through the SEND Transformation Programme, bringing together post Ofsted/CQC improvement work and Dedicated Schools Grant (DSG) deficit management actions.

Work on re-establishing governance, accountability and laying foundations during the Autumn term 2023 now enabled the local area partnership to move implementation forward at pace. Progress since the last update included a range of measures and update on reaching a Safety Valve agreement with the Department for Education.

Some of challenges that schools and the Council needed to focus on, by working in partnership, to deliver these plans included:-

-Inconsistent approach to inclusive provision in schools which meets the needs of children and young people with SEND;

-Poor early support/intervention offer, forcing families and professionals down the route of an Education, Health and Care Needs Assessment (EHCNA) and

-A focus on more funding rather than meeting needs and improving outcomes for children and young people.

Members' discussion and comments included:-

- Positive to see actions taking place and it looked like this would meet it objectives
- Concern was expressed that the budget would not meet the expectation of needs.
- Members' welcomed the news of the Safety Valve programme
- Assurance was sought on steps in place if the situation worsens – governance measures were in place
- Money was made available where savings targets were reached and then could be drawn down
- Information about what early years settings were involved and it was agreed this would be looked into and reported back.

DECISION:

that the update on Devon's SEND Transformation Programme be noted.

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DEVON EDUCATION FORUM

24/01/24

ACTION:

SEND Improvement Director (Kellie Knott)

118 Finance

a Schools Finance Group (SFG) Minutes

The Forum considered the above minutes (also considered in relation to other finance reports within the agenda) .

Also available at [Schools Finance Group \(SFG\) – Education and Families \(devon.gov.uk\)](https://www.devon.gov.uk/schools-finance-group-sfg-education-and-families)

DECISION:

that the minutes of the Schools Finance Group (SFG), 12 January 2024 be received.

b High Needs Group Minutes

DECISION:

The Forum received and noted the High Needs Sub Group minutes, 8 January 2024.

c Finance Update

DISCUSSION:

The Forum considered the report of the Director of Children and Young People's Futures and Director of Finance and Public Value (DEF/24/03).

The report (DEF/24/03) and presentation included:-

Budget Monitoring Month 8 (2023/24)

Schools

Dedicated Schools Grant Management Plan and Safety Valve

High Needs

Investment

Risks

The summary showed:

- The Month 8 outturn forecast for 2023/24 sees a significant overspend in the overall Dedicated Schools Grant (DSG) of £40.6 million which is associated with the continued demand on High Needs of £39.6 million after taking into account management actions and £1 million overspend to the Growth Fund.
- The DSG Adjustment Account, which shows the cumulative DSG Deficit as per government guidance, is projected to rise to £165.1 million by the end of 2023/24.
- £9.6 million has been achieved of the expected £20.2 million management actions to be delivered from the current DSG Deficit Management Plan/
- An additional £2 million savings within the independent sector have been identified from 3-5 year placements ending and Adult Social Care contribution.
- The SEN team are continuing to see a high level of requests for EHCP
- referrals, 2,055 requests have been received for the period January 2023 to November 2023 compared to 1,865 for the same period in 2022, however the number of requests being refused at 6 weeks and 16 weeks has increased since 2022 for the same period. Support from schools is required to take action to mitigate the growing demand.
- The increasing DSG deficit could have a considerable impact on future education budgets within the DSG as well as impacting on the financial sustainability for Devon County Council.

Members' discussion included:-

- A timeline for a decision on the Safety Valve bid – it was hoped this would be by the end of February
- If there should be more caution around the projection for the DSG deficit
- Management actions were built in and some of these were in place although changes had not happened as quickly as wanted but there was now rigor and more realism in place about when these could be achieved.
- Risks associated with the Safety Valve to schools budgets – Statutory Instrument was in place until 2026
- More stability in leadership which should reduce risk with a clear consistent direction
- Communication to schools needs to be clear and inform on actions taken or required
- SEND schools falling into disrepair – there was capital funding for maintenance. Agreed to find out more about this aspect and report back.

DECISION:

- (a) that month 8 DSG monitoring position be noted; and

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(b) that the current Safety Valve / DSG management plan position be noted.

ACTION:

Director of Finance and Public Value (Adrian Fox)

d **2024/25 Dedicated Schools Grant (DSG) Settlement**

DISCUSSION:

The Forum considered the report of the Director of Children and Young People's Futures and Director of Finance and Public Value (DEF/24/04).

The report (DEF/24/04) included:-

- DSG Settlement 2024/25
- Schools Block
- Central School Services Block
- High Needs Block
- Early Years Block
- Other Schools Grants
- DSG Deficit & Management Plan

Members' discussion included:-

The meeting was informed the schools funding for next financial year 2024-25 for the schools block allocation was going to be £525 million which includes a £2.6 million for the Growth Fund this year.

The National Non-Domestic Rates (NNDR) continues to be paid by Schools rather than direct arrangement with the DfE as a couple of the District Councils do not want to put procedures in place for April 2024. Guidance states that in 2 tier local authorities all billing authorities need to agree to implement the changes. If mutual consent is not reached it will not be possible for any billing authority to adopt the revised payment process.

The NNDR funding received is equivalent to the previous year's actual NNDR payments (along with adjustments relating to the year before that). Because the funding is lagged, any increases in NNDR costs compared to the previous year has to be managed within the overall allocation and less funding is available to distribute to individual schools. In 2023/24 the shortfall was £511,000.

Members' discussion included:-

- Recognised that the authority starts from a low baseline and had been poorly funded for so long. Lobbying had taken place on this and would continue to do so.
- Highlighted the rates for 2 years olds had dropped and the increases in minimum wages which had a big impact on small independent settings.

DECISION:

(a) that the amendment to Basic Entitlement in line with the principles agreed at Schools Forum (22 November 2023) be approved; and

Vote (Schools, Academies and PVI)

(b) that changes to the Dedicated Schools Grant funding 2024/25 be noted.

ACTION:

Director of Finance and Public Value (Adrian Fox)

- e **Schools Funding Consultation Proposal 4 (Transfer of 0.5% Schools Block to High Needs Block)**

DISCUSSION:

The Forum considered the joint report of the Director of Children and Young People's Futures and Director of Finance and Public Value (DEF/24/05), together with the report of Devon School Leadership Services (DSL)C/O, (DEF/24/06), on school consultation responses in respect of this matter.

Devon Education Forum discussed proposal 4 of the schools funding consultation at its meeting on 22 November 2023. Further information was required on what the funding would be used for, therefore the decision was deferred until the January 2024 meeting. Members agreed that a further consultation with schools would be conducted.

The Council has revised its initial proposal to transfer 0.5% (£2.6 million) and is now requesting a 0.25% (£1.3 million) transfer, which will pump prime this early help work. Schools can be assured that the impact of this funding will be managed as part of safety valve monitoring via the DfE.

The Council is clear that unlike other authorities, it will not seek to apply the funds transferred in 2024/25 to the 'bottom line' to address the deficit but will reinvest in support for schools to improve the system. It will also not be seeking a significant schools block transfer which may be proposed in other areas

Members' discussion included:-

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- Grateful to have extra time to discuss the proposal with school colleagues.
- Very hard decision to make as schools feel they are unable to afford this, and it will affect the service they offer
- Risks associated with the decision and possible unintended consequences.
- Supportive of the transformation programme and committed to partnership working
- Schools were facing an increasing demand on services for SEND and higher wages
- Key message to the DfE is that there isn't enough money in the system
- Following consultation, it had been proposed to change the transfer figure from 0.5% to 0.25%
- Felt it was important to communicate to the DfE about the pressure on schools as they did respond to concerns

DECISION:

(a) that the consultation responses set out in DSLS report (DEF/24/06) be noted; and

(b) that the transfer of 0.25% (£1.3 million) between blocks for 2024-25, to support the Safety Valve plans to manage the high needs funding sustainably and meet the needs of children and young people earlier be approved.

Vote (Schools, Academies and PVI)

ACTION:

Director of Finance and Public Value (Adrian Fox)

119 Standing (and other) Groups

The Forum received the following from its standing and other groups (excepting Schools' Finance Group (SFG) minutes and High Needs Group minutes, considered under the Finance Update above):-

(a) Standing Groups

(i) School Organisation, Capital and Admissions (SOCA)

Minutes of the meeting held on 5 December 2023.

Also available at

[School Organisation, Capital and Admissions Group \(SOCA\) – Education and Families \(devon.gov.uk\)](https://www.devon.gov.uk/school-organisation-capital-and-admissions-group-soca-education-and-families)

120 **Correspondence**

None received

121 **Dates of Future Meetings**

Meetings at 10am. Please check venue/arrangements

<https://democracy.devon.gov.uk/mgCalendarMonthView.aspx?GL=1&bcr=1>

Wednesday 20 March 2024

Wednesday 19 June 2024

Wednesday 20 Nov 2024

Wednesday 22 Jan 2025

Wednesday 19 March 2025.

NOTES:

1. *Minutes should always be read in association with any Reports for a complete record.*
2. *If the meeting has been webcast, it will be available to view on the [webcasting site](#) for up to 12 months from the date of the meeting*

* **DENOTES DELEGATED MATTER WITH POWER TO ACT**

The Meeting started at 10.00 am and finished at 11.40 am

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Education and Learning Update Report

Report of the Director of Children and Young People's Futures

Recommendation: That DEF note the report.

This report contains the essential updates on attendance and exclusions within all Devon schools and a commentary on the statutory update to the national guidance on working to improve attendance (DfE guidance 2024).

The two previous reports contained school outcomes data for Devon schools which are published in October / November annually and rest on nationally validated data from the previous academic year's test scores. These reports have been shared twice before for this group and so are not repeated here. However, Ofsted have been active in the county in the current academic year and this report contains an update on their findings.

Attendance: The DfE published a non-statutory document called 'Working Together to Improve Attendance in March 2022. It has since been republished and updated (March 2024) and will become statutory in September 2024. The Department for Education have issued revised interim guidance up to the 18th August 2024 and then a fresh set of expectations from 19th August 2024. The Local Authority is well placed to respond to the new requirements, but a further look at team deployment is now planned. In essence, DCC will expect all schools to sign up and share data with the DfE portal which will give live time data analysis, adopt a fresh strategy, and implement all aspects of the (soon to be statutory) attendance guidance. There are also some technical changes to the coding schools use when recording the reasons for any absence. The link to the updated version is here: <https://www.gov.uk/government/publications/working-together-to-improve-school-attendance> .

The documents set out expectations for schools (whether academies or maintained) and for governors, multi academy trusts and Local Authorities. In addition to the refreshed guidance the DfE have also issued a communications plan for families ('Moments Matter' – this has already been shared with our schools) and updated the penalty notice thresholds (the latter being potentially contentious as it relates to the level of fines for term time holidays).

Devon has a pattern of attendance that, although having improved since 2022, remains below national averages and also marginally below most large shire counties. Apart from the obvious impact on pupil outcomes, this is also a significant safeguarding concern. The guidance makes clear this is not a 'schools only' issue but rather a multi-agency one.

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There are also wider implications for all this. The DfE guidance page also references the views of the National Children's Commissioner. She is independent of the DfE itself but has made several recommendations – none of which are obliged to be taken up by DfE or schools – but which will resonate in the coming months. These are printed below for information but with a caveat – these are NOT yet policy but will inform the next phase. There are cost implications for both schools and Local Authorities. This list goes well beyond what is in the soon to be statutory expectations. The recommendations include.

- Introduce family liaison officers for all schools and train up existing officers.
- Introduce a register of all unregistered alternative provision with clear minimum standards and mechanisms for quality assurance.
- Issue guidance for schools about how to create internal alternative provision.
- All schools should publish a mental health and wellbeing policy online.
- Mental health first training for all teachers to spot the early signs of common mental health issues.
- Expedite the rollout of mental health support teams to all children by 2025.
- Make counsellors available to every school.
- Assign key workers to children on CAMHS waiting lists and those receiving support but disengaging from school.
- Update the early career framework with training on SEND.
- Give LAs and MATs powers to open special schools in addition to the current free school wave.
- Make LAs with an average EHCP waiting time over 20 weeks to publish a plan to reduce it.
- Ofsted should look at how schools deregister children as part of inspecting safeguarding.
- Make LAs admissions authorities for all schools.
- Introduce a child not in school register and a consistent unique identifier for all children.
- Train social workers in 'educational neglect' and treat regular school attendance as a key outcome for children with history absenteeism.
- Give virtual school heads powers to direct admissions for children in need.
- Ban home education for any child with a social worker who has been identified as at risk of harm in the home or where home education would expose them to additional harms.
- Ofsted should revise its SEND inspector framework to include attendance as an evaluation criterion.
- Ofsted and the Care Quality Commission should conduct a joint targeted area inspection on school attendance and children missing education.

1. Key Performance Indicators for attendance, exclusions, EHE and CME

Attendance

		2021/22 – Autumn/Spring Terms Combined*	2022/23 – Autumn/Spring Combined*	2023-2024 – (27/02/2024)**
Total	% Attendance	91.4	92.2	92.6
	% Authorised Absence	7.1	5.9	5.4
	% Unauthorised Absence	1.5	1.9	2.0
	% Persistent Absence	26.8	22.1	20.0
Primary	% Attendance	93.2	94.2	94.8
	% Authorised Absence	6.0	4.9	4.2
	% Unauthorised Absence	0.8	0.9	1.0
	% Persistent Absence	20.2	15.8	14.0
Secondary/ All Through	% Attendance	89.6	89.6	89.8
	% Authorised Absence	8.3	7.2	6.9
	% Unauthorised Absence	2.3	3.2	3.3
	% Persistent Absence	34.7	29.6	28.0
SEN Support (K)	% Attendance	85	83.5	88.7
	% Authorised Absence	10.6	10.2	7.7
	% Unauthorised Absence	4.4	6.3	3.6
	% Persistent Absence	47.1	44.8	31.0
SEN (E)	% Attendance	83.1	82.1	85.6
	% Authorised Absence	12.6	11.6	10.1

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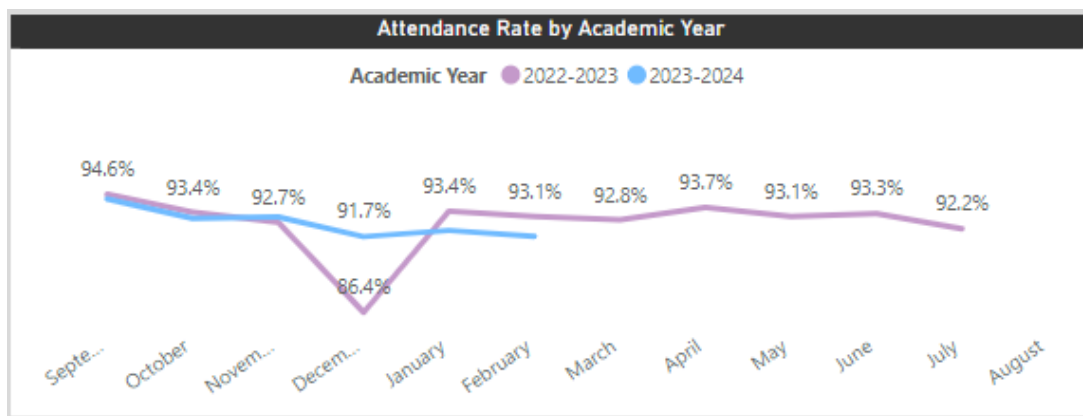
	% Unauthorised Absence	4.3	6.3	4.3
	% Persistent Absence	47.2	44.7	37.0
FSM	% Attendance	87.5	87.3	87.5
	% Authorised Absence	9.1	8.4	8.0
	% Unauthorised Absence	3.4	4.3	4.5
	% Persistent Absence	43.8	40.8	37.0
CiN	% Attendance	DfE Data Not Available	DfE Data Not Available	76.1
	% Authorised Absence			12.6
	% Unauthorised Absence			11.3
	% Persistent Absence			55.0
CP	% Attendance	DfE Data Not Available	DfE Data Not Available	75.8
	% Authorised Absence			11.3
	% Unauthorised Absence			12.9
	% Persistent Absence			58.0
LAC	% Attendance	DfE Data Not Available	DfE Data Not Available	87.8
	% Authorised Absence			7.9
	% Unauthorised Absence			4.3
	% Persistent Absence			31.0
Male	% Attendance	91.3	92.3	92.8

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	% Authorised Absence	6.9	5.9	5.4
	% Unauthorised Absence	1.4	1.8	1.9
	% Persistent Absence	26.0	21.6	19.0
Female	% Attendance	91.3	92.0	92.5
	% Authorised Absence	7.2	6.0	5.5
	% Unauthorised Absence	1.5	2.0	2.0
	% Persistent Absence	27.6	22.0	20.0

* [Data Source - DfE](#)

** Data Source (Devon County Council Local Data supplied from Devon Schools)



Overall attendance

- Overall absence rates have fallen slightly in the last year, both in Devon and nationally. Devon's absence rate for the combined Autumn & Spring 2022/23 terms was 7.8%, slightly higher than national and statistical neighbours' averages (7.3% and 7.5%). **Local data up to 27/2/2024 shows an absence rate of 7.4%.**
- Primary schools have the lowest overall absence rates, followed by secondary and then special schools. Devon primary and special schools have lower absence rates than nationally, whilst secondary schools have higher absence rates. **Local data up to 27/2/24 shows a 5% difference in the rate of attendance between primaries and secondaries.**

Persistent Absenteeism (missed 10% or more sessions)

- Whilst persistent absentee rates fell in the last year, one in five pupils still miss 10% or more sessions. Devon has slightly higher rates than nationally, regionally, and statistical neighbours. Rates are lowest in primary schools and highest in special schools. This is

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also reflected nationally. **Local data up to 27/2/24 shows this is currently at 20% a decrease from previous.**

- 40.8% of Devon Free School Meal pupils were persistently absent compared to 35.7% nationally. **Local data shows this is current at only 37% up to 27/2/24.**

Severely Absent (missed 50% or more sessions)

- Severely absentee rates rose in the last year. Devon has higher rates than nationally, regionally, and statistical neighbours. Primary schools have the lowest rates in Devon with secondary schools having the highest rates. This differs nationally where special schools have the highest rates.

Exclusions:

Permanent Exclusions and Suspensions Year on Year (Equivalent Week):

Academic Year	Number of Pupils Permanently Excluded	Number of Suspensions
2023/2024	93	11004
2022/2023	102	9261

Figures don't include PEX or Suspensions from non-Devon schools. 2022/03 data extracted on 01/03/2024.

2022/23 Figures to Date (Number of permanent exclusions and suspensions):

Key Stage	Permanent Exclusions	Suspensions
Found		23
KS1	5	294
KS2	13	674
KS3	46	5783
KS4	29	4230
KS5	0	0
Grand Total	93	11004

Permanent Exclusions*

	2021/22		2022/23		2023-2024 to 27/2/24*	
	Number	% of cohort	Number	% of cohort	Number	% of cohort
Total	95	0.10%	181	0.19%	109	0.12%
Primary Age	18	0.03%	21	0.04%	20	0.04%
Secondary Age	77	0.20%	160	0.42%	89	0.23%
SEN (E+ K)	72	0.38%	127	0.66%	73	0.38%
SEN Support (K)	64	0.45%	100	0.70%	50	0.35%
SEN (E)	8	0.16%	27	0.55%	23	0.47%
LAC**	0	0.00%	0	0.00%	1	0.11%
Male	63	0.13%	124	0.26%	80	0.17%
Female	32	0.07%	57	0.12%	29	0.06%

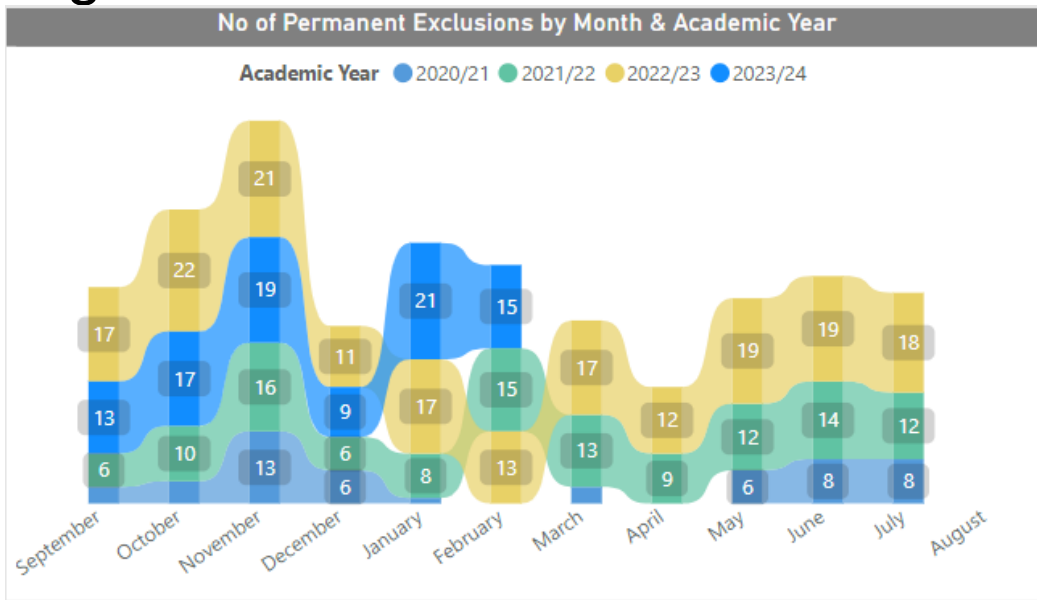
* Data Source (Devon County Council Local Data supplied from Devon Schools)

** Students who are in care to Devon County Council

Exclusions

- Permanent exclusions rose by 58% in the last academic year (2022-23), with an additional 66 children excluded.
- Local data up to 27/2/2024 shows 109 children having been excluded, so if exclusions continue at this rate the overall figure will be higher than last year. Analysis is underway to further establish which schools are major contributors to this rise, what times of year students are being excluded, which year groups or cohorts and for what reasons.
- Pupils eligible for FSM and those with SEN Support have seen the greatest increases in permanent exclusions and suspensions. These pupils also have the highest rates of permanent exclusions. Pupils eligible for FSM are five times more likely to have a permanent exclusion than those not eligible.
- Pupils with SEN Support are nearly nine times more likely to have a permanent exclusion than those with no SEN (0.69% exclusion rate compared to 0.07% for pupils with no SEN). Pupils with an EHCP are nearly seven times more likely when compared to pupils with no SEN (0.53% compared to 0.07%).

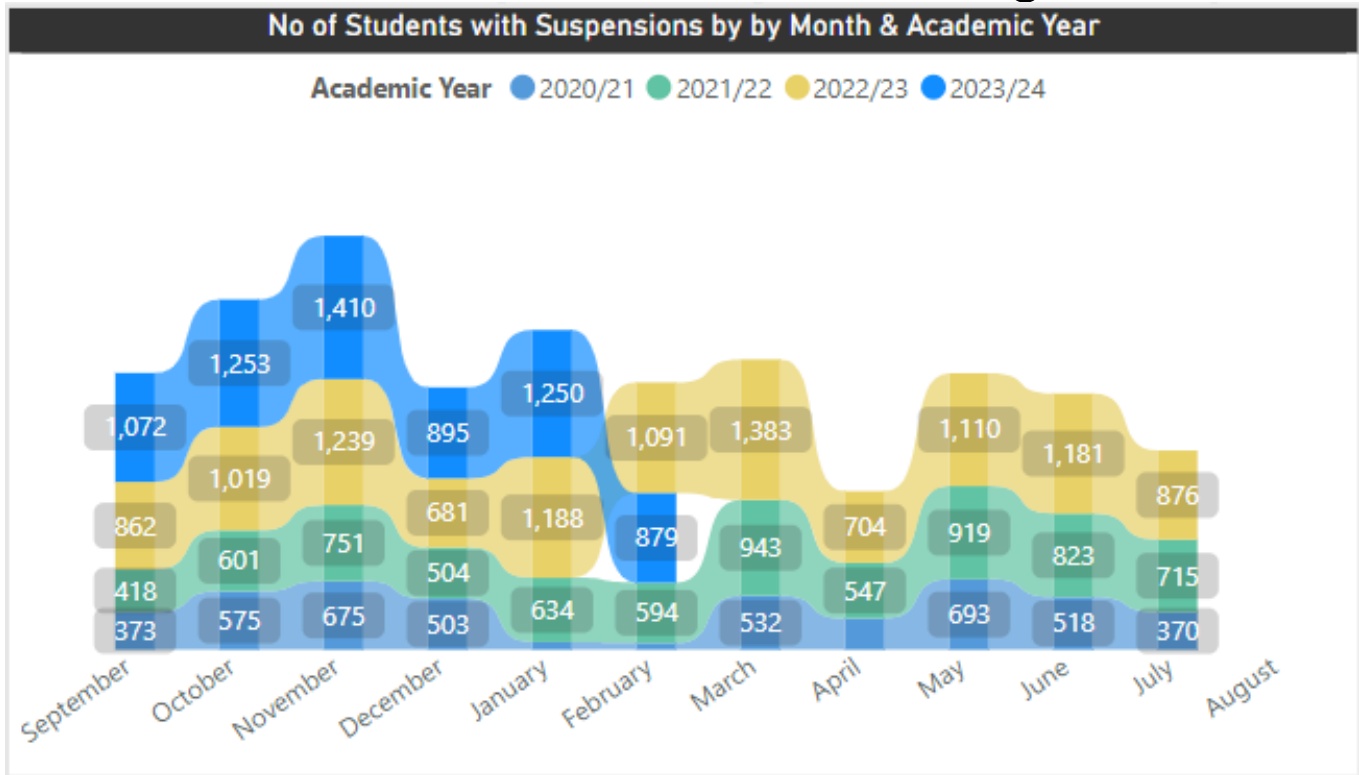
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Suspensions (Number of Students)

	2021/22		2022/23		2023-2024 to 27/2/24*	
	Number	% of cohort	Number	% of cohort	Number	% of cohort
Total	3263	3.48%	4411	4.70%	3380	3.60%
Primary Age	420	0.75%	555	0.99%	443	0.79%
Secondary Age	2843	7.49%	3856	10.16%	2917	7.69%
SEN (E+ K)	1666	8.70%	2291	11.96%	1885	9.84%
SEN Support (K)	1186	8.32%	1728	12.13%	1463	10.27%
SEN (E)	480	9.78%	563	11.47%	438	8.92%
LAC**	111	12.28%	113	12.50%	70	7.74%
Male	2139	4.45%	2820	5.87%	2133	4.44%
Female	1124	2.46%	1591	3.48%	1247	2.73%

* Data Source (Devon County Council Local Data supplied from Devon Schools), numbers as distinct students

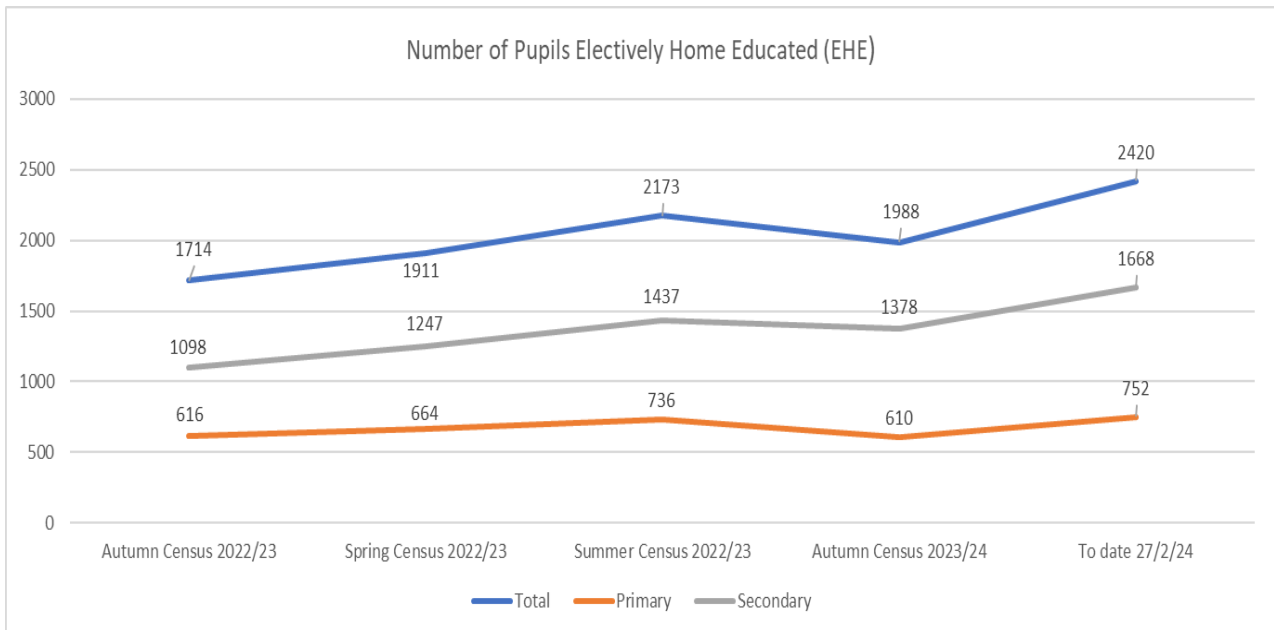


Elective Home Education (EHE)

- In 2022/23, 2,951 children were registered as home educated at some point during the year, equating to 3.1% of the population¹ (compared to 2.7% for 2021/22). This is an increase of 449 children (nearly 18%) and is the highest on record for Devon County Council.
- Local data shows as of 27/2/2024 there are 2420 children registered as EHE.
- During the last 5 years the number of EHE children have risen each year, except during 2019-20 as schools were closed due to COVID 19.
- The number of primary age children being home educated rose by 1.4% last year whilst secondary age children increased by 29.5%.
- Historically the main reason cited for deciding to home educate was lifestyle and philosophical, however mental health issues are now the main reason reported for home education.
- Of the 1,223 children who started their EHE in 2022/23, nearly 43% were previously in LA maintained schools and 44% were previously in Academies and Free Schools². 3% were in

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independent schools before starting EHE and less than 1% were in special schools.



	Autumn Census 2022/23	Spring Census 2022/23	Summer Census 2022/23	Autumn Census 2023/24	To date 27/2/24
Total	1714	1911	2173	1988	2420
Primary	616	664	736	610	752
Secondary	1098	1247	1437	1378	1668
SEN (E+ K Combined)	571	656	778	680	861
SEN Support (K)	443	508	606	516	666
SEN (E)	128	148	172	164	195
CIN	12	7	17	14	7
CP	6	11	11	3	5
LAC	1	0	0	0	0
Male	58	997	1123	1037	1152
Female	38	914	1050	951	1268

Children Missing Education (CME)

	Autumn Census 2022/23	Spring Census 2022/23	Summer Census 2022/23	Autumn Census 2023/24	To date 27/2/24
Total	96	120	101	146	168
Primary	26	41	29	40	67
Secondary	70	79	72	146	101
SEN (E+ K Combined)	52	58	52	66	74
SEN Support (K)	24	28	29	41	41
SEN (E)	28	30	23	25	33
CIN	3	3	8	8	3
CP	5	9	6	4	2
LAC	5	10	4	7	4
Male	58	73	54	86	95
Female	38	47	47	60	73

Children receiving EOTAS (Education Other Than At School) packages (Statutory School Age)

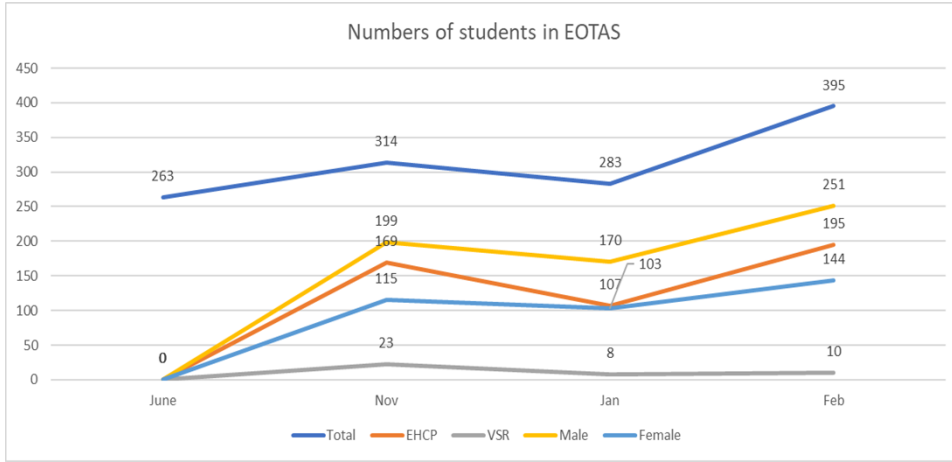
Figures correct as 01/03/2024.

	Total	EHCP	VSR	Male	Female
Number of Pupils	395	195	10	251	144

Number of pupils receiving EOTAS by year group			
Year 11	92	Year 6	19
Year 10	97	Year 5	6
Year 9	78	Year 4	14

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Year 8	56	Year 3	8
Year 7	17	Year 2	3
		Year 1	5
		Year R	0



5.Ofsted

Ofsted inspect individual schools and do not yet inspect Multi Academy Trusts. They have occasionally inspected MATs on a thematic approach (by collating the reports for individual schools within a MAT. This methodology is imperfect as it relies on schools being inspected when their window is open and as a result the sample within any MAT is not always representative.

Since January 2024 Ofsted has announced several mini changes to inspection methodology also. Each school will now be asked about patterns of attendance and exclusions as part of the national drive to improve attendance. Similarly, there is also a focus on the well-being and mental health of students where inspectors think it necessary.

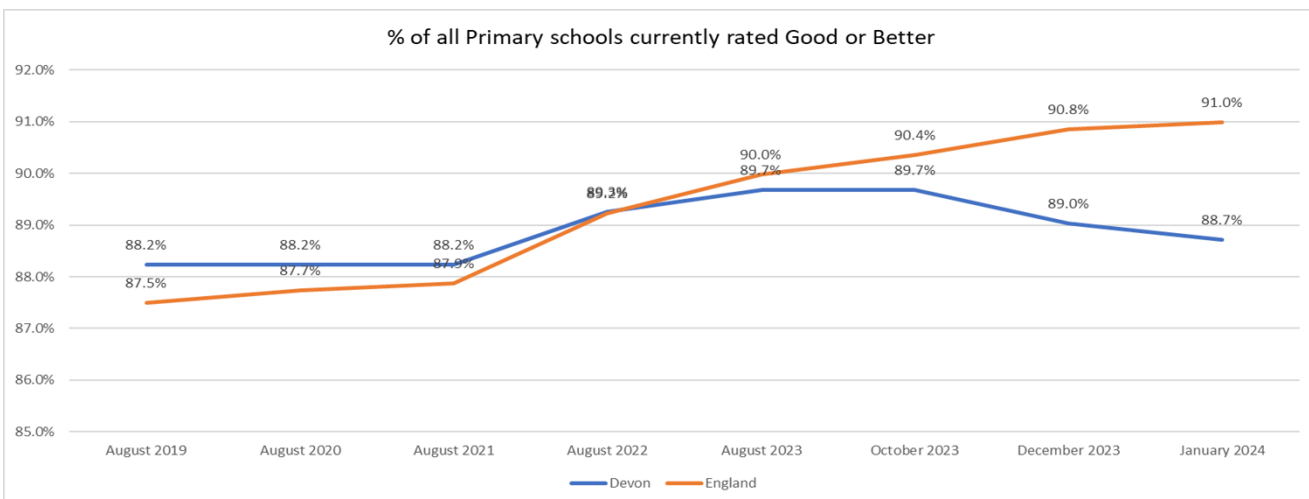
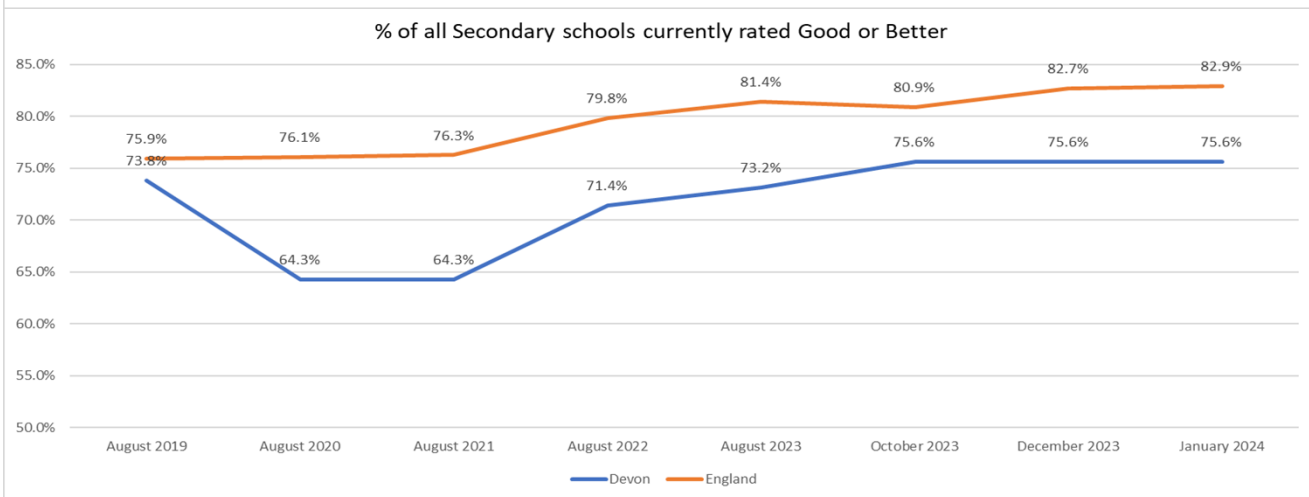
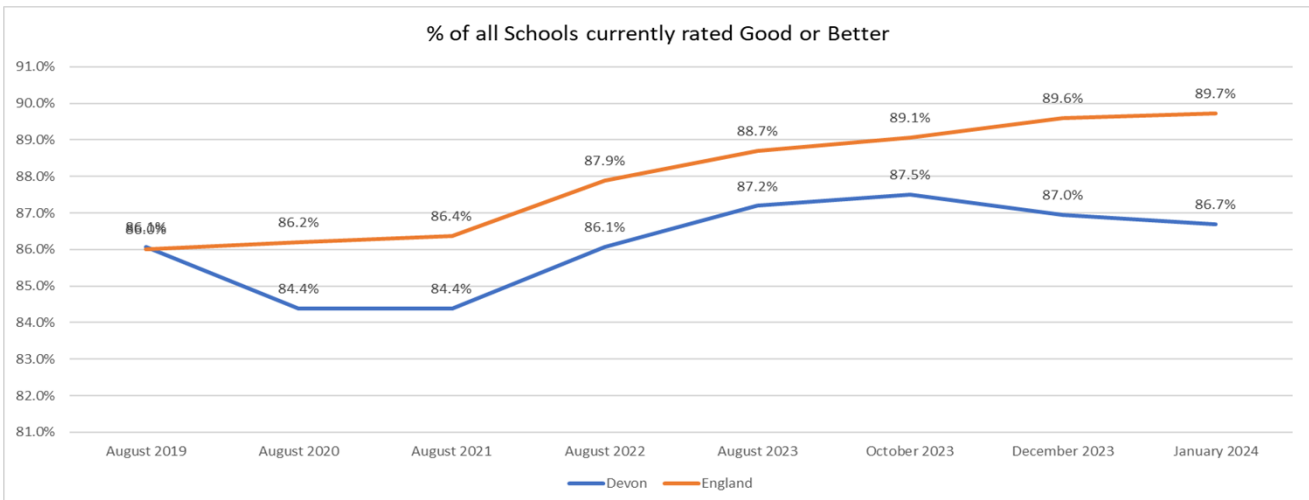
A new Chief Inspector started on January 01st 2024 and has indicated a new framework will be introduced in the coming years. Completely new frameworks usually take up to three years to research, write, test, publish and implement so the changes above are in the form of guidance to inspectors rather than a new framework. In recent years a new framework has been implemented much more rapidly, however we wait to see. The data shown below changes weekly as inspections take place.

The Local Authority still sees a large increase in complaints to Ofsted about schools (180 in 2022-23). These are all individually investigated by DCC. The large uplift in complaints to Ofsted is seen nationally.

- As of (31/1/24) 86.7% of all Devon schools have an Ofsted rating of good or better. This is lower than National which is 89.7%
- 88.7% of Devon Primaries are rated good or better, compared with 91.0% Nationally.
- 75.6% of Devon Secondaries are rated good or better, compared with 82.9% Nationally.

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- 90% of Devon Special schools are rated as good or better. This compares with 89.6% Nationally.



Stuart Collins

Director of Children and Young People's Futures

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For Information contact:

Ceri Morgan

Interim Head of Education on Ceri.Morgan@devon.gov.uk

UPDATE ON DEVON'S SPECIAL EDUCATIONAL NEEDS & DISABILITIES (SEND) TRANSFORMATION PROGRAMME

Report of the Director of Children & Young People's Futures

Recommendations:

- a) Note the update on performance related to SEN Statutory Processes
- b) Note the update on key strands of Devon's SEND Transformation Programme.

1. Background

- 1.1. In September 2023, the Council and its partners agreed a new approach to delivering improvements through the SEND Transformation Programme which brings together post Ofsted/CQC improvement work and Dedicated Schools Grant (DSG) deficit management actions (often referred to as Safety Valve).
- 1.2. The SEND Transformation Programme consists of seven strands; SEND Strategy; Inclusion and Early Help; Preparation for Adulthood; SEN Statutory Processes; Sufficiency; Financial Management & Placement Value and Multi-agency pathways
- 1.3. The is report provides an update on performance of SEN statutory processes, as well as key updates on sufficiency and placement value.

2. SEN Statutory Process Performance

Timeliness of Education Health & Care Needs Assessments (EHCNA)

	Sep 2023	Oct 2023	Nov 2023	Dec 2023	Jan 2024	Feb 2024
Total number of EHCPs						8984
EHCNA requests by month	157	181	219	178	223	138
Total number of EHC assessments in progress						1270
Number of 20 weeks assessments completed	78	93	102	51	65	103
% 20wk assessments completed on time	1%	6%	5%	8%	6%	7%
% 20wk assessments completed on time cumulative	8%	8%	8%	8%	6%	7%
20wk assessments overdue 20 Weeks	562	560	544	565	538	510
20wk assessments overdue 30 Weeks	308	333	296	326	387	370
20wk assessments overdue 52 Weeks	0	0	0	0	0	1

- 1.4. Requests for EHCNAs in Devon continue to grow year on year, much like the national picture. However, Devon is a significant outlier in terms of the

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requests received as a percentage of the overall 0-24 population, when compared to regional, national and statistical neighbours.

- 1.5. Timeliness of issuing Education Health & Care Plans within the statutory 20-week timescales remains a challenge in Devon, given the high request rate (6th highest nationally). The current rate nationally has fallen year on year, with the current England average at around 50%. However, Devon is significantly out of line with the national picture, with the latest unpublished data showing a completion rate of 7%.

Overdue advice requests

	At 1st March 2024
Total open EP Advice Requests	506
EP Advice Requests beyond 6wk deadline for submission	244
EHCP Assessment beyond 20 weeks and EP Advice Requests Outstanding	12
Total open Health Advice Requests	259
Health Advice Requests which are beyond 6wk deadline for submission	126
EHCP Assessment beyond 20wks and Health Advice Requests Outstanding	54
Total open Social Care Advice Requests	163
Social Care Advice Requests beyond 6wk deadline for submission	38
EHCP Assessment beyond 20wks and Social Care Advice Requests Outstanding	12

6 and 16 week decisions

	% of 6wk Decisions Completed in Time	% Of 6wk Agreed	% Of 6wk Refused	% Of 6 Weeks Overturned*	% of 16wk Decisions Completed in Time	% Of 16wk Agreed	% Of 16wk Refused	% Of 16 Weeks Overturned*
February 2024	99%	73%	28%	0%	3%	82%	18%	0%
January 2024	93%	78%	22%	1%	6%	89%	11%	0%
December 2023	91%	84%	16%	1%	4%	76%	24%	0%
November 2023	94%	70%	30%	2%	6%	72%	28%	1%
October 2023	97%	40%	60%	3%	1%	79%	21%	1%
September 2023	93%	61%	39%	3%	2%	67%	33%	6%
August 2023	98%	61%	39%	10%	0%	78%	22%	5%
July 2023	92%	66%	34%	1%	5%	79%	21%	2%
June 2023	80%	66%	34%	3%	1%	80%	20%	1%
May 2023	82%	63%	37%	5%	5%	80%	20%	4%
April 2023	69%	69%	31%	4%	9%	83%	17%	3%
March 2023	66%	67%	33%	5%	15%	93%	7%	3%
February 2023	73%	67%	33%	5%	26%	90%	10%	2%
January 2023	52%	72%	28%	4%	19%	92%	8%	6%
2023 Total	81%	67%	33%	4%	8%	81%	19%	3%

- 1.1. From the date that a request for an EHCNA is submitted the local area has six weeks to decide whether or not to assess. Devon’s timeliness in making 6-week decisions has steadily improved since January 2023. However, the timeliness of 16 week decisions, on whether to issue an EHCP, drops significantly. The current challenges around volume of requests and workforce recruitment and retention is impacting on the timeliness of the assessment part of the process.

EHCP Reviews

	At 1 st March 2024
Total Number of Annual Reviews overdue	1193
Number of EHCP reviews that will be become overdue in the next 7 days	105
Number of EHCP reviews published by the service in last 7 days	187
Number of annual reviews not started	534 Overdue
Number of annual reviews waiting for school action (Where annual review has started)	472 Overdue
	East
	111
	Mid
	131
	North
	54
	South
	146
Number of annual reviews waiting for LA Review Decision (Amend/Maintain/Cease)	96 Overdue
Number where Annual Review decision is to amend and plan is outstanding	714
Number of annual reviews going through amendment outside of annual review process	60

- 1.6. In Devon there are 1193 outstanding EHCPs review. At its peak, in June 2022, this rose to approximately 1800. In most local areas, schools or settings arrange and lead the review meetings with other relevant professionals invited to attend. Of the outstanding reviews, 40% are waiting for school action.
- 1.7. Actions being taken to address performance challenges
- 1.8. Transformation specialists working within the Transformation and Business Services directorate have been directed toward supporting improvements in SEN Statutory Service.
- 1.9. The first output from this work has been a map of the end-to-end process currently used for EHCP requests, assessment, reviews and tribunals. The map illustrates how we work as we endeavour to follow the statutory process and has provided valuable insights that will accelerate delivery and help identify new ways to operate more efficiently.

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- 1.10. The first phase of improvement activity will focus on communication into the SEN Statutory Service and the first 6 weeks of the EHC assessment process.

2. Update on SEND Sufficiency

- 2.1. Sufficiency work has identified a significant shortage in resource base provision in Devon compared to national (0.05% of school population compared to 0.18%). The lack of provision is a key pressure and there is evidence that Authorities with a lower proportion of resource base provision commission more places from high cost independent specialist providers.
- 2.2. The Authority plans to establish an additional 200 resource base places over the next 5 years. There are 6-7 new resource bases due to be operational in September 2024. Proposals either agreed or being consulted on include Holsworthy College, Brixington Academy, Great Torrington Bluecoats and Westcroft Primary. There are several other proposals in early development including the expansion of existing bases.
- 2.3. In addition, the remaining special school building programme continues to focus on increasing places for children with Autistic Spectrum Disorder (ASD), Speech Language and Communication Needs (SLCN) and Social Emotional and Mental Health (SEMH) needs. This will be delivered through the SW Devon Free School (Ivybridge) and the Cranbrook Special School.
- 2.4. A capital funding bid to DfE, as part of Safety Valve proposals, supports plans to extend a further 300+ places in our Further Education colleges to meet demand, as well as providing an improved and enhanced SEND offer. The Authority is working in partnership with Exeter College and Petroc College and there are plans to provide new specialist post 16 provision in Exeter, Tiverton and Barnstaple. The post 16 proposals will ensure providers have suitable provision and accommodation to support learners whose needs cannot be currently met. This bid also includes the set up of a Tavistock satellite site to support a temporary SW Devon Free School to mitigate against delays in building.

Stuart Collins
Director of Children & Young People's Futures

Please ask for:
Kellie Knott
SEND Improvement Director
kellie.knott@devon.gov.uk

Schools Finance Group: Notes of meeting on Wednesday 6 March 2024

Key Points for DEF to Note:

Item 2 – Safety Valve Update

- Further discussions have taken place with DfE and DLUHC; awaiting confirmation of a Safety Valve agreement.

Item 4 – Falling Rolls Fund

- Officers to review DCC guidance following an update on the current funding methodology issued by the DfE.

ATTENDANCE

DCC

Mat Thorpe (Apologies)	Deputy Director of Finance and Public Value
Adrian Fox (Chair)	Head Accountant (Education & Learning)
Kellie Knott (part)	SEND Improvement Director
Heidi Watson-Jones	Safety Valve Project Officer

Devon Schools Leadership Services

Primary:

Jamie Stone	Denbury Primary
Paul Walker (Apologies)	First Federation Trust
Penny Hammett	FORT Federation

Secondary:

Sammy Crook	Tiverton Federation
Alan Blackburn	Uffculme School
Rob Gammon	The King's School
Fay Bowler – (Apologies)	Braunton Academy

Alternative Provision:

Rob Gasson	Wave Multi Academy Trust
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Special Schools

Keith Bennett	Marland School
Sarah Pickering (Apologies)	Mill Water School

DAG

Faith Butler (Apologies)	Special School Governors
Alex Walmsley (part)	Secondary Governors
Adrian Hines (Apologies)	Primary Governors

Early Years Providers

Gemma Rolstone (Apologies)	Puffins Childcare
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Other DCC Officers

Karlien Bond	Senior Accountant (Schools)
Katrina Harverson	Principal Accountant – Education & Learning

SCHOOLS FINANCE GROUP

1. Minutes and matters arising from meeting on 12 January 2024

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Schools Finance Group:

Notes of meeting on Wednesday 6 March 2024

- KK confirmed that Resource Base outreach funding will be removed from April 24 but that a wider approach to outreach provision will be reconsidered. **AF** to discuss with Sammy Crook.
- **KH** confirmed that schools running SEMH Partnership projects have received a letter clearly confirming funding timeframes.
- All other actions completed. Minutes agreed as an accurate record.

- **AF** to discuss resource base outreach issues with Sammy Crook.

2. Safety Valve Intervention Programme - Update

- Further discussions have taken place with DfE and DLUHC; awaiting confirmation of a Safety Valve agreement.
- Finance colleagues confirmed that the budget has been set, and savings identified within the Safety Valve submission will still need to be achieved regardless of any amount that DCC might receive if successful in the programme.
- SFG requested an explanation at the next meeting of how any Safety Valve funding, and LA contribution funding will sit within the authority and be deployed.
- SFG to consider Safety Valve monitoring expectations at the June meeting, assuming a successful outcome.

ACTION:

- **AF** to provide an overview of how Safety Valve funding will sit within the local authority budget and be deployed.
- **Finance Colleagues** to share information around Safety Valve monitoring expectations at the June SFG meeting.

3. DSG Monitoring – month 10

- DSG deficit reserve is projected to rise to £167m by year end.
- £14.6m management action savings identified as at risk of not being achieved.
- Noted an ongoing increase in the level of EHC needs assessment requests, the number of requests being refused at 6 and 16 weeks is not impacting on the overall volume of EHCPs.
- SFG to further consider data around EHC assessment requests and reasons for ongoing increases in EHC assessment requests, and rising proportion of requests from parents and carers (**KK**).
- Considered the impact of LA funding levels on schools' ability to appropriately support children with SEN needs without additional funding and support through an EHCP.
- Discussed increasing overspend in the AP Other budget. Noted that some excluded learners are not immediately placed in Wave provision, and access independent AP provision which can be of varying quality. Re-integration into a more formal learning environment can then be challenging. **KK and R Gasson** to discuss issues further.
- SFG noted the current budget position and the planned management action savings. Remaining management action savings are expected to be achieved by financial year end as projected. Services continue to explore management actions to further increase savings.

ACTION:

- **KK** to present further data around EHC assessment requests at next meeting

Schools Finance Group: Notes of meeting on Wednesday 6 March 2024

- **KK and R Gasson** to discuss issues around successful use of commissioned Alternative Provision.

4. Growth Fund monitoring and Falling Rolls – month 10

Growth Fund

- Noted end of year forecast carry forward of £399k.

Falling Rolls Fund

- DfE have issued an update on the current funding methodology outlining that funding will in future be based on medium super output areas (MSOA) within each LA. Noted these do not neatly fit with school catchments.
- Officers will review the guidance and consider any requests in line with the new guidance.
- **SN** to provide update at the June meeting.

ACTION:

- **SN** to provide update on Falling Rolls guidance at the June SFG meeting.

5. Carry Forwards from 2023-24

- Net de-delegated carry forward of £856k projected.
- Maintained schools will be asked to explain surplus and deficit balances on year-end forecasts. SFG discussed the recommended threshold for surplus of 5%, and checking of significant in-year shifts. **Finance colleagues** to check Year End guidance for maintained schools.
- SFG noted the variable funding methodology for special schools based on actual numbers of children placed and the difficulties this put on longer-term budget planning.
- Mindful of drive to expand the special schools sector, but noted this comes with very low levels of set-up funding. **AF** to feed concerns back to the service.
- Noted previous Head of Education had planned to review the remit of the Schools contingency (FIPS) Panel. KB confirmed that during the funding consultation a 'Schools in Financial Difficulty' process was outlined which aims to adopt a more proactive, cross-service approach to working with schools earlier to protect them from reaching a crisis financial position.
- Noted demographic change will have a significant impact on school funding levels.
- SFG welcomed a renewed approach, however were mindful of sensitivities of carrying forward a balance of £900k at a time when schools are struggling to balance budgets.
- SFG requested a future discussion focused on the Schools' Contingency fund.

ACTION:

- **Finance colleagues** to check Year End guidance for maintained schools on levels of surplus and in-year shifts.
- **AF** to feed concerns around levels of set up funding for new and expanded specialist provision back to the service.
- **KB** to provide paper for discussion on schools contingency fund at June SFG

6. Any Other Business

Automatic Presumption of Pupil Premium Entitlement

Agenda Item 9a

Schools Finance Group:

Notes of meeting on Wednesday 6 March 2024

- It was felt that this approach, as adopted in some other LAs, would significantly increase Pupil Premium funding into Devon schools. This had been raised verbally at November and January DEF meetings.
- Noted the complexities around DCC not being a single tier LA, and issues around access to benefit details to obtain information needed to process eligibility checks.
- Noted that Ceri Morgan had undertaken to follow this up.

Items for DEF on 20 March

- Verbal update on Safety Valve
- Month 10 Finance update

7. Mutual Fund Board

- Month 10 position currently forecasting a £50k overspend, however mindful of varying month by month position during the year.
- Considered schools' feedback following discussion at recent Bursar briefings around proposed closing of the Mutual Fund.
- Agreed that the 2024 Autumn Funding Consultation will include a question, for MF member schools, around closure of the Mutual Fund from Autumn term 2025. This would provide a period of review for the LA to consider the impact.
- Mindful of the reducing number of schools paying into the Mutual Fund as a result of schools joining MATs which impacts on the viability of the fund.
- A decision can be announced before the end of the Autumn term 25 to enable schools to seek alternative provision if required.
- **KB** to respond to school emails and update the Finance Blog to outline the proposal to include in the Autumn funding consultation.
- Will need to clarify the approach to ceasing payment of any new claims at end of Spring term 25 during year of closure. Ongoing legacy long term sickness claim payments could be held over to end of Summer term 25 before payments agreed.

ACTION:

- **KB** to respond to school emails and update the Finance Blog to outline the proposal to include in the Autumn funding consultation.

Future meeting dates:

- **Wednesday 5 June 2024** (09.15 – 12.30 – Teams)
- **Monday 8 July 2024** (14.00 – 17.00 face to face – venue TBC)
- **Monday 9 September 2024** (all day – face to face – venue TBC)
- **Wednesday 6 November 2024** (09.15 – 12.30 – Teams)
- **Friday 10 January 2025** (09.15 – 12.30 – Teams)
- **Wednesday 5 March 2025** (09.15 – 12.30 – Teams)

Notes of High Needs Funding Sub Group

4 March 2024 – 15.30 – 17.00

Present: Paul Walker (Chair), Adrian Hines, Kellie Knott, Zoe Heywood, Katrina Harverson, Rob Gammon, Jamie Stone, Penny Hammett, Rob Gasson, Keith Bennett, Kieron Kilbride, Heidi Watson-Jones (notes)

Apologies: Mat Thorpe, Adrian Fox, Fay Bowler, Alan Blackburn, Alex Walmsley, Sarah Pickering, Gemma Rolstone,

		Actions:
1	<p>Finance Update</p> <ul style="list-style-type: none"> The group noted a DSG overspend of £40.9m at month 10, an in-year overspend of £16m. Management action of £20.2m had been assumed, of which £14.6m has now been identified as at risk of not being delivered (from the previous management action plan). 	
2	<p>EHCP Process Review and data findings</p> <p>SEND Statutory Team Process Review:</p> <ul style="list-style-type: none"> Update requested at the last meeting on the current position regarding the volume of EHCPs in the system. A project, led by Kieron Kilbride has been understanding and mapping processes currently used within the SEND statutory team with a view to developing and implementing both short term and longer term strategic improvement. The group heard how the SEND Statutory team has been challenged by low timeliness of issuing EHCPs, communication, relationships with parents/carers and schools, and staff absence and wellbeing concerns. A process review has resulted in identification of 'no added value' activities within the team which will help the team to save time and allow focus on priority tasks to move EHC assessment requests through the statutory process. It is intended that changes will be managed strategically going forwards to ensure impact and success, initially through temporary redirection of inbound calls to the DCC Customer Service Centre, and developing tactical tools to support improved ways of working within the statutory team. The group considered the impact of reducing the volume of outstanding EHCPs, generating a greater increase in Plans within the system. Kellie Knott confirmed that the full number of EHCPs, including those in the current backlog, had already been included in the Safety Valve projections submitted to the DfE. <p>EHCP Data:</p> <ul style="list-style-type: none"> The group noted the volume of incoming EHC needs assessment requests continues to grow, in spite of efforts to work differently. This was illustrated by geographical area, and year by year. The proportion of parental requests for EHC needs assessment is growing over time (43% so far this year compared to 29% in 2020) and now account for almost 50% of all requests. Requests from schools and settings generally seem to be more successful largely due to the evidenced graduated response, although it was noted that some schools are submitting EHCP requests of which a high proportion are being refused. Based on the data, requests from parent carers are more likely to be refused than those from schools or other agencies. 	

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	<ul style="list-style-type: none"> • The group felt it would be helpful to jointly consider why the request rate continues to rise overall, and how practice differs across the county. • It would also be interesting to analyse where parental requests could be being submitted as a result of their child's school deciding not to request an EHC assessment. • A correlation was suggested between lower school funding levels and the number of EHC needs assessment requests across LAs nationally. Poor schools funding impacts on TA recruitment and subsequently reduces support available in the classroom. • The LA recognises that in addition to fair funding levels, effective early help services must be made available and wrapped around schools to improve support for young people and families. <p>Addressing the Issues:</p> <ul style="list-style-type: none"> • Telephone calls into the team to be temporarily managed by the DCC Customer Service Centre to free up the team. Caseworkers will continue to communicate with families. • Additional plan writing capacity to be brought in, from April initially for 3 months, to process assessments. • From March, the SENCO helpline will be repurposed and expanded into a bookable support for schools' consultation with a multi-disciplinary team. Subjects for consultation will include a conversation prior to submitting an application, or following a refusal to assess. • Further conversations will be planned in due course to review and consider a different approach to high needs banding funding, once the work on ordinarily available provision is complete • Agreed to collectively consider how best to communicate key messages to the wider schools leadership community. Kellie to share data at the upcoming DSLs Schools Briefing in the first instance. • Need to understand why parents are more motivated to request EHC needs assessment, and identify any possible link to children not attending their local school due to perceptions around inclusive behaviour. • ACTION: Kellie Knott and Paul Walker/ Adrian Hines to consider how key messages can be communicated to schools and Governors. • Schools can be encouraged to explain to parents why they have determined that an EHC assessment application would not be appropriate, to ensure that the right children are going through the process and to help parents' understanding. 	<p>KK, PW, AH</p>
<p>3</p>	<p>Commissioning Alternative Provision</p> <ul style="list-style-type: none"> • DCC looking at an overarching plan around Alternative Provision which includes workstreams within the SEND Transformation Programme to address a range of issues including: <ul style="list-style-type: none"> • Practice, inclusion and early intervention / early help • Quality assurance and commissioning framework • Sufficiency and capacity building • It is recognised that unregistered AP is currently being commissioned too frequently, often inconsistently and at significant cost. A needs analysis is being developed to ensure we understand which learners are accessing AP and how their needs can best be met. • 'Quick wins' to be identified to ensure different services can contract more consistently with key providers in the short term. • Needs analysis will underpin a strategy to ensure that the right provision is being put in place to meet children's needs effectively. 	

	<ul style="list-style-type: none">• This is part of a broader piece of work looking at financial processes, ordinarily available provision and the commissioning of independent settings.• The recent DSLS survey of schools' use of AP has helped to inform the work, and it was felt that a strengthened commissioning strategy will be of benefit to all.• Heads agreed that schools would be keen to engage in the strategy development. This could result in better quality provision being accessed with greater value for money.• The group considered if there could be a link between some parents applying for statutory plans to support an alternative educational offer for children who are struggling in a mainstream setting.• The revised approach will explore how AP can be effectively used to provide shorter term support to better enable children to successfully learn with their peers in their local mainstream school.• The strategy will be able to provide clarity of outcomes for the children accessing the AP is needed.• Further update to be provided at the next meeting ACTION: Zoe Heywood.	ZH
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Future meetings:

Monday 20 May – 15.30 – 17.00 (Teams)

Monday 24 June – 15.30 – 17.00 (Teams)

FINANCE UPDATE

REPORT OF THE DIRECTOR OF FINANCE & PUBLIC VALUE AND DIRECTOR OF CHILDREN AND YOUNG PEOPLE'S FUTURES

RECOMMENDATIONS

It is recommended that DEF:

- a) Note month 10 DSG monitoring position as set out in this report.
- b) Note current Safety Valve / DSG management plan position as set out in the report.

All to Note

Budget Monitoring Report – Month 10 (2023/24) – Dedicated Schools Grant

Executive Summary

- The Month 10 outturn forecast for 2023/24 sees a significant overspend in the overall Dedicated Schools Grant (DSG) of £40.9 million which is associated with the continued demand on High Needs after taking into account management actions savings of £7.9 million identified in the current Safety Valve Intervention management plan.
- The Management Action of £20.2 million reflects the budgeted savings expected to be delivered in 2023/24 and are as per the current Safety Valve submission to the DfE. As at month 10 £14.6 million has been identified as being at risk of not being delivered due to either delays in projects not commencing or no longer happening.
- An additional £2.3 million savings within the independent sector have been identified from 3-5 year placements ending and Adult Social Care contribution.
- The DSG Adjustment Account, which shows the cumulative DSG Deficit as per government guidance, is projected to rise to £167.6 million by the end of 2023/24.
- The SEN team are continuing to see a high level of requests for EHCP referrals, 2,178 requests have been received for the period February 2023 to January 2024 compared to 2,005 for the same period in 2022/23 (7.8% increase). Meanwhile the number of requests being refused at 6 weeks decreased by 0.35% and 16 weeks increased by 8.35%. Although refusals are higher in 2023/24, due to the increased number of requests being received, the number of plans being agreed and issued are rising, we're not seeing a volume reduction in EHCPs. Support from schools is required to take action to mitigate the growing demand.
- The increasing DSG deficit could have a considerable impact on future education budgets within the DSG as well as impacting on the financial sustainability for Devon County Council

1. Schools

1.1. In November the revised DSG settlement allocation stands at £308 million (after recouplement for academies and direct funded places) based upon pupil numbers as at the October 2022 Schools census and January 2023 Early Years census.

Table 1: Summary of Month 10 forecast position and significant variations

Budget projections as at Month 10	Revised Budget for year £'000	Underlying outturn forecast £'000	Management Action pending		Net Outturn forecast £'000	Forecast outturn variance £'000	Carry Forward Requested £'000	Transfer to/(from) deficit reserve £'000	Forecast Adjusted variance £'000
			In-year Mgt Action o/s £'000	Savings Plans o/s £'000					
Schools Delegated budgets	202,257	201,858	0	0	201,858	(399)	399	0	0
Academy Grants	318	318	0	0	318	0	0	0	0
DSG and School Funding	(339,524)	(339,524)	0	0	(339,524)	0	0	0	0
Total DSG Funding	(136,949)	(137,348)	0	0	(137,348)	(399)	399	0	0
De-delegated budgets	5,625	4,769	0	0	4,769	(856)	856	0	0
Central School Services Block	4,365	4,308	0	0	4,308	(57)	0	57	0
Early Years & Childcare Services	45,285	45,213	0	0	45,213	(72)	0	72	0
Total DSG central budgets	55,275	54,290	0	0	54,290	(985)	856	129	0
High Needs Budget	135,356	152,459	0	(1,051)	151,408	16,052	0	(16,052)	0
DSG High Needs 23/24 deficit budget prep	(26,227)	0	0	0	0	26,227	0	(26,227)	0
Total High Needs budget	109,129	152,459	0	(1,051)	151,408	42,279	0	(42,279)	0
Total Dedicated Schools Grant	27,455	69,401	0	(1,051)	68,350	40,895	1,255	(42,150)	0

Analysis of outturn variance		Change from Month 9		Change from Month 8	
Total forecast FSP savings £'000	Underlying forecast outturn variance £'000	Total Forecast FSP savings £'000	Forecast outturn variance £'000	Total Forecast FSP savings £'000	Forecast outturn variance £'000
0	0	0	0	0	0
0	0	0	0	0	0
0	0	0	0	0	0
0	0	0	0	0	0
0	0	0	0	0	0
0	0	0	0	0	49
0	0	0	0	0	0
0	0	0	0	0	49
0	0	0	0	0	0
0	0	0	0	0	0
0	0	0	0	0	0
0	0	0	0	0	49
Total	0				

- 1.2. The working budget includes other school grants of £31.5 million.
- 1.3. The growth fund is forecasting an underspend of £399,000 which will be carry forward into 2024/25. This is a favourable change from month 8 due to the SEMH Partnership Fund not requiring the full budget allocation from last year's carry forward.

2. DSG Deficit Management Plan

Table 2: DSG Adjustment Account

	£'000
DSG Adjustment Account	125,437
DSG High Needs 22/23 deficit	42,150
Total DSG Deficit Reserve	167,587

- 2.1. The DSG Adjustment Account, which shows the cumulative DSG Deficit as per government guidance, is projected to rise to £167.6 million by the end of 2023/24. This is due to the funding pressure identified of £42.1 million and after management actions of £7.9 million.
- 2.2. The Authority submitted its final Deficit Management Plan in January 2024 to the DfE as part of the Safety Valve Intervention Programme and are in discussions to progress the decision forward. A decision is expected prior to the end of this financial year.
- 2.3. A breakdown of the budgeted management actions and current revisions are shown in Appendix B

3. High Needs

Table 3: Summary of High Needs budgets and forecast position as at Month 10

	Budget	Mth 10	Variance	Transfer to/(from) deficit reserve	Deficit / (Surplus) Balance	Movement Previous Mth
	£'000	£'000	£'000	£'000	£'000	£'000
Alternative Provision	5,460	7,191	1,731	(1,731)	0	(200)
Children in Care and Exclusions	1,629	1,629	0	0	0	0
Improved Outcomes Disadvantaged Children	1,794	1,657	(137)	137	0	(7)
Inclusion	150	150	0	0	0	0
Safeguarding Every Learner	343	338	(5)	5	0	0
SEN Mainstream	22,121	27,273	5,152	(5,152)	0	(36)
FE Colleges	4,129	4,505	376	(376)	0	60
SEN Services	2,719	2,719	0	0	0	0
SEN 100 Project	923	923	0	0	0	0
Maintained & Academy Special Schools	41,309	45,001	3,692	(3,692)	0	551
Hospital Education Services	837	837	0	0	0	0
Recoupment	1,749	1,849	100	(100)	0	0
Other Special School Fees	49,954	55,807	5,853	(5,853)	0	574
Support Centre Funding	2,239	1,529	(710)	710	0	(5)
Total High Needs Funding	135,356	151,408	16,052	(16,052)	0	937
DSG High Needs 22/23 deficit budget prep	(26,227)	0	26,227	(26,227)	0	0
Total High Needs budget	109,129	151,408	42,279	(42,279)	0	937

- 3.1. Cost and volume variances are shown in Appendix A

Agenda Item 9c

Alternative Provision

- 3.2. Alternative Provision (AP) is currently forecasting an overspend of £1.7 million and predominantly relates to AP Other (forecasting £2 million overspend) where the number of children being excluded or who are requiring support due to not being able to attend School is rising. This is creating budget pressures across several High Needs Block budgets but predominantly within Alternative Provision. 18 Locality SEMH partnerships have been agreed across Devon to provide school-based inclusion solutions and support children with SEMH and reducing the demand on regulated and unregulated AP Providers.
- 3.3. The main AP WAVE contract is forecasting to overspend by £245,000 which relates to additional special commissioning places being 13 higher than budgeted and costing £294,000, 3.4% additional High Needs Block grant funding that had to be paid to AP Schools, this is in line with High Needs Block operational guidance and totalled £128,000. This was a late change in the guidance and therefore did not form part of the 2023/24 budget setting. The overspend has been offset by the average cost being lower than budgeted for both AP Medical and main contract totalling £177,000. Forecast includes £314,000 AWPU clawback from mainstream schools for AP Medical pupils to help mitigate some of the current pressure and includes £116,000 Health income forecast for Diabetes funding.

SEN Mainstream

- 3.4. This covers personalised education packages and EHCPs as well as the central SLAs which support them.
- 3.5. Mainstream EHCPs (pre-16) are reporting an overspend of £3.8 million and relates to non-delivery of Management Action savings of £3.8 million built into forecast as no longer being achieved. The forecast does assume that £367,000 will be achieved in this financial year. Overall EHCP numbers are above the budgeted average 3,403 (vs 2,604 budgeted – after management action).
- 3.6. The forecast includes £764,000 for interim payments where an EHCP has not been issued within 20 weeks.
- 3.7. SEN additional resources are reporting an underspend of £14,000; this is in relation to a saving of £74,000 on the MSI contract but offset by increase in the Occupational Health contract for additional resource from September 2023 which will support new ordering of provision in EHCPs which is currently not being delivered.
- 3.8. Children Educated Other than at School are reporting an overspend of £1.2 million for Tutoring Specialist provision due to the average cost being £4,031 above the budgeted level and an increase of 53 pupils. Personalised Budgets are forecasting an overspend of £194,000 due to the average cost being £4,105 above the budgeted level offset slightly by a reduction of eight pupils (75 vs 82 budgeted).

Maintained and Academy Special Schools

- 3.9. The average numbers on roll including Plus Packages and Exceeded places are forecast at 1,761 (vs 1,769 budgeted). Plus Packages are 12 above budget and we are currently funding 22 guaranteed placements which is resulting in an overspend of £544,000, however this has been offset by a reduction in top up of 42 places and a saving of £773,000.
- 3.10. Place funding has been reduced by a net 14 due to capacity limitations at Orchard Manor, The Promise Tiverton and Southbrook resulting in net savings of £146,000.

- 3.11. 3.4% additional High Needs Block lump sum funding paid to schools as per the operational guidance costing £1.3 million and not included within the budget due to late notification from this DfE of this new requirement for 2023/2024.
- 3.12. Reduction in joint funding due to two pupils leaving who are no longer in care and prior year adjustments total £123,000.
- 3.13. Forecast assumes £1.5 million management action savings will be achieved in this financial year with £2.0 million forecast as no longer be achieved in this financial year.

Other Special Schools Fees

- 3.14. The Other Special Schools budget includes Safety Valve Management Action of £12.4 million of which £8.8 million has been identified as not being delivered in this financial year, however an additional funding from Adult Social Care and for 3-5 year savings have been identified totalling £2 million, resulting in a forecast Management Action savings for 23-24 of £5.6 million of which £5.3 million have been achieved to date.
- 3.15. Placement numbers were lower at the start of the financial year compared to budget however the number of leavers and changes due to Management Actions have been lower than budgeted resulting in an increase in placement numbers (1,297 compared 1,264 budgeted). The forecast includes budgeted profiled growth for the remainder of the year which includes 56 new starters for the rest of the financial year (this is before management action savings). The remaining Safety Valve savings assume that there will be reduction in the Independent Sector placements by the end of this financial year.
- 3.16. The current placements forecast to March 2024 is 1,297 (after Management Action) which is 33 above budgeted for the year, resulting in an adverse volume variance of £874,000, this has been partially offset by a favourable price variance of £619,000 and £1.4 million income from Social Care. The forecast includes budgeted profiled growth for the remainder of the year which includes 56 new starters for the rest of the financial year as agreed with the 0-25 team.
- 3.17. Miscellaneous costs and grant funding totalling £496,000 forecast to be paid to Independent settings.
- 3.18. The commissioning group that has been set up with officers from across the authority to review the independent special school fees have now started to meet with the top 20 schools who Devon commission with to start discussions around ensuring we are receiving value for money and that fees are in line with the EHCP of the young person placed at the school.
- 3.19. All spend is currently being reviewed within Other Special Schools to mitigate the growing demand in this sector.

Support Centres

- 3.20. Support centres are forecasting to underspend by £710,000 which is due to the additional centres planned to be open not opening in this financial year and three of the newest centres not delivering outreach.

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4. Investment

Table 4: Safety Valve staffing investment

Workstream Team	No of Staff	23/24 Staffing Investment	Appointments to date	Further Planned Appointments	23/24 forecast	Current RAG rating
		£'000			£'000	
Prevention of more Complex Support						
Education Key Workers	9	284	9	0	216	●
SEN Caseworkers	4	259	4	0	259	●
Ordinarily Available Provision	4	350	4	0	158	●
Tranistion to Adulthood						
Tranistion to Adulthood	3	224	3	0	185	●
	20	1,117	20	0	818	

- 4.1. Forecasting to spend £818,000 of the £1.1 million allocated from the Safety Valve reserve.
- 4.2. Education Key Workers posts have been approved with funding identified, final appointment was made in October bringing the team up to full capacity.
- 4.3. The four external agency staff employed supporting the 0-25 team casework contracts end December 2023. The team have increased capacity for SEN caseworkers of which all staff have now been appointed too.
- 4.4. Four Advisory Teachers were originally appointed for the Team Around but have now been redirected into the Ordinary Available Provision and Early Years projects.

5. Workstream Savings

Table 5: Management savings / Cost reductions

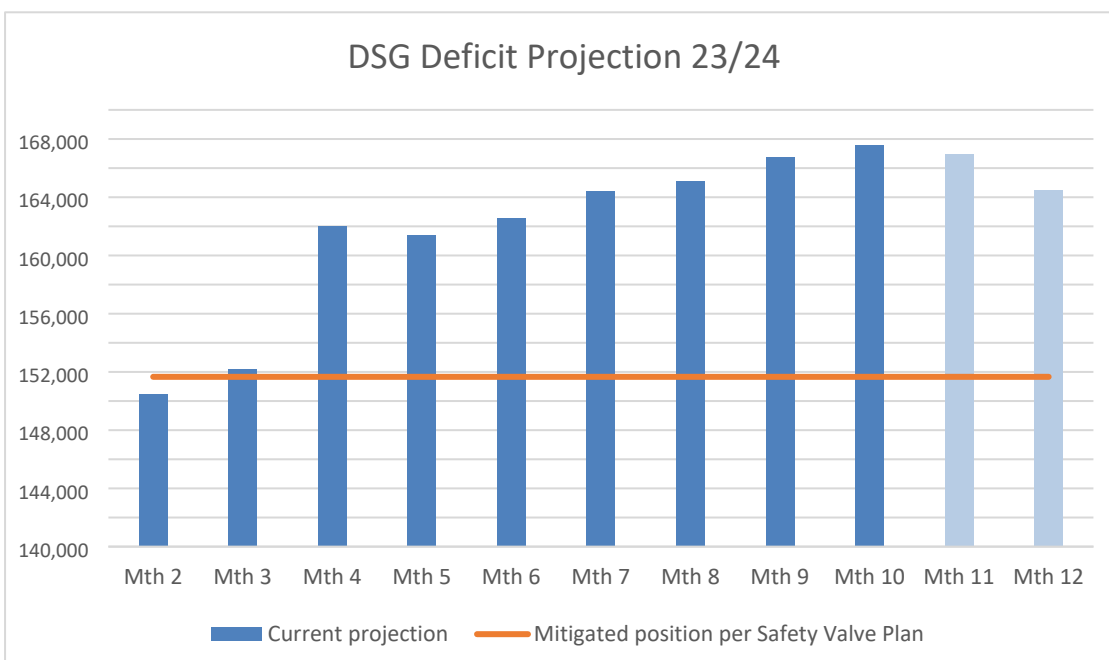
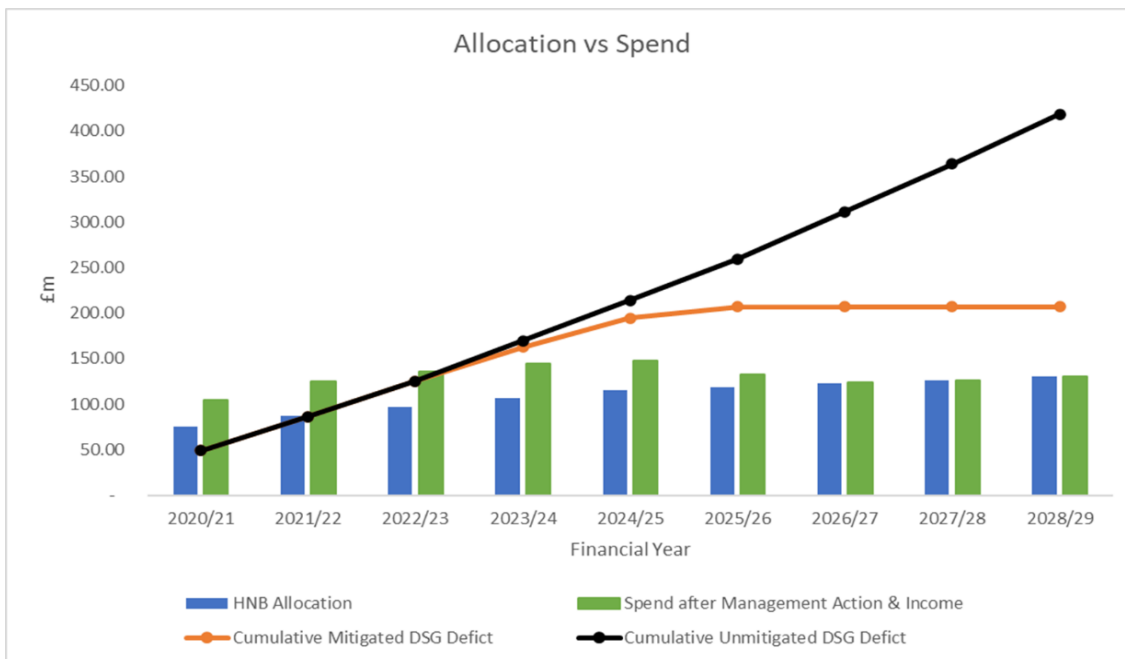
DSG Management Plan savings / Cost reductions Workstream / Management Action	profile of savings						23/24 Targeted Savings	23/24 Forecast Non Deliverable amount	23/24 Forecast Deliverable amount	Actual savings Achieved	Previous Delivery	Current Delivery
	Summer term Planned	Summer term Actuals	Autumn Term Planned	Autumn Term Actuals	Spring Term Planned	Spring term Actuals	£'000	£'000	£'000	£'000	RAG	RAG
New Specialist Provision	(1,755)	(691)	(1,331)	(1,051)	0	0	(3,085)	1,239	(1,847)	(1,742)	●	●
Support Centre Expansion	(1,360)	0	0	0	0	0	(1,360)	1,360	0	0	●	●
SEN 100 Project	(2,789)	(118)	0	(424)	(796)	(189)	(3,585)	2,071	(1,514)	(731)	●	●
Independent Sector	(672)	(1,754)	0	0	0	0	(672)	(1,082)	(1,754)	(1,754)	●	●
Prevention of more Complex Support requirements	(6,014)	(598)	(128)	(271)	(1,387)	0	(7,529)	6,545	(984)	(869)	●	●
Transition to Adulthood	0	0	(3,954)	(498)	0	0	(3,954)	3,456	(498)	(498)	●	●
Other	(1,000)	(1,000)	(50)	0	(250)	(250)	(50)	(1,000)	(1,300)	(1,250)	●	●
Total Management Plan Savings	(13,590)	(4,161)	(5,463)	(2,244)	(2,433)	(439)	(20,235)	12,589	(7,897)	(6,844)		

- 5.1. Pupil data has been provided by workstream leads to evidence those who have been supported either during the summer and Autumn term or taken up a placement within the expanded Maintained and Academy special school places, this has achieved to date, £6.8 million of savings.
- 5.2. The Management Action of £20.2 million reflects the budgeted savings expected to be delivered in 2023/24 as per the February 2022 Safety Valve Intervention submission. As at month 10 £14.4 million is identified at risk of not being delivered due to delays in projects commencing or no longer happening and built into forecast, however we have seen additional savings within the independent sector due to additional £1 million savings for 3-5 year placements ending and £1 million Adult Social Care contribution. Revised Management Action savings forecast to be achieved is £7.9 million. (Appendix B).

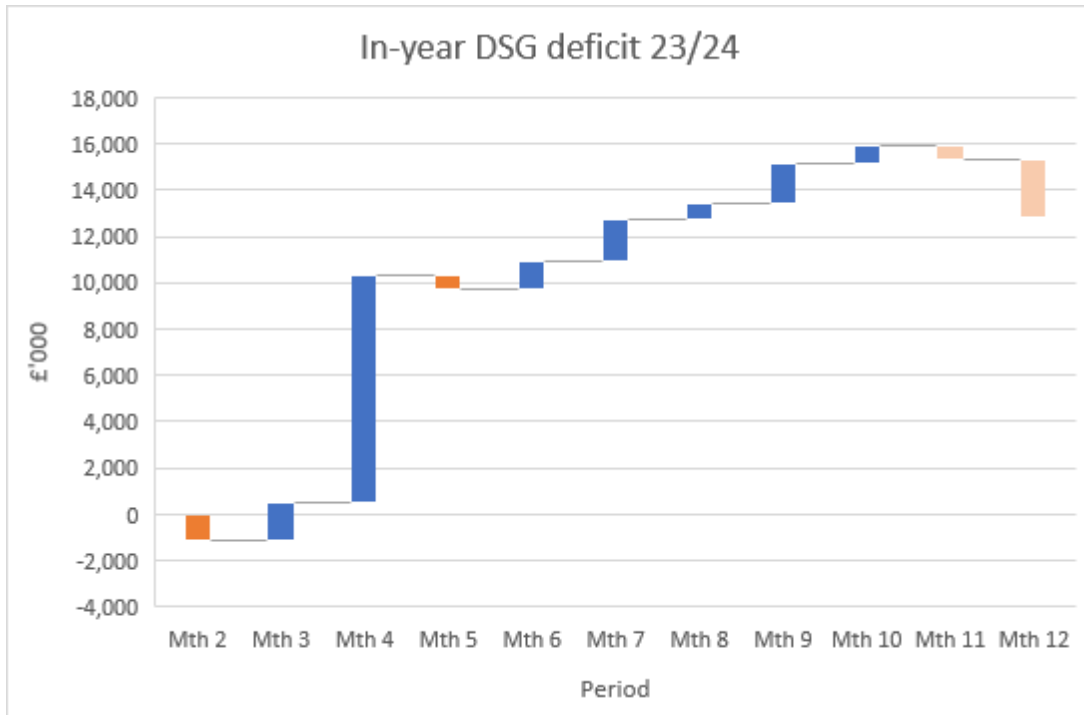
5.3. Programme Management support has been identified within the authority to help both support and deliver the DSG Deficit Management Plan and the SEND Transformation Programme along with a new Governance reporting structure being set up. Weekly meetings are currently being held with the Senior Responsible Officers (SRO), Programme Management support and finance to ensure the Safety Valve Intervention Programme timelines will be met.

6. Impact of cost reduction on overall Deficit

6.1. The revised deficit is now forecasting to be at £167.6 million by 2024/25 which is £26.8 million over that previously stated in the Safety Valve Intervention submission in February 2022.



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7. Capital Investment

7.1. Total investment requirement is £23.5 million with £17 million being funded by the DfE and the remaining contributions being funded by LA contribution and High Needs Provision Capital Allocation. This will create additional 404 places over 3 years and is expected to see £6.7 million saving to the High Needs Block based on the current safety valve plan.

7.2. The forecast spend for 2023/24 is £5.2 million.

SEN Capital Programme	No of additional places	Investment £'000	23/24 Actual Spend £'000	23/24 Forecast spend £'000
Ace Tiverton Special School	30	810	1	99
Lampard School	60	4,200	977	977
Marland Day	40	1,700	243	356
Okehampton Special School	100	11,400	200	351
Orchard Manor Special School, expansion	54	3,100	81	65
South West Devon Special School	120	2,300	18	3,362
	404	23,510	1,520	5,210

7.3. The Authority has been invited to apply for further capital funding as part of the Safety Valve submission. This bid was submitted at the beginning of January 2024.

8. Risks

8.1. Continued growth of EHCPs and unexpected high cost with no facility to reduce external demand will make it difficult to contain costs within the allocated budget.

8.2. The SEN Placement continue to cause increase in the demand on the High Needs Block. Support from schools to take action to mitigate the growing demand and reduce the call on independent placements is necessary.

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- 8.3. Rising demand being seen in Section 19 requests for those children not attending school which is creating additional pressure to the High Needs Block.
- 8.4. Changes in Senior Leadership both within the Service and wider authority could see delays, advances or change in direction to current plans identified.
- 8.5. Staff recruitment and retention both operational and project resources is a continued problem for Education Services which will impact on the deliverability of the plans.
- 8.6. Unexpected demand as new high-cost children and young people move into the area.
- 8.7. Mitigation of the above risks can be achieved through the implementation of the SEND Transformation Programme support from schools and other providers to take action on the growing demand and reduce the call on independent placements.
- 8.8. The Safety Valve savings identified for 2023/24 as part of the previous plan could see significant slippage due to senior staff changes and delays in revisiting projects. Realignment to of the plan with the SEND Transformation Programme.

9. Recommendation

It is recommended that DEF:

- a) Note month 10 DSG monitoring position as set out in this report.
- b) Note current Safety Valve / DSG management plan position as set out in the report.

All to Note

ANGIE SINCLAIR
Director of Finance & Public Value

STUART COLLINS
Director of Children and Young People's Futures

Please ask for: Adrian Fox Adrian.fox@devon.gov.uk

Education & Learning - Education & Health Care Plan (EHCP) Cost & Volume Analysis

High Needs EHCP Analysis	No of FYE Pupils				Budget 23/24	Forecast outturn	Variation		Budgeted Unit cost	Forecast Unit cost	Variation	Month 10			Month 9		Change to Mth 9		Month 9	Change
	Budgeted 23/24	Month 10	Variation	%	£'000	£'000	£'000	%	£	£	£	Price Var £'000	Vol Var £'000	Total Var £'000	Price Var £'000	Vol Var £'000	Price Var £'000	Vol Var £'000	No of FTE Pupils	to Mth 9 Pupils
Top ups	150	136	(14)	(10.3%)	1,978	1,740	(238)	(12.0%)	13,187	12,794	(393)	(53)	(185)	(238)	(27)	(171)	(27)	(13)	137	(1)
Medical Planned Places	90	90	0	0.0%	1,600	1,600	0	0.0%	17,778	17,778	0	0	0	0	0	0	0	0	90	0
Medical Planned Additional	39	39	0	0.0%	762	694	(68)	(8.9%)	19,538	17,795	(1,744)	(68)	0	(68)	(59)	(20)	(9)	20	38	1
AP WAVE Special Commission	13	26	13	50.0%	75	368	293	390.7%	5,761	14,154	8,393	218	75	293	472	75	(254)	0	26	0
AP Other [Non-WAVE]	286	190	(96)	(50.5%)	725	2,769	2,044	281.9%	3,255	14,574	11,318	2,151	(313)	1,838	2,173	(335)	(23)	23	183	7
Alternative Provision	578	481	(97)	(20.2%)	5,140	7,171	2,031	39.5%	59,519	77,094	17,575	2,247	(422)	1,825	2,559	(451)	(312)	29	474	7
Personalised Packages	82	75	(7)	(9.3%)	1,334	1,528	194	14.5%	16,268	20,373	4,105	308	(114)	194	349	(114)	(41)	0	75	0
Home Tutoring	132	185	53	28.6%	1,119	2,314	1,195	106.8%	8,477	12,508	4,031	746	449	1,195	753	381	(7)	68	177	8
Educated Other than at School	214	260	46	17.7%	2,453	3,842	1,389	56.6%	24,746	32,881	8,136	1,054	335	1,389	1,101	268	(48)	68	252	8
Mainstream Provision (pre 16)	1,788	2,405	617	25.7%	6,681	8,480	1,799	26.9%	3,737	3,526	(211)	(506)	2,305	1,799	(2,980)	2,954	2,474	(649)	2,412	(7)
Mainstream Provision (pre 16) Plus Packages	816	998	182	18.2%	9,506	10,712	1,206	12.7%	11,650	10,733	(916)	(914)	2,120	1,206	(4,094)	2,583	3,180	(463)	991	7
Mainstream	2,604	3,403	799	23.5%	16,187	19,192	3,005	18.6%	15,386	14,259	(1,127)	(1,421)	4,426	3,005	(7,074)	5,537	5,654	(1,112)	3,403	0
Further Education	879	938	59	6.3%	4,129	4,505	376	9.1%	4,697	4,803	105	99	277	376	109	207	(10)	70	923	15
Top Ups	1,731	1,689	(42)	(2.5%)	23,150	22,377	(773)	(3.3%)	13,372	13,250	(122)	(206)	(566)	(772)	(201)	(515)	(5)	(51)	1,693	(4)
Top Ups Guaranteed	0	22	22	100.0%	0	386	386	0.0%	17,556	17,556	0	0	386	386	0	385	0	1	22	0
Exceeded Places	0	0	0	0.0%	0	0	0	100.0%	10,000	0	(10,000)	0	0	0	0	0	0	0	0	0
Plus Packages	38	50	12	24.4%	528	686	158	29.9%	13,895	13,647	(248)	(12)	170	158	(55)	135	42	35	48	3
Maintained & Academy Special Schools	1,769	1,761	(8)	(0.5%)	23,678	23,449	(229)	(1.0%)	54,823	44,453	(10,370)	(218)	(10)	(228)	(256)	5	37	(15)	1,762	(1)
Sole Funded	1,240	1,280	40	3.1%	59,985	59,943	(42)	(0.1%)	49,078	48,884	(194)	(248)	1,963	1,715	(248)	1,963	0	0	1,280	0
Joint Funded	19	12	(7)	(64.4%)	1,853	1,135	(718)	(38.7%)	112,280	108,573	(3,707)	(43)	(835)	(878)	(43)	(835)	0	0	12	0
Adults	5	5	0	4.8%	433	485	52	12.0%	86,502	86,011	(491)	(3)	22	19	(3)	22	0	0	5	0
Independent Special Schools	1,264	1,297	33	2.5%	62,271	61,563	(708)	(5.9%)	247,860	243,468	(4,392)	(294)	1,149	856	(294)	1,149	0	0	1,297	0
Resource Bases (Topup)	92	88	(4)	(5.0%)	816	811	(5)	(0.6%)	8,870	9,258	388	34	(39)	(5)	34	(35)	0	(4)	88	(0)
Reported Forecast Outturn 2023/24	7,308	8,140	832	10.2%	113,858	119,722	5,864	5.2%				1,467	5,756	7,222	(3,854)	6,715			8,111	29

Workstream / Management Action	23/24 Targeted Savings £'000	Workstream lead	23/24 revised Savings £'000
New Specialist Provision			
The Promise , Okehampton Opening Sept 2022	(800)	Simon Niles / Gill Loman	(500)
Glendinning, expanding Sept 2022	(250)		(258)
Ace Academy, expanding Sept 2022	(225)		(225)
Lampard additional Opening Jan 2023	(480)		0
Marland East-the-Water additional Opening Sept 2023	(467)		(467)
Orchard Manor additional Opening Sept 2023	(397)		(397)
South/West Devon school Opening Sept 2023	(467)		0
	(3,085)		(1,846)
Support Centre Expansion			
Support Centre Expansion	(1,360)	Gill Loman	0
Support Centre Expansion total	(1,360)		0
SEN 100 Project			
Outreach support in special schools - supporting 250 schools across the year (Year 1: supporting 80 children (25 successful); Year 2-5 supporting 160 children (50 successful))	(1,958)	Robyn Emmerson	(805)
SEN Support Service - (Supporting children from to stay in Mainstream Yr1 - Sept 22 - 24 children, Yr 2 - Apr 23 - 48 Children & Sept 23 - 72 Children; Yr 3 forwards Sept intake 72 children)	(918)	Vacant	0
Outreach support to reduce need for EHCPs (Year 1-2 : Supporting 80 children; Year 3 supporting 120 children)	(709)		(709)
SEN 100 Project total	(3,585)		(1,514)
Independent Sector			
Independent Schools: Ceasing 3-5 yr placements at the end of the summer term	(672)	Sam Plumb	(1,754)
Independent Sector Total	(672)		(1,754)
Prevention of more Complex Support requirements			
Prevention of more complex support requirements 5-10 age group and enhanced capacity of 0-25 Team	(2,252)	Vacant	0
Team around the School	(2,105)	Paul Lamana Matthew Gould	0
Special Teachers Curriculum	(2,188)		0
Education Key Workers	(984)		(984)
Prevention of more Complex Support Total	(7,529)		(984)
Transition to Adulthood			
Pre-16 transition NCY10 & 11	(1,990)	Sam Plumb	(498)
Post-16 placement	(1,964)		0
Transition phase total	(3,954)		(498)
Other			
20 placements - Children's Social Care Funding - Education only costs would see savings for DSG (transfer of costs to LA and Health)	0	Matthew Gould	(1,000)
Mainstream Schools: Claim AWPU back from mainstream schools if child receiving education other than at a mainstream school (as Exclusions)	(50)		(300)
Other total	(50)		(1,300)
Total Management Plan Savings	(20,235)		(7,896)

Schools Organisation, Capital and Admissions Group: Notes of meeting on Tuesday 5 March 2024

Key Issues for DEF to Note:

Item 4. Early Years:

- New Early Years entitlements are due to roll out from April 24.
- Take up of Level 2 Early Years Practitioner qualification has exceeded expected demand; further training planned for summer term.
- Team investigating where additional 2-year old places will be required.
- Government Wraparound programme progressing, providing term time childcare from 8am-6pm to be in place by 2026.

Item 5. School Organisation:

- Updated DfE guidance to be introduced from April 24 on Making Significant Changes to an Open Academy.
- SOCA considered current position and issues facing small rural schools in Devon. Currently 36 primary schools with under 50 on roll, 15 of which are LA maintained schools. 116 primary schools with under 100 on roll.
- SOCA considered the Education South West and DfE in-principal agreement to close Kingswear Primary Academy School. An informal consultation is currently live until 22 March to provide DCC Cabinet with further information as the LA has been asked to support the closure.

Item 6. Capital Programme:

- All Devon maintained schools are confirmed RAAC-free. Colyton Grammar, Exmouth CC and Petroc (FE) have been identified with RAAC and are being supported by DfE.
- LA capital funding allocation still to be announced by DfE. Exeter CofE Diocese has identified a reduction in capital funding of 51% over last 3 years.

Attendance:

DCC

Katherine Crompton (Chair)	Capital Programme Manager, Built Environments
Shona Meek	Senior School Organisation Officer
Andrew Brent (part)	Senior Policy Officer
Fran Butler (apologies)	Early Years and Childcare Sufficiency Lead
Nikki Phillips (part)	Early Years and Childcare Team Manager
Heidi Watson-Jones (notes)	Service Support Officer (E&L)

Devon Schools Leadership Services

Primary

Penny Hammett	FORT Federation
David Perkins	Littletown Academy

Secondary

Graham Hill	Pilton Community College
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Special School Heads

Stuart Allman (apologies)	Pathfield School
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DAG

Ian Rogers (part)

Agenda Item 10

Schools Organisation, Capital and Admissions Group: Notes of meeting on Tuesday 5 March 2024

Diocesan Representatives

Kirsty Wright	Diocese of Plymouth
Christina Mabin	Exeter Anglican Diocese (Admissions)
Richard Power	Exeter Anglican Diocese (Capital)

Union Representative

Nigel Williams (part)	Corporate Forum (Education) NASUWT
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In Attendance

Nick Cook – (apologies)	South West Norse
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1. Minutes of Previous Meeting – 5 December 2023

- Online presentation of school term timetable has been updated to improve clarity and encourage parents to refer to school websites.
- It was previously noted that TUPE meetings had not taken place prior to academisation of Trinity Primary. SM and CM confirmed that TUPE meetings had taken place at the time, with HR and Union present.
- Minutes were agreed as an accurate record.

2. Admissions: Determined Admission Arrangements 2025-26

- Co-ordinated admissions schemes and other admission arrangements have been published at <http://devon.cc/lapolicies>.
- Own admission authority schools have until 15 March 2024 to confirm to the LA and Diocese, and publish on their school websites.
- Draft policies for 2026/27 will be available by the end of the summer break and schools should schedule governance meetings in September to consider this, noting the draft documents are not compulsory for own admission authority schools.
- Documents to be shared with Dioceses should be available by 1 October 2024.
- All admission authorities must schedule a determination meeting before the statutory deadline of 28 February 2025.
- SOCA noted the amendments to the Coordinated Admissions Scheme, particularly relating to staff priorities, these have previously been raised.

3. Admissions: Flexi-Schooling

- A survey was circulated to secondary schools only. **ACTION: DSLS to recirculate to obtain primary views.**
- Secondary responses have indicated that some schools are aware of flexi schooling as an option for parents to request, and would be grateful for the LA to provide a template and guidance.
- Further discussion at the next meeting.
- **ACTION: DSLS to recirculate Flexi-Schooling survey to obtain primary views.**

4. Early Years Update

- New entitlements due to roll out from April 2024.
- Promotion of careers in Early Years and Childcare being developed with Reddoor Film and Media.
- Level 2 Early Years Practitioner qualification course has started with excellent take up. Hoping for a second course during the summer term to manage the demand.

Schools Organisation, Capital and Admissions Group: Notes of meeting on Tuesday 5 March 2024

- Provider Self Update and Early Years census now live. Some issues with parents accessing information about local childcare provision now that PinPoint has ceased.
- Childcare Sufficiency Report was considered at December Cabinet and is now available to view on DCC website. There should be sufficient 2-year-old places for April 2024 but more places for under two-year-olds will be needed from September 2024.
- Capital funding is available, and the team are considering areas of highest need, and requirements to manage the new Wraparound programme.
- Information on this has been circulated by DfE to ensure access for children from 0800 – 1800 by 2026. A secondment opportunity for a Wraparound Provision programme lead is currently being advertised.
- School survey to be shared shortly to gather comprehensive information on the available offer. Primary Schools do not have to provide this themselves, however all children must be able to have access (e.g. via childminders or other local providers)
- HAF Easter holiday provision now live for parents to access. Extended criteria have been slimmed down to cover only children with benefit-related income.

5. School Organisation Update

Small Schools:

- 36 primary schools with under 50 on roll, 15 of which are LA maintained schools. 116 primary schools with under 100 on roll.
- Currently facing a falling demographic in the primary sector, volatility in pupil numbers, along with other factors, are having a significant impact for rural schools.
- Ongoing drive from DfE for all schools to be part of a Multi Academy Trust, and Devon continues to see conversions. LA continues to support local families of schools, whether MATs, or Federations.
- School Place Planning team identify and can support schools with place planning concerns which are highlighted through a wide range of demographic, pupil and performance data and information on emerging Local Plans on a Local Learning Community basis.
- School Organisation team can provide support for schools to manage statutory processes to consider possible amalgamations or mergers, Early Years provision, Resource Base provision and formal partnership arrangements.
- SOCA noted schedule of small Devon schools including the forecast Number on Roll for future years. Figures suggest a generally static position.
- It was concerning that a number of the small schools identified had not received any admissions preferences, which could impact on future numbers, particularly where there is a significant Year 6 cohort leaving in summer 24.
- SOCA welcomed the information – additional illustration of the overall impact on the school NoR would be helpful. **ACTION: SM**

Changes to DfE Guidance:

- DfE have brought in new guidance from April 24 on 'Making Significant Changes to an Academy'. A summary of the changes was considered.
- New thresholds will be in place for: removal of physical capacity in mainstream, decreasing / increasing number of pupils in Resourced Provision, decreasing places in special or AP, change of age range (incl. adding nursery provision)
- Three tier system for significant change applications will be introduced, which should simplify the current system for the most common school organisational changes.

Agenda Item 10

Schools Organisation, Capital and Admissions Group: Notes of meeting on Tuesday 5 March 2024

- All proposals will continue to require an Impact Assessment.
- LAs will be expected to set out a Sufficiency Framework setting out medium term forecasts on demand.
- LAs will be required to set out a high level school place strategic plan, which will be part of a continuous process of strategic assessment and planning.
- Expecting that strategic place planning conversations between the LA and DfE will be established more formally.

- All schools are encouraged to contact the School Organisation Team if there are any queries with regards to the changing thresholds and/or require support with any school organisational changes that may require a statutory process for maintained schools or a significant change process for academy schools.

- **School Closure:** SOCA noted the DfE in-principal agreement to close Kingswear Primary Academy School. An informal consultation is currently live until 22 March to provide Cabinet with further information as DCC is being asked to agree to the closure.
- Noted Kingswear had not featured on the small schools data spreadsheet
- **Resource Bases:** approved at Holsworthy CC and Brixington Primary. Currently consultations live for provision at Torrington Bluecoat Primary, Newport Academy Primary and West Croft Primary.
- **Pathfield:** Noted proposed phased reduction in registered places from Sept 2025 at Pathfield Special School, linked to closure of Pathways provision. A number of concerns and objections had been received as part of the consultation, and the Governing Body is pausing the proposal to consider this.
- **Langtree:** proposal to extend age range from 3-11 to 2-11 from 15 April 2024 has been approved.
- **Cranbrook new Special School :** no update available at this time regarding sponsor.
- **Glendinning** – removal of post 16 offer has been approved by the Region's Group.
- Awaiting Regional Director decision on: Lady Seawards (age range), Clyst Vale (Hearing Support Centre closure), Axminster Primary (expansion)
- SOCA noted proposed Multi Academy Trust changes and academisation proposals.

ACTION:

SM (Bill Aplin) to provide data on the overall impact on the small schools' NoR as identified in forecasting for when the annual small schools data is next submitted to SOCA.

8. Capital Programme Update

- **RAAC:** confirmation that all Devon maintained schools are RAAC-free. Colyton grammar, Exmouth CC and Petroc FE have been identified with RAAC and are being supported by DfE
- **Net Capacity Tool** update issued by DfE. This changes designation of certain room types. Initial findings using the new tool suggest it does not significantly change the overall net capacity of maintained schools.
- **Special Schools Net Capacity methodology** still awaited.
- **Condition Data Collection (CDC) Reports** ongoing, led by DfE.
- **Team experiencing** increasing pressure on LA team to provide condition surveys and capital maintenance in advance of academy conversion affecting capital maintenance scheme budget.

Schools Organisation, Capital and Admissions Group: Notes of meeting on Tuesday 5 March 2024

- **Adaptation capital work requests** being received for capital work to enable children with a primary need of a physical disability to be educated in mainstream settings. Noted that there is no specific budget allocated in Devon to address this, which is adding additional pressure to the capital maintenance programme.
- **Capital Maintenance Scheme** planning continues. KC planning to survey schools to establish what work schools are undertaking between quinquennial surveys which can feed into programme planning.
- Mindful that challenges at school-level with rising costs and school funding has not supported smaller scale capital work to be undertaken between quinquennial surveys in schools.
- **Basic Need programmes** at Cranbrook include Cranbrook Education Campus, a 70 place special school, and a feasibility for a new primary site.
- Information at a future meeting detailing capital maintenance projects being planned at specific school sites would be helpful. **ACTION: KC to consider**
- Noted that LA capital funding allocation is yet to be announced
- RP advised the Diocese has identified a significant reduction of 51% to Diocese capital funding available over last 3 years. Figures impacted as more schools move to Academy Trusts.
- Noted that BET has several emergency works have had to be managed in addition to the agreed programme this financial year which have also impacted the overall SCA budget significantly.

ACTION:

- **KC** to consider presentation of planned capital maintenance works at next meeting
- **KC** to present information around capital funding allocations at next meeting.

9. SW Norse Update

- No update at this meeting.

Future meeting dates:

- **Tuesday 14 May 2024** (9.30 – 11.30)
- **Tuesday 24 September 2024** (9.30 – 11.30)
- **Tuesday 3 December 2024** (9.30 – 11.30)
- **Tuesday 4 March 2025** (9.30 – 11.30)

