

SEND Top-up and Locality Funding

Key Messages

Forum members are asked to note the content of the paper below and the attached presentation (Appendix 1).

1. Introduction/background

- 1.1. A review of SEND high needs funding was instigated in 2021.
- 1.2. In 2022, following extensive cross-sector activity we procured a resource allocation system called 'Formulate for SEND' from Imosphere.
- 1.3. Formulate is a web-based system that supports the allocation of funding for children and young people with Education Health and Care (EHC) Plans. It is used in a number of local authorities across England and we have met with colleagues from these authorities to learn from their experience as part of our work. It has a longer history in resource allocation for social care.
- 1.4. Local Authority practitioners complete a needs profile within the system for each young person with an EHC Plan and this generates an annual funding band between 1 and 10. A brief overview of the needs profile is on the attached presentation.

2. Implementation of Formulate for SEND

- 2.1. Between September 2023 and March 2024, we completed needs profile forms for over 500 children and young people with EHC Plans to gather an initial data sample. Imosphere has returned the analysis of this initial sample.
- 2.2. In April and May 2024, we costed provision for a representative sample of 200 children and young people in mainstream schools and submitted to Imosphere for analysis to develop the basis of a funding model. Imosphere has returned the analysis of this initial costing sample.
- 2.3. The Local Authority team are now working with partners across the sector to gather further information and undertake moderation activity to build a funding model for EHC Plans for children and young people in mainstream schools.
- 2.4. An advisory group including parent/carer representatives and colleagues from schools is being established to guide the next steps.

- 2.5. Engagement and consultation activity is ongoing throughout the summer term and into the autumn term. LA officers are attending SENCO and headteacher briefings and will share wider communications across the city.
- 2.6. We have completed some initial moderation activity with educational psychologists, advisory services and citywide SENCOs.
- 2.7. We plan to start the implementation of the new funding model in the autumn term 2024 for newly issued EHC plans in mainstream schools.
- 2.8. Implementation for existing EHC plans for children and young people in mainstream schools is scheduled to begin in September 2025.

3. SEND Funding for the academic year 2024/25

- 3.1. The interim model in place for the allocation of SEND funding is linked to the Sheffield Support Grid (SSG) numbers as reported in the January school census.
- 3.2. This funding is allocated in three parts:
 - An initial block to each school based on SSG levels from the January SSG return.
 - A targeted funding block delegated to the locality to be allocated to children and young people where additional funding is required.
 - Strategic and leadership funding to support staffing and development work across localities.
- 3.3. The total budget for the interim model is £5.9m, which had been retained for the 24/25 school year.
4. The January 2024 SSG return demonstrates an increase in the number of children and young people whose needs are at SSG levels 4 and 5 across mainstream schools.
5. As a consequence of the increase in young people at SSG levels 4 and 5, there is an increase in the proportion of funding allocated to the initial block to schools of £1.12m for the school year 2024/25.
6. To ensure the availability of funding for targeted work within localities, it has been agreed to transfer additional funding from the high needs budget into the targeted funding element to maintain the 2023/24 allocation.

7. Funding to support children and young people without EHC plans from September 2025

- 7.1. The implementation of Formulate will centralise the allocation of funding for children and young people with EHC plans meaning that this funding will no longer be issued by localities.

7.2. We are co-producing a new model to support children and young people without EHC Plans from September 2025 with parent/carer representatives and practitioners from across the sector.

7.3. We will continue to update the Education Funding Forum, practitioner briefings and the wider sector throughout the year.

8. Recommendations

Forum members are asked to:

- Include SEND Funding as a standing item to the Schools Forum agenda until agreed otherwise.
- Note the transfer of additional funding from the high needs budget into the interim funding model.