

SEND Top-up and Locality Funding Update

Key Messages

Forum members are asked to note the content of the paper below

1. Introduction/background

- 1.1. A review of special educational needs and disabilities (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. Update on the Implementation of Formulate for SEND

- 2.1. Imosphere has delivered the bespoke Sheffield pupil needs profile on schedule, this is the form used to deliver the funding band.
- 2.2. In the summer term 2023/24 the Local Authority (LA) team worked with some primary and secondary schools on some pilot work to complete pupil needs profiles for all pupils with EHC Plans. This has supported the planning of work for 2024/25 and has added to the modelling of band allocation across the city.
- 2.3. An advisory group has held constructive discussions across the full range of areas involved in the funding review and has shaped the work for 2024/25. These meetings will continue throughout the year.
- 2.4. The funding team are attending a range of sector briefings over the next half-term to update on progress so far and the plans for 2024/25.
- 2.5. The first multi-agency moderation of the live system is scheduled for November 2024.

- 2.6. SEND Statutory Assessment and Review Service (SENDSARS) has completed pupil needs profiles for newly issued EHC Plans following EHC needs assessments from 2 September 2024. This allocates a funding band but not a funding value at the moment.
- 2.7. A plan has been developed for the transition of pupils with existing EHC plans in mainstream schools, this is being further discussed with the Inclusion Taskforce and SEND funding advisory group, then will be shared with all settings.
- 2.8. Guidance and information materials are being finalised and will also be shared following discussion at the above groups.

3. Funding Review activity for 2024/25

- 3.1. Initial modelling of funding values has been completed and will be shared advisory groups and pilot schools for initial consideration
- 3.2. Approximately 700 pupil needs profiles have been completed for pupils in mainstream schools. For more accurate modelling to take place and support a decision on band values we require at least half of the current mainstream school pupils to have a completed pupil needs profile. This will allow a decision on funding values and anticipated total expenditure by the end of this term and in advance of the next Education Funding Forum meeting.
- 3.3. SENDSARS have a schedule of activity throughout 2024/25 to complete pupils needs profiles for those pupils with existing EHC plans including engagement with schools in and out of city.

4. Exceptional Needs Funding to support children and young people with SEN Support

- 4.1. 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.
- 4.2. We are keen to undertake further work on the EHCP funding model to establish the potential costs of this. Once we have more information we will progress the conversation on exceptional needs funding for pupils with SEN Support.
- 4.3. The Department for Education (DfE) has delayed the indicative Dedicated Schools Grant (DSG) settlement and we do not have a timescale for this information.
- 4.4. We will continue to update the Education Funding Forum, practitioner briefings and the wider sector throughout the year.

5. Recommendations

Forum members are asked to note this update