

Schools Forum 29th June 2023 16:00-18:00

Chair: Simon Horne

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Item No	Title of Report	Decision/ Discussion/ Update	Officer(s)	Paper(s)
1.	Apologies for Absence		Chair	
2.	Membership	Update	Clerk	
3.	Declarations of Interest		Chair	
4.	Minutes of the meeting held on 30 th March 2023		Chair	
5.	Matters Arising		Chair	
6.	2022-23 DSG Outturn	Update	Richard Cox	
7.	2022-23 School Balances	Update	Sharon Palma	
8.	Proposed use of DSG Reserves	Update/ Decision	Neil Marlow	Verbal
9.	High Needs Update <ul style="list-style-type: none">• Projected expenditure 2023-24• High Needs Commissioned Places• High Needs Review Update• Recommendations	Update	Karen Flanagan	
10.	Schools in Financial Difficulty Panel	Update	Neil Marlow	Verbal
11.	AOB		Chair	
12.	Dates for Next Meetings		Clerk	

SCHOOLS FORUM
MINUTES OF THE MEETING HELD
ON THURSDAY 30 MARCH 2023

Membership	Name	Phase	School	HT/Gov	End Date
Maintained	*Luke Bridges	Primary	All Saints CE, N20	HT	30/11/24
Maintained	Ziz Chater	Primary	Martin Primary	HT	30/11/24
Maintained	*Simon Horne (C)	Secondary	Friern Barnet	HT	18/01/24
Maintained	*Sarah Sands	Primary	Garden Suburb Infants	HT	30/11/24
Maintained	Anthony Vorou	Primary	St John's CE, N11	Gov	18/01/24
Maintained	Harvey Freeman	Primary	Hasmonean Primary	Gov	18/01/24
Maintained	Chaya Posen	Primary	Noam School	HT	07/07/24
Maintained	*Jackie Menczer	Primary	Menorah Primary	HT	03/02/26
Maintained	*Liz Longworth	Primary	Northside	HT	31/12/24
Maintained	Sarah Maltese	Primary	St Pauls N11	HT	31/12/24
Maintained	*Ian Phillips	Primary	Squires Lane Learning Fed.	Gov	30/03/26
Academy	Dan Hawkins	Primary	Childs Hill, Claremont Fed	HT	31/12/24
Academy	Clare Wagner	Secondary	Henrietta Barnett	HT	31/12/24
Academy	Sian Morris	Primary	The Hyde Prim. Acad.	HT	07/10/24
Academy	Claire Barnes	Secondary	Ark Pioneer	Gov	31/12/24
Academy	Marc Lewis (Sub for Gavin Smith)	Secondary	Wren Academy	HT	30/11/24
Academy	Matthew Stevens	Secondary	Saracens	HT	30/11/24
Academy	*Robin Archibald	Primary	Broadfields Academy	HT	30/11/24
Academy	*John Bowra	Secondary	Chris's College Finchley	Gov	18/01/24
Academy	Violet Walker	Secondary	Queen Elizabeth Girls' School	HT	31/12/24
Special	*Ian Kingham	Special Academy	Oak Lodge	Dp HT	18/01/24
Special	Gilbert Knight (VC)	Special Maintained	Oakleigh	Gov	18/01/24
EY	*Ben Hasan	Maintained Nursery	Moss Hall Nursery	HT	07/12/25
EY	Sarah Vipond	PVI	Middx University Nursery		18/01/24
PRU	*Joanne Kelly	PRU	PRUs	HT	18/01/24
Post-16	Vacancy				
Trade Union	*Keith Nason	Trade Union	National Education Union		18/01/24

Non-Members:

*Cllr Pauline CoakleyWebb, Chair of Children, Education & Safeguarding Committee
 Ben Thomas, Strategic Lead, Barnet LA (Local Authority)

*Neil Marlow, Chief Executive and Director of Education and Learning, Barnet Education and Learning Service (BELS)

*Karen Flanagan, Director of SEND & Inclusion (BELS)

Sharon Palma, Head of Finance

*Richard Cox, Interim DSG Finance Manager

*George Peradigou, Clerk

*Denotes member present

1 **WELCOME TO NEW MEMBERS**

The Chair introduced and welcomed new members Jackie Menczer, Primary Headteacher representative from Menorah Primary, and Ian Phillips, Primary Governor representative from the Squires Lane Learning Federation. Both had recently been elected to the Forum.

The Chair also confirmed that Gilbert Night had accepted the nomination received, in his absence, for the position of Vice Chair.

2 **APOLOGIES FOR ABSENCE**

Apologies for absence were received and accepted on behalf of Dan Hawkins, Sarah Maltese, Matt Stevens, Clare Wagner, Violet Walker, Sarah Vipond, Sian Morris, Marc Lewis, Ziz Chater, Claire Barnes, and Harvey Freeman.

3 DECLARATIONS OF PECUNIARY INTEREST

No declarations of interest were declared related to agenda items to be discussed.

4 MINUTES OF THE PREVIOUS MEETING

The minutes of the meeting held on 12 January 2023, copies of which had been circulated prior to the meeting, were confirmed, and approved by the Chair, subject to minor amendments.

Matters Arising

5. Minutes of the Previous Meeting: Budget Working Party

Members were reminded that the Budget Working Party had been co-ordinated by Sarah Sands, with support from the LA, to help deal with the high number of schools with deficit budget balances.

Sarah Sands gave an update on proceedings, as follows:

- The working party had received support and representation from Headteachers and the various LA departments, including finance and building compliance.
- Meetings were focused on supporting schools to manage budgets, with the most recent meeting focusing on buildings and the criteria used to allocate funding to schools for building projects. It was established that 'big' ticket' projects had to be of the value of £10,000 or more and that the LA received between £3-3.5m a year for such works. Examples included roofs, window replacements, subsidence, and structural problems. A conditions audit and health & safety scoring system underpinned the prioritisation of such works. Schools with 'big ticket' items had agreed to inform Alison Dawes as soon as possible.
- Particularly larger and cost-heavy projects could be broken up and delivered gradually over a longer timeframe.
- Projects for voluntary aided schools were prioritised using a different mechanism, and academy schools would apply directly to the Condition Improvement Fund (CIF).
- Schools requested improved communication regarding the progress of capital projects or bids.
- The estates team was due to present to the Admin Forum regarding compliance. Schools would also be provided with a contact list and information on which services were free and traded.

5. Minutes of the Previous Meeting: Document Uploads

The Clerk confirmed that the meeting documents had been uploaded and that the membership details and links to previous minutes had now been corrected.

8. Budget Proposal 2023-24: Special School Funding from the High Needs Block

In response to a query raised by Ian Kingham at the previous meeting regarding the passporting of High Needs Block Funding to Special Schools, Karen Flanagan confirmed that there would be a 3.4% uplift, as outlined in the High Needs Block 2022-23 Outturn and 2023-24 Budget to be discussed under Item 8.

8. Budget Proposal 2023-24: Band E Pupil Funding

Dan Hawkins had previously raised the concern that he had a number of pupils in his schools identified as Band E, meaning they had met the criteria for a special school place, although they remained in mainstream schools due to a lack of available special school places. He stated that he experienced difficulties accessing the funding available for these pupils and enquired as to whether this funding would still be available.

In response, Karen Flanagan stated that her team had circulated information to all Headteachers regarding the funding changes following the review that was conducted the previous year. This was also included in the appendix of the High Needs Block 2022-23 Outturn and 2023-24 Budget (item 8) to be discussed.

There were no other matters arising.

5 DSG MONITORING (MONTH 11)

Richard Cox outlined the report which contained an update of the 2022-23 DSG forecast outturn as at Month 11.

It was noted that, as per Table 1, in November 2022, the DSG allocation for 2022-23 was revised to include the additional £234k received for the schools' block, increasing the overall budget by £2.501m.

As per Table 2, the forecast expenditure for 2022-23 was £247.802m.

Forecast reserves for the end of year stood at £6,540,000.

In response to a query, Neil Marlow explained that Barnet Hill Academy (an independent school) had withdrawn its application to become a voluntary aided school as it was not able to meet some of the criteria. Therefore, the originally monies set aside within the growth fund was freed up and would drop into reserves.

The Chair commented that, whilst the reserve budget seemed high, a large amount will be required to deliver suggestions arising from the high needs block review, as would be discussed later as well as the continued increasing costs within high needs.

6 SCHOOLS IN FINANCIAL DIFFICULTY

Richard Cox presented the report, which gave an update on the financial position of all maintained schools over the last year.

At the closing of accounts for 2021-22, the cumulative net surplus for all maintained schools was approximately £12.24m, with 65 schools in surplus and 22 schools in deficit.

During quarter 2 monitoring, the position had deteriorated with 35 schools expecting to go into deficit and 49 expecting to stay in surplus by year end. This reduced the cumulative net surplus of all maintained schools to £2.49m.

The recent quarter 3 monitoring suggested that the cumulative net surplus position had improved to £3.94m, with 54 schools with projected surpluses and 28 with projected deficits.

With the increased number of schools going into deficit and increasing financial pressures, it was proposed that a Schools in Financial Difficulty Panel be established to meet on a termly basis, which would consist of key stakeholders from the LA, BELS, schools, and the Schools' Forum to review the latest data. The proposed Terms of Reference for the proposed Panel was reviewed.

Sarah Sands commended the proposal as the Headteachers she had spoken to felt isolated with regards to dealing with financial pressures.

The Forum **RESOLVED** that the Schools in Financial Difficulty Panel be established.

The Chair requested that expressions of interest from members of business managers be directed to Richard Cox and Neil Marlow. Sarah Sands undertook to cascade the requested expressions of interests to the Budget Working Party.

Action: Members and Sarah Sands

Ben Hassan conveyed that the Panel needed to think extensively about how to sustainably deal with the coming financial pressures moving forward. Richard Cox pointed out that, short of lobbying the Government, there was not much the LA could do to alleviate national financial pressures. Neil Marlow added that Officers were actively meeting schools with financial difficulties to provide support and commended Richard Cox for his work in this area. He stated that the LA may eventually need to consider closing schools or merging schools due to falling school rolls, as had happened in some Inner London Boroughs.

Sarah Sands stated that the Nursery and Primary Headteacher Forum was due to circulate another survey to schools to gather data about what the main financial pressures are and what schools were anticipating. The aim was to then work with unions and lobby the Government using this information. Sarah Sands undertook to update the Forum about this.

Action: Sarah Sands

Luke Bridges challenged the LA to support this lobbying and expressed his dismay at the statement from the Secretary of State for Education suggesting that financial pressures would be alleviated by the fact that energy costs would be half of that initially predicted. Richard Cox added that, as schools were locked into energy contracts, school budgets were unlikely to be positively impacted by this any time soon.

The Chair and Neil Marlow stated that the LA would continue lobbying and they expected unions to do the same. Cllr CoakleyWebb reiterated that this was a national problem affecting all boroughs.

7 HIGH NEEDS BLOCK REVIEW

Karen Flanagan gave an update of the High Needs Block Review, as outlined within the report. She recorded thanks to all who had been involved so far with phase one of the review.

Members noted that phase two of the review had begun with consultations with special schools, ARPs and PRUs. Phase three was scheduled to begin in May with further meetings with stakeholders. The Headteacher Network would also soon be consulted.

The final report was expected to be available by the end of the current academic year, at which point recommendations would be reviewed and decided upon. Reserves had been earmarked as a contingency of the high needs block to support the agreed recommendations.

8 HIGH NEEDS BLOCK 2022-23 OUTTURN AND 2023-24 BUDGET

Karen Flanagan stated that the High Needs Block was in slight deficit by £28k (0.05%). Allocations had been increasing from the Department for Education (DfE), the latest being an increase of 10.45%. She brought members' attention to the fact that the current increase in expenditure was also 10.4% and highlighted that it would be challenging if this trend continued, without the DfE allocations continuing to increase.

It was noted that this was a national issue and that Barnet had done very well to manage its high needs block. A high number of LAs had significant deficits and Barnet planned to avoid this by undertaking the review and taking preventative action early.

The main reason for the increase in expenditure had been the increase in the number of commissioned specialist placements, as outlined within the report. This included the Windmill Special School, which was due to initially open on a satellite site from September 2023, until the new school building was expected to open fully in February 2024. Karen Flanagan explained that the decision was taken to open on a satellite site first to ensure that those requiring special school placements were not lost to independent provisions. She stated that it would have been very difficult to get these children back into the Barnet education system once they had moved to the independent sector.

There had been a national increase in the number of children with Education, Health and Care Plans (EHCPs) and those requiring SEND provision. As per the banded levels, there was attached funding for children with EHCPs, whereas SEND provision was funded by schools.

The LA's EHCPs had increased by 8.6% for the year, compared to national yearly increases of approximately 10%.

Several additional costs, such as special school costs which were currently funded by supplementary grants, had been accounted for. This was done for prudence because such grants were sometimes rolled into the overall budget.

Members noted the increased high needs block expenditure and the number of EHCPs maintained by Barnet and the potential impact for the HNB in terms of a future deficit position, should no action be taken.

The Forum **AGREED** the increases of 3% (totalling £136k) top up to ARPs and 5% (totalling £610) for Bands. The risk of deficit to the High Needs Block if no further action was taken was also noted.

9 ANY OTHER BUSINESS

SEND and AP Improvement Plan and Strategic Partnership Board

Karen Flanagan reminded members that the DfE's SEND and AP Improvement Plan had been published. She also stated that members were needed for the BELS SEND and AP Strategic Partnership Board and that expressions of interest should be sent to her.

Action: Members

Next Meeting Date

It was noted that the next meeting date would be circulated shortly.

There being no further business for discussion, the Chair brought the meeting to a close.

Meeting/Date	Schools Forum 29 th June 2023	Agenda Item No.	6
Report Title	2022-23 DSG Outturn		
Decision/ Discussion/ Update	Update		
Author	Richard Cox – Interim Finance Manager DSG Sharon Palma – Head of Finance		
Appendices	None		
Summary	This report updates Schools Forum on the 2022-23 DSG Outturn (31 March 2023).		
Recommendations	That School Forum note the 2022-23 DSG Outturn (31 March 2023).		

1. Summary

- 1.1. The total DSG allocation for the London Borough of Barnet for the financial year 2022-23 is £398.894m After adjustments for academy recoupmnt and high needs places of £148.202m, the balance remaining is £250.692m of receipts into the Local Authority.
- 1.2. Expenditure for the financial year 2022-23 is £245.851m (Table 1)
- 1.3. At the end of the 2022-23 financial year, the reported DSG surplus carried forward to the DSG reserve is £4.841m. Taking into account 2021-22 brought forward reserves, the total reserve balance for the DSG carried into 2023-24 is £9.711m (Table 2)
- 1.4. Earmarked reserves for 2023-24 include the available balance of £0.787m for Hong and Afghanistan refugees attending Barnet schools, after spend of £0.213m; and £1.000m for High Needs Therapies Programme and £1.539m Early Years contingent spend under grant conditions.

Dedicated Schools Grant (DSG)				Table 1
	2021-22 Outturn	2022/23 Budget	2022-23 Outturn after reserves	2022-23 Variance after reserves
	£000	£000	£000	£000
Expenditure				
Schools Block:				
Individual Schools Budget	150,578	151,829	152,267	438
ESG Retained Funding	700	700	700	0
Growth fund	0	2,745	384	(2,361)
Central School Services Block	2,216	2,266	2,344	78
Sub-total	153,494	157,540	155,695	(1,845)
Early Years Block	28,348	30,720	29,181	(1,539)
High Needs Block	56,840	62,432	60,975	(1,457)
Sub-total	85,188	93,152	90,156	(2,996)
Grand Total	238,682	250,692	245,851	(4,841)
Income				
DSG Income	(240,735)	(250,692)	(250,692)	
DSG Balance	(2,053)	0	0	(4,841)

Table 2

DSG reserves	B/Fwd	Use of Reserve	Top up Reserve	Net Reserve Top up	C/Fwd
	£m	£m		£m	£m
DSG Reserve	(4.870)	0.861	(5.702)	(4.841)	(9.711)
DSG Reserves	(4.870)	0.861	(5.702)	(4.841)	(9.711)
Earmarked Reserves					
Hong Kong and Afganistan Refugees (remaining support funds available from £1.0m commitment)		0.787			0.787
High Needs Therapies Programme		1.000			1.000
Early Years Contingent Spend under Grant Conditions		1.539			1.539
DSG Reserves balance after Earmarked					(6.385)

2. Schools Block

2.1. Individual School Budgets (ISB) are passported to schools based upon the funding formula. London Borough of Barnet applies the National Funding Formula.

2.2. There is a net £0.438m overspend in the schools block for 2022-24 for ISB's. The Council received additional DSG in March 2023 of £0.234m which was unallocated. Several schools received additional cash advances during the year totalling £0.625m to support cash flow. This will need to be repaid in 2023-24. There was lower than anticipated claims made on the schools contingency fund for redundancy costs. However, it is suggested that Schools Forum continue to review this fund as more and more schools begin to face financial difficulties and may need to draw down from this fund.

- 2.3. The growth fund is the main driver of surplus within the schools block with an underspend of £2.361m reported for 2022-23.
- 2.4. The majority of growth is funded through the Authority Pro Forma (APT) and is determined by numbers of pupil on roll at census.

3. Central Services Block

- 3.1. This block of the DSG is retained by the Local Authority to support central services for schools and to fund historic commitments.
- 3.2. The Central Support Services Block is overspent by £0.078m due solely to uncontrollable increased licence costs determined by central government.

4. Early Years (EY)

- 4.1. The final recorded EY expenditure is £29.181m. 95% of the funding was earmarked and passed through to schools and settings. The remaining 5% was retained by the Council for contingent spend in line with the conditions of grant.

5. High Needs Block

- 5.1. The final outturn for the high needs block for 2022-23 is £60.795m against the budget of £62.432m, an underspend of £1.457m. It should be noted that compared to the prior year an additional budget sum of c. £6.9m was received and had this budget uplift not occurred it is likely there would have been an overspend as reported in the previous year.

Meeting/Date	Schools Forum 29 th June 2023	Agenda Item No.	7
Report Title	2022-23 School Balances		
Decision/ Discussion/ Update	Update		
Author	Sharon Palma – Head of Finance		
Appendices	None		
Summary	This report updates Schools Forum on school balances for the 2022-23 Financial Year ended 31 March 2023		
Recommendations	That School Forum note the contents of this paper.		

1. Aims

- 1.1 To inform members on the Barnet maintained schools' revenue balances for the financial year ended 31 March 2023 and to notify members that schools' revenue balances for Barnet academies will be reported to the Schools Forum at the Autumn meeting, after the Academies' financial year end of 31 August 2023.
- 1.2 To notify members that the data is taken from Q4 school returns and that balances are unaudited and may yet be subject to audit adjustments. However, material changes are not expected.

2. Maintained School Balances

- 2.1 The overall reported balance as at 31 March 2023 for Barnet maintained schools is £8,733.0m. This compares to £11,431.2m the previous year, a decrease of £2,698.1m or (24%).

Sector	Revenue Balances			
	As at 31.03.23 £000	As at 31.03.22 £000	increase / (decrease) £000	%
Nursery	(539.5)	(180.5)	(359.0)	(199%)
Primary	3,893.8	6,205.8	(2,312.0)	(37%)
Secondary	3,581.2	3,034.1	547.1	18%
Special	1,193.2	1,652.9	(459.6)	(28%)
PRU	604.4	719.0	(114.6)	(16%)
Total	8,733.0	11,431.2	(2,698.1)	(24%)

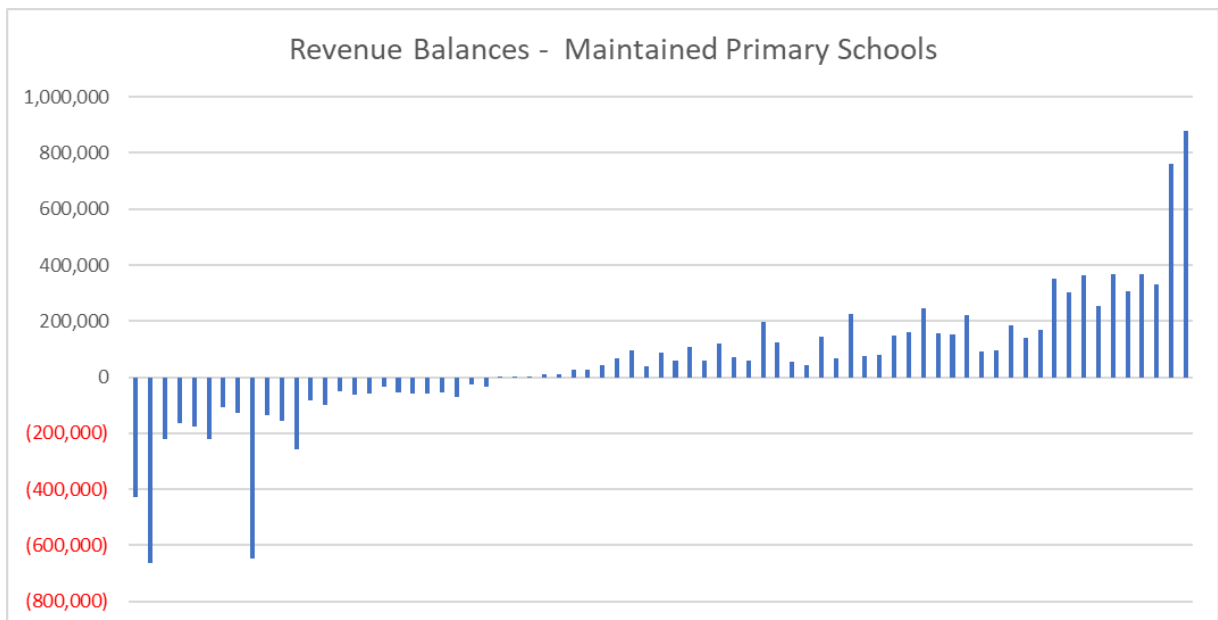
2.2 Maintained nurseries revenue balances worsened as the prior year reported deficit balance of £180.5m moved into further deficit to total £539.5m as at 31 March 2023, an adverse movement of £359.0m or (199%).

2.3 Overall, the reported revenue balances for maintained primary schools as at 31 March 2023 is £3,893.8m, a decrease of £2,312.0m or (37%) compared to the previous year. However, it should be noted that the majority of primary schools reported a balanced or surplus position.

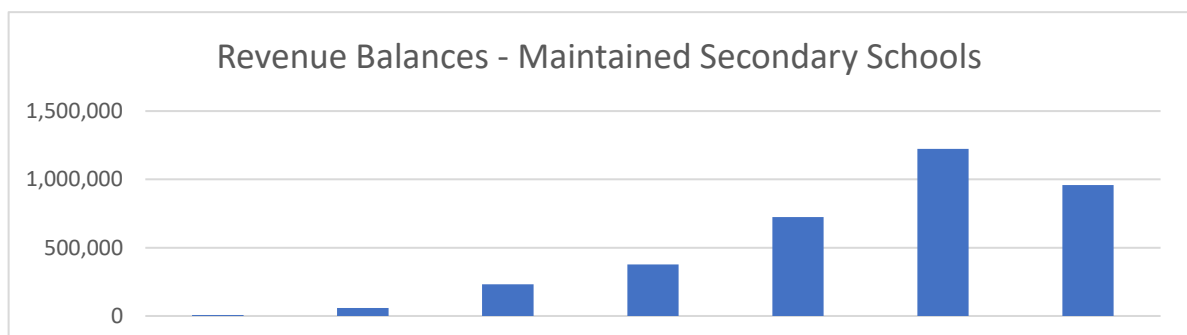
2.4 25 maintained primary schools reported deficit outturn balances totalling £4,060.1m. Of these 25 schools, 13 had deficit balances of > %5 of income, totalling £3,393.9m.

2.5 Compared to the previous year, 8 primary schools that had reported surplus balances moved into deficit in 2022-23.

2.6 Similarly, but in opposite, 4 primary schools moved from deficit balances in 2021-22 into surplus balances in 2022-23.



2.7 Maintained secondary schools overall reported surplus balances totalling £3,581.2m. This compares to £3,034.1m in 2021-22, an increase of £547.1m or 18%.



2.8 Compared to the previous year, 4 secondary schools reported an increase in surplus balances and 3 secondary schools reported decreases in surplus balances, the single largest decrease of which is 11%.

2.9 Special schools and PRUs while maintaining surplus balances, reported year on year decreases in surplus balances of 28% and 16% respectively.

3. Planning for deficit budgets

3.1 It should be noted that as set out in the statutory guidance for Schemes for Financing Local Authority Maintained Schools section 6.5 - Schools must submit a recovery plan to the local authority when their revenue deficit rises above 5% at 31 March of any year. The 5% deficit threshold will first apply when deficits are measured as at 31 March 2023.

Meeting/Date	Schools Forum 29 June 2023.	Agenda Item No.	9
Report Title	High Needs Block (HNB) and SEND updates. <ul style="list-style-type: none"> • Update on the HNB Financial Position with further analysis around areas of spend on placements. • Update on number of specialist places in ARPs and Special schools • Key headlines from the recently published SEND data. • DfE SEND and AP Change Programme and HNB review 		
Decision/ Discussion/ Update	Update.		
Author	Karen Flanagan Director of SEND and Inclusion.		
Appendices	Appendix 1. Increase in Provision of specialist places (ARP or Special School) from 2019.		
Summary	Summary of HNB expenditure for 2022-2023 and predicted expenditure for 2023 – 2024.		
Recommendations	The Schools Forum is asked to: <ul style="list-style-type: none"> • Note the actions outlined in section 3.9. 		

1. Purpose of Report

1.1 The purpose of this report is to ensure that the Schools Forum continues to be consulted on financial and wider issues relating to the arrangements for pupils with special educational needs in line with the [Schools Forum Powers and Responsibilities](#).

1.2 This report provides:

- An update on the
 - financial position and more detailed analysis of spend by type of placement alongside actions needed (section 3.8).
 - Detail with regard the increase in the number of specialist places (ARP and Special School).
 - Key Headline statistics following recent publication of SEND data (more detailed analysis to be given in the next Schools Forum)
 - An update with regard HNB review (separate verbal update) and the selection of Barnet as the Lead LA for the DfEs SEND and AP Change Programme.

2. High Needs Block (HNB) Spend.

2.1 The report to the Schools Forum of 30 March 2023 provided an overview of HNB expenditure. There have been some adjustments since then and the final outturn position for financial year 2022 – 2023 is at table 3 below.

- The last row on Table 1 below shows Barnet's final HNB allocation after deductions for the last 3 years. Overall, there has been a 24.06% increase in allocation since 2021/22, 12.43% from 2021/22 to 2022/23, and 10.34% from 2022/23 to 2023/24.

Table 1: HNB allocation for last three years.

High Needs Summary	2021-22	2022-23	2023-24	Change 22-23 to 23-24	Percentage
Total High Needs Block (before deductions)	£ 60,847,000	£ 68,153,116	£ 74,823,273	£ 6,670,157	9.79%
Total High Needs Block deductions	£ 5,319,000	£ 5,720,334	£ 5,864,000	£ 143,666	2.51%
Total High Needs Block (after deductions)	£ 55,528,000	£ 62,432,782	£ 68,959,273	£ 6,526,491	10.45%

2.2 Barnet has moved from a deficit position of £2,076,689 in 2019/20, £1,556,664 in 2020/21, and £1,500,633 in 2021/2022 to a surplus of £1.4m in 2022/23 to be added to the reserves.

Table 2.

2021/22 Budget, Outturn 2021/22, and updated Budget 2022/23

Area	Outturn 2019/20	Outturn 2020/21	Outturn 2021/22	Outturn 2022/23	Budget 2023/2024
Place funding and PRU top-up	6,481,307	6,728,180	7,852,798	8,463,297	9,106,819
Top-up ARPs	3,122,850	3,457,697	4,134,091	4,493,621	4,668,937
Top-up Special schools	8,372,353	9,305,625	10,157,696	11,354,437	12,442,775
Top-up Post 16	3,997,222	3,979,617	3,970,086	4,417,766	4,596,143
Mainstream top-ups	9,953,967	10,445,714	11,041,201	12,428,941	13,998,188
Top-up Out of Borough	2,530,453	2,612,811	2,790,042	2,722,071	3,056,617
Independent sector	7,926,614	9,337,038	10,920,469	10,650,946	11,560,000
Other Hard to Place pupils, Hospital Funding, Autism Strategy,	4,851,923	5,365,598	6,162,251	6,443,586	9,460,627
Total expenditure	47,236,690	51,232,281	57,028,633	60,974,664	68,890,106
Budget	45,160,000	49,675,617	55,528,000	62,432,780	68,890,106
Variance	-2,076,689	-1,556,664	-1,500,633	1,458,116	0

2.3 Whilst this is a positive, we need to be mindful that if as is expected, the HNB allocation does not continue to increase at the recent levels and, we continue to see the same increases in expenditure, including specialist places, we will be in a significant deficit within a very short period of time as can be seen by the illustrative table below (table 3).

Table 3: Potential deficit should expenditure continue to increase at 10% and HNB allocation only increase by 5% each year from 2024-2025.

High Needs Summary	2024-25	2025-26	2026-27	2027-28
Total High Needs Block (after deductions)	£72,407,237	£76,027,598	£79,828,978	£83,820,427
Total Predicted Spend	£75,855,200	£83,440,720	£ 91,784,792	£ 100,963,272
Variance (£)	-3,447,964	-7,413,122	-11,955,814	-17,142,844

2.4 Careful consideration will be needed with regard utilisation of the reserves so that the needs of all children and young people with SEND continue to be supported in the most efficient way and that we try to build reserves to offset any future decreases.

Funding will also be needed to:

- Fund the increase in numbers of children and young people being supported by an EHCP.
- Further develop the universal offer in terms of what is ordinarily available.
- Fund any agreed recommendations arising from the HNB review.

3. Educational Placements: costs.

3.1 Out of Borough (OOB) Placements

- As is to be expected within a London Borough, a number of our children and young people are educated in other Borough maintained schools in accordance with parental preference and/or geography.
- The number of children we place Out of Borough in other LA schools has increased from 199 in 2019/20 to 244 in 2023/24 (20.6%).
- The average cost of OOB schools in 2023/24 is £12,544.10. The average cost for Barnet schools is £9,234.13. Transport costs have not been included.
- Costs have increased by 20.79%, from £2,530,453.36 in 2019/20 to £3,056,616.71 in 2023/24.

Table 4.

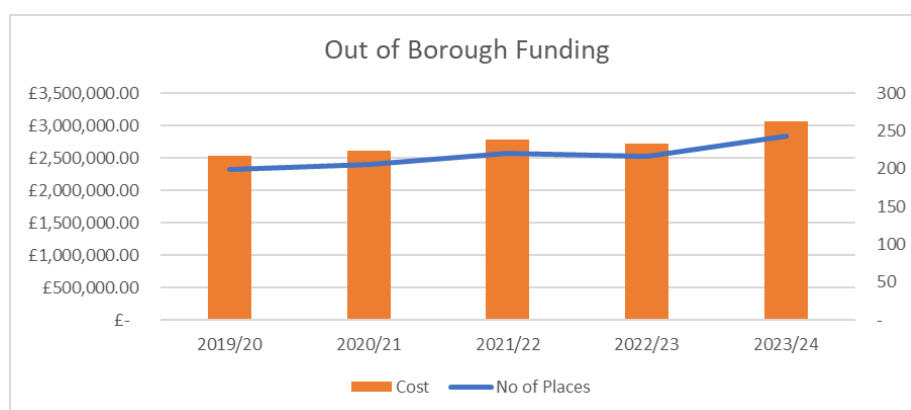


Table 4A.

OOB	2019/20	2020/21	2021/22	2022/23	2023/24
No of Places	199	206	220	217	244
Cost	£ 2,530,453.36	£ 2,612,810.91	£ 2,790,041.78	£ 2,722,070.71	£ 3,056,616.71
Average Cost per placement	£ 12,715.85	£ 12,683.55	£ 12,682.01	£ 12,544.10	£ 12,544.10

3.2 Further Education (FE) and post 19 Independent Specialist Providers.

- The cost of FE has increased by 17.96%, from £3,282,995.01 in 2019/20 to £3,872,800.00 in 2023/24. Learner numbers have increased by 10.16%.
- It is not only the numbers that are increasing but also the average cost of a placement.

Table 5.

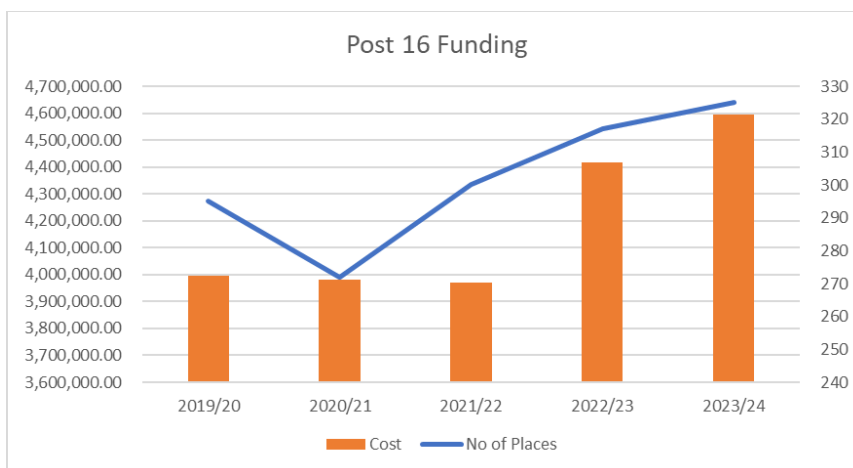


Table 5A

Post 16	2019/20	2020/21	2021/22	2022/23	2023/24
No of Places	295	272	300	317	325
Cost	3,997,222.18	3,979,617.15	3,970,085.64	4,417,766.00	4,596,143.25
Average Cost	13,549.91	14,630.95	13,233.62	13,936.17	14,141.98
Setting Type	2019/20	2020/21	2021/22	2022/23	2023/24
FE	3,282,995.01	3,453,104.30	3,286,540.89	3,701,424.04	3,872,800.00
ISP	714,227.17	526,512.85	683,544.75	716,342.29	723,343.25

3.3 Additionally Resourced Provision (ARP) and Special Schools.

- The cost of places in Barnet special schools and ARPs has understandably increased as we have increased the number of commissioned places.
- For ARPs this has seen an increase of just over £1.5m (49.50%) since 2019/20; and for special schools the increase has been just over £4m (48.61%).
- Top up rates vary across our special schools, but the average rate is £17k plus £10k base commissioned funding. Including commissioned base rates of £10k Barnet special school costs are between £24-34k per placement. This compares to an average of £40k for day independent.
- In terms of the numbers of specialist places, we have continued to increase the numbers of commissioned places in order to meet demand as can be seen in the table below.
- Since 2021 Barnet has increased the number of specialist places at Special Schools or in ARPs by 210. With the development of Friern Barnet and the Windmill this will increase by a further 145 places when they are full (Appendix 1).

Table 7. Increase in total spend for pupils placed in ARP and Special.

ARPs	2019/20	2020/21	2021/22	2022/23	2023/24
Cost	3,122,850	3,457,697	4,134,091	4,493,621	4,668,937
Sp. Schools	2019/20	2020/21	2021/22	2022/23	2023/24
Cost	8,372,353	9,305,625	10,157,696	11,354,437	12,442,775

Table 7A

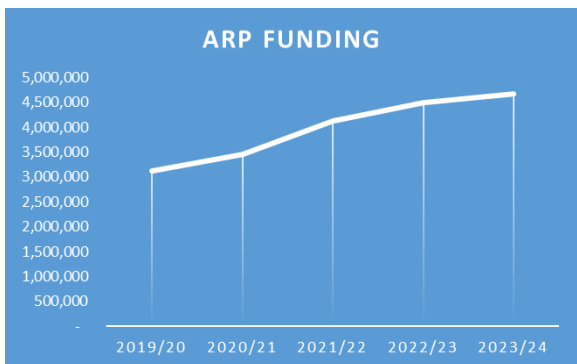
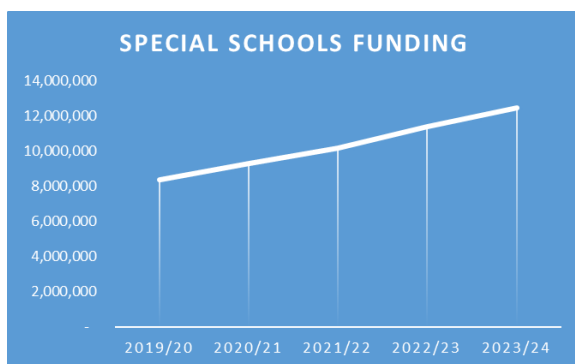


Table 7B.



3.4 Independent Placements.

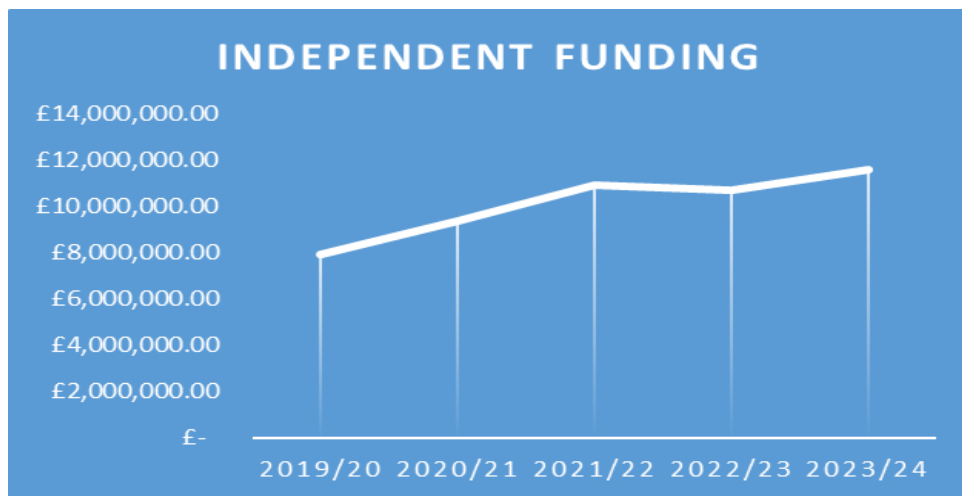
Independent placement costs (day and residential) have increased by 45.83% since 2019/20 when they were at £7,926,614.46 rising to £11,560,000.00 in 2023/24. As can be seen in table 8 below the total costs for independent school placements rose by

- 17.91% from 2019/20 – 2020/21
- 16.95% from 2020/21 – 2021/22
- There was a small decrease between 2021/22 and 2022/23 of 2.46%
- Then another rise in 2022/23 – 2023/24 /24 of 8.53%

Table 8.

Independent	2019/20	2020/21	2021/22	2022/23	2023/24
Cost	£ 7,926,614.46	£ 9,337,038.06	£ 10,920,468.52	£10,650,946.00	£ 11,560,000.00

Table 8A.



3.5 Demand is not just from the increase in the numbers of children and young people being supported by EHCPs but also the cost of placement. Whilst the DfE has allocated a 3.4% increase for special schools, fee increases across the independent sector is greater than that in many cases.

3.6 Barnet are part of a London consortium where challenge is made to price increases and in many cases, this does reduce the amount of the increase. One of the most recent examples in June 2023, where one independent day provider asked for a 9% increase. For the 27 learners placed in the school this would mean an additional burden of £75,900 per annum to the HNB. We are still in negotiation.

3.7 There is further work to be done in terms of clarifying the level of need that is expected to be met in mainstream and our local specialist provision and the support needed to increase confidence in our local offer. This will decrease the funding needed for independent schools which can then be reinvested in our own schools and improve what is ordinarily available. In order to achieve this, we will need to ensure:

- Schools know what is expected of them and feel confident in the delivery of that support.
- All schools are equally welcoming and equally able to deliver what is ordinarily available.
 - Parents and carers feel confident in our local provision.
 - Our children and young people are educated in their home borough within Barnet's offer, so they are close to their families and homes and develop the skills needed for adulthood.

3.8 How will we achieve this? What do we need to do?

- Through a shared consensus, approach and understanding to ensure consistency of provision and approach of our local offer for all partners and stakeholders.

Effective partnership working and authentic coproduction with our children and young people with SEND and their families.

- Further and more in-depth analysis of spend including differing types of placement such as independent, so we can better understand the drivers for demand and identify ways of addressing those.

- The HNB review will provide tailored advice and recommendations for the Schools Forum.

We will need to consider the recommendations and work to develop a locally agreed and coproduced plan. This will be overseen by the SEND and AP Strategic Board and reported back to the Schools Forum.

- As the Lead LA for the London Regional Expert Partnership (REP), we will be supporting the development of and testing of the proposals set out in the DfE SEND and AP Improvement Plan¹, these include:

- National standards (what is ordinarily available).
- The Local Area Improvement Plan (LAIP).
- Digitisation of EHCPs.
- National rates for Bands and Tariffs.
- Development of three-tiered approach to Alternative Provision (AP).

4 Key headlines from recently published national SEND data.

4.1 The annual national statistics relating to SEND were published in June. Key headlines are below. A further and more detailed analysis showing Barnet's position against national and regional, as well as key findings and implications, will be reported in the next Schools Forum meeting.

¹ [SEND and alternative provision improvement plan - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/611111/SEND_and_alternative_provision_improvement_plan_-_GOV.UK.pdf)

4.2 There are two key statistical releases:

- [Special educational needs in England](#)
- [Education, health and care plans](#)

4.3 Nationally, the number of children and young people with EHC plans increased to 517,000, as at census day in January 2023, up by 9.24% from 2022. Barnet' increase was 7.72%

Table 9.

Total number of Plans										
	2015	2016	2017	2018	2019	2020	2021	2022	2023	% +
England	240183	256315	287290	319819	353995	390109	430697	473255	517026	9.24%
London	41104	43708	48554	53975	59672	65853	72193	78203	85601	9.45%
Barnet	1731	1817	2088	2256	2372	2682	2899	3211	3459	7.72%

4.4 Nationally there were 114,500 initial requests for an EHC plan during 2022, up by 22.67% from 93,300 in 2021. The increase in London was 18.07%. Barnet's increase was higher than both the national and regional increase at 26.41%.

Table 10.

	2017	2018	2019	2020	2021	2022	% +
London	10868	11664	13336	12074	14342	16934	18.07
England	64555	72423	82329	75951	93302	114457	22.67
Barnet	444	490	493	523	617	780	26.41

4.5 In 2022, nationally 50.7% of new EHC plans (excluding exceptions) were issued within 20 weeks. This was higher in London at 63.10%. Barnet's compliancy rates are 97.90%, significantly above London or national and the SEN team should be commended for this.

Table 12.

Timeliness		2015	2016	2017	2018	2019	2020	2021	2022
	London	70.80%	60.60%	58.40%	58.10%	64.60%	61.80%	63.90%	63.10%
	England	59.20%	58.60%	64.90%	60.10%	60.40%	58.00%	59.90%	50.70%
Excluding exceptions	Barnet	26.20%	45.90%	99.00%	99.20%	97.10%	98.00%	98.30%	97.90%

4.6 1.5 million pupils in England have special educational needs (SEN), an increase of 87,000 from 2022. Both the number of pupils with an education, health and care (EHC plan) and the number of pupils with SEN support have increased:

- Nationally, the percentage of pupils with an EHC plan has increased to 4.3%, from 4.0% in 2022. For Barnet this increase was from 3.6% to 4% and for London the increase was from 4.1% to 4.5%.
- Nationally the percentage of pupils identified as requiring SEN Support has also increased from 12.6% in 2022 to 13.0% in 2023. For London this increased from 11.7% to 12.1% and in Barnet the increase was from 10.6% to 10.8%.

Table 13.

		2020/21	2021/22	2022/23
England	EHC plans	325,618	355,566	389,171
	EHCP %	3.7	4	4.3
	SEN support	1,083,083	1,129,843	1,183,384
	SEN Support %	12.2	12.6	13
London	EHC plans	55,856	60,250	65,345
	EHC %	3.8	4.1	4.5
	SEN support	165,782	170,735	176,999
	SEN support %	11.4	11.7	12.1
Barnet	EHC plans	2,321	2,528	2,827
	EHCP %	3.4	3.6	4
	SEN support %	6,940	7,409	7,640
	SEN support %	10.2	10.6	10.8

5 DfE SEND and AP Change Programme.

5.1 Following an Expression of Interest by Barnet, we have been selected to be the lead LA for the London Regional Expert Partnership. London are one of 9 regions who will be testing out the key proposals outlined in the DfEs [SEND and AP Improvement Plan](#).

5.2 The initial startup period has been extended and the launch event will take place on the 19 September 2023 and following that more detail will follow in terms of expectations and use of the bid funding. A further update will be provided in the next Schools Forum Meeting.

6 The HNB Review.

6.1 A verbal update will be provided by the external consultant leading the review, Peter Gray.

-----End of report -----

Appendix 1. Increase in commissioned places since 2021.

- In terms of the numbers of specialist places, we have continued to increase the numbers of commissioned places in order to meet demand as can be seen in the table below.
- Since 2021 we have increased specialist places at Special Schools or in ARPs by 210. With the development of Friern Barnet and the Windmill this will increase by a further 145 places when they are full.

Increase in special school and ARP places from 2021.	2021 Commissioned numbers and planned commissioned numbers for 2023 – 2024.	
Expansion of existing provision at Oakleigh and Oak Lodge special schools and at Kisharon special school	• 195 to 212 at Oak Lodge	+ 17
	• 114 to 129 at Oakleigh	+ 32
	• 43- 82 at Kisharon	+39
Increasing the number of placements at the purpose-built Additional Resource Provision (ARP) at Whitefield secondary school	Whitefield is under the leadership of a new Headteacher (started Sept 2022) and numbers are increasing. We are working with the school to increase numbers further. Whilst the building is not at full capacity for ARP pupils, it is being utilised by	

	Mapledown special school to manage the demand for their places.	
The development of a Secondary ARP for Cognition and Learning needs in 2022 in Friern Barnet School	ARP opened on schedule in September 2022 and is admitting 10 pupils per year group rising to 50 pupils in 2026.	+20
Northway	The new Grasvenor site for Northway Special School provided an additional 17 places for September 2022, and a further 9 in September 2023. In total places will increase from 125 in 2021 to 196 by 2025.	+ 26
Increase the number of post 16 places at Oak Lodge special school	Repurposed Edgware site for Oakbridge Post 16 including accommodation to host Post 16 Oak Lodge pupils for an increased 15 places.	+ 15
Develop a new all-through special school to cater for the needs of children and young people with autism ('The Windmill'). This will provide 90 places from Key Stage 1 to Key Stage 5.	<p>The new build is being led by the DfE. They have recently advised the Council of a further delay to the expected opening of September 2023. The Council is working with the DfE and a local school (Dollis) will host a satellite site until the new build is completed.</p> <p>Year Numbers</p> <p>Year 1: 2023-2024 20</p> <p>Year 2: 2024-2025 48</p> <p>Year 3: 2025-2026 70</p> <p>Year 4: 2026-2027 90</p>	+ 20
Increase in numbers placed at existing ARPs: Coppetts Wood, Chalgrove, Claremont	<ul style="list-style-type: none"> • Claremont now offering 13 primary places. • Coppetts Wood is now offering 16 primary places. • Chalgrove is now offering 14 primary places. 	+1 +6 +6
Further development for 2023/24.	A new 28 place ARP for Cognition and Learning needs in one of our primary schools in 2023 has been agreed and plans are on schedule for this to be opened at capacity in September 2023.	+28
Total current increase up to Sept 2023.		+ 210
Total increase when full at Friern Barnet, Windmill and Northway	<p>Windmill + 70 by 2026/27</p> <p>Friern Barnet + 30 by 2026/27</p> <p>Northway +45</p>	+145