**Oxfordshire County Council**

**Schools Forum – 7 February 2024**

**Special Schools & High Needs Funding 2024-25**

DRAFT

|  |  |  |  |
| --- | --- | --- | --- |
| **Settings** | **Sector** | **Voting Entitlement (for decision papers only)** |   |
| Academies |  | Foundation Stage |  | Schools’ Forum approval is required in order  |  |
| Maintained Schools |  | Primary |  | to move funding from the school’s block to the |  |
| PVI Nurseries |  | Secondary |  | High Needs Block |  |
| Special Schools |  | Special |  | **All** representatives vote on Block movements  |  |
| Local Authority |  | 16+ |  |  |  |
| Schools Forum |  | High Needs |  | Voting on amendment to the school  |  |
|  |  |  |  | funding formula excludes non-school  |  |
|  |  |  |  | members except for the PVI representative |  |

# Item for Information - Purpose

## The paper sets out the 2024-25 proposed funding arrangements for:

## Special Schools

## High Needs (Delivering Better Value) Funding highlighting:

## The deficit position, the projected growth in the deficit over the 4 years to 2026-27

## Update on the work with Department of Education (DfE) Deficit Management Plan (DMP) to develop a financial strategy to mitigate the deficit (Delivering Better Value, DBV).

# Recommendation for Schools Forum

## For Special Schools and Academies, Schools Forum is asked to:

### Confirm support of no change for 2024-25 to the principles of the special school / special academy funding model used in 2023-24

### Note the increase in top up rates to replicate the 0.5% pupil-led funding per pupil increase to be received by primary and secondary schools in 2024-25

### Note the requirements under the DSG conditions of grant in respect of the Minimum Funding Guarantee and the requirement to pass on part of the additional high needs funding for 2024-25 to special schools, PRUs and the hospital school.

## For High Needs, Schools Forum is asked to note the report.

# Special Schools Funding

## The principles of the special schools / special academies funding model for 2024-25 are proposed to remain the same as that agreed by special school headteachers in 2014 and used since the 2014-15 financial year. Details of the funding model are outlined at Annex A.

## The local authority, following consultation with all schools and its Schools Forum, has continued to implement the National Funding Formula (NFF) as closely as possible. As part of the application of this funding approach, all primary and secondary mainstream school settings have initially been guaranteed a 0.5% increase on pupil-led funding per pupil. As in previous financial years, a similar increase as used in the mainstream schools funding model will be applied to pupil related factors in the special schools’ formula model in 2023-24.

## The top-up factor will be increased from £8,181 in 2023-24 to £8,225. This increase will be a base level funding adjustment and will form the top up rates for future years. All other formula factors including Planned Places will be allocated at the same rate as in previous years. The arrangement incorporates the teachers’ pay grant (TPG) and teachers’ pensions employer contribution grant (TPECG) into the national funding formula.

## The Special School funding will consist of:

* Funding based on planned places.
* Funding for top-up and other factors.
* An historic amount for Pay and Pensions funding - formerly TPG and TPECG.
* An adjustment in respect of Minimum Funding Guarantee.
* An adjustment set out in the DSG conditions of grant to pass funding to special schools.

## The Minimum Funding Guarantee (MFG) will continue to apply to maintained special schools and special academies (including special free schools) in 2024-25. This is a protection mechanism for special schools. For 2024 to 2025 this will be 3% over 2 years, based on a like-for-like comparison with a special school’s overall budget in 2023 to 2024. This considers the additional high needs funding that local authorities are receiving in 2023 to 2024 and 2024 to 2025, some of which is intended to help with the additional costs that schools are facing. The 2024-25 allocation (£573k) compared to 2023-24 (£571k).

## High needs place funding for the financial year 2024-25 is based on High Needs place numbers confirmed and published by the ESFA for academies, along with the latest information available from the SEN team in respect of local authority maintained special schools. Academies will receive their place funding direct from the ESFA, and the authority will pass place funding to maintained special schools. Top-up place numbers follow the same notification methodology, with the majority of funding being passed to all special schools’ settings by the local authority. The payment of top-up funding of places in special schools and special academies commissioned by LAs other than Oxfordshire will be met by the commissioning authority. Responsibility for collecting top-up income from other local authorities continues to be the responsibility of relevant special school.

## The number of places at each special school is made up of Composite place numbers. Composite places numbers are calculated for the 2024-25 financial year - translating academic years to financial years on the basis of 5/12 (April to August), 7/12 (September to March) for pre-16, and 4/12 (April to July), 8/12 (August to March) for post-16.

## The ESFA funds academies from the LA’s High Needs budget for each agreed place, regardless of whether the place is occupied. The LA, therefore, adopts a cautious approach when agreeing place planning submission numbers.

## Top-up funding for Oxfordshire pupils will be paid to special settings on a monthly basis. The amount payable for all schools and academies will be based on an initial estimate of the Oxfordshire pupils attending during the financial year. If the actual number of children is significantly different, the top up funding will be adjusted in year on the basis of pupil information submitted by special schools and special academies to the local authority’s Special Educational Needs (SEN) team. As in previous years, special schools and special academies will be expected to agree top up funding with other local authorities for out of county pupils on roll and be responsible for the collection of the funding.

## The place funding rate remains at £10,000 per place. For the 2024 to 2025 financial year, the historic teachers’ pay grant (TPG), and the teachers’ pensions employer contribution grant (TPECG) have been incorporated into the high needs NFF allocations to local authorities. As in 2023-24, an allocation of £660 per pupil will be included for 2024-25 to reflect the teachers’ pay and pensions funding. This funding will be included as a separate line on special schools’ statements so that it is transparent and readily identifiable. The Oxfordshire top-up per pupil rate is expected to be as stated in paragraph 3.3 above. Allocation of funding for other funding model elements for each school, including Premises, Split Sites, Hydrotherapy Pools and Deprivation, will be allocated in line with the principles agreed for 2014-15. There is a separate funding allocation, applied to a number of residential places, made to Woodeaton Manor special school in respect of its residential facility. Appendix A outlines the main funding principles used.

# High Needs (DBV) Forecast

## On 19 December 2023, the DfE confirmed the 2024/25 Dedicated Schools Grant (DSG) allocation for Oxfordshire will be £695.6m as shown in Table 1. Expenditure on High Needs DSG funded services has been higher than the available funding since 2020/21 with deficits continuing to grow mainly because of anticipated increases in demand. As set out in Sections 4 and 5 forecast expenditure for 2024/25 is £21.3m higher than the grant funding after taking account of planned savings.

**Table 1: Dedicated Schools Grant Funding for Oxfordshire**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Summary of Block Funding** | **2023/24****£m** | **2024/25****£m** | **2024/25****Forecast Expenditure****£m** | **2024/25 Forecast Deficit****£m** |
| Schools block | 476.7 | 509.2 | 509.2 |  |
| Central Services Schools block | 5.0 | 5.2 | 5.2 |  |
| High Needs block | 102.9 | 108.0 | 129.3 | 21.3 |
| Early Years block | 44.3 | 73.2 | 73.2 |  |
| **Total** | **628.9** | **695.6** | **716.9** | **21.3** |

**Note:** *The mainstream schools additional grant (MSAG) introduced as additional funding for 2023/24 has been rolled into the National Funding Formula for 2024/25.*

# High Needs Deficit

## The Business Management & Monitoring Reports to Cabinet in January and May 2023 set out that spend on High Needs is expected to exceed the grant funding available in 2023/24 by £18.3m and the annual deficit is expected to continue to increase over the medium term. The forecast as at the end of November 2023 projects an increase in the 2023/24 deficit to £21.2m, an increase of £2.9m. This is due to accelerated growth in the number of learners supported as well increased complexity of needs. It highlights that government funding is not keeping pace with increased demand (refer Table 2).

 **Table 2 – High Needs Deficit Forecast2023/24: £21.2m**



## The Council approved a Local Area High Needs / Special Education Needs & Disability (SEND) Deficit Management Strategy during 2022 to help frame the changes required, as well as several approved System Reforms. Significant progress has taken place in the past six months in many areas including:

* + Activity planning with system partners around the Local Area SEND Strategy.
	+ Capital investment in new special schools to increase local capacity and release better value.
	+ Enhanced pathways in mainstream education for children with SEND - five programmes have taken place with positive outcomes driving forecast savings of £0.5m.
	+ Development of partnership working with Health (a new health funding protocol and special schools nursing contract are due to be finalised early 2023).
	+ As per the 2022 public SEND consultation regarding the transfer of resource bases to schools, positive engagement with schools is underway and full staff consultation will be held accordingly.
	+ Ongoing progress on the build of two special schools and proposals have been submitted to the DfE for two further schools.
	+ Engagement with Oxfordshire colleges is ongoing to establish enhanced post-16 opportunities in Oxfordshire.

## Oxfordshire has participated in the DfE’s Delivering Better Value (DBV) programme. However, continued increases in demand mean that annual deficits against the grant funding are still expected to grow in future years. Section 4 sets out details of the SEND programme and the High Needs budget.

## Appendix B sets out budget forecast and changes for 2024/25 to 2026/27. These reflect demographic growth and other pressures as well as funding increases and planned savings. The changes and forecast deficits are summarised in Table 11 below.

# SEND Programme & High Needs Budget

## This section provides an update on:

* + The deficit accumulated since 2020-21 together with the projected deficit over the next 4 years to 2026-27
	+ How work with the SEND Local Area Strategy and SEND System Reforms is impacting the High Needs Deficit Recovery plan
	+ The progress of the Department for Education (DfE) Delivering Better Value (DBV) programme and the early findings from this work
	+ Explain the further investment being sought to support inclusion in mainstream settings - DBV grant, disapplication from Schools Block money and continued investment in top ups for mainstream and special schools - and the potential approaches to support this.

## The SEND (High Needs) service came into this year with an accumulated deficit of £41.1m plus an in-year deficit forecast of a further £21.2m and a total projected deficit by 2026-27 of £144.2m (refer Table 3).



## The outcomes for children and young people with SEND in Oxfordshire are not good enough. In addition, in the past five years, spending in Oxfordshire on children and young people with SEND has exceeded the available budget.

## SEND (High Needs) expenditure is forecast to exceed the grant funding available by £25.0m in 2024/25. The cumulative deficit by 31st March 2024 is forecast to be £62.3m.

## Thanks to the work which took place in 2022, there is now a clear and public-approved Local Area SEND Strategy to help frame the changes required, as well as several approved System Reforms.

## Significant progress has taken place over the last year in many areas including:

* + Activity planning with system colleagues around the Local Area SEND Strategy
	+ Enhanced pathways in mainstream education for children with SEND - five programmes have taken place with great outcomes, including forecast savings of £0.45million
	+ Development of partnership working with Health (health funding protocol and special schools nursing contract are in the process of being finalised).
	+ As per the 2022 public SEND consultation regarding the transfer of resource bases to schools, positive engagement with schools is underway and full staff consultation will be held accordingly.
	+ Ongoing progress on the build of two special schools and free school funding proposals submitted to the DfE for two further schools.
	+ Engagement with Oxfordshire colleges is ongoing to establish enhanced post-16 opportunities in Oxfordshire.

## In addition, there is ongoing insight and support via intensive engagement with the DfE DBV programme. The DBV programme has confirmed and provided evidence for areas of change already identified, as well as bringing to the surface several areas to explore further.

##  National Policy

### The government will use the outputs from the DBV programme to inform any future policy, which highlights the importance of our ongoing commitment to this programme. However, it is also becoming clear that changes in national policy will be incremental not revolutionary, and that no new funding will be provided in the short term. Therefore, there are very few available options and OCC will need to use available resources creatively to lever the greatest possible impact.

## Statistical Neighbour and National Benchmarking

### Oxfordshire’s High Needs block allocation per 1,000 of the 2-18 population is rising but remains below Local Authority average both nationally (England) and compared to statistical neighbours.

### The proportion of young people with Education, Health and Care (EHC) Plans has grown by over 40%% over the past 3 years, a similar rate of growth to statistical neighbours, but the overall rate is still below the national (England) average.

### In Oxfordshire the number of EHC Plans has risen from 2,027 in 2015/16 to a forecast 6,506 in this year, 2023/24. This is an increase of 221% so although central government has increased the allocation for SEN to Oxfordshire by 49% over the same period, this has fallen considerably short of the increased demand.

### Oxfordshire has a higher proportion of children with EHC Plans in a mainstream setting than the national Local Authority average and a higher proportion than most statistical neighbours.

## Forecast Deficit

### The forecast deficit for SEND is set out in the table below. The High Needs Board has developed plans (including plans to increase special school places), to deliver the savings over a five-year period, but these are insufficient to remove the High Needs deficit.

### The forecast deficit is based on existing savings plans. The DBV exercise has confirmed the spend trajectory for Oxfordshire is in line with the existing forecast. The next stage of DBV DMP is to complete a redrafting and reprofiling of the plan to be progressed and delivered over a two-to-three-year timeframe. This exercise may change the focus of savings activities.

## DfE Support & Advice

### The DfE have a SEND support programme that consists of Safety Valve Agreements for those local authorities with the highest deficits and DBV programme for the remaining deficit authorities. A Safety Valve arrangement attracts funding from the DfE to help deal with the SEND cumulative deficit. Oxfordshire does not qualify for the DfE Safety Valve scheme. The DfE have recently published details of the latest Safety Valve agreements that give an insight into thinking consistent with the Green Paper.

### Oxfordshire was successful in lobbying to be included as part of Tranche 1 of the DBV Programme and qualify for the Safety Valve arrangements. This was based on the trajectory of the High Needs deficit.

### Engagement with the DfE contracted consultants Newton Europe and more recently, CIPFA have led to a requirement to revise the Deficit Management Plan (DMP) and re-profile the programme spend and target mitigations / cost reduction savings over 2/3 years.

### The savings that form the High Needs Deficit Recovery plan are summarised in the annex. The key contribution to deficit recovery is the expansion of Special School places and the impact that Early Intervention and Inclusion Hubs may have. Early Intervention proposals and the potential impact of Inclusion Hubs and other approaches form part of the bid for DBV grant.

## How Local Area SEND Strategy and System Reforms are Impacting the Deficit Reduction Plan

### Build New Special Schools & expand places where possible.

Expansions continue. Two new builds in progress and two in planning. Based on current data, it has been established that up to 700 new special school places will be required (ages 4-19) by 2026. This assumption will continue to be tested in conjunction with the data analysis taking place in the DBV Programme. A plan is being developed, which includes new schools at Bloxham Grove and Faringdon, progressing with the new school in Didcot through a bid to the DfE for a Free School, and continuing with a rolling programme of expansions where feasible. Property Services are engaged in a site search suitable for a further new school to support pupils with SEMH (social, emotional and mental health) needs in the southeast of Oxfordshire, also to be the subject of a Free School bid, and if the need is confirmed by data analysis, potentially two further new schools. This project will require considerable investment, £19m has been allocated from the High Needs DfE capital grant over the next three years. Two Free School bids have been made in latest round and the outcome is expected in January 2023.

### Enhanced pathways

Five programmes have taken place with significant impact, including forecast savings of £0.45m.

Further funding would be targeted at the creation of In-reach/Out-reach Inclusion Hubs, which from initial modelling have the potential to support more children locally, meeting needs at an earlier stage and avoiding the escalation to specialist provision. Business case based on case reviews suggests that some young people could be prevented from escalating to more expensive placements. Early modelling suggests a saving up to £5.6m over 5 years but this estimate will be reassessed as part of the DBV analysis.

Ongoing investment for this project is subject to the success of the bid for DBV grant and the Dedicated Schools Grant (DSG) block transfer application to the Secretary of State

### Early Intervention

Further work would focus on building confidence in schools for working with CYP with SEND. Modelling of the financial impact will be completed as part of DBV programme. Activities may include expanding the reach of SEND Helpdesk, further training and support to school to implement the Ordinarily Available Toolkit and Inclusion Support. All initiatives are aimed at supporting schools to deliver a robust graduated approach, meeting the needs of children and young people with SEND at the earliest opportunity.

### Resource Bases

Following on from the Local Area SEND Strategy and system reforms consultation, regarding the transfer of resource bases to schools, positive engagement with schools is underway and full staff consultation will be held accordingly.

### Specialist Colleges

To create a right sized model through reviewing the current Independent Specialist Provider and re-establishing the pre-annual review process. Key activities have been determined, with a plan in progress. Meetings have commenced with colleges to ascertain courses on offer. These savings may come earlier as reviews taking place.

### Preparing for Adulthood

Long term project to develop alternative education and support services in County.

### Contract Renegotiation

To date a rationalisation in line with demand for Alternative Provision places / top up has resulted in £0.4m savings, with a £0.2m impact on financial year 2022/23. This has exceeded the £0.3m target.

A revised paper on Alternative Provision will be taken to Schools Forum in the next quarter and a high-level plan will be drafted. A category management spend review will be undertaken to analyse the service, reduce spend, develop alternatives, and review packages to see whether some children could return to mainstream education.

Independent Non-Maintained Specialist Schools (INMSS) contracts: Oversight of procurement/contracts for INMSS providers is required by contract management specialists to ensure that fees, including uplifts are managed strategically, allowing more accurate financial forecasting and ensuring principles of best value. Anticipated savings to be modelled. Procurement activity is also needed beyond the framework that we have joined as this alone is unlikely to provide adequate capacity.

### Health Funding Provision:

### A review of Health funding for provision currently covered by schools is taking place. An agreed protocol has been drafted, which establishes the correct proportion of funding to be provided by Health. This also includes a contribution to INMSS placements. It is hoped that a final draft will be complete by the end of the year and approval will be sought from the Joint Commissioning Executive by the end of January 2023.

# Delivering Better Value (DBV) Programme - Progress & Key Drivers for our Current Position

## The revised DBV DMP submitted to DfE on Friday 19 January 2024 contains details of unmitigated forecasts, areas driving spend and keys areas of focus for cases studies (Special Schools Inreach / Outreach, Enhanced Pathways, Relational Schools, and Behavioural Inclusion). Case studies, parent carer surveys and data deep dives took place during 2023 to gather further insight.

## The revised final plan will be completed in the next 3 months.

## The work with the DBV programme has helped to confirm several key areas of SEND expenditure, and possible drivers for this expenditure. The intention is to investigate these further, as part of the implementation plan and DBV funding proposal to the DfE:

1. Independent Non-Maintained Special School (INMSS) expenditure represents the highest area of growth over the next 5 years and is driven by number of EHC Plans. (Current spend is c.£25m on 450 children/young people)
2. Mainstream expenditure is the second highest forecasted spend in the next 5 years and is driven by increasing number of EHC Plans Page 384
3. Of the number of EHC Plans in INMSS, the caseload is primarily driven by children and young people (CYP) with pre-existing EHC Plans who move provision.
4. Of the number of EHC Plans in mainstream, the caseload is primarily driven by new EHC Plan starts.
5. Oxfordshire already has a comparatively low rate of EHC Plans compared to statistical neighbours and is below the national (England) average. This suggests that there is minimal opportunity in supporting more CYP with SEN support if the target is what has been achievable in similar authorities.
6. From work with the DBV programme, escalation of provision has contributed to the rise of EHC Plans in special schools. Amongst the parents and carers with children that moved from mainstream to specialist provisions, the driving factor most commonly cited behind these moves is a perceived inability to meet need by the mainstream setting.
7. Confidence in the ability to meet need is low across all key stages apart from in KS5 (post 16) settings and nursery. This reflects earlier findings that EHC Plans spike in transition years.
8. There are, however, always cohorts of parents and carers who are happy with the support their child is getting. This is reflected in the survey comments, suggesting that there may be opportunity to ensure greater consistency in how students with SEN are supported across schools and educational settings.
9. The escalation of EHC Plans to specialist provision is more prominent in certain settings and merits further investigation.
10. Initial findings from case reviews and deep dives suggest there may be the potential to achieve a significant reduction in INMSS placements and for those children whose needs could be met or improved in other local settings. Further investigation is taking place around this.

## Investment / Enhanced Funding strategy

### Outlined below are the approaches to enable expansion of project work with schools and continue to enhance pathways in mainstream education.

### The service will develop partnerships to create the implementation plans for early intervention, including how impact would be measured:

* + Inreach / outreach hubs for primary age SEMH needs.
	+ Whole county training in trauma informed practice.

### Specialist team that can be deployed to carry out short term direct work with teachers and teaching assistants.

# Conclusion:

## DfE is in the process of extending the DBV programme delivery window to allow the project to continue across 2024/25. As part of the arrangements the service is currently reviewing the Cost Reductions / Savings and extending the mitigation projection to 2026/27 The review is expected to be completed over the next 3 months.

## The service will provide regular updates on progress to the Schools Forum going forward.

**Appendix A: High Needs Budget – Medium Term Financial Strategy 2024-25 to 2026-27**

# Principles of Special School Funding Model Agreed and implemented 2014-15 and to continue for 2023-

## The original intended approach for the financial year 2014-15 was to review the profile of pupils across each of the special schools and special academies and develop a banding system that reflected the different levels of support required for pupils. At that time this proved difficult to achieve, and special school and special academy headteachers asked local authority officers to investigate a simpler modelling approach which gave schools the same level of top-up per pupil but differentiated on some other specific costs relating to each school such as premises factors and pupils, such as deprivation.

## The overall level of top-up for pupils in each school would therefore be different, mainly because of premises and deprivation variances. The rationale for having the same average top up per pupil in respect of non-premises costs put forward by schools and adopted by the local authority is based on the following:

* all schools have pupils with a wide range of needs, and on average it is expected that this approach would provide each school with a reasonable distribution of the resources available.
* schools were concerned about the time needed to develop and moderate the pupil profiling approach and the accuracy / objectivity of such an approach.
* it was expected that the top up funding available overall is unlikely to increase to any great extent and therefore the available resources will need to be divided among all special schools and special academies as fairly as possible.
* schools and academies would have more predictability and stability in their budgets which would help them plan support for the different needs of all of their pupils over the short and longer terms.
* schools would be able to apply a form of pupil profiling if they so wish, determining low, medium and high-cost students when calculating the level of top up funding to be claimed from other authorities.

##  As expected, remodelling resulted in winners and losers, and Dedicated Schools Grant (DSG) conditions provide for Minimum Funding Guarantee (MFG) protection relating to special school top up funding in a similar way as for primary and secondary schools. The operational guidance provides some more information about the principles to be applied but does not state a formula that is to be applied in the same way as that for primary and secondary schools.

# Detailed assumptions used in modelling.

## Place funding for the financial year 2024-25, subject to the specifics below, is in general based in part on the academic year 2023-24 place numbers and places agreed for September 2024 for the first part of the 2024-25 academic year. Place numbers are provided by the LA’s SEN team following discussion with special schools and academies.

## Place number calculation

* Full time equivalent Pre-16 places are calculated 7/12th agreed place numbers for academic year 2023-24 and 5/12th agreed place numbers for academic year 2024-25
* Full time equivalent Post-16 places are calculated 8/12th agreed place numbers for academic year 2023-24 and 4/12th agreed place numbers for academic year 2024-25

This weighting approach mirrors the funding methodology assumed by the ESFA/DfE for Pre-16 and Post 16 pupils.

##  Once formula funding allocations are issued and the financial year has begun, any agreed increase in place numbers and resultant funding is dealt with outside of this formula modelling. In exceptional circumstances should place numbers fall, reduction in funding to the school or academy will be considered by the local authority.

## Funding per place falls into two parts:

* Core funding: £10,000, as set by the DfE and explained in detail in the DSG High Needs funding guidance. The DfE have incorporated the teachers’ pay grant (TPG) and teachers’ pension employer contribution grant (TPECG) within the high needs national funding formula. An allocation of £660 per pupil will be included for 2023-24 to reflect the Teachers’ Pay and Pensions funding (formerly TPG and TPECG). This funding will be included as a separate line on special schools’ statements so that it is transparent and readily identifiable.
* Top-up funding: a level of funding required over and above core funding to enable a pupil with high needs to participate in education and training. This is the balance of the overall budget available for special schools and academies after core funding and other specific funding allocations have been made (see paragraphs 2.2 to 2.8 below).

## The residential allocation for Woodeaton Manor, applied to a number of residential places, has been maintained at the same level as for prior years.

##  Premises allocations totalling £1.06m has been allocated to special schools on the basis of previously available floor area information.

## Split sites allocations have been included in the modelling. Special school headteachers had previously agreed which schools have additional sites and this information is used to allocate the overall split site budget between these schools. The level of funding for this factor has been maintained as recommended by special school headteachers to ensure smaller schools such as Bishopswood have some protection against costs of being on multi-sites. The total budget of approximately £112k is divided equally between the 4 schools identified as having an additional site, giving £28k each. Schools identified as having additional sites are as follows.

* John Watson
* Springfield
* Mabel Prichard
* Bishopswood

## A deprivation allocation totalling approximately £100k is divided between schools on the basis of the latest available FSM Ever6 pupil numbers from the DfE, the same data used to allocate the Deprivation related element of Pupil Premium. This results in an allocation for 2024-25 of approximately £225 per FSM Ever6 pupil, based on June 2023 pupil data.

## Minimum Funding Guarantee (MFG) protection has been calculated at the DfE suggested rate of 3% over 2 years, based on a like-for-like comparison with a special school’s overall budget in 2023 to 2024.

## A small allocation continues to be made in the modelling for hydrotherapy pools. This follows from earlier work by special school headteachers and their recommendation that this should be recognised as an unusual cost. Allocations are made to those schools that have a pool to maintain based on the surface area / volume of the facility at the school. Allocations are made to the following schools: Frank Wise, Springfield, Bardwell and Kingfisher. Information available indicates that the Kingfisher pool is approximately double the size of the pools at the other three schools and therefore the allocation to Kingfisher (£13,000) is twice that of the amount allocated to the other schools (£6,500). Headteachers had previously agreed that the smaller hydrotherapy pool at Bishopswood should also be included and £1,000 is therefore again allocated to that school in the modelling.

## The process for dealing – agreeing and transferring any additional funding - with pupil numbers that differ from initial top up estimates will continue as in previous years. An initial prudent and agreed estimate is made of the number of Oxfordshire pupils in each special school and academy for 2024-25 and planned regular top up payments for the financial year will be based on these numbers. Top-up funding being passed to institutions at the start of each month for maintained special schools and mid-month for academies, aligned with the allocation of actual cash to the local authority’s bank account from central government. If the actual number of Oxfordshire children on roll exceeds those commissioned, then Oxfordshire will make funding available from the month in which the pupil starts at the special school or academy. Funding for these latter pupils will be passed separately to institutions and will be in accordance with agreed additional allocations protocol.

## Charging and recovery of top-up and other applicable funding relating to places commissioned by other local authorities is the responsibility of the special school concerned as previously agreed with maintained special school headteachers. Academies or their Trust have this responsibility automatically.

## The special schools funding model provisionally allocates approximately £24.9m, as summarised below.

## Funding Factors Percentage

1. Planned Places - 46.15%
2. Place led top up funding - 37.77%
3. Bonus top up funding - 5.72%
4. Additional High Needs Funding - 2.96%

**Place related total - 92.60%**

**Specific funding factors**

1. Split Sites - 0.39%
2. Residential - 0.78%
3. Hydrotherapy Pools - 0.12%
4. Premises - 3.74%
5. Deprivation - 0.35%
6. MFG - 2.02%

**TOTAL - 100.0%**

## Overall special school budget model has initially increased by 6.1%.

**Appendix B: High Needs Budget – Medium Term Financial Strategy 2024-25 to 2026-27**

