

Schools Forum

20 March 2023

SPECIAL EDUCATIONAL NEEDS HIGH NEEDS BLOCK 2022/23
FEBRUARY 2023 MONITORING REPORT

This report is for Information

1. Recommendations:

That Schools Forum members:

- 1.1 Note the contents of the report in relation to the 2022/23 HNB Grant budget monitoring for the period 1 April – 28 February 2023.

2. Purpose

- 2.1 To provide Schools Forum with the HNB monitoring position as at 28 February 2023 projected to 31 March 2023.

3. HNB Budget 2022/23

- 3.1 The HNB budget for 2022/23 reported to Schools Forum on 26 September was £60.808M, net of deductions.
- 3.2 The balance brought forward as at 1 April 2022 is £3.930M surplus.
- 3.3 The anticipated in year deficit as at 30 November 2022 projected to 31 March 2023 that was previously reported to Schools Forums was £1.266M.
- 3.4 The current position as at 28 February 2023 projected to 31 March 2023 is now an in-year surplus of £0.197M
- 3.5 Appendix 1 shows the 2022/23 High Needs Block Budget Allocation, the actual expenditure as at 28 February 2023 the projected outturn as at 31 March 2023 and the variance from budget.
- 3.6 A column has also been added that shows the previously reported in year deficit of £1.266M

3.7 The Variances are explained below;

Variation 1 – Independent Schools

Out of borough placements, show a budget pressure of £1.427M. This is less than the previously reported figures of £2.039M due to slippage in the dates when pupils were expected to take up places and a reduction in the anticipated tri part funded places following a meeting in January 2023 with Sandwell Social Care Trust. A contingency sum had been included for new placements equating to £700K which has now been removed as these placements will not occur in this financial year. However, they will impact next year.

The Placement and Provision Panel were placing 2-3 pupils per week in the Autumn term and this appears to have slowed down slightly so far this year, although an upturn is expected September 2023 following 2022 phased transfers exercise.

Variation 2 – Mainstream Schools

There has been an increase in both EHCP assessments and the funding of early years pupils which has resulted in a pressure of £730K in delegated funding to school for individual pupil support which is an increase from previously reported figures following closure of the delegation. Previously reported was £683K

Variation 3 – Focus Provision Schools

There has been an increase in EHCP assessments which has resulted in a projected overspend of £175K on the delegated funding provided to Focus Provisions. On closing down the delegation this is now a pressure of £173K, so there is very little movement here.

Variation 4 – SEN Special Unit

A new Special Unit has been agreed at Uplands Primary School. It was previously budgeted for within the SEN Developments cost centre when the budgets for 2022/23 were finalised as discussions were still underway with the school at that point. More Pupils have been placed in the provision than was expected in November 2022 therefore funding increased from £186K to £214K.

Variation 5 – High Point Special School

There are more pupils on roll at High Point from 1 September 2022 than was anticipated when the budget was prepared. Therefore, there was a pressure of £186K, however, now the delegation is closed the pressure is £156K

Variation 6 – Early Years

An amount of £480k from the Early Years Grant is used to offset the early support for pupils in private provider settings and those in mainstream early years settings. Predicted costs in private provider settings has increased from £710K previously reported to £850K as more and more support for early years is being requested. The support for EYS pupils in mainstream schools is set against the schools' delegation and not shown separately. The £480k will be insufficient to cover the full costs of meeting the needs of the pupils in the early years settings. There is a pressure of £300K against private providers alone.

Variation 7 – Recoupment

The Element 3 top up for pupils placed in Sandwell schools that are the responsibility of a neighbouring LA are funded by Sandwell for all pupils in the special schools and LAC pupils placed in mainstream schools. This is recouped from the relevant authority. There has been an increase in pupils being placed which has resulted in an increase in recoupment income, with Shenstone being the highest importer of pupils due mainly to the location of the school. This has resulted in an additional £140K more recoupment than originally expected.

Variation 8 – Albright Education Centre

A small number of pupils have been placed temporarily at Albright Education Centre pending a permanent placement being agreed. These have been funded E3 Top up for the period of occupancy.

Variation 9 – SEN and Support for Inclusion Services

The total variances equate to a saving of £484K across 10 service areas. These are mainly due to staff turnover, maternity leave, opting out of the LA superannuation scheme and full time budgeted posts covered by staff on reduced hours and the inclusion of

2022/23 pay awards. The savings within these areas will increase during the year following slippage in staff appointments.

Variation 10 SEN

SEN Developments is showing an underspend of £1.6M – This budget head currently covers independent appeals and reports. It also holds the HNB surplus balancing figure of £630K, which is the difference between the calculated budgets as at 1 April 2022 and the HNB Grant initial settlement 2022/23 as well as the additional grant received in July 2022. The funding for the Special Unit was held here and is now accounted for in variance 4 Above

4. Recommendations

- 4.1 That Schools Forum note the contents of the report.

Date: 10/3/23

Contact Officer: Michael Jarrett

Tel No: 0121-569-8204