Schools Forum
Meeting Agenda

Thursday, 12 November 2026 at 9.30 am
to be held in Mezzanine Room 3, Tor Hill House, Union Street, Torquay, TQ2 5QW

Membership

Steven Hulme
Stuart Bellworthy
Tim Stephens
Steve Margetts
Alex Newton
Tamsin Summers
Laurence Frewin
Nik Salter

Sarah Tomkinson
Sally Banfield
Maria Beer
Nikki O'Dwyer
Katy Burns
Matt Burrell
Stuart Heron

1.	**Attendance**	
2.	**Minutes of the last meeting**	(Pages 3 - 8)
3.	**Actions from September Meeting**	(Pages 9 - 10)
4.	**Place Planning update**	(Pages 11 - 26)
5.	**Draft School Block allocations**	
6.	**SEND reform update and funding implications**	(Pages 27 - 38)
7.	**Modelling of formula options**	
8.	**Final Proposals for De-delegation**	
9.	**Higher Needs block transfer proposals**	
10.	**Updated Monitoring**	
11.	**Final DSG settlement**	

For information relating to this meeting or to request a copy in another format or language please contact:
Louise Willmott,

12. **Review of membership/representation**

13. **Items for next meeting**

14. **Future meeting dates**

Minutes of the Schools Forum

Held via Microsoft Teams
26th September 2026

-: in attendance :-

Alex Newton (Chair) Secondary Academy Head; **Steve Margetts (Vice Chair)** Secondary Academy Head; **Maria Beer** (Primary Maintained Governor); **Katy Burns** (Primary Academy Head); **Matt Burrell** (Secondary Academy Governor); **Laurence Frewin** (14-19 Provider Representative); **Stuart Heron** (Secondary Academy Governor); **Nikki O'Dwyer** (Primary Academy Head); **Nik Salter** (Early Years Provider); **Tim Stephens** (Primary Academy Governor); **Tamsin Summers** (Secondary Academy Head); **Sarah Tomkinson** (Primary Maintained Head); **Beth Woodward** (PRU)

1. Apologies/Changes to Membership

Apologies were received from Stuart Bellworthy and Sally Banfield. Members welcomed Beth Woodward to the meeting as new Head of the PRU, replacing Steven Hulme. It was noted that a number of membership changes were expected during the year. It was agreed that membership and sector representation would be reviewed in January 2027, with schools asked to confirm that they were content with their representatives.

Action: Chair/Clerk to review membership and representation in January 2027 and address anticipated vacancies.

2. Minutes of the last meeting

The minutes of the previous meeting were approved as an accurate record, with no amendments to the substance.

It was agreed that published minutes should identify contributors by role rather than by name wherever practicable.

Action: Clerk to use roles rather than individual names in published minutes.

3. Actions from June Meeting

The Forum reviewed the outstanding actions:

- Detailed place-planning information, including school- and year-group-level data and grammar school admission trends, remained in development. A Schools Forum-focused update would be brought to the November meeting and circulated in advance if available.
- Trend information on education otherwise than at school and alternative provision would be considered alongside the SEND Reform update because the policy context had changed.
- Schools Forum representation on the SEND governance board had been agreed and

implemented.

- A proportionate funding mechanism for the multi-agency child protection arrangements remained under development. It was confirmed that Schools Block funding could not be top-sliced for this purpose; a proposal was expected to be considered through the wider partnership arrangements.
- The timing and scope of future review of Element 3 funding would be determined in the context of the SEND Reform Plan.

Actions: Officers to bring detailed place-planning and admissions trend information to the November meeting; incorporate education otherwise than at school, alternative provision and Element 3 funding into future SEND Reform reporting.

4. Confirm Membership and Representation

Current membership was confirmed on an interim basis. Members noted that some representatives were covering more than one relevant perspective and that forthcoming vacancies should allow representation to be regularised.

The requirement for selective-school representation was queried and it was confirmed that Stuart Heron currently fulfils this requirement in his role as a governor. A full review was deferred until January 2027.

5. Elect Chair and Vice-Chair

As per the Forum Terms of Reference, nominations for the Chair and Vice Chair were discussed and voted on. Members unanimously agreed that the current Chair should continue in office. Stuart Heron was elected Vice-Chair.

The appointments were formally proposed, seconded and approved by a show of hands.

6. Review Terms of Reference

The February 2025 Terms of Reference were reviewed. Members requested clearer wording on matters for decision, consultation and information, aligned with the statutory Schools Forum guidance.

It was also agreed that references to “14–19” and “16–19” provision should be made consistent. Subject to the statutory wording, the document should use “further education” as the working term.

Members were reminded that a substitute may attend when a member is unavailable. The Forum supported an induction offer for new members covering the DSG blocks, governance responsibilities and the Terms of Reference.

Actions: Clerk to update the Terms of Reference using the accountability table from the statutory guidance; standardise the further-education terminology; develop an induction approach for new members.

7. Overview of DSG Blocks

Members received an overview of the four Dedicated Schools Grant blocks and were reminded that statutory duties arise from legislation rather than from the funding blocks themselves. The presentation summarised the responsibilities funded through each block, the restrictions on transfers and the Forum's role in approval and oversight.

The Finance representative confirmed that expenditure is reported to the Department for Education through the statutory Section 251 returns at budget-setting and year-end.

Members requested that future monitoring reports identify the relevant DSG block for each budget line, including where an item spans more than one block. The Forum also supported using the overview materials as part of new-member induction.

Action: Officers to show the relevant DSG block against items in future finance monitoring reports and circulate the overview materials.

8. Updated budget monitoring, including High Needs pressures

The Forum noted a forecast in-year DSG deficit of approximately £5.2 million against the £4.4 million deficit assumed when the budget was set. The principal pressures were in-year EHCP top-up funding for primary and secondary schools and additional pressure in special-school High Needs expenditure.

A separate early-years adjustment of approximately £583,000 arose from a prior-year pupil-count calculation error. The Department for Education had advised that this should be carried forward and included in any future deficit write-off arrangement. The position remained dependent on confirmation of the national approach.

Officers reported low confidence that the in-year position could be recovered. Demand across children's services was increasing, placement sufficiency was constrained and some children were therefore being placed in higher-cost out-of-area or independent provision. The figures would be included in the SEND Reform quarterly return due at the end of October.

Demand for education, health and care needs assessments had increased substantially, including a marked rise in parental requests following uncertainty about national SEND reforms. Members also raised the level of health contributions. Officers confirmed that the matter was being escalated regionally. Any legally sensitive detail will be checked before publication.

Actions: Include the current forecast in the October SEND Reform monitoring return; continue regional escalation regarding health contributions; confirm before publication whether any legally sensitive information may be included.

9. SEND Reform

The Forum received an overview of Torbay's three-year SEND Reform Plan. National approval had been delayed, although initial feedback from Department for Education advisers had been positive. Approval was significant because it was expected to result in a 90% write-off of the accumulated deficit and release capital and programme funding.

The first phase would focus on launch and testing, followed by wider implementation from April 2027 to March 2029. This work would run alongside completion of the existing priority impact plan and preparation for a further inspection, creating significant capacity pressures.

Subject to approval, key elements included approximately £1.2 million of first-year capital funding for mainstream inclusion; approximately £900,000 for “Experts at Hand”, including occupational therapy, speech and language therapy, educational psychology and multidisciplinary support; and development of up to ten specialist bases across early years, schools and post-16 settings over three years.

The planned approach aimed to reduce reliance on independent placements and education otherwise than at school by increasing local specialist capacity and testing additional support through the Alternative Provision Specialist Taskforce. Quarterly monitoring would continue and might affect access to future funding.

The Forum agreed that “SEND Reform and funding implications” should become a standing agenda item. Once the plan outcome was known, members would receive a full overview of the three-year financial model, risks and expected impact, followed by deeper reviews of individual areas where required.

Actions: Circulate the Department for Education decision when received; add SEND Reform and funding implications as a standing agenda item; bring the three-year plan and financial forecast to the November meeting if approval is received.

10. Upfront SEND Funding

Members received an overview of the Department for Education consultation on upfront SEND funding for mainstream schools. The proposal could allow a local authority, with Department for Education approval, to increase the £6,000 additional-support threshold and transfer a proportionate amount from the High Needs Block to the Schools Block through a local inclusion factor.

The proposal remained at consultation and test-and-learn stage. No South West authority was known to have volunteered for the initial trial. Members noted significant unresolved questions about distribution, accountability and the effect on centrally provided support services.

The Forum agreed that Torbay was not currently in a position to be an early adopter. The item should return when further guidance and learning from test areas are available, likely in the new financial year.

Action: Bring the proposal back to the Forum when the consultation outcome and further national guidance are available.

11. Early signals for modelling of formula options

Officers reported that national information on the 2027/28 funding formula and DSG settlement remained limited. Current-year figures had therefore been used for early illustration.

Possible changes included the consolidation of grants into the DSG and a reduction associated with the teachers’ pension scheme grant, which could reduce school budgets while removing the corresponding cost. It was not yet known whether the option to transfer 0.5% from the Schools Block to the High Needs Block would be required.

Final values for de-delegated and centrally retained services would not be available in time for all decisions to be taken at the November meeting. De-delegation decisions would be taken

only by eligible maintained-school representatives, who were asked to consult the schools they represent. Centrally retained funding, planned pupil growth and falling-rolls support would require further modelling once the December DSG settlement was received.

Actions: Officers to keep members updated as national information becomes available; consult maintained schools on de-delegation; bring updated formula and centrally retained funding models to the Forum when the DSG settlement and supporting data are available.

12. Early Discussion of de-delegation and central retention

Members noted that decisions on de-delegated services are made only by eligible maintained-school representatives. Those representatives were asked to consult the primary and secondary schools they represent so that any future decisions reflect the views of the maintained sector.

The Forum also discussed centrally retained services, particularly funding for planned pupil growth and falling rolls. Officers explained that this funding had previously met planned growth costs, with any balance used to support schools at National Funding Formula rates. The final position could not be confirmed until updated allocations had been processed through the Authority Proforma Tool.

Action: Keep members informed as further information becomes available and ensure that maintained-school representatives consult their sectors before de-delegation decisions are taken.

13. Future Meeting Dates

- Thursday 12th November 2026, 09:30
- Thursday 14th January 2027, 09:30
- Thursday 18th March 2027, 09:30
- Thursday 10th June 2027, 09:30

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Alternative Provision and EOTAS

Financial Position and Three-Year Projection | Schools Forum

Purpose

This briefing provides Schools Forum with a concise financial overview of Local Authority expenditure on Alternative Provision (AP) and Education Otherwise Than at School (EOTAS), showing the historical position, current position and three-year planning projection. It also sets out the terminology used and the quality and consistency principles that underpin Torbay's commissioned offer.

Definitions

- **Alternative Provision (AP):** Education arranged away from a pupil's usual mainstream or special school where additional or alternative educational support is required. In Torbay, Local Authority-directed AP is commissioned through a consistent pathway, beginning with the core commissioned framework.
- **Education Otherwise Than at School (EOTAS):** An individual educational arrangement for a child or young person where education is secured otherwise than in a school setting. AP and EOTAS are distinct: use of a provider within Torbay's core commissioned framework for an AP placement does not in itself mean that the child is EOTAS.
- **APST:** Alternative Provision Specialist Taskforce. A separately identified element within AP expenditure in this projection.
- **Core commissioned framework / "EOTAS block":** Torbay's operational term for its core commissioned framework of 18 providers. It can be used to secure AP as well as EOTAS provision, so the term describes the commissioning framework rather than the legal or educational status of the child.

Historical and current financial position

Academic year / position	EOTAS	Pre-16 AP	Post-16 AP	Vulnerable Pupils / Total
2024/25 recorded	Not separately recorded	£2,435,421	£408,175	£134,484 / £2,978,081
2025/26 recorded	£1,504,056	£187,508	£843,119	£145,903 / £2,680,586
2026/27 current position*	£1,138,638	£40,455*	£709,128	£29,407 / £1,917,628*

***Current/part-year position.** The pre-16 AP figure was recorded in the source as "£40,455,00" and has been interpreted as £40,455.00 for planning purposes. The current-year total should not be treated as a full-year outturn.

Three-year financial projection

Academic year	EOTAS	Core AP	APST	Total AP	Combined
2027/28	**£1,024,774**	**£1,297,124**	**£6,000**	**£1,303,124**	**£2,327,898**
2028/29	**£922,297**	**£1,361,981**	**£9,000**	**£1,370,981**	**£2,293,278**
2029/30	**£830,067**	**£1,430,080**	**£9,000**	**£1,439,080**	**£2,269,147**
Three-year total	**£2,777,138**	**£4,089,185**	**£24,000**	**£4,113,185**	**£6,890,323**

Forecast assumptions: EOTAS is modelled to reduce by 10% year on year from the current planning baseline of approximately £1.139m. Core AP is modelled with a 5% annual expenditure increase. APST is £6,000 in 2027/28 and £9,000 in each of the following two years. These are planning assumptions, not fixed budgets or targets for individual placements.

Financial caveats

- The projection is shown at current prices and does not include a separate allowance for future inflation or provider price increases. Actual expenditure may therefore be higher.
- Provider fees, staffing, transport and other delivery costs may increase even where activity reduces, which may limit the cash-releasing effect of the projected EOTAS reduction.
- The model uses currently identifiable Local Authority AP and EOTAS expenditure and should be refined through annual budget-setting as actual activity, costs and commissioning information develop.

Consistency and quality of the offer

The financial position sits alongside Torbay's move to a more consistent and quality-assured AP/EOTAS commissioning model. Local Authority-directed AP follows one commissioning approach: the core commissioned framework is considered first, followed by the wider quality-assured TAPS offer where the core framework cannot appropriately meet need; provision outside those routes is exceptional and subject to authorisation, safeguarding and commissioning assurance.

Quality oversight includes provider onboarding and approval, quality-assurance assessments and site visits, contract monitoring, and monitoring of attendance, engagement, progress and outcomes. The purpose is to secure greater consistency of offer and stronger assurance that commissioned provision is safe, suitable and delivering appropriate educational outcomes.

Schools Forum headline

The current three-year planning projection is £6.890m for AP and EOTAS combined. The forecast reflects a declining EOTAS trajectory alongside planned growth in AP expenditure. The principal financial objective is a more consistent, quality-assured commissioning approach, with expenditure reviewed against actual demand, cost, provider quality and outcomes.

School Place Planning

November 2026

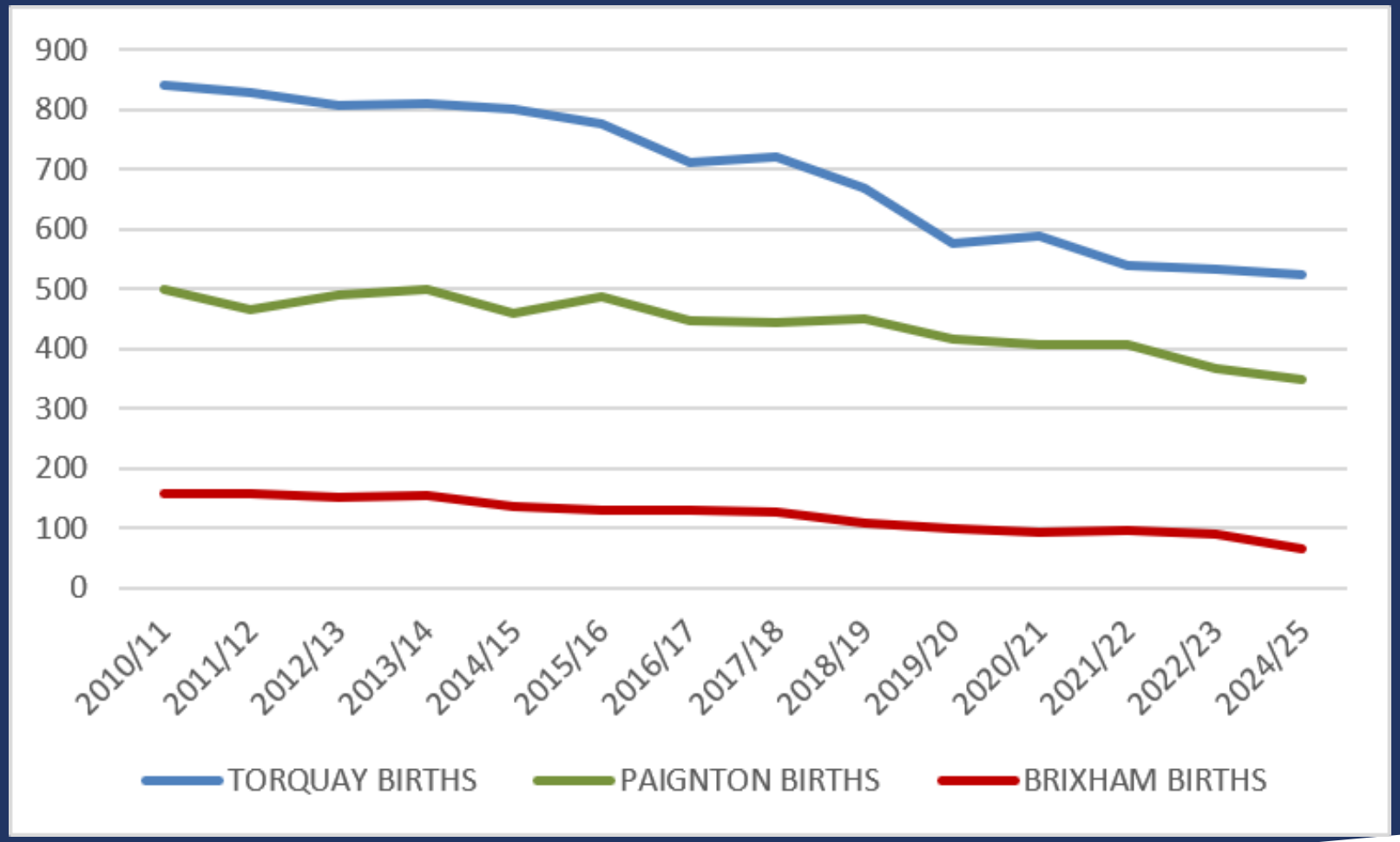
Clare Talbot

TORBAY COUNCIL

Influencing Factors

- Birth rate
- Housing
- Grammar Intake

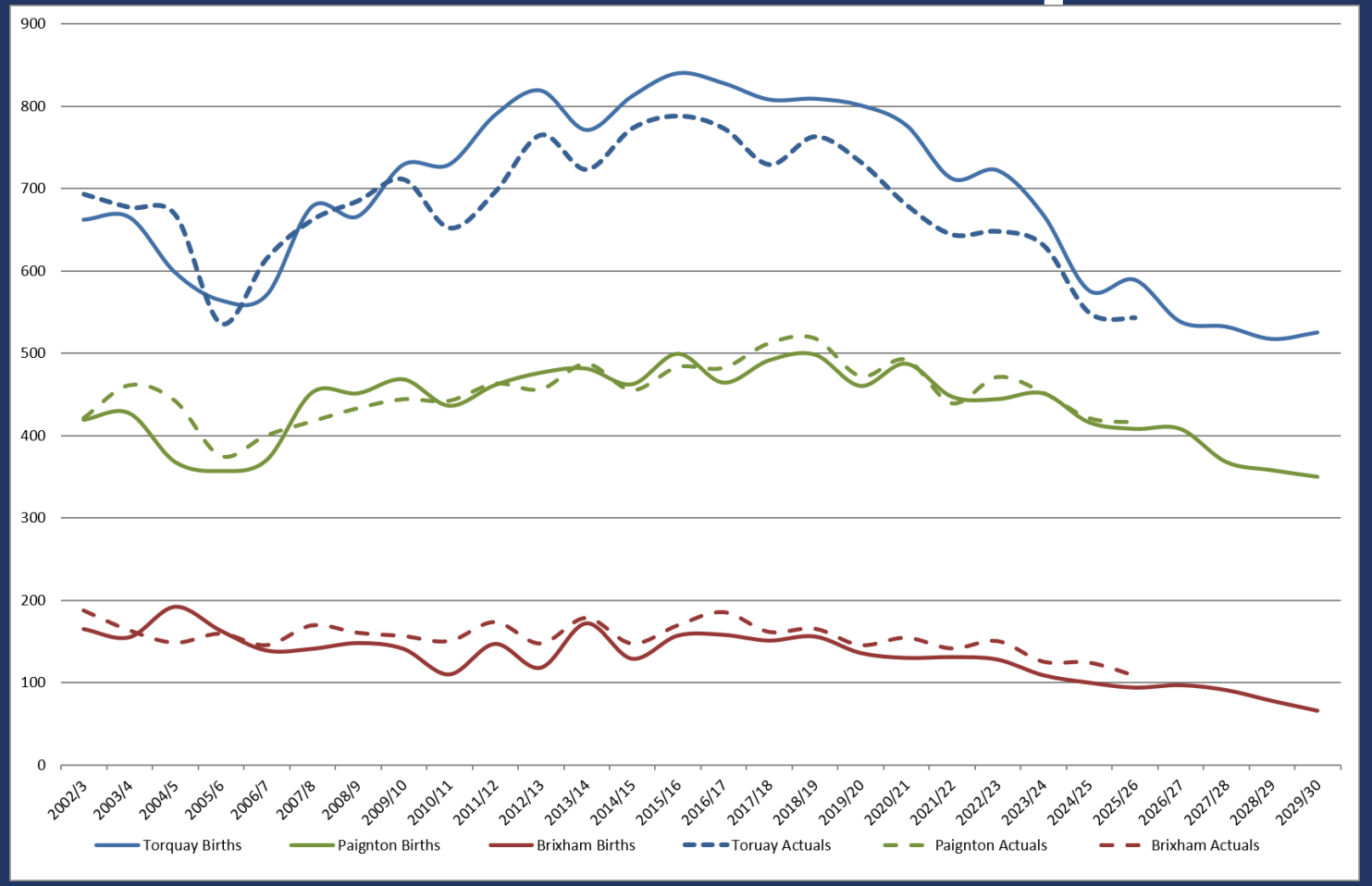
Local Birth Rates since 2010



- Birth rate shows no sign of recovery
- Stabilising at lower rates
- Birth rates peaked in 2010 (2015 admitting year) & steadily dropped since:
  - TQY dropped by 315 (10.5 FE)
  - PGN dropped by 149 (5FE)
  - BRX dropped by 91 (3FE)
- Housing not generating sufficient growth to mitigate impact

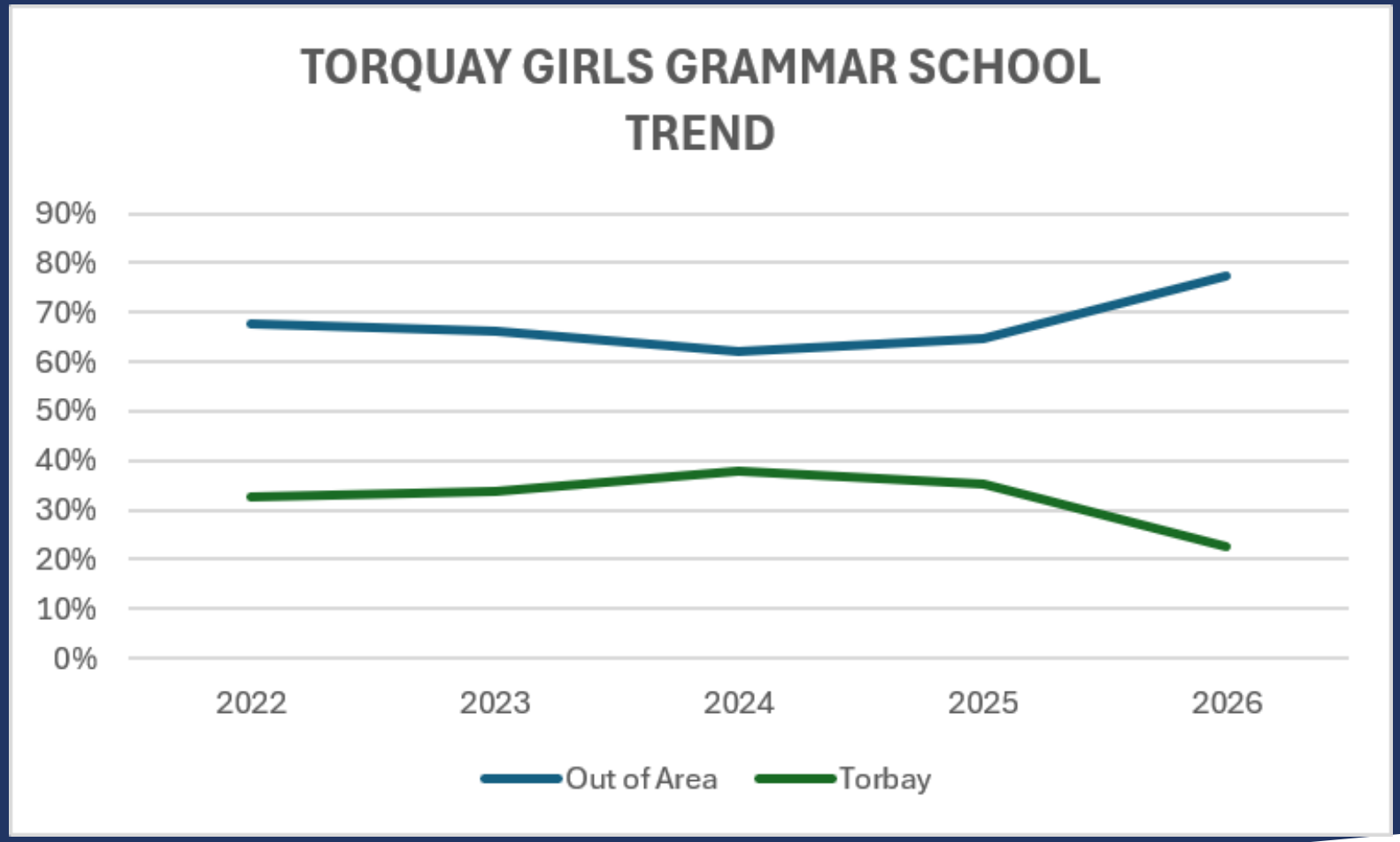
Source: Office National Statistics

Birth Rates & Reception Cohort



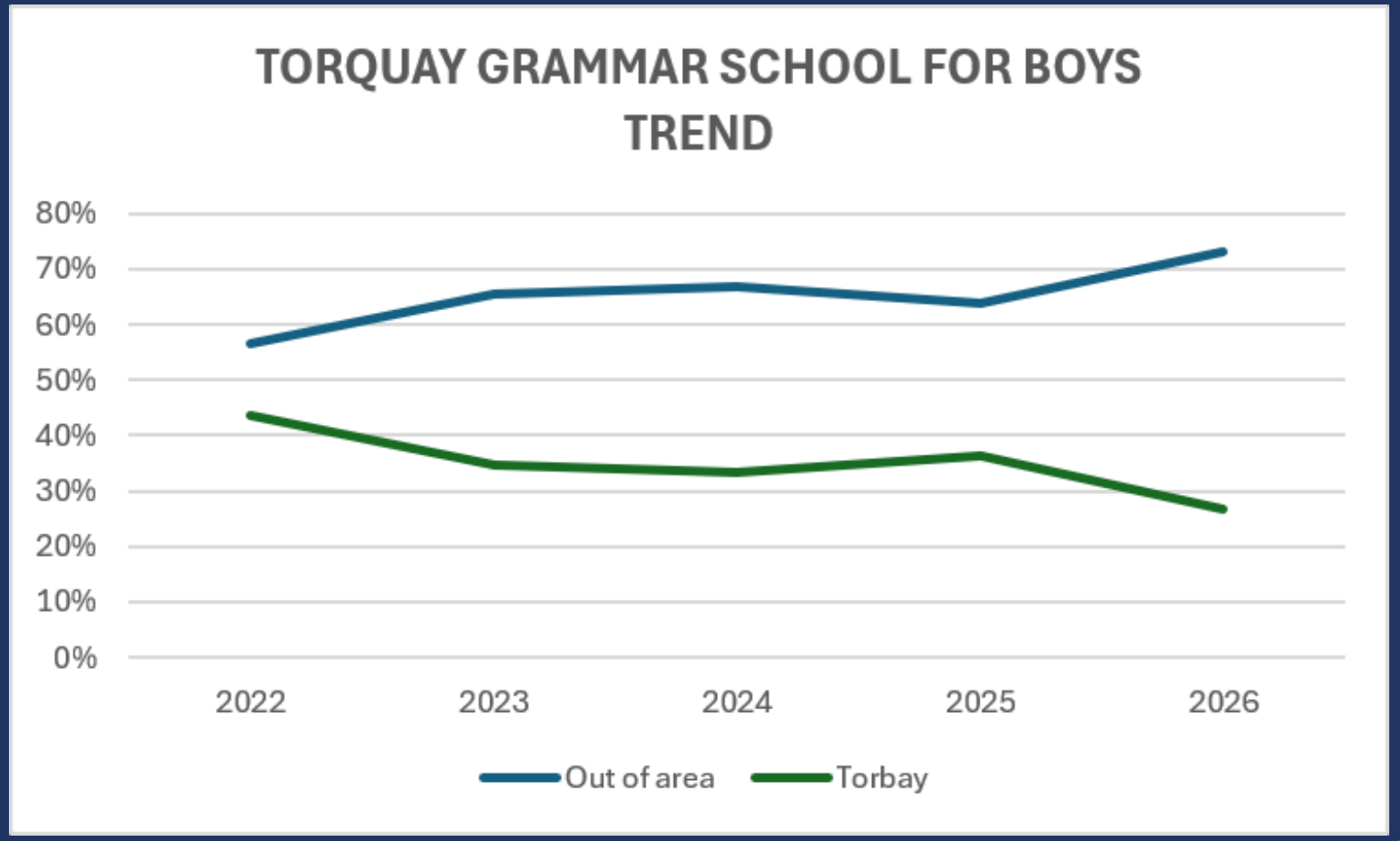
- Direct correlation between falling birth rate & NOR
- Peaks in birth rate led to high intakes in 2015
- Steady decrease in numbers from 2018 onwards

Grammar School Analysis



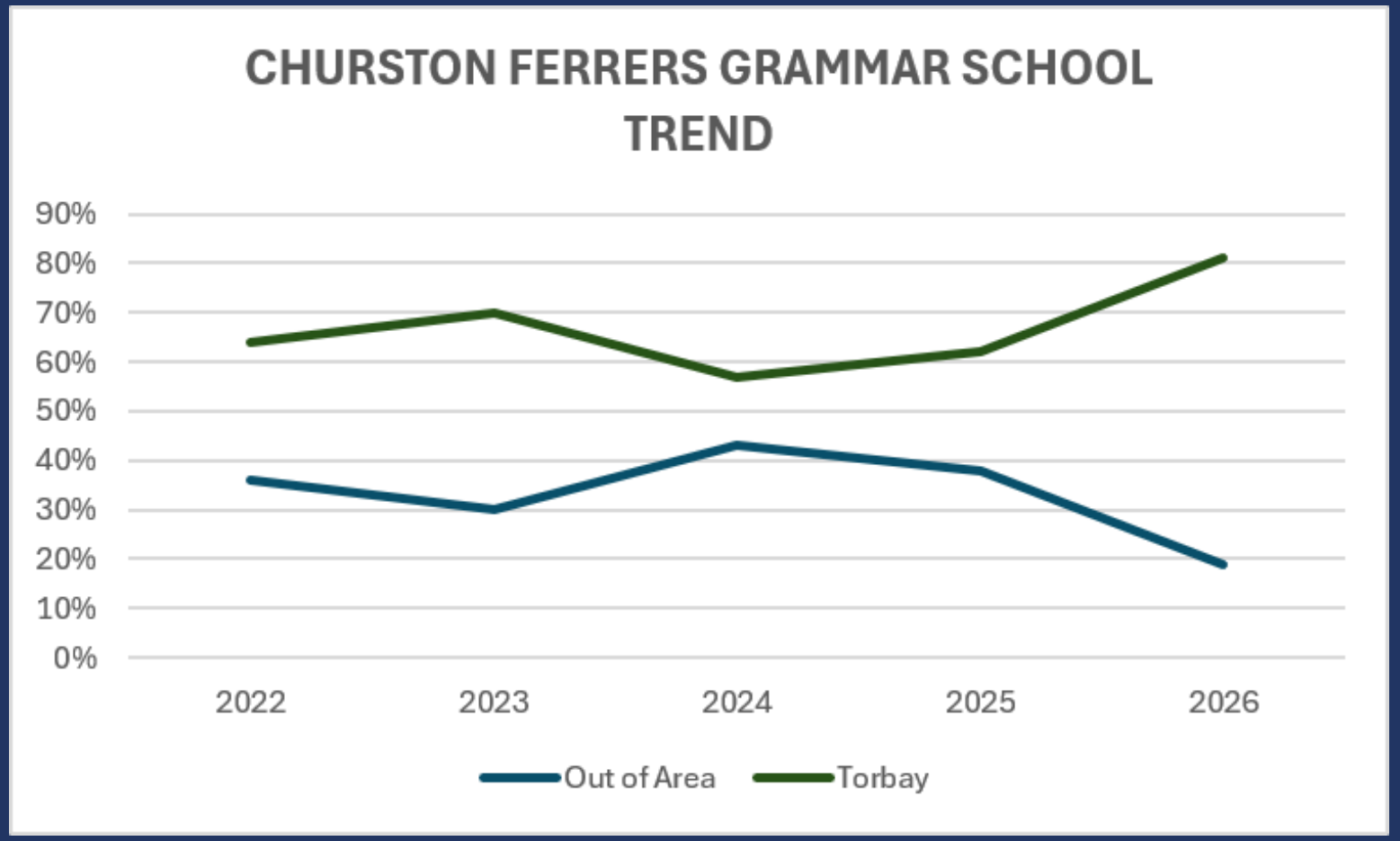
- In 2022 68% of pupils were from out of area, this increased to 77% in 2026
- Increase of 9%
- Analysis shows majority of 2026 in area pupils are from Torquay

Grammar School Analysis



- In 2022, 57% of pupils were from out of area, this increased to 73% in 2026
- Increase of 16%
- Analysis shows majority of 2026 in area pupils are from Torquay

Grammar School Analysis

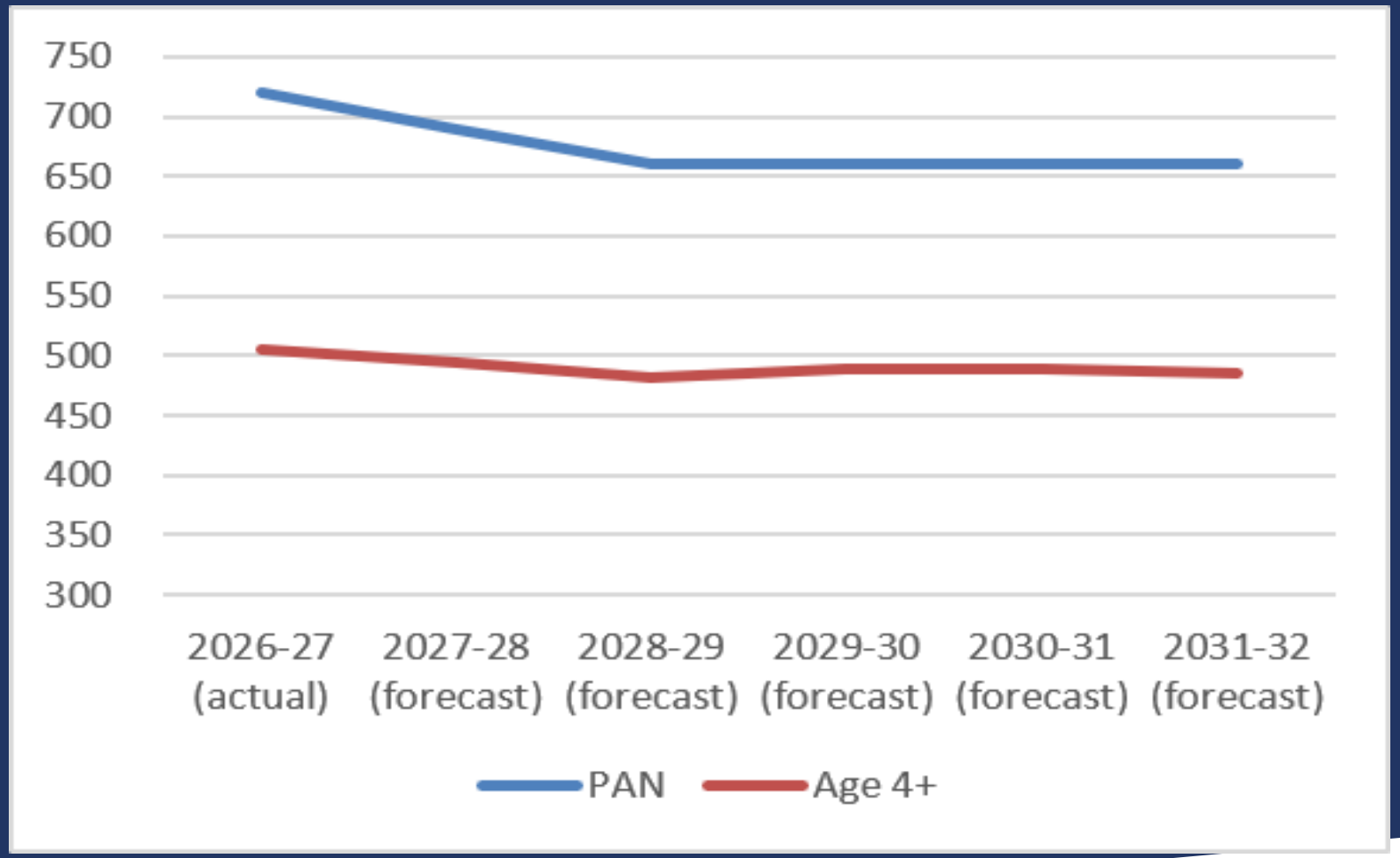


- In 2022, 36% of pupils were from out of area, this decreased to 19% in 2026
- Decrease of 17%
- Analysis shows majority of 2026 in area pupils are from Paignton, followed by Brixham

Conclusion of Grammar School Analysis

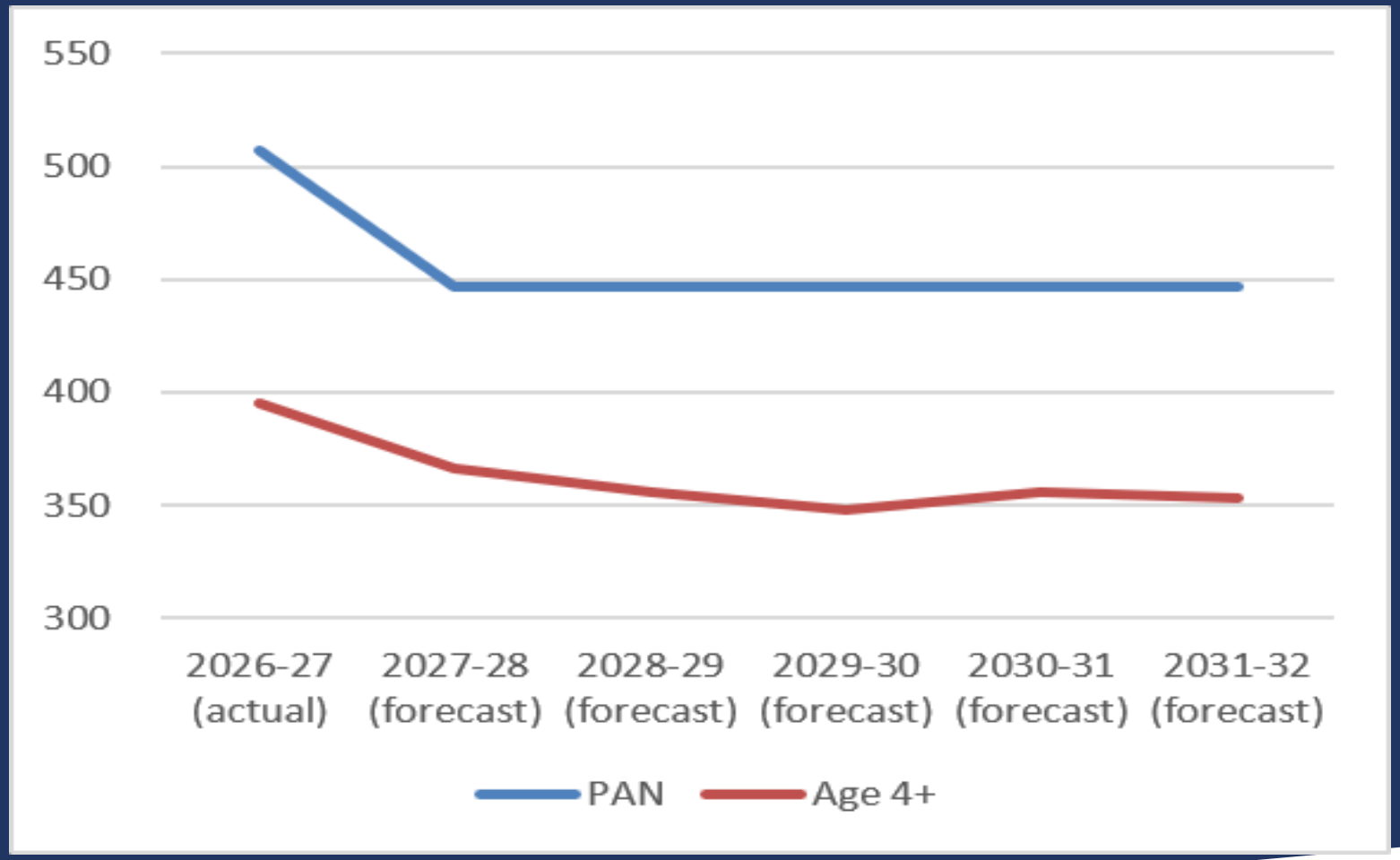
- Over the last 5 years, the trend is for the Torquay Grammar Schools to admit more out of area pupils, whilst Churston Ferrers admit more Torbay pupils. *Churston Ferrers has recently changed its admission policy to give priority to 'feeder primary schools' in the local Torbay area*. This is expected to change again for September 2027.
- There is an expectation that the popularity of all the grammar schools will ensure they will fill to capacity.
- This will have a positive impact on future projections and help to mitigate against falling secondary numbers due to the smaller birth cohorts moving through.
- In 2026 the Torquay Year 7 cohort grew by 43% and in Brixham it grew by 109%

Draft Primary Projections for Torquay



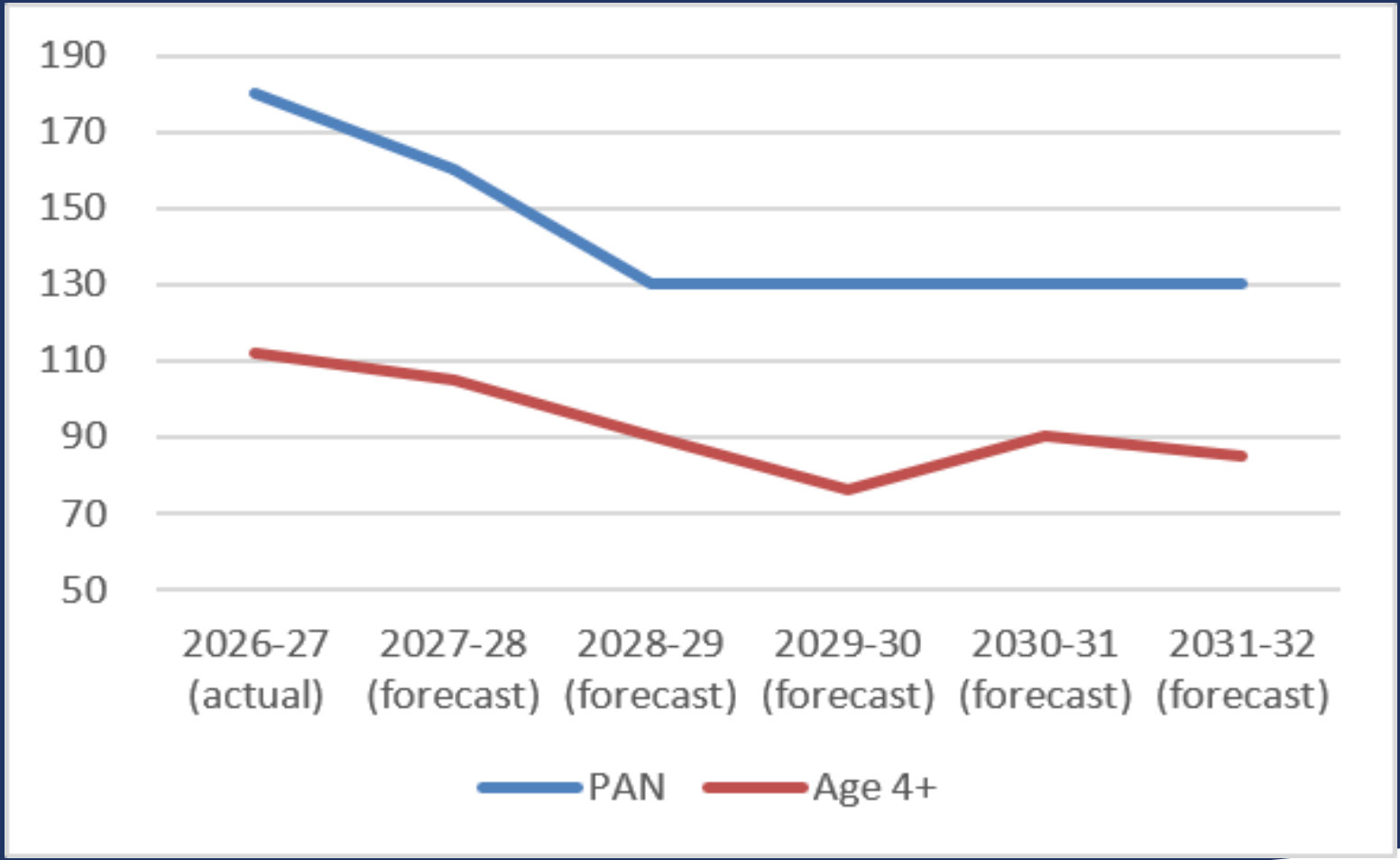
- Surplus capacity of 26% by 2031 (6FE)
- Proactive reduction of PAN by 4FE

Draft Primary Projections for Paignton



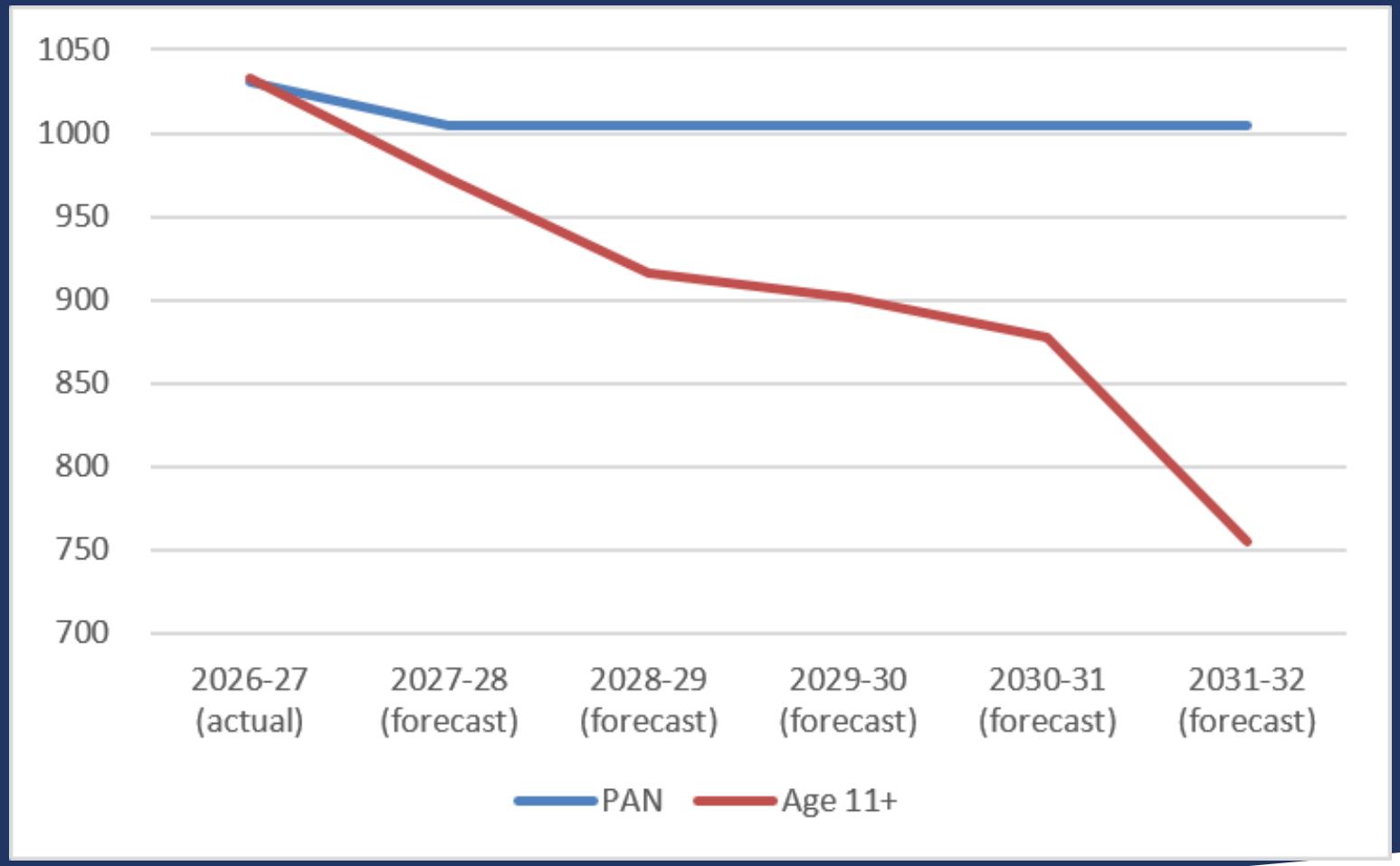
- Surplus capacity of 21% by 2031 (3FE)
- Proactive reduction of PAN by 3FE

Draft Primary Projections for Brixham



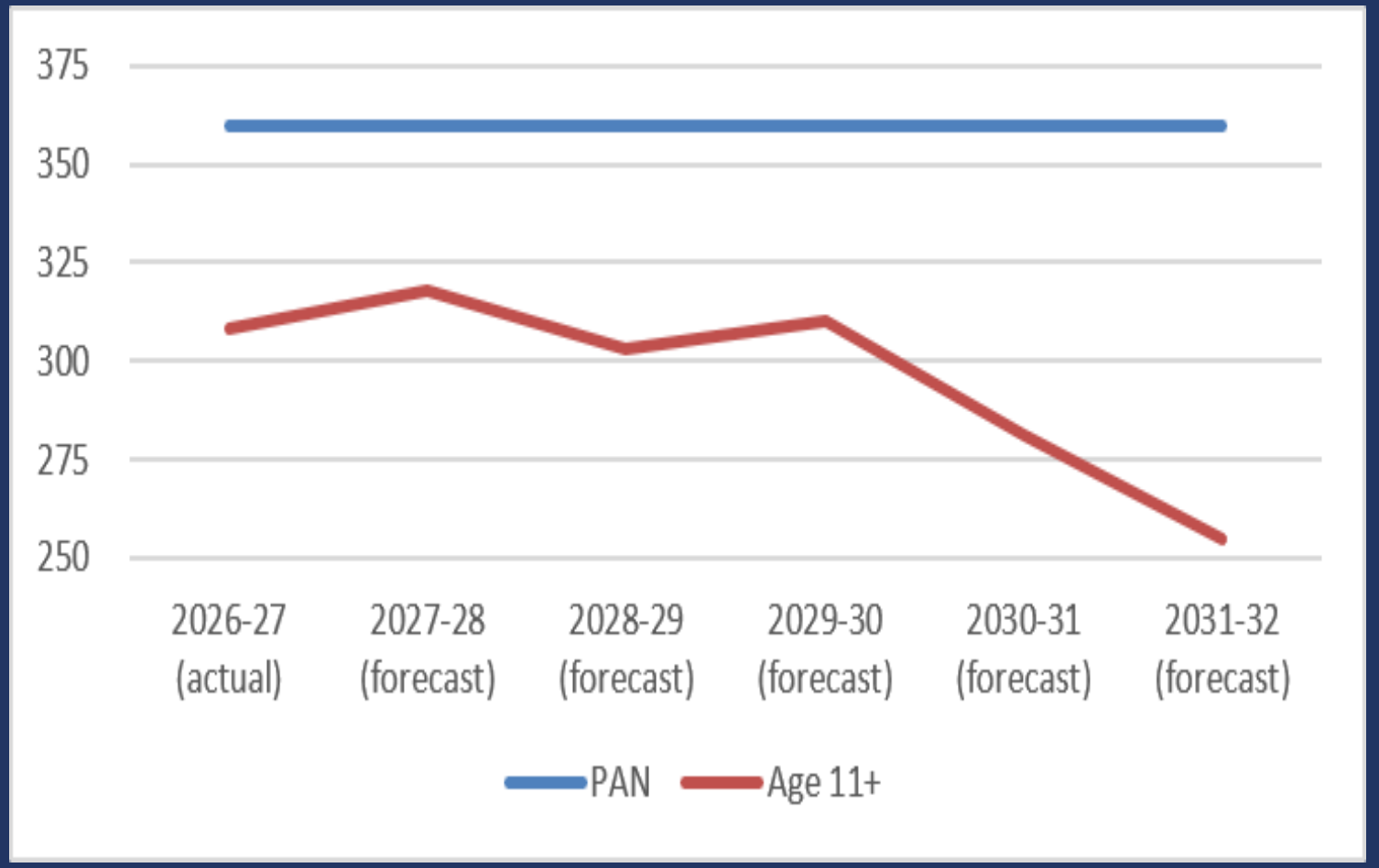
- Surplus capacity of 35% by 2031 (1FE)
- Proactive reduction of PAN by 2.5FE

Draft Secondary Projections for Torquay



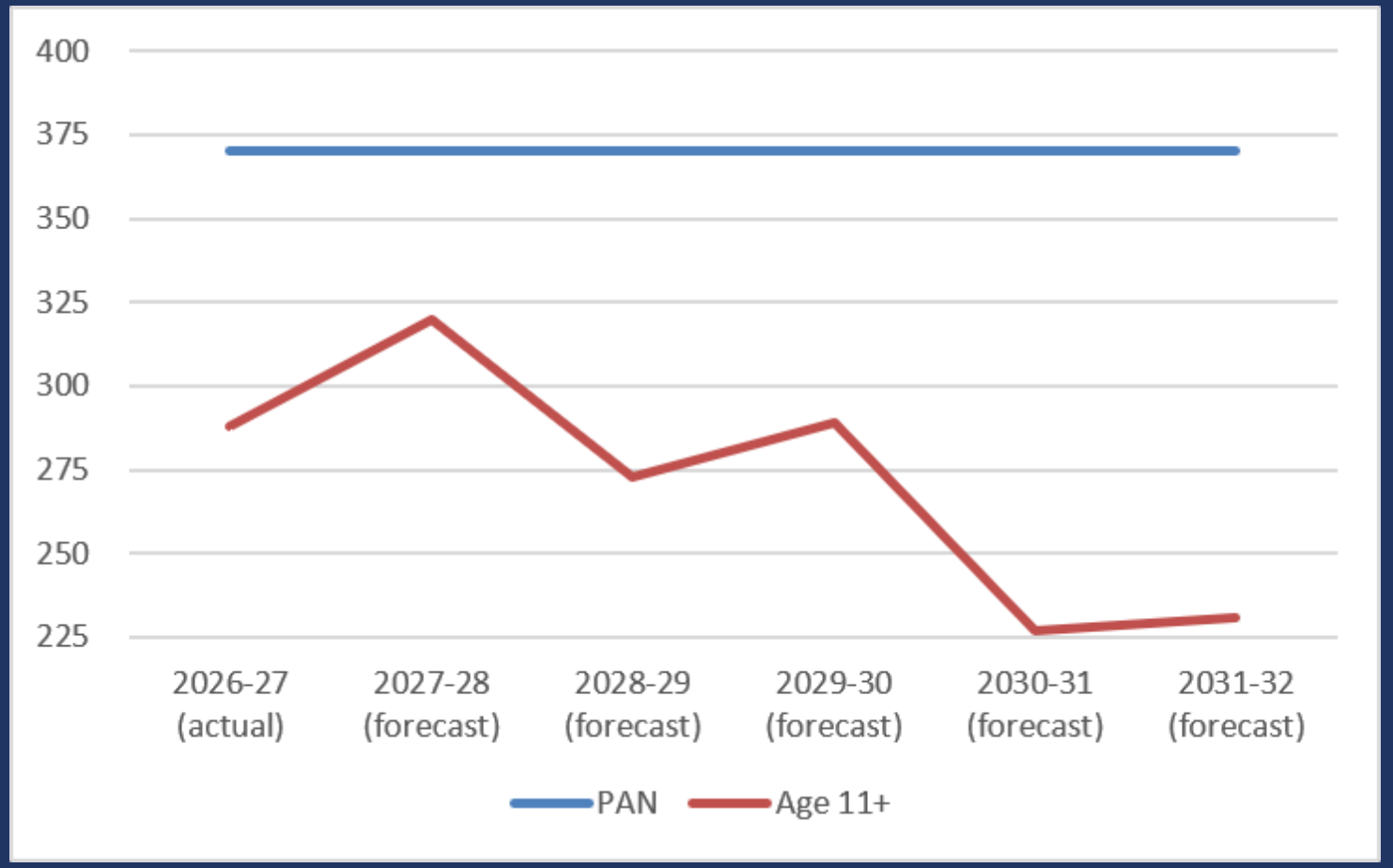
- Surplus capacity of 25% by 2031 (8FE)
- No PAN reductions proposed; expect inward migration to increase

Draft Secondary Projections for Paignton



- Surplus capacity of 29% by 2031 (3.5FE)
- No PAN reductions proposed

Draft Secondary Projections for Brixham



- Surplus capacity of 38% by 2031 (4.5FE)
- No PAN reductions proposed; expect inward migration to increase

Conclusions

- Low birth cohorts will impact ALL schools
- Any growth from planned local housing developments is already factored into projections
- Grammar schools admitting from out of area will help mitigate falling numbers

Questions

For further information:

clare.talbot@torbay.gov.uk

Department for Education

The Local SEND Reform Plan

2026-27 Quarterly Data

Financial summary

1. Forecast expenditure for High Needs Block (£000)				
	Initial forecast for 2026-27	2nd quarter revision	3rd quarter revision	4th quarter revision
Early Years settings including PVIs	£0.000	£0.000		
Mainstream school or academy placements	£6,684.965	£7,293.949		
Specialist bases in mainstream settings	£783.817	£783.817		
Maintained special school or special academy placements	£17,075.193	£17,175.193		
NMSS or independent school placements	£3,494.412	£3,620.000		
Alternative Provision placements	£4,556.381	£4,564.481		
Hospital school placements	£483.300	£438.700		
Mainstream Post 16 provision	£3,475.000	£3,591.000		
Specialist Post-16 institutions	£10.000	£10.000		
Health, social care, therapy services and care provision	£0.000	£0.000		
Other spend	-£253.816	-£208.700		
Total	£36,309.252	£37,268.440	£0.000	£0.000
Block transfers	£0.000	£0.000		
Other income	-£295.000	-£145.000		
Total net	£36,014.252	£37,123.440	£0.000	£0.000

1.1 Forecast expenditure against total DSG (£000)				
	Initial forecast for 2026-27	2nd quarter revision	3rd quarter revision	4th quarter revision
Outturn DSG expenditure	£167,157.850	£168,791.626		
Total expenditure against DSG	£167,157.850	£168,791.626	£0.000	£0.000
Total expected DSG income	-£162,757.850	-£162,988.626		
Other income	£0.000	£0.000		
Total in-year surplus (-) or deficit (+)	£4,400.000	£5,803.000	£0.000	£0.000

Assumptions	Data Confidence RAG
Category changes from last template presented challenges ensuring cohorts were accurately represented.	Amber Green

2. Current and forecast unit cost of support for children and young people with an ECHP by setting type (£000)				
	Initial forecast for 2026-27	2nd quarter revision	3rd quarter revision	4th quarter revision

Early Years settings including PVIs	£0.000	£0.000		
Mainstream school or academy placements	£9.948	£9.846		
Specialist bases in mainstream settings	£17.040	£16.677		
Maintained special school or special academy placements	£31.159	£31.114		
NMSS or independent school placements	£87.360	£90.500		
Alternative Provision placements	£31.323	£31.407		
Hospital school placements	£22.118	£10.968		
Mainstream Post 16 provision	£11.469	£11.851		
Specialist Post-16 institutions	£0.139	£0.143		
Health, social care, therapy services and care provision	£0.000	£0.000		
Other spend	-£2.447	-£2.734		
Total	£208.109	£199.772	£0.000	£0.000
Block transfers	£0.000	£0.000		
Other income	£0.000	£0.000		
Total net	£208.109	£199.772	£0.000	£0.000

Assumptions	Data Confidence RAG
Category changes from last template presented challenges ensuring cohorts were accurately represented.	Amber Green

3. Forecast SEN transport expenditure (£000)

	Initial forecast for 2026-27	2nd quarter revision	3rd quarter revision	4th quarter revision
Pre-16 SEN expenditure	£3,063.979	£3,008.669		
Post-16 SEN expenditure	£149.130	£147.070		
Total expenditure	£0.000	£3,155.739	£0.000	£0.000

Assumptions	Data Confidence RAG
Actual included. Unable to add a total to Q1 as it's a protected sheet.	Green

Children and young people (CYP) summary

4. Number of all CYP in local area categorised by age

	Q1	Q2	Q3	Q4
Under 5	5,349	5,349		
Age 5 to 10	7,872	7,872		
Age 11 to 15	7,686	7,686		
Age 16 to 19	5,710	5,710		
Age 20 to 25	6,906	6,906		
Total number by age group	**33,522**	**33,522**	**0**	**0**

Assumptions	Data Confidence RAG
Figures are based on the latest available ONS population projections and will not vary between quarterly returns unless updated projections are published.	Green

5. Number of all CYP with EHC plans or receiving top ups by age

	5.1 Total number of EHC plans by age group			
	Q1	Q2	Q3	Q4
Under 5	21	39		
Age 5 to 10	526	561		

Age 11 to 15	708	735		
Age 16 to 19	519	498		
Age 20 to 25	137	124		
Total number	**1,911**	**1,957**	**0**	**0**

Assumptions	Data Confidence RAG
Original annual forecasts were based on the position at January each year: 1,835 at January 2026 and 1,958 at January 2027.	**Green**

	5.2 Total number of CYP receiving individual top ups with no EHC plan by age group			
	Q1	**Q2**	**Q3**	**Q4**
Under 5	0	0		
Age 5 to 10	13	13		
Age 11 to 15	17	17		
Age 16 to 19	2	2		
Age 20 to 25	0	0		
Total number	**32**	**32**	**0**	**0**

Assumptions	Data Confidence RAG
Claification required - due to changes in template categories this may fluctuate in further quarters	**Amber Green**

	5.3 Total number of CYP supported by the High Needs Block with no EHC plan or individual top up			
	Q1	**Q2**	**Q3**	**Q4**
Under 5	4	4		
Age 5 to 10	40	40		
Age 11 to 15	140	140		
Age 16 to 19	1	1		
Age 20 to 25	0	0		
Total number	**185**	**185**	**0**	**0**

Assumptions	Data Confidence RAG
Claification required - due to changes in template categories this may fluctuate in further quarters	**Amber Green**

6. Number of all CYP with EHC plans by provision

	Q1	**Q2**	**Q3**	**Q4**
Early Years settings including PVIs	1	2		
Mainstream school or academy placements	640	709		
Specialist bases in mainstream settings	46	47		
Maintained special schools or special academies	548	552		
NMSS or independent schools - LA funded placements	40	40		
NMSS or independent schools - other suitable arrangements	0	0		
Alternative Provision	2	2		
Mainstream Post 16 provision	303	303		
Mainstream Post 16 specialist provision	0	0		
Specialist Post-16 institutions	72	70		
Elective Home Education (EHE)	32	32		
Other arrangements by LA (EOTAS)	94	94		
Other (including hospital schools where applicable)	133	106		

Total number	**1,911**	**1,957**	**0**	**0**

Assumptions	Data Confidence RAG
Original annual forecasts were based on the position at January each year: 1,835 at January 2026 and 1,958 at January 2027.	Green

7. Number of all CYP with EHC plans by primary need

	Q1	Q2	Q3	Q4
Autistic Spectrum Disorder	591	602		
Hearing Impairment	13	14		
Moderate Learning Difficulty	206	202		
Multi- Sensory Impairment	1	1		
Physical Disability	97	97		
Profound & Multiple Learning Difficulty	14	13		
Social, Emotional and Mental Health	511	529		
Speech, Language and Communications needs	368	387		
Severe Learning Difficulty	50	47		
Specific Learning Difficulty	39	43		
Visual Impairment	9	9		
Other Difficulty/Disability	12	13		
SEN support but no specialist assessment of type of need	0	0		
Total number of EHC plans by primary need	**1,911**	**1,957**	**0**	**0**

7.1 Number of all CYP with EHC plans in Early Years Settings including PVIs by primary need

	Q1	Q2	Q3	Q4
Autistic Spectrum Disorder	0	0		
Hearing Impairment	0	0		
Moderate Learning Difficulty	0	0		
Multi- Sensory Impairment	0	0		
Physical Disability	1	1		
Profound & Multiple Learning Difficulty	0	0		
Social, Emotional and Mental Health	0	1		
Speech, Language and Communications needs	0	0		
Severe Learning Difficulty	0	0		
Specific Learning Difficulty	0	0		
Visual Impairment	0	0		
Other Difficulty/Disability	0	0		
SEN support but no specialist assessment of type of need	0	0		
Total number of EHC plans by primary need	**1**	**2**	**0**	**0**

7.2 Number of all CYP with EHC plans in Mainstream Settings or Academy Placements by primary need

	Q1	Q2	Q3	Q4
Autistic Spectrum Disorder	175	195		
Hearing Impairment	9	10		
Moderate Learning Difficulty	51	54		
Multi- Sensory Impairment	1	1		
Physical Disability	34	36		
Profound & Multiple Learning Difficulty	0	0		
Social, Emotional and Mental Health	157	178		
Speech, Language and Communications needs	178	195		
Severe Learning Difficulty	1	1		

Specific Learning Difficulty	20	24		
Visual Impairment	4	4		
Other Difficulty/Disability	10	11		
SEN support but no specialist assessment of type of need	0	0		
Total number of EHC plans by primary need	**640**	**709**	**0**	**0**

	7.3 Number of all CYP with EHC plans in Specialist Bases by primary need			
	Q1	**Q2**	**Q3**	**Q4**
Autistic Spectrum Disorder	17	18		
Hearing Impairment	0	0		
Moderate Learning Difficulty	0	0		
Multi- Sensory Impairment	0	0		
Physical Disability	0	0		
Profound & Multiple Learning Difficulty	0	0		
Social, Emotional and Mental Health	12	12		
Speech, Language and Communications needs	17	17		
Severe Learning Difficulty	0	0		
Specific Learning Difficulty	0	0		
Visual Impairment	0	0		
Other Difficulty/Disability	0	0		
SEN support but no specialist assessment of type of need	0	0		
Total number of EHC plans by primary need	**46**	**47**	**0**	**0**

	7.4 Number of all CYP with EHC plans in Maintained Special Schools or Special Academies by primary need			
	Q1	**Q2**	**Q3**	**Q4**
Autistic Spectrum Disorder	197	198		
Hearing Impairment	1	1		
Moderate Learning Difficulty	69	69		
Multi- Sensory Impairment	0	0		
Physical Disability	28	28		
Profound & Multiple Learning Difficulty	9	9		
Social, Emotional and Mental Health	89	92		
Speech, Language and Communications needs	107	107		
Severe Learning Difficulty	33	33		
Specific Learning Difficulty	13	13		
Visual Impairment	2	2		
Other Difficulty/Disability	0	0		
SEN support but no specialist assessment of type of need	0	0		
Total number of EHC plans by primary need	**548**	**552**	**0**	**0**

	7.5 Number of all CYP with EHC plans in Non-Maintained Special Schools or Independent Schools by primary need			
	Q1	**Q2**	**Q3**	**Q4**
Autistic Spectrum Disorder	12	12		
Hearing Impairment	0	0		
Moderate Learning Difficulty	1	1		
Multi- Sensory Impairment	0	0		
Physical Disability	0	0		
Profound & Multiple Learning Difficulty	0	0		
Social, Emotional and Mental Health	22	22		
Speech, Language and Communications needs	2	2		
Severe Learning Difficulty	2	2		

Specific Learning Difficulty	1	1		
Visual Impairment	0	0		
Other Difficulty/Disability	0	0		
SEN support but no specialist assessment of type of need	0	0		
Total number of EHC plans by primary need	**40**	**40**	**0**	**0**

	7.6 Number of all CYP with EHC plans in Alternative Provision by primary need			
	Q1	**Q2**	**Q3**	**Q4**
Autistic Spectrum Disorder	49	39		
Hearing Impairment	0	0		
Moderate Learning Difficulty	20	14		
Multi- Sensory Impairment	0	0		
Physical Disability	9	7		
Profound & Multiple Learning Difficulty	4	3		
Social, Emotional and Mental Health	60	53		
Speech, Language and Communications needs	18	20		
Severe Learning Difficulty	6	3		
Specific Learning Difficulty	0	0		
Visual Impairment	0	0		
Other Difficulty/Disability	1	1		
SEN support but no specialist assessment of type of need	0	0		
Total number of EHC plans by primary need	**167**	**140**	**0**	**0**

	7.7 Number of all CYP with EHC plans in Post-16 (Further Education or Specialist Further Education) Settings by primary need			
	Q1	**Q2**	**Q3**	**Q4**
Autistic Spectrum Disorder	113	112		
Hearing Impairment	3	3		
Moderate Learning Difficulty	59	58		
Multi- Sensory Impairment	0	0		
Physical Disability	20	20		
Profound & Multiple Learning Difficulty	0	0		
Social, Emotional and Mental Health	131	131		
Speech, Language and Communications needs	32	32		
Severe Learning Difficulty	8	8		
Specific Learning Difficulty	5	5		
Visual Impairment	3	3		
Other Difficulty/Disability	1	1		
SEN support but no specialist assessment of type of need	0	0		
Total number of EHC plans by primary need	**375**	**373**	**0**	**0**

	7.8 Number of all CYP with EHC plans accessing Education Other Than At School (EOTAS) by primary need			
	Q1	**Q2**	**Q3**	**Q4**
Autistic Spectrum Disorder	28	28		
Hearing Impairment	0	0		
Moderate Learning Difficulty	6	6		
Multi- Sensory Impairment	0	0		
Physical Disability	5	5		
Profound & Multiple Learning Difficulty	1	1		
Social, Emotional and Mental Health	40	40		
Speech, Language and Communications needs	14	14		
Severe Learning Difficulty	0	0		

Specific Learning Difficulty	0	0		
Visual Impairment	0	0		
Other Difficulty/Disability	0	0		
SEN support but no specialist assessment of type of need	0	0		
Total number of EHC plans by primary need	**94**	**94**	**0**	**0**

Assumptions	Data Confidence RAG
Please note due to template assumptions 7.8 includes other temporary placement cohorts outside of EOTAS.	Amber Red

8. Number of all CYP with SEN in local area not in education, employment or training

	Q1	Q2	Q3	Q4
Under 5	0	0		
Age 5 to 10	0	0		
Age 11 to 15	0	0		
Age 16 to 19	24	28		
Age 20 to 25	0	0		
Total number by age group	**24**	**28**	**0**	**0**

Assumptions	Data Confidence RAG
Data for year groups 12 -13 only. Data for 20-5 is not yet robust. LA working on creating a more robust data collection.	Red

9. Number of all EHC Needs Assessment requests by CYP age

	Q1	Q2	Q3	Q4
Under 5	15	6		
Age 5 to 10	48	42		
Age 11 to 15	34	24		
Age 16 to 19	7	6		
Age 20 to 25	2	0		
Total number by age group	**106**	**78**	**0**	**0**

Assumptions	Data Confidence RAG
	Green

10. Number of all EHC Needs Assessments by CYP age

	Q1	Q2	Q3	Q4
Under 5	16	12		
Age 5 to 10	38	24		
Age 11 to 15	26	24		
Age 16 to 19	2	4		
Age 20 to 25	0	0		
Total number by age group	**0**	**0**	**0**	**0**

Assumptions	Data Confidence RAG
Unable to add a total to Q1 as it's a protected sheet.	Green

11. Number of all EHC Needs Assessments that result in an EHCP				
	Q1	Q2	Q3	Q4
Under 5	15	12		
Age 5 to 10	35	21		
Age 11 to 15	19	18		
Age 16 to 19	2	2		
Age 20 to 25	0	0		
Total number by age group	**71**	**53**	**0**	**0**

Assumptions	Data Confidence RAG
	Green

12. Number of all new EHCPs issued				
	Q1	Q2	Q3	Q4
Under 5	14	16		
Age 5 to 10	39	31		
Age 11 to 15	28	20		
Age 16 to 19	3	1		
Age 20 to 25	0	0		
Total number by age group	**84**	**68**	**0**	**0**

Assumptions	Data Confidence RAG
	Green

Health, social care, therapy services and care summary

13. Professional workforce FTE				
	Q1	Q2	Q3	Q4
Speech and Language Therapists (SaLTs)	11.82	12.28		
Speech and Language Therapists (SaLTs) support workers	3.20	2.60		
Occupational Therapists (OTs)	12.77	12.84		
Occupational Therapists (OTs) support workers	1.64	1.64		
Educational Psychologists (EPs)	8.15	9.15		
Educational Psychologists (EPs) support workers	0.00	0.00		
Specialist teachers	0.00	0.00		
Speech and Language Therapist advanced practitioner	0.00	0.00		
Total	**38**	**39**	**0**	**0**

Assumptions	Data Confidence RAG
Actual included	No Input

14. Number of mainstream settings supported by SaLTs, OT's, EP's and respective support workers	
	14.1 Number of mainstream settings supported by EAH Speech and Language Therapists and support workers

	Q1	Q2	Q3	Q4
Early years	0.00	0.00		
Primary	0.00	0.00		
Secondary	0.00	0.00		
All through - 5 to 16	0.00	0.00		
Post 16	0.00	0.00		
Total	**0**	**0**	**0**	**0**

14.2 Number of mainstream settings supported by EAH Occupational Therapists (OTs) and support workers

	Q1	Q2	Q3	Q4
Early years	0.00	0.00		
Primary	0.00	0.00		
Secondary	0.00	0.00		
All through - 5 to 16	0.00	0.00		
Post 16	0.00	0.00		
Total	**0**	**0**	**0**	**0**

14.3 Number of mainstream settings supported by EAH Educational Psychologists (EPs) and support workers

	Q1	Q2	Q3	Q4
Early years	0.00	0.00		
Primary	0.00	0.00		
Secondary	0.00	0.00		
All through - 5 to 16	0.00	0.00		
Post 16	0.00	0.00		
Total	**0**	**0**	**0**	**0**

14.4 Number of mainstream settings supported by Specialist Teachers

	Q1	Q2	Q3	Q4
Early years	0.00	0.00		
Primary	0.00	0.00		
Secondary	0.00	0.00		
All through - 5 to 16	0.00	0.00		
Post 16	0.00	0.00		
Total	**0**	**0**	**0**	**0**

Assumptions	Data Confidence RAG
	No Input

15. Total planned LA and ICB spend on professionals (£000)

	Initial forecast for 2026-27	2nd quarter revision	3rd quarter revision	4th quarter revision
Speech and Language Therapists (SaLTs)	£662.000	£640.807	£0.000	£0.000
Speech and Language Therapists (SaLTs) support workers	£180.000	£180.495	£0.000	£0.000
Occupational Therapists (OTs)	£489.517	£737.188	£0.000	£0.000
Occupational Therapists (OTs) support workers	£64.620	£64.620	£0.000	£0.000
Educational Psychologists (EPs)	£990.900	£891.380	£0.000	£0.000
Educational Psychologists (EPs) support workers	£0.000	£0.000	£0.000	£0.000
Specialist teachers	£0.000	£286.543	£0.000	£0.000
Total	**£2,387.037**	**£2,801.033**	**£0.000**	**£0.000**

	15.1 Total planned LA spend on professionals (£000)			
	Initial forecast for 2026-27	2nd quarter revision	3rd quarter revision	4th quarter revision
Speech and Language Therapists (SaLTs)	£0.000	£0.000		
Speech and Language Therapists (SaLTs) support workers	£0.000	£0.000		
Occupational Therapists (OTs)	£0.000	£0.000		
Occupational Therapists (OTs) support workers	£0.000	£0.000		
Educational Psychologists (EPs)	£990.900	£891.380		
Educational Psychologists (EPs) and support workers	£0.000	£0.000		
Specialist teachers	£0.000	£286.543		
Total	**£990.900**	**£1,177.923**	**£0.000**	**£0.000**

	15.2 Total planned ICB spend on professionals (£000)			
	Initial forecast for 2026-27	2nd quarter revision	3rd quarter revision	4th quarter revision
Speech and Language Therapists (SaLTs)	£662.000	£640.807		
Speech and Language Therapists (SaLTs) support workers	£180.000	£180.495		
Occupational Therapists (OTs)	£489.517	£737.188		
Occupational Therapists (OTs) support workers	£64.620	£64.620		
Total	**£1,396.137**	**£1,623.110**	**£0.000**	**£0.000**

Assumptions	Data Confidence RAG
The ICB and LA have a section 75 agreement in place, to avoid duplication and double counting we have included the health professionals within the ICB spend. The Specialist Teacher 2nd quarter revision is based on contractual spend for EAH.	**Amber Green**

16. Number of CYP without EHCP or specialist placement supported by specialists and support workers

	16.1 Number of CYP without EHCP or specialist placement supported by Speech & Language Specialists and support workers			
	Q1	Q2	Q3	Q4
Under 5	24	25		
Age 5 to 10	70	70		
Age 11 to 15	12	12		
Age 16 to 19	3	3		
Age 20 to 25	0	0		
Total	109	110	0	0

	16.2 Number of CYP without EHCP or specialist placement supported by Occupational Therapists and support workers			
	Q1	Q2	Q3	Q4
Under 5	4	4		
Age 5 to 10	15	15		
Age 11 to 15	7	7		
Age 16 to 19	3	3		
Age 20 to 25	0	0		
Total	29	29	0	0

	15.3 Number of CYP without EHCP or specialist placement supported by Educational Psychologists and support workers			
	Q1	Q2	Q3	Q4
Under 5	0	9		
Age 5 to 10	0	55		
Age 11 to 15	0	12		

Age 16 to 19	0	0		
Age 20 to 25	0	0		
Total	0	76	0	0

Assumptions	Data Confidence RAG
This data is not currently recorded as standard within the Electronic Patient Record System used by CFHD/DPT. These figures are based on current open caseloads for service. EP data submitted under Quarter 2 includes CYP involvement during both Quarter 1 and 2. During this period, reporting was such that it wasn't possible to attribute the involvement to one three-month period. We have put in place measures to address this going forward	**Red**

Tribunal appeals

17. Rate of Tribunal appeals				
	Q1	**Q2**	**Q3**	**Q4**
Appeal lodged	45.00	42.00		

Assumptions	Data Confidence RAG
Actual appeals included.	**Green**

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