

ROTHERHAM SCHOOLS' FORUM

Date and Time:- Friday 12 September 2025 at 8.30 a.m.

Venue:- Rockingham Professional Development Centre, Roughwood Road, Rotherham. S61 4HY

The items which will be discussed are described on the agenda below and there are reports attached which give more details.

AGENDA

1. Welcome and Introductions

Welcome by the Chair and introductions by all Forum Members present.

2. Apologies for Absence

To receive apologies from any Forum Member who are unable to attend the meeting.

3. Declarations of Interest

To invite Forum Members to declare any interests they may have on agenda items to be considered at this meeting, to confirm the nature of those interests and whether they intend to leave the meeting for the consideration of the item.

4. Minutes of the Previous Meeting (Pages 5 - 10)

Recommendation: To receive and approve the minutes of the previous meeting held on 13th June 2025.

5. Matters Arising from Previous Minutes

To consider and report on any matters arising from the previous minutes.

6. Membership and Constitution of the Rotherham Schools Forum (Standing Item)

To consider any updates or amendments to the membership of the Schools Forum.

7. Dedicated Schools Grant / Schools Budget Update 2025/26 (Pages 11 - 14)

Louise Keith, Principal Finance Officer and Joshua Amahwe, Head of Finance to report.

Recommendations:

1. That the Schools Forum note the latest DSG funding for schools for the 2025/26 financial year.
2. That the Schools Forum note the forecast positions of Rotherham's maintained schools and the centrally retained DSG budgets for the year.

8. Schools Budget Planning & Funding 2026-27 (Pages 15 - 19)

Louise Keith, Principal Finance Officer and Joshua Amahwe, Head of Finance to report.

Recommendations:

1. That the Schools Forum note the proposed funding framework and structure of Rotherham's local funding formulae for 2026-27.
2. That Schools Forum note the schools budget planning key dates for determining the schools block funding for 2026-27.

9. Exclusion and Suspensions Annual Report (Pages 21 - 24)

Sarah Whitby to report.

Recommendation: That Members of Schools Forum receive the report and note the contents of the update.

10. Part Time Timetables Annual Report (Pages 25 - 27)

Sarah Whitby to report.

Recommendation: That Members of Schools Forum receive the report and note the contents of the update.

11. Education, Health and Care Plans (EHCPs) Annual Update (Pages 29 - 37)

Cary-Anne Sykes to report.

Recommendation: That Members of Schools Forum receive the report and note the contents of the update.

12. Schools Forum Forward Plan

To consider the attached Forward Plan of agenda items and receive any updates.

13. Any Other Business

To receive any other items of urgent business.

**The next meeting of the Rotherham Schools Forum will
be held on Friday 5 December 2025
commencing at 8.30 a.m.
in Rockingham Professional Development Centre.**



John Edwards,
Chief Executive.

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**ROTHERHAM SCHOOLS' FORUM
FRIDAY 13 JUNE 2025**

Present:-

Mark Windle – Badsley Primary (Primary Maintained) (in the Chair)
John Barnett – Thorogate Junior and Infant (Primary Maintained)
Carol Brookes – Wales High School (Academy)
Chris Eccles – Oakwood High School (Academy)
David Horrigan – Maltby Learning Trust (Primary Academy)
Lee Morritt – Aspire
Colin Price – NEU Representative
Mark Ryan – RNN Group
Sascha Schofield –Governor Representative (Special School Academy)
Karen Smith - Nexus MAT (Special Academy)
Cary-Anne Sykes – Head of Service (SEND)
Nevine Towers - Head of Business and Operations (Primary Academy)

Joshua Amahwe – Head of Finance, CYPS
Mark Cummins, SEND Project Lead, CYPS
Niall Devlin – Assistant Director, Education and Inclusion
Angela Kemp – Secretary to the Rotherham Schools Forum

Apologies were received from:-

Kate Blyth – Rawmarsh Ryecroft Infants (Maintained)
Dr Sipra Deb - Wickersley Nursery (PVI Nursery)
Paul Higginbottom – Swinton Queen Primary (Academy)
Lisa McCall – Wales High School (Academy)
Lynsey Hadfield - Executive Head, Arnold Nursery (Maintained)
Louise Keith – Principal Finance Officer, CYPS
Steve Scott – Happy Kids (PVI Nursery)
Pam Ward – Head of Service, Education, CYPS
Sarah Whitby – Head of Service – Access to Education

1. WELCOME AND INTRODUCTIONS

The Chair welcomed everyone to today's meeting and introductions were made.

The Chair proceeded to share the very sad news that Alan Richards, a long-standing governor representative on the Rotherham Schools Forum had passed away. The Forum paid tribute to Alan's service and contributions to the Forum. The Forums' thoughts were with Alan's family members and the wider school community.

2. DECLARATIONS OF INTEREST

No declarations of interest were made.

3. MINUTES OF THE PREVIOUS MEETING

Consideration was given to the minutes of the previous meeting held on Friday 28th March 2025.

Resolved:

- That the minutes of the meeting held on 28 March 2025 be approved as a correct record for signature by the Chair.

4. MATTERS ARISING FROM PREVIOUS MINUTES

There were no matters arising during the consideration of the previous meeting minutes.

5. MEMBERSHIP AND CONSTITUTION OF THE ROTHERHAM SCHOOLS FORUM (STANDING ITEM)

Consideration was given to the membership and constitution of the Schools' Forum and suggested changes were put forward for the Forum's approval.

Resolved:

- That the appointment of Councillor Simon Currie as a Primary School Governor representative for a term of 3 years be agreed.
- That the appointment of Mehdi Najefi as a Primary School Governor representative for a term of 3 years be agreed.

6. SCHOOLS BUDGET - 2024-25 OUTTURN AND 2025-26 LATEST UPDATE

The Head of Finance (CYPS) presented a report on the school's budget 2024/25 outturn position and the latest position of the school's budget for 2025/26 and commented on the following:

- The breakdown of the DSG funding blocks and the total DSG funding allocated for 2024/25 together with the latest confirmed DSG funding allocations for 2025/26.
- The carry forward of school balances to support the budget.
- The final outturn position for all Rotherham maintained schools (including nurseries and PRU) for 2024/25.
- The action being taken to assess schools who had significant surplus balances at year end.
- The cost pressures within the High Needs Block which was reflective of the increased pressures within the SEND system and how the position compared with the assumptions outlined in the Safety Valve Agreement.
- The increased funding received at year end for the expansion of

childcare and nursery entitlement which had contributed to the underspend position on the Other Central DSG budgets.

- The closing deficit position of the DSG reserve account for 2024/25 which had been rolled forward into 2025/26.
- The four schools that had submitted deficit budgets for 2025/26 and the ongoing dialogue that was taking place with those schools to ensure budget recovery plans were in place.
- The continuing cost pressures and associated financial risks facing schools in 2025/26 which related to Teachers pay award, NJC pay offer, increase in employers NI contributions, inflationary pressures and falling pupil numbers.

Discussion ensued and comments were raised by members of the Forum which reflected on the changing landscape of provision in schools and the associated affordability of provision in the future, including cost pressures associated with meeting increasing SEND need in schools and the suggestion that this should also be included as a financial risk facing schools.

Resolved:

- **That the Schools Forum noted the final reported position for Local Authority (LA) maintained schools and the centrally retained Dedicated Schools Grant (DSG) budgets for 2024/25.**
- **That the Schools Forum noted the latest budget projections of Rotherham's maintained schools for 2025/26 and the identified financial risks against the schools DSG budgets.**

7. SCHEME FOR FINANCING SCHOOLS UPDATE

Consideration was given to the report presented by the Head of Finance (CYPS), which set out the main amendments required to the Scheme for Financing Schools in order to bring it in line with the Department for Education's (DfE) latest version, updated as of 27th March, 2025.

Discussion emerged in relation to the notice period stipulated should schools intend to seek alternative insurance arrangements and whether that notice period was reciprocated by the LA should alternative insurance arrangements be sought by the LA. The Head of Finance agreed to follow this up and report back.

Resolved:

- **That the Schools Forum noted the updates to the Scheme for Financing Schools sections highlighted in yellow.**
- **That the Schools Forum noted the Department for Education's (DfE) latest version, updated 27th March 2025.**

- **That the Schools Forum agreed for the Updated Scheme for Financing Schools be disseminated to schools.**

8. HIGH NEEDS BUDGET AND FUNDING ARRANGEMENTS 2025/26

Joshua Amahwe, Head of Finance (CYPS) presented the funding arrangements of the High Needs budget block and the approach that had been taken to determine the 2025/26 budget and referred to the following:

- The confirmed high needs block funding for 2025/26 which represented an increase of £4 million compared to the final 2024/25 position and included the 0.5% funding transferred from schools to the high needs block as previously agreed by Schools' Forum earlier this year.
- The High Needs funding framework being driven primarily by the Department for Education with there being no significant changes to the structure of the funding system from previous years.
- The context for budget planning for 2025/26 which was one of increasing demand and financial pressures.
- Prevailing cost pressures within the High Needs Block amid an increase in the number of local children with an education, health and care plan that required specialist support and independent specialist placements.
- The proposed rates for specialist places and the top-up funding required across the sector during the next financial year
- The funding uplift provided for local special schools which the Forum was encouraged to recognise was above the recommended minimum funding guarantee (MFG) of 0%.
- The forecasted accumulated DSG deficit which included a deficit brought forward from 2024/25 together with the planned in year deficit for 2025/26 which was adrift of the target assumed in the Safety Valve Agreement and continued to be closely monitored.

Discussion ensued around the funding allocation for special school places and concerns were shared that this had remained unchanged for several years and did not reflect the substantial changes seen over the past decade within this area of provision. In addition, concern was also expressed that the uplift applied to meeting the needs of EHCP pupils did not appear realistic when factoring in associated staffing costs, pay awards and employer NI contributions.

Discussion continued to focus upon the financial challenges facing schools, how Rotherham's position compared with other Local Authorities and the factors that continued to impact the High Needs Block which reflected the SEND system across the country.

Forum Members were advised that a decision with regards to the ongoing management of the Safety Valve deficit was still awaited and expected to be shared in the Autumn.

Resolved:

- That the Schools Forum noted the high needs funding settlement for 2025/26.
- That the Schools Forum noted the proposed funding requirements for 2025/26, particularly in relation to the number of commissioned specialist places and the payment of top up funding to mainstream, special schools/academies and other providers and settings.

9. SEND SUFFICIENCY STRATEGY - ANNUAL UPDATE

Mark Cummins, SEND Transformation Project Lead presented an update in relation to Rotherham's SEND Sufficiency progress and future planning arrangements and commented on the following:

- The current SEND Sufficiency Strategy which had formed part of the Local Authority's Safety Valve Agreement that was due to run until the end of 2025/26.
- The development of 100 new resource provision placements along with the implementation of a local accessibility capital funding framework which had created an increase in in-borough SEND capacity that was now open and moving towards capacity across all primary and secondary settings.
- The latest numbers of mainstream accessibility capital projects which had been funded to provided improved access to curriculum and the creation of additional provision across special school settings.
- The current number of active EHCPs.
- Current Place Planning arrangements which had shown a continued growth of special school placements and an increase in the numbers of young people educated in mainstream settings which had reduced the number of independent placements required.
- Rotherham's latest comparative data to the national position as at 31st March 2025 which was set out in detail within the report. A further updated position was expected to be available towards the end of June 2025.
- The development of a new SEND Sufficiency Strategy post Safety Valve period which was now underway and the engagement work taking place with key stakeholders within the SEND system to understand current pressures and key areas of focus.
- Future place requirement projections based on a 'if nothing changes' basis which were detailed in paragraph 1.11 of the report.
- The approval process and timescales for implementing the new SEND Sufficiency Strategy which was expected to be from April 2026.

Discussion ensued in relation to the Independent Specialist Provision position and the work that was ongoing to improve the understanding of why there was more Post 16 / FE specialist provision required in

Rotherham compared to the national position.

Resolved:

That the Schools Forum received and noted the update provided.

10. SCHOOLS FORUM FORWARD PLAN

The current version of the Forward Plan was reviewed, and members of the Forum were invited to add any relevant issues which they felt should form the basis of a future report.

Resolved:

- **That the Forward Plan be noted and that any additions to the Forward Plan be submitted to the Secretary of the Forum for inclusion.**

11. ANY OTHER BUSINESS

There were no other urgent business items raised.

The Chair of the Forum concluded business and thanked everyone for their attendance and contributions.

REPORT FOR SCHOOLS FORUM

1.	Date of meeting:	12th September 2025
2.	Title:	Schools Budgets 2025-26 – Latest Position (Sept)
3.	Directorate:	Finance and Customer Services

1. PURPOSE OF REPORT

- 1.1 To provide an update on the schools funding for 2025/26 and the latest monitoring position for the Local Authority maintained schools budgets and centrally retained Dedicated Schools Grants (DSG) budgets.

2. RECOMMENDATION(S)

- 2.1 It is recommended that the schools forum note the latest DSG funding for schools for the 2025/26 financial year.
- 2.2 That Schools Forum note the forecast positions of Rotherham's maintained schools and the centrally retained DSG budgets for the year.

3. LATEST DEDICATED SCHOOLS GRANT 2025/26

- 3.1 The latest confirmed DSG funding allocation for Rotherham for 2025-26 is £121.076m, which includes a total of £28.744m in Schools Block funding for the LA maintained schools.

	Mar 2025 Allocation (£m)	Jul 2025 Allocation (£m)	Change (£m)
Schools Block	29.584	28.744	-0.840
Central Schools Services Block	1.794	1.794	-
Early Years Block	42.202	42.387	0.185
High Needs Block	48.031	48.151	0.120
Total DSG	121.611	121.076	-0.535

- 3.2 The latest allocation includes the following changes since the last position reported to School Forum in June 2025:

- **Schools Block** – A reduction of £840k due to the academisation of a maintained primary school. There is no impact on existing maintained schools overall funding position.

- **Early Years Block** – An increase of £185k attributable to an increase in numbers eligible for universal entitlement for 3 & 4 year olds (£271k) and 2 year old disadvantage entitlement (£6k) partially offset by a reduction in numbers for the additional 15 hours entitlement for eligible working parents of 3 & 4 year olds (£92k).
- **High Needs Block** – the increase of £120k represents a positive funding adjustment made by DfE to reflect actual number of pupils in receipt of high needs funding that are placed in specialist schools within and outside the borough (referred to as the import/export adjustment).

4. UPDATE ON CENTRALLY RETAINED DSG BUDGETS

- 4.1 These relate to budgets for schools' expenditure that are retained centrally and where it is cost effective to be managed by the council. It comprises in the main, elements of the schools' block, early years, and the high needs DSG blocks. The table below summarises the latest forecast position across all the centrally retained DSG budgets.

	Budget 2025/26 (£m)	July 2025 Forecast (£m)	Forecast Variance (£m)
Schools Block	0.362	0.362	-
Central Schools Services Block	1.794	1.794	-
Early Years Block	42.110	42.110	-
High Needs Block	49.329	52.412	3.083
Total DSG	93.595	96.678	3.083

Schools Block

- 4.2 The centrally retained schools block budget of £362k represents the amount de-delegated from maintained schools' funding and managed centrally by the council. Overall the de-delegated budgets - Schools in Financial Difficulty (SIFD), School Improvement & Trade Union Facility Time - are all showing a forecast balanced position for 2025-26. The LA has committed to supporting two schools using the SIFD funding for 2025-26 and it is likely that additional commitments will need to be made as schools continue to face rising costs alongside a drop in pupil numbers.

Central Schools Services Block (CSSB)

- 4.3 The DSG allocation for CSSB remains unchanged at £1.794m for the year. The CSSB DSG funding is used to support ongoing commitments such as SACRE, Teachers Pensions costs, Schools Forum admin costs, Schools Admissions and Copyright Licensing. A balanced budget position is currently forecast for the year across the CSSB budgets.

Early Years Block

- 4.4 Aa balance position is currently forecast across the early years block, with the brought forward balance from 2024/25 to be utilised to fund the Inclusion Support Grant (Tier 3) funding commitments. At this stage it is assumed that participation numbers for the 2-year-olds and 3 & 4 year old childcare entitlement (including the expansion) will be in line with budget projections.

High Needs Block Budgets

- 4.5 A cost pressure of £3.083m is currently forecast for the High Needs block and mainly relates to SEND provision and support. The latest forecast is an increase compared to the planned approved deficit for 2025/26 of £2.5m. The forecast deficit is mainly due to the following; inflationary costs; increase in EHCP pupils in mainstream and special schools; and continuing placements in out of authority independent settings (although it should be noted that placements in out of borough schools have stabilised). Work is ongoing through the SEND sufficiency programme to create more local places and provision aimed at further reducing expensive out of authority specialist placements.
- 4.6 It should be noted that DSG deficits would need to be managed within allocated DSG funds, as LAs are not allowed to cover DSG deficits using their General Fund resources. The Safety Valve Programme (inclusive of the SEND Sufficiency Strategy) is the framework for managing the demand challenges and cost pressures in the high needs block. It details the actions / measures to be implemented in 2025/26 and beyond to achieve the planned deficit.

Overall DSG Reserves forecast position

- 4.7 An overall deficit is currently anticipated in the DSG reserves (£3.6m) in 2025/26 compared to a balanced position assumed in the signed Safety Valve Agreement. It should be noted that 2025/26 represents the last year of the Safety Valve Agreement / programme. The forecast deficit in the DSG reserves in 2025/26 is due to the cumulative impact of demand challenges and cost pressures facing the SEND system over recent years.
- 4.8 The current statutory deficit protections has been extended by the Government for another 2 years to 31 March 2028 (originally planned to cease by the end of the current year). This would now provide flexibility for the Council to carry forward the 2025/26 year end DSG reserve deficit of £3.6m. DfE has asked the council to put forward a DSG plan covering the next 5 years. This will show the financial trajectory (costs and funding) beyond the SV agreement and whether financial sustainability can be achieved in the medium term.

5. UPDATE ON DELEGATED SCHOOLS BUDGETS

- 5.1 The forecast net balances as reported by 24 LA maintained primary, secondary and special schools and nurseries in their July budget monitoring statements are shown below.

	2024/25 Outturn (£m)	2025/26 Original Budget (£m)	2025/26 Latest forecast (£m)	Variance (£m)
Nursery	0.806	0.666	0.546	-0.120
Primary	1.223	0.790	0.883	0.093
Secondary	0.509	0.126	0.138	0.012
PRU	-0.182	-0.358	-0.378	-0.020
	2.356	1.224	1.189	-0.035

5.2 Main highlights from the above:

- The July forecast positions indicate a decrease in surplus balances of £1.167m compared to the 2024/25 final outturn position. This could be attributed to the increased financial pressures faced by schools.
- When compared to the original budget, the July monitoring position shows a net decrease in reported balances of £35k. Nursery schools balances have decreased by £120k and the PRU by £20k. This is partially offset by an increase of £93k across primary schools and £12k in secondary.
- The latest position includes a total of 3 schools operating under a licensed deficit for 2025/26, of which 2 schools will receive funding through the Schools in Financial Difficulty (DSG) fund. All schools in deficit have budget recovery plans in place to return their budgets to a sustainable position with an agreed timeframe. The following detailed the latest position for those schools with deficit balances:

	Original budget	July 2025 position	Comments
Aston Fence J&I	-£0.034	-£0.034	
Wales Primary	-£0.045	-£0.010	£20k SIFD funding
Rawmarsh Ryecroft	-£0.026	-£0.006	£12k SIFD funding

- Local Authority maintained schools will submit their 2025/26 revised budgets to the council on 17th October 2025.

NAMES & CONTACT DETAILS

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REPORT FOR SCHOOLS FORUM

1.	Date of meeting:	12 th September 2025
2.	Title:	Schools Budget Planning & Funding 2026-27
3.	Directorate:	Finance and Customer Services

1. PURPOSE OF REPORT

- 1.1 The purpose of this report is to inform the Forum of the schools budget planning and funding arrangements for 2026/27, specifically in relation to the schools funding block and the funding formula that will form the basis for determining individual schools budgets.
- 1.2 Dedicated School Grant (DSG) funding for 2026/27 will be provided in 4 funding blocks, namely schools, early years, high needs and central schools services blocks. This report deals with the distribution of DSG funding within the schools block.

2. RECOMMENDATION(S)

- 2.1 That the Schools Forum note the proposed funding framework and structure of Rotherham's local funding formulae for 2026-27.
- 2.2 That Schools Forum note the schools budget planning key dates for determining the schools block funding for 2026-27.

3. BACKGROUND

- 3.1 The updated Schools National Funding Formula (NFF) summary policy document for 2026/27 was published by the Department for Education (DfE) on 4 August 2025. It outlines key elements of the schools national funding formula (NFF) to support budget planning by local authorities, ahead of the publication of the NFF allocations for 2026/27.
- 3.2 The following summarises the key elements of the policy guidance including the funding framework, the structure of the schools NFF for 2026/27, the funding factors that will be used and how they will operate, along with requirements on local authorities and schools.

4. FUNDING FRAMEWORK FOR SCHOOLS 2026/27

- 4.1 The budget for maintained schools in 2026/27 will consist of funding from the following funding streams:
 - Core school funding – via the National Funding Formula (NFF). NB schools would also receive funding from other DSG funding blocks namely, early years and high needs.

- Pupil Premium Grant (PPG) funding
- Other grant funding e.g. Universal Infant Free School Meals; PE & sports premium grant; etc.

- 4.2 There are no significant changes to the 2026/27 funding framework for schools. The Government will continue to allocate core funding to schools using the national funding formula.
- 4.3 The 2026/27 schools NFF will use the same funding factors as the current year, namely: basic entitlement; additional needs factors (e.g. deprivation, low prior attainment, English as an additional language and mobility); and school led factors (e.g. lump sum, sparsity, growth and premises related factors – rates, PFI, split sites).
- 4.4 The NFF will continue to provide funding protections to guarantee a minimum amount of funding for every pupil. This is to ensure that a school's funding is protected from year-on-year formula changes and preventing sudden excessive drops. The above individual NFF factors for 2026/27 will operate in the same way as in 2025/26.
- 4.5 In June 2025, the government announced that, starting from September 2026, free school meals (FSM) will be extended to all children in households receiving Universal Credit. For 2026/27, no changes are proposed to the schools NFF to allocate funding for this expansion of FSM. Instead, the funding needed for the FSM expansion will be provided through a separate grant. Details of this would be published in due course.

5. ROLLING IN PREVIOUS GRANTS

- 5.1 The Schools Budget Support Grant (SBSG) and National Insurance Contributions (NICs) grant will be rolled into the notional NFF for 2026/27. This follows a very similar approach to previous grants in 2025/26. The SBSG and NICs grant rates that would be rolled into or added to the funding factors in the notional NFF have been published. For the SBSG, this will represent the full year equivalent amount.
- 5.2 The rolling in of these grants into the schools' notional NFF allocations will affect the core budgets that maintained schools will receive from April 2026

6. ROTHERHAM'S LOCAL FUNDING FORMULA 2026/27

- 6.1 Local authorities will continue to be responsible for maintaining the local funding formulae for mainstream schools in their area for 2026/27. The funding allocated to maintained schools and academies in Rotherham will continue to be determined by RMBC's local schools formulae.
- 6.2 The following are requirements placed on local authorities in respect of their local funding formulae for 2026/27:
 - Local authorities were required to bring their own formulae closer to the schools NFF from 2023/24. This transition will continue in 2026/27.
 - Local authorities must continue to move their local formula factor values at least a further 10% closer to the corresponding NFF values, except where local formulae are already 'mirroring' the NFF. These criteria do not apply to rates, PFI or exceptional circumstances factors.

- As in previous years, local factor values within 2.5% of the respective NFF values will be taken as ‘mirroring’ the NFF. Changes have been made to Rotherham’s local funding formula to gradually align all factors to the NFF since its introduction on 2018/19. Currently, Rotherham’s local funding formula is deemed to be ‘mirroring’ the NFF – as most of the funding factor values are either aligned to NFF values or within 2.5% of the NFF values.
- For 2026/27, there are 16 funding factors, most of which are mandatory and therefore must be included in local funding formulae. These mandatory factors remain unchanged from 2025/26.
- The recommended minimum funding guarantee (MFG) rate and other technical changes to the funding factors within local authorities funding formulae would be confirmed when NFF allocations are published.

7. DSG FUNDING BLOCK TRANSFERS

- 7.1 As in previous years, local authorities continue to be able to transfer up to 0.5% of their schools block to other blocks of the DSG, with schools forum approval, without submitting a disapplication request. A disapplication request to the DfE is required for any transfers above 0.5%, or any amount without schools forum approval; this applies to any transfers, even if an amount was agreed in previous years. Local authorities with safety valve agreements will have this managed as part of safety valve monitoring.

8. CONSULTATION ON FORMULA CHANGES & BLOCK TRANSFERS

- 8.1 Local authorities must consult with all maintained schools and academies in their area, as well as with their schools forums, about any proposed changes to their local funding formulae, including the principles adopted and any funding transfer from the schools block to other funding blocks e.g. the high needs block.
- 8.2 Any consultation should include the modelling of the impact of proposed formula changes on individual schools and academies and these should be communicated to all schools affected by the changes.

9. SCHOOLS BUDGET PLANNING TIMELINES

- 9.1 In recent years the timelines for local authorities to review their local formulae and carry out consultation (with indicative schools allocations) have been squeezed. This is due to the delay by the Government in publishing NFF allocations and issuing the funding model to LAs to assist with modelling.
- 9.2 The following are the expected timelines for the schools budget / planning process:

Timeline / Dates	Action / Activity
Autumn 2025	DfE to publish the NFF allocations and supporting documentation (including operational guidance)
Early November 2025	Consultation document issued to schools / academies with indicative allocations – responses sought on proposed formula changes and funding block transfer

17 November 2025	Local authorities to submit disapplication requests to the DfE to seek approval for transferring funds (above 0.5%) from the schools block to the high needs budget
5 December 2025	Schools Forum meeting – outcomes of the consultation presented and to seek approval of funding transfer proposal
Mid December 2025	The Authority Proforma Tool (APT) will be released by the DfE for local authority submissions. The APT will be populated with schools block data, primarily drawn from the autumn 2025 schools census
December 2025	Local authorities DSG allocations using the NFF will be published by DfE
16 January 2026	School Forum meeting - budget reports (schools block; early years block & central school services block) presented at the meeting
Late January 2026	Local authorities to submit their Authority Proforma Tool (APT) for 2026/27 to DfE for compliance checks and approval
28 February 2026	Confirmation of schools budget shares to mainstream maintained schools

10. NAMES & CONTACT DETAILS

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<div>BRIEFING</div>	TO:	Schools' Forum
	DATE:	12 th September 2025
	LEAD OFFICER:	Kelly Robinson Strategic Lead for Inclusion and Alternative Provision
	TITLE:	Exclusions and Suspensions Academic Year 2024-2025
1. Background		
1.1	To the end of the academic year 2024-25, in total, there were 84 permanent exclusions through all Rotherham Schools compared with 93 permanent exclusions recorded for 2023-24. This reduction is testament to the collective dedication to inclusion across schools and multi-agency partners.	
1.2	The strong commitment from headteachers, service leads and professionals across Rotherham remains. Multiagency, collective working is a key focus in Rotherham to further reduce exclusions and suspensions. There is support through inclusion panels and referral to services from; Exclusions team, Fair Access team, Elective Home Education team, Attendance team, Early Help, Education Psychology, Education Health and Care Team, Outreach, Specialist Inclusion, Virtual School and Youth Justice Service to ensure pupils are able to maintain and/or reintegrate to mainstream schools as soon as appropriate and possible. Systems are in place to support schools in working together to further develop proactive pathways to ensure pupils thrive academically, personally, emotionally and socially within their own communities.	
2. Key Issues		
2.1	<div>Centrally published data for full academic year 2023-2024</div> <div>Suspensions and permanent exclusions in England, Academic year 2023/24 - Explore education statistics - GOV.UK</div> <div>Centrally published exclusions data is a year in lag.</div>	
2.1.1	<div>Permanent Exclusion</div> <div>Nationally in 2023-24 there was a 16% increase in PEX from 2022-23 Rotherham permanent exclusions to conclusion 2023-24 represents an increase of 22% from 2022-23</div> <div>Suspension</div> <div>Nationally in 2023-24 there was a 21% increase in suspensions from 2022/23 Rotherham suspensions showed a 7% increase from 2022/23</div>	

		2023/24		2022/23	
		Suspension (rate)	Permanent exclusions (rate)	Suspension (rate)	Permanent exclusions (rate)
England		11.31	0.13	9.33	0.11
Yorkshire and The Humber	Yorkshire and The Humber	16.50	0.14	13.54	0.12
	Rotherham	12.78	0.15	11.88	0.14

Analysis on Permanent Exclusions data for 2023-24 and 2024-25

Please note that all data below covering Permanent Exclusions discounts any exclusions that have been withdrawn or reinstated.

Permanent Exclusions Summary		Autumn Term	Spring Term	Summer Term	Overall
Primary	2023-24	5	4	1	10
	2024-25	3	1	2	6
Secondary	2023-24	39	26	19	84
	2024-25	31	24	23	78
All	2023-24	44	30	20	94
	2024-25	34	25	25	84

For all Schools, permanent exclusions overall shows a 10.6% decrease for the academic 2024-25 year against last years position 2023-24

PEX instances are most prevalent in autumn term and transition support from all services, including Aspire Outreach, has been enhanced to further support this trend.

2.1.2

The table below shows the permanent exclusion reasons for 2024-25 academic year. 56.4% of all exclusions in 2024-25 were given as a result of persistent disruption, with a rising number for verbal abuse / threat to adult at 15.3% and 11.1% for physical assault against pupils.

Exclusion Reasons	PERM Exclusions	No of Suspensions	% of all suspension and exclusions
Verbal Abuse/Threat - Adult	17	1059	15.3%
Physical Assault against Pupil	15	770	11.1%
Physical Assault against Adult	13	355	5.2%
Drug & Alcohol Related	12	168	2.6%
Persistent/general disruptive	10	3968	56.4%
Use/Threat of Offensive Weapon	7	128	1.9%
Verbal Abuse/Threat - Pupil	3	148	2.1%
Inappropriate use of Social Media	3	27	0.4%
Sexual Misconduct	2	48	0.7%
Racist Abuse	1	70	1.0%
Damage to Property	1	137	2.0%
Abuse against SO & GI (LGBT+)		32	0.5%
Bullying		35	0.5%
Theft		18	0.3%

2.1.3 From the 84 Permanent Exclusions in 2024-25, 73% of pupils excluded are males and 27% females.

2.1.4 Focus on Year groups and Key Stages evidences that 58.3% of PEX covering 2024-25 are for pupils in KS3. 21 pupils in Year 9, followed by 22 pupils in Year 10.

Year and Key Stages	2023-2024	2024-2025	% total PEX 2024 -2025
	Full Academic Year	Full Academic Year	
Key Stage 1	2	1	1.2%
Key Stage 2	7	5	6.0%
Year 7	15	16	
Year 8	11	12	
Year 9	20	21	
Key Stage 3	46	49	58.3%
Year 10	32	22	
Year 11	6	7	
Key Stage 4	38	29	34.5%

2.1.5 At the point of their permanent exclusion in 2024-25, 68% of pupils have a SEND need identified with 59% of these being pupils recorded as SEN Support. This compares to 23.5% of the whole Rotherham school age population who are identified with a SEND need (SEN support or EHCP).

	No SEND	SEND Support	EHCP	SEND NEEDS
Primary	1	1	4	5
Secondary	26	48	4	52
Total	27 (32.1%)	49 (58.3%)	8 (9.5%)	58 (69.0%)

2.1.6 76% of permanently excluded pupils in 2024-25, were also eligible for Free School meals (FSM), this compares to 31.4% of the whole Rotherham school age population.

2.1.7 Across the total number of permanent exclusions in 2024-25, 62.4% were White British pupils with 11.8% identifying as Gypsy/Roma Traveller. This compares with 76% whole Rotherham school age population identifying as White British and 1.6% identifying as Gypsy/Roma Traveller. GRT exclusions account for 10 children, none of whom were known to Early Help or Social Care at the point of their exclusion.

2.2 Suspensions

Suspensions Summary		Autumn Term		Spring Term		Summer Term	
		Suspensions	No Pupils	Suspensions	No Pupils	Suspensions	No Pupils
Primary	2023-24	170	95	110	79	119	88
	2024-25	188	118	208	123	206	136
Secondary	2023-24	2281	1089	1659	911	1602	874
	2024-25	2416	1064	1979	995	1972	936
All	2023-24	2451	1185	1769	990	1721	962
	2024-25	2604	1182	2187	1118	2178	1072

Suspensions have increased across all school phases since 2020/2021 with this rise continuing in 2024-2025, albeit at a slower rate.

	<p>Autumn term 2024 saw 2604 suspensions (based on 1182 pupils) against 2451 in autumn 2023 (based on 1185 pupils).</p> <p>Spring term 2025 saw a total of 2187 suspensions (based on 1118 pupils) against 1769 in Spring 2024 (based on 990 pupils). Although this represents an increase, when comparing this to the autumn term 2024 this shows a decrease in suspensions occurred and a decrease in the number of individual pupils.</p> <p>Summer Term 2025 saw a total of 2178 suspensions (based on 1072 pupils) against 1721 in summer 2024 (based on 962 pupils)</p> <p>Primary suspensions increased across each term during 2024-25 in comparison with the same term during 2023-24. Autumn increase (10.58%) spring increase (89%) and summer increase (73%) with total annual increase 50.87%</p>
2.2.1	Data across all suspensions this academic year shows that 63% of pupils suspended are male and 37% female.
2.2.2	At the point of suspension in 2024-25, 60% of pupils have SEND needs identified. This breaks down as 44% identified as SEND support and 14.5% with an EHCP in place. The whole Rotherham comparator is 23.5% of pupils are identified with any form of SEND, breaking down as 6.3% of pupils have a EHCP and 17.2% of pupils are identified as SEN Support.
2.2.3	The 2024/25 Suspension data shows that 57% of that cohort are also eligible for FSM, compared to 31.4% across the whole Rotherham school population.
2.2.4	76% of suspensions were for White British Ethnicity pupils, followed by 4.5% of pupils recorded as not obtained. 4% of suspension are from pupils recorded as Gypsy Roma and 4% from Asian Pakistani pupils.
	*Whole Rotherham comparator taken from Spring Census 2025
3. Key Actions and Timelines	
3.1	<p>September 2025 -Send out of exclusions data across all phases to allow for local comparison and benchmarking, to be repeated on a termly basis.</p> <p>September 2025- Launch of updated monthly online inclusion events with focussed monthly sessions including information, advice, guidance and best practice.</p> <p>Autumn 2025 – Outreach offer to target support and promote reintegration of pupils to transition from Aspire to mainstream as well as exit plans for partnership placement pupils.</p>
4. Recommendations	
4.1	That Schools Forum note the content of the briefing and consider any additional actions required.

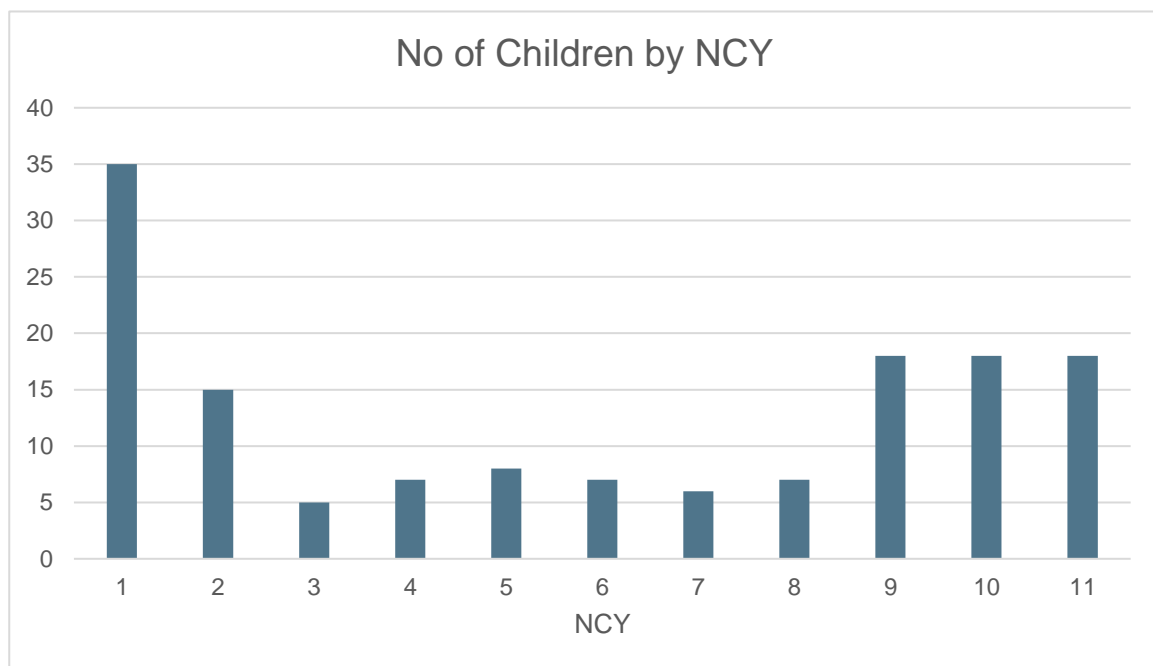
BRIEFING	TO:	Schools' Forum
	DATE:	12 th September 2025
	LEAD OFFICER:	Kelly Robinson Strategic Lead for Inclusion and Alternative Provision
	TITLE:	Part Time Timetables Academic Year 2024-2025
1. Background		
1.1	<p><u>Working together to improve school attendance (applies from 19 August 2024)</u> sets out the statutory basis for the use of Part Time timetables.</p> <p>The law entitles every child of compulsory school age to an efficient, full-time education suitable to their age, aptitude, and any special educational need they may have.</p>	
1.2	<p>For the most vulnerable pupils, regular attendance is also an important protective factor and the best opportunity for needs to be identified and support provided. In very exceptional circumstances, where it is in a pupil's best interests, there may be a need for a temporary part-time timetable.</p> <p>A Part time timetable could be considered to support a medical condition which prevents a pupil from attending school full time and is used to help the pupil access as much education as possible.</p>	
1.3	<p>Reporting to the Local Authority the use of part time timetables enables analysis which support best practice to be shared and any areas of further support to be identified and addressed in partnership across the school and Local Authority systems. This data is requested from the Local Authority during both SEND and Children's Services Inspections and to support this duty all schools are requested to report any use of a Part Time timetable for individual students.</p>	
1.4	<p>To the end of the academic year 2024-25, schools shared 144 reports for pupils supported by part time timetables.</p>	
1.5	<p>Part time timetables are reported through Trade Rotherham and reviewed by the Strategic Lead Inclusion and Alternative Provision. Support and guidance is offered where progress is not being made to ensure that children are not being reintegrated to full time education.</p>	

2. Key Issues

2.1 From school reported data 2024 – 2025, the vast majority of part time timetable are put in place to support Emotionally Based School Avoidance (100% instances across all year groups Years 3 – 11)
In Year 1, 42% timetables are designed to support integration to school.
In Year 2, 60% medical support, 30% support EBSA, 10% integration to school

2.2 From school reported data 2024 – 2025, 53% of part time timetables are agreed in order to support pupils in primary schools and 47% agreed for secondary aged pupils.
35% pupils with part time timetables are in KS1
19% pupils are in KS2
22% pupils are in KS3
25% pupils with part time timetables are in KS4

2.3 This breaks down as follows by year group:



2.4 In 2024 – 2025 57% pupils with part time timetables in place are male.

2.5 From reported data 2024 – 2025, 45% pupils with a part time timetable are also supported by an EHCP.

2.6 Across all part time timetables, the most common number of hours a pupil attends school is 16 hours, at each Key Stage the average hours are as follows;

KS1 – 19.88 hours

KS2 – 14.31 hours

KS3 – 12.75 hours

KS4 – 16.5 hours

2.7 For reported part time timetables 2024-2025, the duration of part time timetables was as follows;

Up to half a term – 16%

Between half a term and one term – 30%

Between one and two terms – 26%

Between two and three terms – 22%

Beyond three terms – 6%

3. Key Actions and Timelines	
3.1	<p>September 2024 – Part time timetable online reporting launched at Trade Rotherham</p> <p>September 2025- Reminder to all settings of online reporting pathway for part time timetable reporting</p> <p>2025 - 2026 – Best practice part time timetable use and models of reintegration sharing through; Primary Inclusion Panel, Locality Partnership Panels, Specialist Inclusion Team support meetings with individual schools, Attendance meetings with individual schools and monthly focus at inclusion events.</p>
4. Recommendations	
4.1	<p>That Schools Forum note the content of the briefing and consider any additional actions required.</p>

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BRIEFING

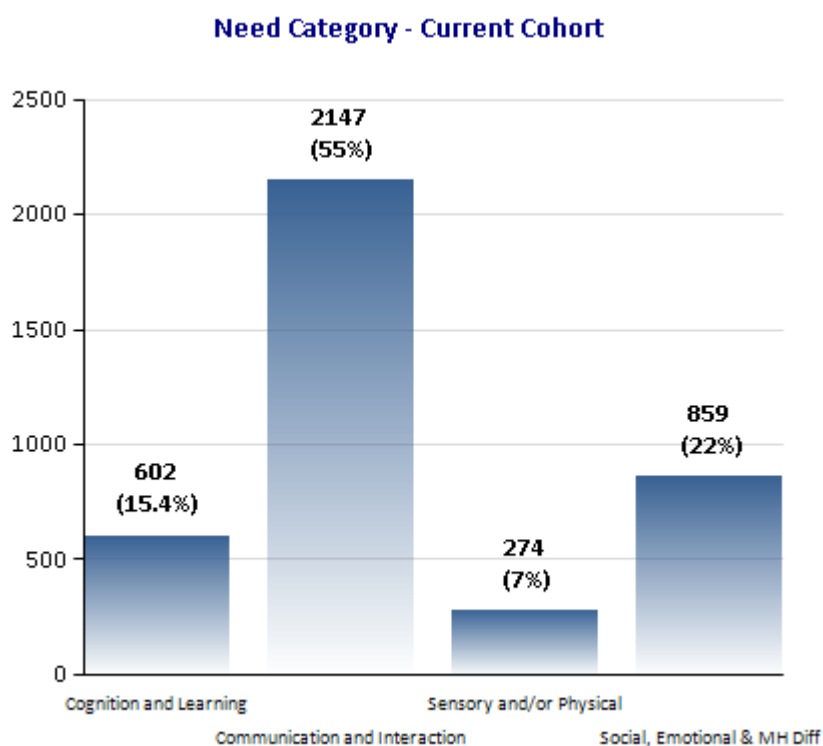
TO:	Rotherham Schools Forum
DATE:	12 th September 2025
LEAD OFFICER:	Cary-Anne Sykes (Head of Service SEND)
TITLE:	Education, Health and Care Plans (EHCPs) Annual Update

1. Background

1.1 England EHCPs (Jan 2025): 638,745

Rotherham 3909 active EHCP's September 2025

EHCP Need Profile – Current Cohort Overview



This chart presents the distribution of primary need categories among children and young people with active Education, Health and Care Plans (EHCPs).

Key Findings:

- Communication and Interaction needs dominate the cohort, accounting for 55% (2,147 individuals). This includes conditions such as autism spectrum disorder and speech, language, and communication needs.
- Social, Emotional and Mental Health (SEMH) needs represent 22% (859 individuals), highlighting the growing importance of emotional wellbeing and behavioural support.
- Cognition and Learning needs make up 15.4% (602 individuals), encompassing moderate to severe learning difficulties.

- **Sensory and/or Physical needs are the smallest category at 7% (274 individuals), including visual, hearing, and physical impairments.**

Implications for Schools Forum:

- The high proportion of communication and interaction needs suggests a continued demand for specialist speech and language services, autism support, and inclusive communication strategies.
- The significant SEMH cohort reinforces the need for mental health provision, pastoral support, and trauma-informed approaches within schools.
- Planning for staff training, resource allocation, and multi-agency collaboration should reflect this need profile to ensure effective support across all categories.

1.2

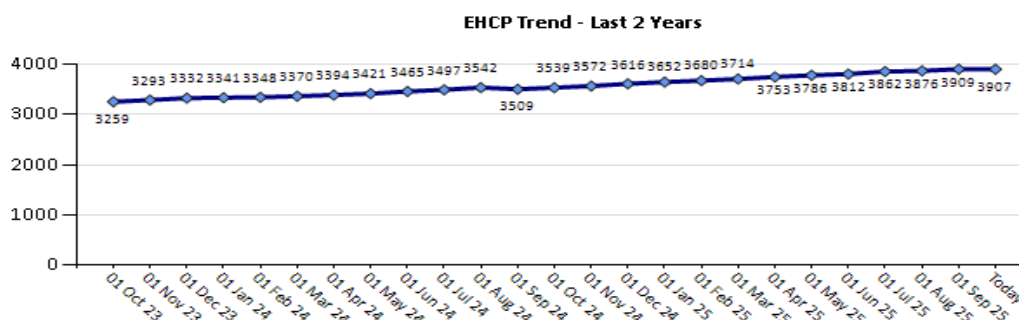
EHCP Placement Breakdown Regional and national Comparison

EHCP Pupils by School Types / Provision Categories:	% of CYP with EHCP at SEN2 25 Census Day - Provision types					Latest National comparison (SEN2 2025)	% Rotherham Gap to National
	Rotherham	Barnsley	Sheffield	Wakefield	Doncaster		
No of EHCP's active at SEN2 - Census Day 25	3623	3044	5952	3857	3142		
Special Schools - ALL	32.8%	18.1%	29.2%	18.4%	26.5%	25.0%	7.8%
*Resource Provision	4.0%	4.6%	7.1%	4.1%	0.4%	2.4%	1.6%
Mainstream Schools	36.6%	41.1%	34.5%	49.5%	38.0%	39.7%	-3.1%
Independent Non Maintained Special Schools	3.3%	8.4%	2.2%	4.2%	4.5%	5.3%	-2.0%
Independent Specialist Provision	4.9%	2.0%	4.6%	1.7%	7.0%	1.5%	3.4%
Post 16 / FE Colleges	13.7%	14.5%	10.3%	13.1%	9.5%	12.3%	1.4%
AP - PRU Total	0.6%	0.3%	0.6%	3.4%	1.2%	0.8%	
SEN units	0.0%	1.9%	0.0%	0.0%	0.5%	1.4%	
EHE - elective home education	1.3%	1.6%	0.8%	1.8%	1.7%	1.1%	
Other arrangements made by LA	0.2%	0.8%	1.0%	1.9%	0.0%	1.8%	
Ed_elsewhere	3.8%	8.2%	10.8%	4.7%	11.6%	7.8%	
NEET	1.7%	4.8%	7.4%	0.9%	6.5%	2.8%	

2. Key Issues

2.1

Over the past two years, the number of **Education, Health and Care Plans (EHCPs)** has shown a consistent upward trend. Starting from **3,259** in **October 2023**, the figures have steadily increased month by month, reaching **3,909** as of **today**.

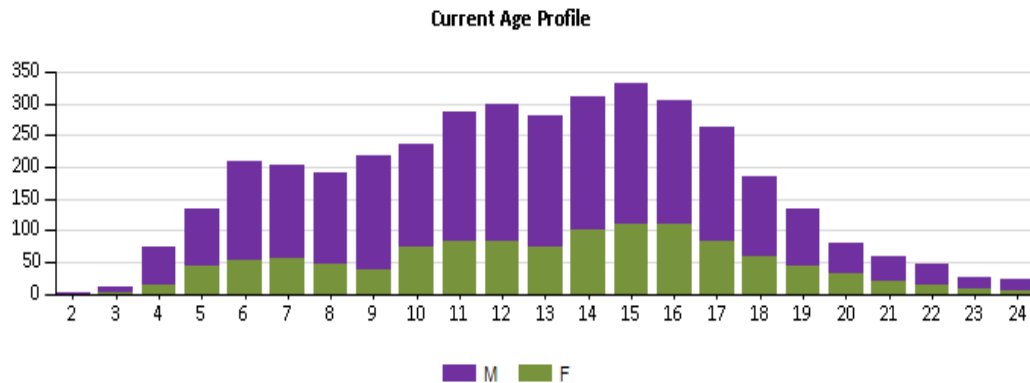


The growth has been gradual but persistent, with only minor fluctuations. For instance, there was a slight dip in **September 2024** (from 3,542 in August to 3,509), but the overall trajectory quickly resumed its upward path.

This sustained rise in EHCPs may reflect growing demand for support services, increased identification of needs, or improved access to assessments and provisions.

The data underscores the importance of strategic planning and resource allocation to meet the evolving needs of children and young people requiring EHCPs.

2.2 Current Age Profile – EHCP Cohort



The bar chart presents the age distribution of children and young people currently receiving **Education, Health and Care Plans (EHCPs)**, spanning ages **2 to 24**. Each age group is broken down by gender, with **purple bars representing males** and **green bars representing females**.

The data reveals a pronounced concentration of EHCPs among the **13 to 15-year-old** age range, which represents the peak of the cohort. This likely corresponds with the transition phase from **Key Stage 3 to Key Stage 4**, a period often associated with increased identification of needs and preparation for post-16 pathways.

Outside of this peak, the number of EHCPs gradually declines:

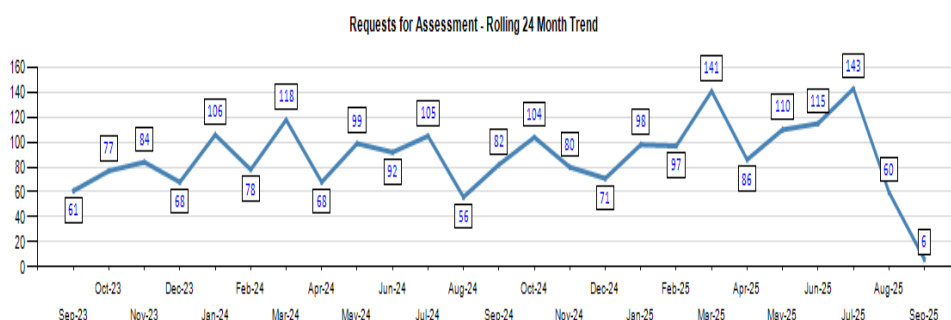
- **Early years (ages 2–5)** show relatively low numbers, possibly reflecting the time required for identification and assessment.
- **Post-16 (ages 16–24)** also show a tapering off, though the continued presence of EHCPs into early adulthood highlights the importance of sustained support through further education and into adulthood.

The gender split indicates a **higher proportion of males** across nearly all age groups, consistent with national trends in EHCP data.

This profile is crucial for informing **strategic planning**, particularly around:

- **Transition support** at key educational stages,
- **Capacity planning** in secondary and post-16 settings,
- **Gender-responsive approaches** to SEND provision.

2.3 Requests for EHCP Assessment – 24-Month Trend Overview



This graph tracks the monthly volume of **requests for Education, Health and Care Needs Assessments** over a rolling 24-month period, from **September 2023 to September 2025**.

The data reveals a **highly variable pattern**, with notable spikes and dips throughout the timeline:

- **Early 2024** saw a significant rise, peaking at **113 requests in February**, followed by another surge in **April (99)** and **June (105)**.
 - The **highest peak** occurred in **May 2025**, with **143 requests**, indicating a possible seasonal or policy-driven factor influencing demand.
 - Conversely, **July 2025** shows a dramatic drop to just **6 requests**, which may reflect data lag, school holidays, or reporting anomalies.
- Despite fluctuations, the overall trend suggests:
- A **general increase in demand** for EHCP assessments over time.
 - Periodic surges that may align with **academic cycles, transition points, or local awareness campaigns**.

This pattern has implications for:

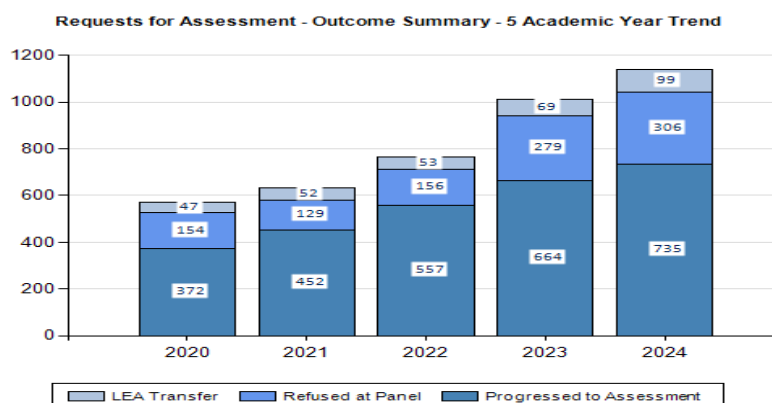
- **Workforce planning** within SEND services,
- **Timely processing and decision-making** to meet statutory deadlines,
- **Resource allocation** across educational settings.

Understanding these trends helps Schools Forum members anticipate pressures on the system and support strategic responses to ensure children and young people receive timely and appropriate support.

EHCP Assessment Requests – Outcome Summary (2020–2024)

This bar chart presents a five-year overview of the outcomes of **requests for Education, Health and Care Needs Assessments**, broken down into three categories:

- **Progressed to Assessment**
- **Refused at Panel**
- **LEA Transfer**



Key Trends:

- The number of requests **progressing to assessment** has steadily increased year-on-year, rising from **372 in 2020** to **735 in 2024**—almost doubling over the five-year period. This reflects both rising demand and a greater proportion of requests meeting the threshold for statutory assessment.
- **Decisions not to assess** have also increased, from **154 in 2020** to **306 in 2024**, suggesting that while demand is growing, a significant number of requests still do not meet the criteria for assessment. This may point to the need for clearer guidance and support at the pre-assessment stage.

- **LEA transfers** have grown modestly, from **47 in 2020** to **99 in 2024**, indicating a gradual rise in mobility or cross-border referrals.

Implications for Schools Forum:

- The upward trend in assessments places increasing pressure on SEND services, schools, and associated resources.
- The rise in decisions not to assess highlights the importance of early intervention and robust evidence gathering to support requests.
- Continued growth in LA transfers may require enhanced coordination between local authorities to ensure continuity of support.

EHCP Assessment Requests – Source Breakdown (2020–2025)

2.5

A decision to assess EHC criteria occurs after a Local Authority (LA) receives a request for an Education, Health and Care (EHC) Needs Assessment, which can be made by a parent, young person, or school. The LA then considers if the child may have Special Educational Needs (SEN) and if those needs require provision beyond SEN support, a decision they must make and communicate within six weeks. This decision is based on the Children and Families Act 2014 and the SEND Code of Practice, focusing on whether the child requires provision in accordance with an EHC plan. The LA must assess if the child or young person meets the legal test for an assessment, which asks:

1. **Does the child or young person have or may have Special Educational Needs (SEN)?**
2. **Is it necessary to make special educational provision for them in accordance with an EHC plan?**

The LA considers evidence such as:

- **Academic attainment and rate of progress:**

The child's educational progress compared to what is expected for their age.

- **Support already provided:**

Whether the current SEN support and interventions at the child's school or setting are insufficient to meet their needs.

- **Complexity of needs:**

Whether the child's needs are severe or complex and affect their daily life.

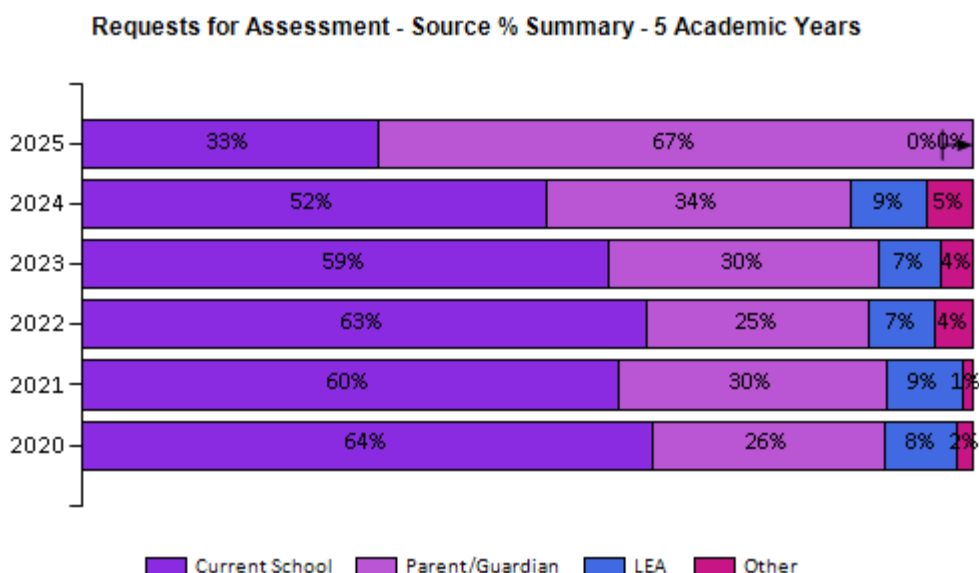
- **Multi-agency needs:**

Whether support from more than one agency is required.

The chart below illustrates the changing landscape of **who initiates requests for Education, Health and Care Needs Assessments** over the past five academic years, broken down by:

- **Current School**
- **Parent/Guardian**
- **LA (Local Authority)**
- **Other**

2.6



Key Observations:

- **Parent/Guardian-initiated requests** have seen a **sharp rise**, increasing from **26% in 2020** to **67% in 2025**, now representing the **majority of all requests**.
- In contrast, **school-initiated requests** have declined significantly—from **64% in 2020** to just **33% in 2025**.

Implications for Schools Forum:

- The shift toward **parent-led requests** may reflect growing awareness among families, but also raises questions about:
 - **Consistency in early identification** within schools,
 - **Access to support and advice** for families navigating the EHCP process,
 - Potential **pressures on SEND services** due to increased direct demand.
- The decline in school referrals could indicate:
 - Challenges in capacity or confidence among school staff,
 - A need for enhanced training and support around SEND identification and referral processes.

This evolving pattern highlights the importance of strengthening **collaborative working** between schools, families, and the local authority to ensure timely and appropriate access to assessments.

2.7

Monthly EHCP Assessment Requests and Outcomes – Two-Year Overview

This dataset provides a detailed view of **2,205 requests for Education, Health and Care Needs Assessments** over a 24-month period, highlighting how many:

- **Progressed to assessment**,
- Where **there is a decision not to assess**, or
- Were **transferred to another Local Authority (LA Transfer)**.

Key Insights:

- **63.4% of requests progressed to assessment**, indicating that nearly two-thirds met the threshold for statutory evaluation.
- **26.5% there was a decision not to assess**, suggesting a significant proportion of requests lacked sufficient evidence or did not meet criteria.

- 7.6% were LA transfers, reflecting mobility across local authority boundaries.

Monthly Trends:

- Peaks in demand occurred in May, March, and July 2025, with over 140 requests each month.
- The highest progression rate was in December 2023 (80.9%), while October 2023 had the lowest (42.9%), indicating variability in request quality or panel decisions.
- August and September 2025 show a sharp drop-in activity, likely due to the academic calendar and reporting lag.

Implications for Schools Forum:

- The sustained volume of requests underscores the need for robust early identification, timely decision-making, and adequate staffing within SEND services.
- The decision not to assess rate highlights the importance of supporting schools and families in preparing strong, evidence-based submissions.
- LEA transfers, though a smaller proportion, require inter-authority coordination to ensure continuity of support.

EHCP Request to Assess Graduated Response

This table presents an overview of the quality of new EHCP referrals and their outcomes at panel over a five-month period, focusing on the use of the Graduated Response approach and involvement of Specialist Teams.

Request to assess cases rated at a green had a complete Educational Psychology Report as part of the request.

Amber cases had involvement from an outside agency, for example SIT, speech therapy.

Red cases contained no evidence of a graduated approach.

EHC New Referral GRC & Decisions						
	No evidence of the Graduated response approach	Limited evidence of the Graduated Response approach	Evidence of a good EHC Referral with the use of the Specialist Teams	No Colour coding	Approved Cases at Panel	Refused Cases at Panel
Apr-25	31	26	62	8	94	26
May-25	16	28	39	7	70	15
Jun-25	21	18	37	17	61	19
Jul-25	42	20	60	14	92	46
Aug-25	20	6	27	4	39	14
Totals	130	98	225	50	356	120

Referral Quality Breakdown:

- 225 referrals demonstrated good evidence of the Graduated Response and specialist team involvement.
- 130 referrals showed no evidence of the Graduated Response.
- 98 referrals had limited evidence.
- 50 referrals lacked colour coding, suggesting incomplete or unclear documentation.

Panel Outcomes:

- 356 cases were approved at panel.
- 120 cases did not process to assessment.

Key Observations:

- The majority of approved cases correlate with referrals that had **strong evidence** and a **graduated approach**, reinforcing the importance of quality submissions.
- A significant number of referrals lacked sufficient evidence, which may impact on the decisions.
- The presence of **uncoded referrals** suggests a need for improved consistency in documentation and submission standards.

Implications for Schools Forum:

- Emphasises the need for **ongoing training and support** for schools in applying the Graduated Response.
- Highlights the value of **early engagement with specialist teams** to strengthen referral quality.
- Suggests a review of **submission protocols** to reduce incomplete or poorly evidenced referrals.

EHCP Annual Review Completion – Termly Overview

This data tracks the number of **EHCP annual reviews due and completed** across the **Autumn, Spring, and Summer terms**, highlighting monthly progress and cumulative completion rates.

Term / Month	Reviews Due	Reviews Completed	Reviews Completed Cumulative	
Autumn	1282	354		
September		21	21	1.6%
October		72	93	7.3%
November		96	189	14.7%
December		165	354	27.6%
Spring	1028	835		
January		167	167	16.2%
February		246	413	40.2%
March		422	835	81.2%
Summer	1233	981		
April		148	148	12.0%
May		225	373	30.3%
June		159	532	43.1%
July		277	809	65.6%
August		172	981	79.6%

2.9

Autumn Term (Reviews Due: 1,282)

- Completion steadily increased from **1.6% in September** to **27.6% by December**.
- A total of **354 reviews were completed**, indicating a slower start to the review cycle.

Spring Term (Reviews Due: 1,028)

- Completion accelerated, reaching **81.2% by March**.
- **835 reviews were completed**, reflecting strong performance and improved pace compared to Autumn.

Summer Term (Reviews Due: 1,233)

- Completion reached **79.6% by August**, with **981 reviews completed**.
- Monthly progress showed consistent gains, with **65.6% completed by July**, and a final push in August.

Key Insights for Schools Forum:

- The **Spring and Summer terms** demonstrated significantly higher completion rates, suggesting improved processes or capacity during these periods.
- The **Autumn term lag** may indicate challenges in early-year planning or resource availability.

Continued focus on **early scheduling, tracking systems**, and **support for schools** could help balance review completion across the academic year.

EHCP Process Performance Summary

This section outlines key performance indicators across the EHCP process, highlighting areas of strength and opportunities for improvement:

Annual Review Process

- **68.2%** of annual review paperwork is submitted by schools within the required **10 working days** following the review meeting.
- **44.5%** of annual reviews are held within the statutory **12-month timeframe**, indicating a need for improved scheduling and oversight.
- **35.7%** of amended EHCPs are completed within the **12-week timeframe** following an annual review, suggesting delays in post-review processing.

Decision-Making Timeliness

- **77%** of decisions to **maintain, amend, or cease (MAC)** plans are made within **4 weeks** of the review.
- **98.3%** of decisions to assess are made within the statutory **6-week timeframe**, demonstrating strong compliance at the initial decision stage.
- **85.8%** of EHCPs are issued within the **20-week statutory timeframe**, reflecting good overall performance in plan development.

Phase Transfer Compliance

- **99.5%** of **primary phase transfer decisions** were made on time.
- **93.6%** of **post-16 phase transfers** were completed within the required timeframe.

Summary

The data reflects strong performance in **initial assessments and phase transfers**, while highlighting areas for improvement in **annual review scheduling** and **timely completion of amended plans**. Continued focus on process efficiency, school engagement, and system-wide coordination will be key to improving compliance and outcomes.

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