

LONDON BOROUGH OF WALTHAM FOREST

**Appendix A: Task & Finish Report - Place Monitoring for  
2013-14 and Potential Underspends 2013-14**

Meeting / Date	<b>HIGH NEEDS TASK &amp; FINISH GROUP</b>  <b>15 OCTOBER 2013</b>	Agenda Item	<b>4a</b>
Report Title	High Needs Block Place Monitoring for 2013-14 and Potential Underspends 2013-14		
Decision/ Discussion/ Information	For Information and Discussion		
Report Author/ Contact details	Rishi Peetamsingh, Group Accountant, 020 8496 6304 <a href="mailto:rishi.peetamsingh@walthamforest.gov.uk">rishi.peetamsingh@walthamforest.gov.uk</a>  Shehwar Sultan, Principal Accountant 020 8496 6322 <a href="mailto:shehwar.sultan@walthamforest.gov.uk">shehwar.sultan@walthamforest.gov.uk</a>  Graham Moss, Strategic Development Consultant 07962 017 447 <a href="mailto:moss362@btinternet.com">moss362@btinternet.com</a>		
Tables	Table of Places, Spend and Projected Outturn		

## 1 Summary

- 1.1 This report provides the monitoring position on the High Needs Block 2013-14. It provides the latest data on the take up of places across Specialist Settings. It also gives areas of significant budget variations. At this point in time we are reporting an under spend of £1.234m which is explained under 4.1, 4.2 and 4.3. If this position is maintained it would mean that we would only need to utilise £0.052m of the £1.182m under spend brought forward, leaving £1.130m in High Needs Reserves. However, this position will change when monitoring of all other expenditure is completed.

## 2 Background

- 2.1 The High Needs Block covers activities that directly or indirectly support High Needs - Low Incidence SEN (HNLI) pupils and students. Schools are expected to meet the full cost of Low Needs - High Incidence (LNHI) pupils and students from their delegated budgets.

**2.2** In the current financial year 2013-14 the High Needs Block has total resources of £33.198m before deduction for recoupment academies and the funding for post 16 students is £1.345m. This funding is predominantly used for place-led funding and commissioning fees. In Waltham Forest place-led funding utilises a third of the High Needs Block. This is in line with other Local Authorities across London.

**2.3** This report updates the funding issues relating to the largest areas of expenditure which are the biggest for Waltham Forest making up almost £20.0m of our £33.0m High Needs Block. These are: place-led funding for special schools, PRU and Alternative Provision; and commissioning fees for Waltham Forest pupils attending Waltham Forest special schools and Academies; and commissioning fees for late arrivals pupils in PRUs.

### **3 Monitoring of places:**

**3.1** Table 1 and 2 illustrate the number of specialist places that Waltham Forest submitted for HNLI pupils in 2013-14 to the EFA. The Local Authority had sought expansion of places to meet growing demand in special resourced provision and for post-16 provision at William Morris Academy (part of the Hornbeam Trust).

**3.2** These places have been agreed with the EFA. Funding is deducted from the High Needs Block by the EFA for those places expected to be filled by Waltham Forest pupils. It is important that this funding is not lost by places remaining unfilled. Therefore it is essential to review the actual take-up to check whether they are still needed for 2014/15.

**3.3** Waltham Forest is also responsible for meeting the additional commissioning fees. If these places are not completely filled, commissioning costs will also fall.

**3.4** The areas of significant variances in the take up of places are:

- The Resource Provision at Oakhill School and Highams Park Academy each has three un-filled places. (Refer to Table 1)
- The Social, Emotional & Behaviour Difficulties (SEBD) Provision in PRUs has seven more pupils than planned. (Refer to Table 1)
- The take up of places in special schools and academies has been as planned except in the case of William Morris Academy. (Refer to Table 2)

### **4 Potential Underspends in 2013-14:**

**4.1** For pupils educated outside the borough, the EFA made an adjustment to our High Needs Block to ensure that the educating local authority has the funding to meet the cost of the place-led funding. Waltham Forest pays the commissioning top-up fee. Other Local Authority schools have not been proactive in claiming the top-up. The SEN team is actively attempting to establish contact with these schools to firm up fees. However, based on the

amounts received to date it appears that initial cost estimates were perhaps higher than required. This may generate an under spend of around £0.250m to £0.300m.

- 4.2 As it was not clear how place led funding for post 16 students in special schools was going to be met, an estimate of the likely cost was set aside in the HNB. It later transpired that the EFA allocated funding for these students from the post 16 LDD budget. Initial calculation estimate that this will lead to an under spend of £0.740m in 2013-14. This adjustment will be reflected in the expenditure forecast for 2014-15.
- 4.3 The projected under spend in the commissioned places in special schools is £0.244m. This illustrated in Table 3.
- 4.4 Monitoring of all other expenditure is due to be completed by the end of October. Any other significant variances will be reported to Schools Forum on the 13 November 2013.

## 5 Tables

**5.1 Table 1: Special Resource Provision Placements Update**

Special Resource Provision in Mainstream Schools (Place-Led funding at £10,000)	Average Planned Places 13-14	Actual Places as at October 2013	Above or (Below) planned numbers
	A	B	B-A
Whitehall Primary School	20	22	2
Davies Lane Primary School	18	16	(2)
Oakhill School	6	3	(3)
South Grove Primary School	18	16	(2)
Buxton School	12	14	2
Frederick Bremer Secondary School	12	13	1
Heathcote Secondary School	15	14	(1)
The Woodside Primary School	21	22	1
Highams Park Secondary School	6	3	(3)
Chingford Foundation School	23	23	0
PRU -SEBD Provision	6	13	7
	<b>156</b>	<b>158</b>	<b>3</b>

## 5.2 Table 2: Special Schools and Academy Placements Update

Special Schools & Academies	Average Planned Places 13- 14	Actual Places as at August 2013	Above or (Below) planned numbers
	<b>A</b>	<b>B</b>	<b>B-A</b>
Belmont Park	58	58	0
Brookfield House	84	83	(0)
Joseph Clarke	85	83	(2)
Whitefield	332	333	1
William Morris	157	132	(24)
	<b>716</b>	<b>690</b>	<b>(26)</b>

## 5.3 Table 3: Special Schools and Academy Funding Update

Special School	Planned Funding Projection	Actual Place-led funding	Actual Top up Funding for WF Pupils	Actual Revised Projection	Above or (Below) planned cost
	<b>A</b>	<b>B</b>	<b>C</b>	<b>D=(B+C)</b>	<b>D-A</b>
	£	£	£	£	£
Belmont Park	1,227,667	579,200	655,039	1,234,239	6,572
Brookfield House	1,807,521	837,500	995,778	1,833,278	25,757
Joseph Clarke	1,372,813	850,000	480,083	1,330,083	-42,729
Whitefield	7,513,167	3,323,300	4,221,243	7,544,543	31,377
William Morris	3,135,571	1,566,700	1,303,546	2,870,246	-265,324
	<b>15,056,737</b>	<b>7,156,700</b>	<b>7,655,690</b>	<b>14,812,390</b>	<b>-244,347</b>