

**SURREY COUNTY COUNCIL****CABINET****DATE: 25 JANUARY 2022****REPORT OF CABINET MEMBER: DENISE TURNER- STEWART, CABINET MEMBER FOR EDUCATION AND LEARNING****LEAD OFFICER: RACHAEL WARDELL, EXECUTIVE DIRECTOR FOR CHILDREN, FAMILIES AND LIFELONG LEARNING****SUBJECT: DEVELOPING LOCAL SPECIAL EDUCATIONAL NEEDS AND DISABILITY (SEND) PROVISION IN SURREY TO MEET DEMAND FROM 2023/24 ONWARDS****ORGANISATION STRATEGY PRIORITY AREA: GROWING A SUSTAINABLE ECONOMY SO EVERYONE CAN BENEFIT/ TACKLING HEALTH INEQUALITY/ ENABLING A GREENER FUTURE/ EMPOWERING COMMUNITIES****Purpose of the Report:**

Surrey's latest sufficiency modelling projections to 2030-2031, which are based on the previous three year's trends from academic years 2018-2019 to 2020-2021, indicate significant growth in the total number of pupils with Education, Health and Care Plans (EHCPs) resident in Surrey over the forecast period. This projected growth is expected to reach its peak in 2026-27 and 2027-28, before reducing slightly thereafter. By 2030-31, the total number of Surrey EHCP pupils in National Curriculum Years (NCY) 0-14 (age 4-19 years), is projected to be more than 2,500 higher than the 2020-21 total.

Surrey's existing maintained specialist provision, which includes specialist school places in SEN Units in mainstream schools and in Special Schools/ academies, has over 3,700 places and is full.

Between 2019 and 2021 Surrey's Cabinet approved the strategy for three phases of the SEND Capital Programme with a combined capital investment of £79.6m to expand the local specialist estate at pace to ensure local children and young people can have their educational needs met close to home and within state maintained provision wherever possible. This investment is already delivering 1,600 additional specialist school places towards the projected demand of 5,100 by 2025 (ANNEX 1). More than 500 of these were delivered between 2019-2021.

By 2030-2031, the local area's Specialist Education Estate is projected to require more than 800 additional places on top of the planned growth delivered by the first three phases of the SEND Capital Programme. The significant increase in demand requires in-county provision of up to 6,000 maintained specialist school places for Surrey pupils aged 4-19 years by September 2030. (ANNEX 2) Based on latest sufficiency modelling and engagement work with schools, the potential to deliver 872 additional places has been identified (ANNEX 4).

A further expansion of the Specialist Education Estate is necessary to achieve our long-term ambition to ensure that Surrey resident pupils receive a full time high quality specialist education closer to home, more connected to local communities and local support services. This report seeks support for this further expansion and delegated authority to manage the Capital pipeline.

## Recommendations:

It is recommended that Cabinet:

1. Approves in principle the use of SEND Capital funding against the programme of adaptation and refurbishment of Surrey County Council (SCC) owned assets and state maintained schools for Phase 4 of the programme. This is in order to deliver up to 872 additional Specialist School Places in Surrey from September 2023 onwards.
2. Delegates the decision to transfer the £60m SEND Capital funding from pipeline to budget to the Capital Programme Panel, based on approval of individual business cases once schemes, locations and costs are confirmed.
3. Approves the delegation of authority to allocate resources from the approved £60m budget required for individual projects to the Cabinet Members for Education & Learning, Resources and Land & Property, following Capital Programme Panel approval.

## Reason for Recommendations:

Following national legislative changes brought about by the 2014 Children & Families Act and revised Special Educational Needs and Disabilities (SEND) Code of Practice, 2015, Surrey has seen the number of Education, Health and Care Plans (EHCPs) as a percentage of the 4-19 general school age population increase from 3.4% to 4.1% between 2018-2021. This figure is projected to increase to over 5% of the 4-19 general population by 2024, resulting in the projected demand for up to 6,000 maintained specialist school places. (Annex 3)

The sustained increase in demand for specialist provision has resulted in over-reliance on the independent school sector and out of county placements, which frequently also involves excessive home to school travel distances for EHCP pupils outside of resident districts and boroughs.

The Department for Education expects Local Authorities (LA) to manage their specialist estates efficiently to avoid detriment to schools' educational offers, creating disadvantage to children and young people who have SEND or to the LA's financial position. This means ensuring the availability of maintained specialist school places that are appropriately matched to SEN need-type, phases of education and geographic location so that all of Surrey's statutory school age children with an EHCP that require a full-time specialist setting in either a mainstream SEN Unit or Special School have a named placement, ready for the beginning of each academic year.

The recommended Phase 4 SEND Capital investment completes the planning for sufficiency of specialist school places from September 2023 to 2031.

## Executive Summary:

### Context

1. The SEND Capital Programme is aligned with Surrey's Community Vision 2030, which seeks to realise the local area's ambition that everyone benefits from education, skills and employment opportunities that help them to succeed in life.

2. Surrey's SEND Partnership Strategy 2019-2022 is ambitious about improving outcomes for children and young people with special educational needs and disabilities (SEND) and the whole system approach to achieve the step change needed. This requires educational settings, health commissioners and providers, Surrey County Council's social care and education services working together with children and their families to meet needs. This needs to be delivered within national funding that has not kept pace with demand.
3. The 2021/22 High Needs budget assumes an overspend of £24m. Latest projections are for an additional overspend of £9m in-year. Whilst this is being contained by a corporate contingency budget this year, significant cost containment is required in future years to reduce the overspend and achieve a balanced in-year position. The Council's SEND transformation strategy sets out the planned trajectory to try and achieve this, with the SEND Capital Programme the biggest single contributor to the cost containment required. (ANNEX 1)
4. As of September 2021, Surrey has a current cohort of 1,678 pupils educated in the independent sector at a cost of c£70m per year. In order to provide sufficient maintained specialist school places for those that need them and ensure a more equitable deployment of limited resources, more than 800 additional places in Surrey's maintained schools are critical from September 2023 onwards.
5. An average Non-Maintained Independent placement costs around £50k, whereas a Maintained specialist placement costs approximately £20k, so each Maintained specialist placement has the potential to contain cost of around £30k per annum. Based on current cost and benefit assumptions, £60m Capital investment is estimated to deliver an additional 712 specialist school places. This would achieve annual cost containment of approximately £21.4m. If 872 additional Specialist School Places are created under Phase 4 of the programme and filled, this will represent an annual cost avoidance of approximately £26.2m.
6. The majority of Surrey's existing specialist school provision is graded by Ofsted as Good or Outstanding. This provision enables better long term outcomes for pupils educated closer to home by local providers, who successfully support local children and young people to live, learn and grow up locally to achieve their potential. Improved investment in Surrey's specialist education estate will support local schools to continue to deliver high quality inclusive education to some of the county's most vulnerable children and young people.
7. The recently commissioned Specialist Education Estate Fit for Purpose Accommodation Review ("the Review") explored analysis of Health & Safety compliance against each of Surrey's existing 81 specialist provision assets, which comprise of 25 special schools and 51 SEN Units in mainstream primary and secondary schools. This was undertaken by a specialist consultancy team of project managers, surveyors, cost consultants and engineers.
8. BB104 compliance (the Department for Education's non-statutory area guidelines for buildings and grounds in specialist school provision) was also assessed to identify over provision or shortfall schools and existing sites where future expansion is possible. This also took into account the quality and fitness for purpose of existing provision for current pupil numbers per establishment and highlighted key risks associated with potential development including relevant material planning considerations.
9. The Review has informed an up to date understanding of the current Specialist Education Estate, including benchmarking for cost per pupil place and identified sixteen Special Schools and twenty-nine SEN Units in mainstream Primary and

Secondary Schools with potential to expand. These would be subject to full feasibility studies and effective mitigation of identified planning risks.

10. An Expression of Interest exercise was then initiated in October 2021 to begin to shape the notional programme for Phase 4 (ANNEX 4). Mainstream Primary and Secondary Schools and Special Schools were encouraged to submit applications for new and/or expanded specialist provision, based on the shared understanding of demand by SEN need-type, phase of education and geographical location.

11. Thirty two applications were received and assessed by a Quality Assurance Panel of senior SCC officers from relevant SEND, Education and Land & Property departments. A high proportion of the applications were from mainstream schools without current specialist school provision keen to support the county-wide inclusion plan through increasing the availability of places for children and young people with SEND to access in the county. The Quality Assurance Panel rejected a number of applications on the following basis:

- Settings that have not progressed sufficiently to date on their school improvement journeys, and therefore more work and LA support is required to ensure the increased likelihood of successful Ofsted inspection outcomes
- Concerns around opening new specialist provision in very small schools where SEND pupils would be well above planned admission numbers.
- Sites with known and existing contentious planning issues where approval by the Planning Authority would be unlikely to be achieved
- Cost prohibitive schemes that would only provide a very small number of additional specialist school places and would not represent value for money.

All notional schemes approved in principle in the proposed fourth phase of the programme will be subject to feasibility and full business case development work with applicant schools to ensure project viability.

12. The proposed Phase 4 SEND Capital Programme will require significant partnership working across schools and settings, health commissioners and providers, as well as the Council's SEND, Education Place Planning, Commissioning and Property teams. The scale of the ambition to deliver more than 800 specialist school places on top of the planned growth from Phase 1-3 of the SEND Capital Programme is considerable.

13. Key to achieving this will be:

- Maintained schools able to support and retain pupils with a greater range of needs.
- Reducing placement breakdown/increasing stability in local provision and improving outcomes for children who can continue to go to the same school as their siblings and their friends.
- Increased school devolution to promote creativity, innovation and better use of resources aligned with need.
- Strategic forward planning to ensure Inclusion and Additional Needs teams and Commissioning teams are identifying pupils currently educated in the independent sector to access named maintained placements at the point of Key Stage Transfer, or in-year as appropriate.
- Strategic forward planning to ensure that young people in non-specialist places in maintained schools where that place is at risk are found maintained specialist placements in Surrey rather than NMI and / or out of county.
- The distribution of new specialist school provision that reduces SEND home to school travel distance so that a higher proportion of pupils can attend the nearest most appropriate school that can meet their needs.

14. Pupil-level analysis of SEND transport patterns per Surrey district and borough was undertaken by Edge-ucate for Surrey resident pupils who currently attend specialist provision in SEN Units in mainstream primary and secondary schools and special schools (ANNEX 5). This was in order to shape the proposed Phase 4 programme by geographical location with the objective of reducing home to school travel distances and costs.
15. The assessed geographical location of up to 872 new additional specialist school places delivered through the proposed Phase 4 of the SEND Capital Programme is critical to ensure long-term sustainability. This is to ensure that SEND home to school transport times are reduced in line with Department for Education recommendations, improving congestion and traffic flow around the county.

### **DELIVERY OF ADDITIONAL SPECIALIST SCHOOL PLACES AND INTENDED BENEFITS TO SURREY'S CHILDREN, YOUNG PEOPLE AND RESIDENTS**

16. Benefits realisation ensures Surrey's maintained specialist education provision is fit for purpose and creates additional employment/supported internship opportunities for residents around areas of expansion.
17. Children, young people, and families can access the same level of high-quality support wherever they live in Surrey. We have a good, shared understanding of our children and young people who have SEND in Surrey and our support offer matches their identified needs.
18. Expanding Surrey's specialist provision aligns with the Preparation for Adulthood programme and strategy for Post-16 to create local further education and employment pathways such as apprenticeships and supported internships. This enables young people who have SEND to make a successful transition to adulthood and secure employment.
19. Capacity created locally will also make certain that SEND home to school transport distance and costs are reduced so that pupils attend their closest most appropriate school with shorter journey times. Opportunities for developing independent travel skills can be maximised as a result of children and young people being educated closer to home. This will also address local congestion around school sites as well as traffic flow around the county, which will be of benefit to Surrey's Green Agenda.
20. The distribution and occupancy of current Special Schools and SEN Units in mainstream schools clearly illustrates that there is insufficient provision of Autism and Communication & Social Interaction Needs, Moderate Learning Difficulties, Severe Learning Difficulties and Social Emotional Mental Health Needs Special places.
21. The approved remedification and expansion programme will ensure that additional places are matched appropriately to need type, phases of education and geographic locations.

<b>Consultation:</b>
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22. The consultation approach for Phase 4 of the SEND Capital Programme is a continuation of the development of Surrey's SEND Partnership Strategy, which was subject to full public consultation and reviewed by the Council's Cabinet on 29 January 2019. Consultees included education providers, SEND System-partners (Children and Adult Education Services, Social Care Services and Health providers), parent carers, children and young people, local districts, and boroughs.

23. The Council has undertaken further engagement activities with schools in 2021, including encouraging settings to provide 'Expressions of Interest' (EOI) for capital expansion and targeted discussions with schools as well as Phase Councils. Different phases of schools have been included within this process, including mainstream maintained and academy primary, secondary and special schools. Comments and expressions of interest received from previous phases of the programme as well as lessons learned have also been used in the development of this report for approval.
24. Public consultation will be carried out for each approved project going forward in line with statutory Planning Consultations and Judicial Review periods for Land & Property developments.
25. Further public consultation will also be undertaken for each approved project in line with Department for Education statutory processes for Making Significant Changes to Maintained Schools or an Open Academy by Mutual Agreement and Free School Presumption (Section 10 Consultation) processes. This public-facing work needs to demonstrate that fair and open local consultation has been undertaken with all those who could be affected by the proposed change, and that the Local Authority or Academy Trust has considered all responses received. The Lead Cabinet Member for Education & Learning and the Regional Schools Commissioner (or the Secretary of State as appropriate) will need evidence that they have been consulted and will consider any reasonable objections from them.

#### **Risk Management and Implications:**

26. Sufficiency data requires close monitoring and frequent ratification to ensure projected demand for learners with EHCPs is up to date and accurate. This is mitigated by triangulation with local intelligence which ensures appropriate projections of supply of specialist school places per district and borough as well as quadrant, which are aligned with need as well as agreed capital and revenue projections for the Council.
27. Specific timescale risks associated with the statutory process including Making Significant Changes to Schools (DfE guidance, October 2018), planning and procurement could mean that permanent expansion projects are not delivered in readiness for the beginning of an academic year. This risk has been mitigated by forward planning statutory Education processes alongside and Land & Property processes.
28. The SEND Capital Programme's delivery will continue to be monitored by Surrey's Children, Families & Learning Capital Board and jointly planned by Education and Land & Property partners in regard to continued business justification, financial viability, progress, risks, and issues as appropriate.
29. Targeted conversations with Headteachers and Governing Bodies of LA Maintained Schools and Multi-Academy Trust Chief Executive Officers took place in mid-November 2021 after the expression of interest exercise was initiated through communications with schools in the previous month. This was to further ascertain and promote interest in school expansion with settings that have leadership capacity on top of 'business as usual'. These conversations resulted in highly positive feedback in the form of significantly increased numbers of applications submitted by

mainstream schools and academies keen to work with the LA to establish new SEN provision, compared to previous phases of the programme. (Potentially up to 872 additional places).

30. All building and refurbishment projects are required to include risk, issue, and quality registers. At a programme level estimated costs include allowances for design development and construction risk and are based on current costs. (i.e., exclude inflation) Estimated costs exclude uplifts for meeting the Operationally Carbon Net Zero target. These will be subject to approval from the CFL Capital Programme Board and reported by exception for decision-making.
31. Evaluative processes for measuring the success of SEND Capital investment are employed in reviewing the impact and lessons learned from Phase 1-3 projects. Learning from experience is critical so that previous lessons learned can be applied, with the goal of seeking opportunities to continue to implement improvements throughout each phase of the programme. It is the responsibility of all officers involved with the SEND Capital Programme to look for lessons in order to drive sustainable change and progression.
32. A Programme Risk Register will be used to identify, manage, and mitigate programme risks. This is managed by the Programme Leads for Education and Land & Property. In addition, each individual approved project within the programme will have a comprehensive costed risk, issue, and quality register. These will be managed by the Land & Property Schools Project Management teams.
33. Early discussions and Pre-Application consultation with the Planning Authority and Procurement ensure that potential contentious planning conditions and routes through procurement frameworks are mitigated early. Monthly programme review meetings between the Programme Leads and Planning were established under Phase 3 of the programme for this purpose.

#### **Financial and Value for Money Implications:**

34. The financial pressures on the DSG and High Needs Block (HNB) continue to be a key focus of the SEND Transformation programme. At the end of 2020/21, following a year end overspend of £34.5m, the cumulative deficit on the HNB now stands at £83m with an overall DSG deficit balance of £63.7m when offsetting other block surpluses.
35. The current budget contains an assumed overspend of £32.7m which is matched by a General Fund contribution to the offsetting reserve. This will mean the deficit, and offsetting reserve will be over £115m by the end of 21/22.
36. The budget this year assumed an overspend of £23.8m with a further £9m contingency contained, initially, within corporate budgets. This means that at present, the forecast outturn will be within that overall budget allocation, although any further increase in pressure will result in additional overspend which is not budgeted for.
37. Remaining approved projects from Phases 1-3 of the Capital programme (ANNEX 1) are estimated to deliver over £24.3m of cost containment over the next five years.

The creation of additional SEND provision in Surrey therefore remains one of the largest contributors to containing costs.

38. The Capital investment required to complete all projects identified within this fourth phase of the programme is estimated at £74m. There is currently £60m available within the Capital Programme Pipeline.
39. Transferring the £60m from the current pipeline into a Core budget, would enable schemes to be progressed up to that value. Further work will continue to determine how the additional £14m could be funded. The recent Spending Review announced £2.6bn of new capital investment in High Needs provision over a three-year period. Further detail is expected to be announced in the Spring around individual LA allocations. The full £74m is based on the development of up to 872 additional specialist school places in new specialist SEN Units in mainstream schools, special school expansions and a new SEN School. (Annex 4). If external grant funding is not secured the Council would need to consider the benefits of allocating additional capital funding.
40. Annex 4 sets out the possible schemes which could be delivered with the available £60m funding envelope. This would deliver an additional 712 specialist school places. If the further £14m were to be identified, this would increase cost containment potential by approximately £5m.
41. A sustainable specialist estate will be developed to provide fit for purpose facilities for Surrey's pupils who have SEND and require a specialist school placement, providing cost effective solutions to support revenue cost containment to the Dedicated Schools Grant's High Needs Budget. The investment will be funded from the pipeline capital programme budget within Land & Property in order to progress this next phase of the SEND Capital Programme.
42. The total cost of the approved SEND Capital Programme is projected to be £153.6m:

<b>Programme Phase</b>	<b>Investment £'m</b>
Phase 1	39.9
Phase 2	21.3
Phase 1 & 2 expanded schemes	6.9
Phase 3	11.5
Phase 4	74
<b>TOTAL</b>	<b>£153.6m</b>

43. This is funded by:

<b>Approval period</b>	<b>Investment £'m</b>
24 September 2019	33.2
29 September 2020	36.0
26 January 2021 (repurposed capital allocation)	10.4
25 January 2022	60.0*
<b>SUB TOTAL</b>	<b>139.6</b>
Additional funding required	£14.0m
<b>TOTAL</b>	<b>£153.6m</b>

\* This has been assumed in the capital programme contained in the Medium-Term Financial Strategy

44. Each individual project will be required to demonstrate value for money at cost per pupil place and benefits realisation achieved, in addition to being subject to robust cost challenge and scrutiny to drive optimum value as it progresses.

#### **Section 151 Officer Commentary:**

45. Although significant progress has been made over the last twelve months to improve the Council's financial position, the medium-term financial outlook beyond 2021/22 remains uncertain. The public health crisis has resulted in increased costs which may not be fully funded. With uncertainty about the ongoing impact of this and no clarity on the extent to which both central and local funding sources might be affected in the medium term, our working assumption is that financial resources will continue to be constrained, as they have been for the majority of the past decade. This places an onus on the Council to continue to consider issues of financial sustainability as a priority in order to ensure stable provision of services in the medium term.
46. As such, the Section 151 Officer supports the recommendations of this report as the future of the DSG HNB is a significant factor in the Council's medium term financial position. Expanding local SEND provision and reducing reliance on the NMI sector is the single biggest contributor to returning the DSG High Needs Block to financial sustainability.
47. Each project will require a business case to be approved through Capital Programme Panel (CPP) to ensure appropriate scrutiny of costs, benefits and timescales.

#### **Legal Implications – Monitoring Officer:**

48. Part 3 of the Children and Families Act 2014 places a duty on the local authority to support children and young people in England with special educational needs or disabilities and to keep under review the educational provision in its area for those children and young people.
49. The best value duty is contained in s3 of the Local Government Act 1999 as a result of which the Council is under a duty to make arrangements to secure continuous improvement in the way in which functions are exercised, having regard to a combination of economy, efficiency, and effectiveness. The relevant guidance states that Councils should consider overall value, including economic, environmental and social value when reviewing service provision.
50. Under Section 2 (1) of the Local Authorities (Land) Act 1963 a local authority has extensive development powers and may, for the benefit or improvement of its area, erect, extend, alter, or re-erect any building and construct or carry out works on land.

#### **Equalities and Diversity:**

51. The SEND Partnership Strategy 2019-2022, to which the SEND Capital programme aligns, was subject to a full Equalities Impact Assessment (EIA) published on 21 January 2019. This EIA has been reviewed and remains relevant to the activity outlined in this Cabinet paper.

52. Phase 4 of Surrey’s SEND Capital Programme is expected to have a positive impact on Equalities and Diversity, as a result of increasing the number of Surrey children and young people who will have their additional needs better met by local schools in their local area.

53. Due consideration will be given to the Equalities and Diversity impacts of individual schemes as they progress into approved projects. Individual Equalities Impact Assessments are undertaken in line with statutory consultation periods aligned with the Department for Education statutory processes for Making Significant Changes to Maintained Schools or an Open Academy by Mutual Agreement.

**Other Implications:**

54. The potential implications for the following council priorities and policy areas have been considered. Where the impact is potentially significant a summary of the issues is set out in detail below.

Area assessed:	Direct Implications:
Corporate Parenting/Looked After Children	<p>The programme of capital investment directly supports both the Surrey Corporate Parenting Strategy 2020 and SEND Partnership Strategy 2019-2022.</p> <p>Increasing the sufficiency of provision in Surrey for children and young people who have SEND and/or who are looked after will enable better long-term outcomes, with children closer to home and more connected to local communities and support services.</p> <p>Local capital investment improves value for money through the strengthening of collaboration with local providers, as well as other local authorities to manage the market more effectively.</p>
Safeguarding responsibilities for vulnerable children and adults	<p>The council has a duty to promote and improve safeguarding in education as well as educational outcomes for all children and young people who are vulnerable or disadvantaged. The creation of additional specialist capacity closer to home supports highly effective joint agency monitoring to safeguard children, to reduce placement breakdown and increased demand on care services.</p>
Environmental sustainability	<p>The provision of specialist school places closer to home will reduce the average journey times for learners with EHCPs. This also supports the development of sustainable independent travel skills for pupils with SEND, which is aligned with Preparation for Adulthood outcomes. These benefits also involve maximising local business opportunities and the social value they create across the county, including how local communities can be best supported and enhancing communications both internally and externally.</p>
Compliance against net-zero emissions target and future climate compatibility/resilience	<p>Design philosophy that has been adopted to create new or refurbish and extend existing buildings will support low energy consumption, reduce solar gain, and promote natural ventilation. Any proposals will be in line with this policy and any new building will be to the standards in the local planning authority’s adopted core planning strategy. Commitment to drive forward the transition to a zero carbon built environment, through the pursuit of lower operational energy use, increased supply of renewable energy to Surrey’s buildings and reduced embodied carbon – the GHG emissions associated with non-operational phases like construction.</p>
Public Health	<p>No significant implications arising from this report.</p>

## What Happens Next:

### 55. Timescales:

- a. W/C 10 January 2022 and onwards: Site visits to notional schemes approved in principle looking to establish new SEND Provision
- b. Tuesday 1 February 2022: Notification to successful applicant schools
- c. W/C 7 February 2022: Significant Change processes start with schools and academies
- d. February 2022 SCC Land & Property commence Feasibility on Notional Phase 4 schemes
- e. June 2022: Lead Cabinet Member and Regional Schools Commissioner decisions on Phase 4 Significant Changes to LA Maintained Schools and Academies
- f. Completion of Phase 1-3 SEND Capital programme approved projects to approved timescales

56. Business cases will be taken to Capital Programme Panel to seek approval for scheme budgets. Subsequent decisions about resource allocation for approved schemes will be expedited through delegated authority to Lead Cabinet Members for Education & Learning, Resources and Land & Property.

57. Issues/ Risks/ Outcomes will be communicated via the CFL Capital Board alongside monthly SEND Transformation Board and Lead Cabinet Member Briefings

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### Consulted:

#### Internal:

- CFL Capital Programme Board
- SEND Transformation Board
- Cabinet Members Denise Turner-Stewart and Becky Rush
- Directors of Education, Liz Mills and Land & Property, Simon Crowther
- Strategic Finance Business Partner CFL, Daniel Peattie
- Deputy Strategic Finance Business Partner ELLC, Louise Lawson
- Education, Commissioning and Land & Property Staff

#### External:

- Maintained mainstream primary schools
- Maintained mainstream secondary schools
- Maintained special schools
- Surrey SEND Partnership Board

### Annexes:

- Annex 1: SEND Capital Programme Phases 1-3 Project delivery status
- Annex 2: SEND Capital Programme Phase 4 (Notional schemes, subject to full business case development)

- Annex 3: Surrey Education, Health and Care Plans (EHCPs) per percentage of the 4-19 general school age population
- Annex 4: SEND Capital Strategy Cost Containment to DSG High Needs Block
- Annex 5: Home to School Travel patterns for Surrey EHCP pupils in Specialist School Placements

**Sources/background papers:**

Surrey SEND Partnership Strategy 2019-2022

Surrey SEND Sufficiency Strategy 2020

Surrey School Organisation Plan 2020-2030

Surrey SEND Commissioning Strategy 2021

Surrey SEND Transformation Programme update 2021

Executive Summary Surrey Specialist Estate Fit for Purpose Accommodation Review 2021

Schools' Expression of Interest Applications for SEND Capital Programme Phase 4  
December 2021

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## Annex 1: SEND Capital Programme Phases 1-3 - Approved Projects' Delivery Status

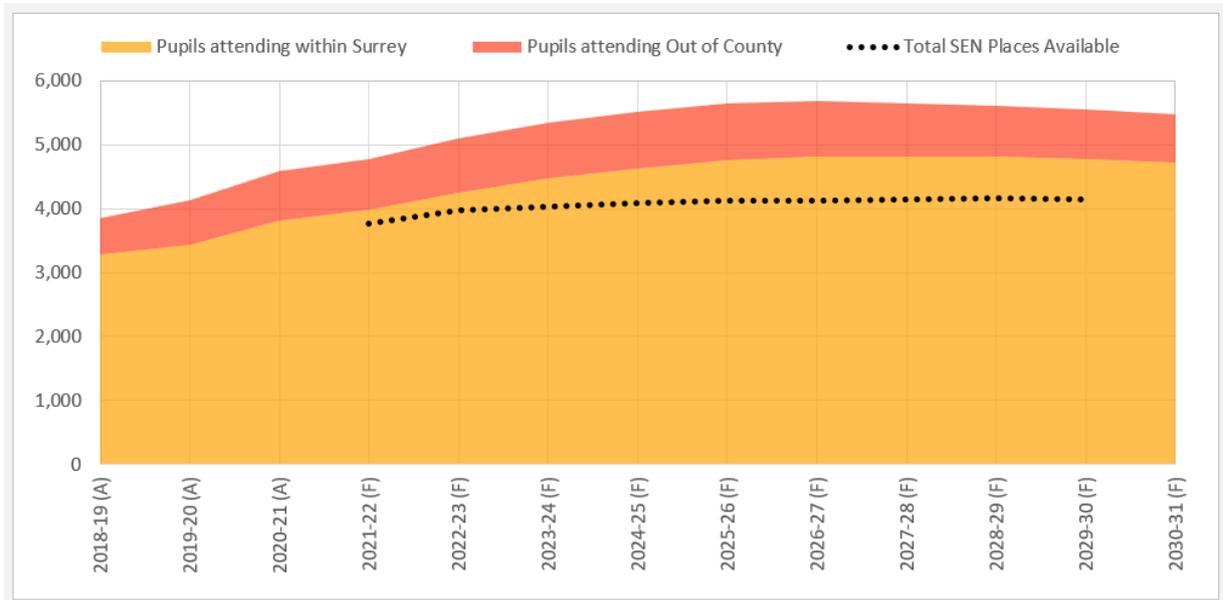
Project number	Placement name	Placement Type	SEN Need-Type & DFE Designation	Surrey School Designation	Phase of Education	Quadrant	District/ Borough	Project	Total additional places	New places Sept 22	Target Delivery of works	Delivery Status
1	Woodfield School	Special School	Moderate Learning Difficulties	Learning & Additional Needs	Secondary 11-16 years	SE	Reigate & Banstead	Secondary Bulge Class	10	0	Sept 2019	Delivered
2	Linden Bridge Academy	Special School	Autism and Communication & Interaction Needs	Complex Social Communication Needs	All Through 4-16 years	NE	Epsom & Ewell	Primary Bulge Class	8	0	Sept 2019	Delivered
3	Philip Southcote School	Special School	Moderate Learning Difficulties	Learning & Additional Needs	Secondary & Post 16 11-19 years	NW	Runnymede	Secondary Bulge Class	10	0	Sept 2019	Delivered
4	Freemantles School	Special School	Autism and Communication & Interaction Needs	Complex Social Communication Needs	All Through 4-19 years	NW	Woking	Secondary Bulge Class	16	0	Sept 2019	Delivered
5	Pond Meadow Academy	Special School	Severe Learning Difficulties	Severe Learning Difficulties	All Through 2-19 years	SW	Guildford	Secondary Bulge Class	14	0	Sept 2019	Delivered
6	Brooklands School, Wray Park site	Special School	Severe Learning Difficulties	Severe Learning Difficulties	Primary 2-11 years	SE	Reigate & Banstead	Primary Bulge Class	8	0	Sept 2019	Delivered
7	Walton Leigh School	Special School	Severe Learning Difficulties	Severe Learning Difficulties	Secondary 11-16 years	NE	Elmbridge	Secondary Bulge Class	11	0	Sept 2019	Delivered
8	Bell Farm Primary School	SEN Unit/ Resourced Provision	Autism and Communication & Interaction Needs	Communication & Interaction Needs	Primary 4-11 years	NE	Elmbridge	New SEN Unit	21	2	Sept 2020	Delivered
9	Worplesdon Primary School	SEN Unit/ Resourced Provision	Autism and Communication & Interaction Needs	Communication & Interaction Needs	Primary 4-11 years	SW	Guildford	New SEN Unit	21	0	Sept 2020	Delivered
10	Brooklands School, Alexander Road site	Special School	Autism and Communication & Interaction Needs	Complex Social Communication Needs	Primary 4-11 years	SE	Reigate & Banstead	Special School Expansion	70	11	Feb 2022	Contract
11	Freemantles School	Special School	Autism and Communication & Interaction Needs	Complex Social Communication Needs	All Through 4-19 years	NW	Woking	Special School Expansion	72	9	Mar 2023	Planning
12	Meadhurst Primary School	SEN Unit/ Resourced Provision	Autism and Communication & Interaction Needs	Communication & Interaction Needs	Primary 4-11 years	NE	Spelthorne	Redesignation from SLCN to ASD and Expansion	29	5	Part 1 Sept 2021 Part 2 Sept 2022	Delivered Feasibility
13	Fox Grove Academy	Special School	Autism and Communication & Interaction Needs	Complex Social Communication Needs	All Through 4-19 years	SE	Mole Valley	DfE Delivery: new Special Free School	152	32	Dec 2021	Delivered
14	Betchwood Vale Academy	Special School	Autism and Communication & Interaction Needs	Communication & Interaction Needs	All Through 4-19 years	SE	Mole Valley	DfE Delivery: new Special Free School	180	0	Sept 2024	Design
15	SCC funded ASD Special Free School West of County	Special School	Autism and Communication & Interaction Needs	Communication & Interaction Needs	All Through 4-19 years	TBC	TBC end of January 2022	New Special Free School	200	0	Sept 2024	Feasibility
16	Limpfield Grange School (Girls)	Special School	Autism and Communication & Interaction Needs	Communication & Interaction Needs	Secondary & Post 16 11-19 years	SE	Tandridge	Special School Expansion (Post 16)	40	9	Sept 2023	Feasibility
17	Sunnydown School (Boys)	Special School	Autism and Communication & Interaction Needs	Communication & Interaction Needs	Secondary 11-16 years	SE	Tandridge	Special School Refurbishment	4	0	April 2021	Delivered
18	Woodfield School	Special School	Moderate Learning Difficulties	Learning & Additional Needs	Secondary 11-16 years	SE	Reigate & Banstead	Special School Expansion	60	10	Sept 2022	Planning
19	The Abbey Academy	Special School	Moderate Learning Difficulties	Learning & Additional Needs	Secondary 11-16 years	SW	Waverley	Special School Expansion	60	13	June 2023	Planning
20	Three Rivers Academy	SEN Unit/ Resourced Provision	Autism and Communication & Interaction Needs	Communication & Interaction Needs	Secondary 11-16 years	NE	Elmbridge	New SEN Unit	30	8	Jan 2023	Feasibility
21	Philip Southcote School (Main site)	Special School	Moderate Learning Difficulties	Learning & Additional Needs	Secondary 11-19 years	NW	Runnymede	Special School Expansion	26	11	Jan 2023	Planning
22	Philip Southcote School at The Meads External works at The Meads	Special School	Moderate Learning Difficulties	Learning & Additional Needs	Secondary 16-19 years	NW	Runnymede	Relocation of Post 16	30	10	Sept 2021 May 2022	Delivered Planning
23	Philip Southcote at Chertsey High School	Special School	Moderate Learning Difficulties	Learning & Additional Needs	Secondary 11-16 years	NW	Runnymede	Special School Expansion - new satellite site	20	4	Sept 2021	Delivered
24	Philip Southcote at Kings International College	Special School	Moderate Learning Difficulties	Learning & Additional Needs	Secondary 11-16 years	NW	Surrey Heath	Special School Expansion - new satellite site	20	4	Sept 2021	Delivered
25	Chandlers Field School	SEN Unit/ Resourced Provision	Autism and Communication & Interaction Needs	Communication & Interaction Needs	Primary 4-11 years	NE	Elmbridge	New SEN Unit	25	6	Oct 2021	Delivered
26	Bramley Oak Academy	Special School	Social, Emotional & Mental Health Needs	Social, Emotional & Mental Health Needs	Primary 5-11 years	SW	Guildford	Special School Expansion	49	0	Part 1 April 2021 Part 2 Nov 2023	Delivered Design
27	West Hill Academy	Special School	Moderate Learning Difficulties	Learning & Additional Needs	Primary 4-11 years	SE	Mole Valley	Special School Expansion	30	14	Part 1 Sept 2021 Part 2 Sept 2022	Delivered Design
28	Manor Mead School at Virginia Water	Special School	Autism and Communication & Interaction Needs	Communication & Interaction Needs	Primary 4-11 years	NE	Spelthorne	2 year Temporary Expansion	60	20	Part 1 Sept 2021 Part 2 Sept 2022	Delivered Feasibility
29	Wishmore Cross Academy	Special School	Social, Emotional & Mental Health Needs	Social, Emotional & Mental Health Needs	Primary & Secondary 7-16 years	NW	Surrey Heath	Special School Expansion	28	0	Sept 2021	Delivered
30	The Park Academy	Special School	Moderate Learning Difficulties	Learning & Additional Needs	Secondary 11-16 years	NW	Woking	Special School DfA Compliance	2	0	Sept 2021	Delivered
31	Fox Grove Academy	Special School	Autism and Communication & Interaction Needs	Complex Social Communication Needs	All Through 4-19 years	NE	Elmbridge	Temporary Accommodation Sept 21-Dec 21	64	0	Sept 2021	Delivered
32	Sunnydown School	Special School	Autism and Communication & Interaction Needs	Communication & Interaction Needs	Secondary 11-16 years	SE	Tandridge	Special School Expansion	40	0	TBC	Feasibility
33	Temporary Sponsor/s to be confirmed by end of January 2022	Special School	Autism and Communication & Interaction Needs	Communication & Interaction Needs	Secondary 11-16 years	NE/NW	TBC end of January 2022	2 year Temporary Expansion arrangements for SCC funded ASD Special School West of County	100	40-50 TBC	Sept 2022	Feasibility
34	Temporary Sponsor/s to be confirmed by end of January 2022	Special School	Autism and Communication & Interaction Needs	Communication & Interaction Needs	Secondary 11-16 years	NE/NW	TBC end of January 2022	2 year Temporary Expansion arrangements for delayed Betchwood Vale Academy	86	50	Sept 2022	Feasibility
<b>Programme Total</b>									<b>1,518</b>	<b>268</b>		

Current approved projects within the SEND Capital Programme will deliver approximately 300 additional specialist school placements for Surrey resident EHCP Pupils from September 2022. This will achieve 49% cost containment to Surrey's DSG High Needs Budget target for the financial year.

Cost Containment to DSG HNB Revenue							Notes
	2021/2022	2022/2023	2023/2024	2024/2025	2025/2026	2026/2027	
Number of additional specialist school places	290	300	273	189	163	92	From approved projects in SEND Capital Programme Phase 1-3. Phase 4 would deliver additional places that could be phased in from 2023/2024 onwards and would be in addition to these totals.
Total cost containment target for DSG HNB	£28,000,000	£12,300,000	£13,200,000	£13,000,000	£4,800,000	£3,300,000	Phase 4 would deliver additional cost containment from 2023/2024 onwards as projects are likely to be delivered between 2023-2025.
Potential Part Year cost containment from SEND Capital programme	£5,800,000	£6,000,000	£5,460,000	£3,780,000	£3,260,000	£1,840,000	Part year due to school terms running from September to July.
Additional places as % of total cost containment	21%	49%	41%	£29%	68%	56%	From approved projects in SEND Capital Programme Phase 1-3 only. Phase 4 would increase to % of total cost containment from 2023/2024 onwards.

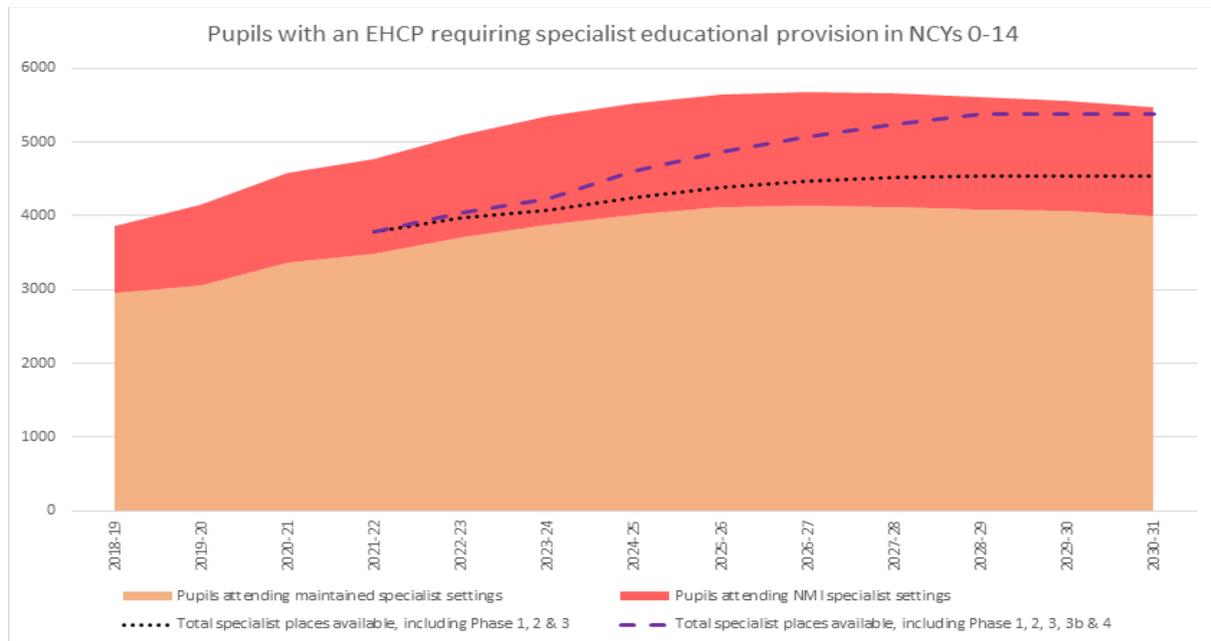
**Annex 2: Surrey Projected Demand for Specialist School Placements**

**Table 1: Projected shortage of Specialist School Placements for Surrey resident EHCP Pupils, with average annual deficit of 34% year on year throughout the planning period**



Source: edge-ucate SEN

**Table 2: Impact of planned growth from the current SEND Capital Programme and notional Phase 4 on demand for Specialist School Placements for Surrey resident EHCP Pupils**



Source: edge-ucate SEN

Phase 4 of the SEND Capital Programme will close the gap between sufficiency of maintained specialist school placements across the county and the further reduce over-reliance on the independent sector.

**Annex 3: Surrey Education, Health and Care Plans (EHCPs) per percentage of the 4-19 general school age population**

All Surrey EHCP pupils age 4-19 years (NCY0-NCY14)													
Actuals				Forecast/ Projected need									
Year	2018 - 2019	2019 - 2020	2020 - 2021	2021 - 2022	2022 - 2023	2023 - 2024	2024 - 2025	2025 - 2026	2026 - 2027	2027 - 2028	2028 - 2029	2029 - 2030	2030 - 2031
General Population age 4-19 years	233,662	235,934	238,716	240,582	242,290	243,000	243,274	243,003	241,938	240,334	238,253	236,084	233,530
EHCP Count NCY0-14	8,013	8,845	9,729	10,372	11,117	11,719	12,132	12,447	12,609	12,609	12,527	12,387	12,241
EHCPs per % general age 4-19 population	3.4%	3.7%	4.1%	4.3%	4.6%	4.8%	5%	5.1%	5.2%	5.2%	5.2%	5.2%	5.2%
EHCP Growth year on year	~	10.3%	10%	6.6%	7.1%	5.4%	3.5%	3%	2.6%	0%	-0.6%	-1.1%	-1.2%

Source:  edge-ucate SEN

## Annex 4: SEND Capital Programme Phase 4 (Notional schemes, subject to full business case and cost plan development)

Placement Type	SEN Need- Type & DFE Designation	Surrey School Designation	Phase of Education	Quadrant	Project	Project Type	Total additional places	Target Delivery of works	Notional Cost (Capital)	Cost per Pupil Place (Capital)	Cost per Pupil Place (Revenue)	Total Annual Placement Cost (Revenue)	DSG HNB Cost Containment Potential
Existing SEN Units	Autism and Communication & Interaction Needs	Communication & Interaction Needs	Primary	NE & NW	Redesignation from dual SEN need to ASD and re-provision of space to fit for purpose standard *	Modular expansion & refurbishment	10	Sep 2023	£3m	£0.3m *	£13,252	£132,520	£300k
Mainstream SEN Unit	Autism and Communication & Interaction Needs	Communication & Interaction Needs	Primary	NE, NW, SE, SW	New SEN Units	Modular Expansion & Refurbishment	94	Sep 2023	£4.45m	£0.47m	£13,252	£1,245,588	£2.2m
Mainstream SEN Unit	Autism and Communication & Interaction Needs	Communication & Interaction Needs	Secondary	NE, SE	New SEN Units	Modular Expansion & Refurbishment	84	Sep 2023	£7.3m	£0.87m	£14,000	£1,176,000	£2.52m
Special School	Autism and Communication & Interaction Needs	Communication & Interaction Needs	Primary	NE	Special School Expansion	New build	60-80	Sep 2026	£10m	£0.125m	£17,534	£1,052,040	£2.4m
Special School	Autism and Communication & Interaction Needs	Complex Communication & Interaction Needs	Primary	SE, SW	Special School Expansion	Remodelling & Refurbishment	50	Sep 2024	£2.95m	£0.59m	£21,616	£1,080,750	£1.5m
Special School	Severe Learning Difficulties	Severe Learning Difficulties	Primary	SE, NW	Special School Expansion	Modular Expansion/ Refurbishment	40-60	Sep 2023/24	£4.1m	£0.10m	£23,051	£1,383,035	£1.8m
Special School	Social, Emotional & Mental Health Needs	Social, Emotional & Mental Health Needs	Primary	SW	Special School Expansion	Modular expansion	49	Sep 2024	£6m	£0.12m	£29,995	£1,467,785	£1.47m
Special School	Autism and Communication & Interaction Needs	Communication & Interaction Needs	Secondary	NE, SE	Special School Expansion	Modular Expansion & Remodelling	140	Sep 2023/24	£9.12m	£0.65m	£19,297	£2,701,580	£4.2m
Special School	Autism and Communication & Interaction Needs	Complex Communication & Interaction Needs	Secondary	SE, SW	Special School Expansion	Remodelling & Refurbishment	25	Sep 23	£0.5m	£0.2m	£22,347	£558,675	£0.75m
Special School	Severe Learning Difficulties	Severe Learning Difficulties	Secondary	NE, SE	Special School Expansion	Modular Expansion, Remodelling & Refurbishment	100	Sep 24	£7m	£0.7m	£23,716	£2,371,558	£4.5m
Special School	Moderate Learning Difficulties	Learning & Additional Needs	Secondary	NE, NW, SE, SW	Special School Expansion	Modular expansion & refurbishment	40	Sep 2023	£2.35	£0.58	£21,154	£848,160	£2.85m
<b>Pipeline Subtotal</b>							<b>712</b>		<b>£56.77m</b>	<b>£3.23m surplus</b>			
Special School	Social, Emotional & Mental Health Needs	Social, Emotional & Mental Health Needs	Secondary	NE/NW	New Special School (Free School Presumption)	New build	160	Sep 2026	£17m	£0.10m	£26,038	£4,156,080	£4.8m
<b>TOTAL</b>							<b>872</b>		<b>£73.77m</b>			<b>£18,181,881</b>	<b>£29.29m</b>

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712 additional specialist school places are deliverable within the £60m capital investment for Phase 4. Options for securing the additional £14m required to deliver new 160 place SEMH Special School provision are being explored. There are opportunities, subject to Regional Schools Commissioner approval and agreement with Trusts, to explore expansion of existing secondary SEMH provision by up to 70 places which could be delivered at a faster pace by 2024/2025.

The Specialist Education Estate Review provides clear benchmarking for cost per pupil place, based on the different development approach required to deliver the proposed Phase 4 of the programme. Phase 3 of the programme's delivery was based on an average cost of around £29k per place and this is because the majority of projects were achieved through utilising and adapting capacity within undersubscribed mainstream primary and secondary schools and available SCC owned assets.

By comparison, the proposed Phase 4 programme is based on an average cost of approximately £75k per place. The reason for this is that the programme includes both new build and provision within existing assets (i.e., requiring refurbishment or remodelling) as well as a number of modular solutions, with a range of costs that reflect different scope of work to deliver the additional specialist school places.

**Annex 5: Current Home to School Travel Patterns for Surrey Resident EHCP Pupils attending Specialist School Placements**

**Table 1: Surrey resident pupil travel patterns to Special Schools per District & Borough**

		Home Residence											
District	Elmbridge	Epsom and Ewell	Guildford	Mole Valley	Reigate and Banstead	Runnymede	Spelthorne	Surrey Heath	Tandridge	Waverley	Woking	OOC	
Special School location	Elmbridge	8%	1%	0%	1%	0%	9%	13%	1%	0%	0%	3%	0%
	Epsom and Ewell	10%	23%	1%	9%	9%	2%	6%	0%	3%	0%	0%	2%
	Guildford	3%	1%	31%	7%	2%	7%	4%	15%	1%	25%	17%	3%
	Mole Valley	14%	31%	7%	33%	16%	3%	5%	2%	12%	5%	4%	6%
	Reigate and Banstead	1%	9%	0%	15%	39%	1%	0%	1%	37%	0%	0%	4%
	Runnymede	12%	6%	1%	2%	0%	20%	14%	2%	0%	1%	4%	6%
	Spelthorne	10%	1%	0%	1%	0%	12%	9%	0%	0%	0%	1%	0%
	Surrey Heath	5%	1%	13%	1%	1%	11%	11%	50%	1%	8%	17%	25%
	Tandridge	3%	6%	3%	15%	17%	1%	3%	0%	31%	1%	1%	26%
	Waverley	8%	2%	30%	5%	1%	5%	4%	10%	1%	52%	10%	27%
	Woking	10%	5%	11%	4%	1%	23%	8%	16%	0%	5%	40%	1%
	OOC	15%	14%	2%	8%	13%	5%	22%	4%	16%	4%	3%	N/A

**Table 2: Surrey resident pupil travel patterns to SEN Units in Mainstream Schools per Surrey District & Borough**

		Home Residence											
District	Elmbridge	Epsom and Ewell	Guildford	Mole Valley	Reigate and Banstead	Runnymede	Spelthorne	Surrey Heath	Tandridge	Waverley	Woking	OOC	
SEN Units in Mainstream School location	Elmbridge	47%	9%	0%	3%	0%	0%	7%	0%	0%	0%	2%	0%
	Epsom and Ewell	8%	51%	2%	2%	9%	1%	5%	0%	0%	0%	7%	22%
	Guildford	3%	2%	32%	0%	1%	1%	0%	5%	0%	10%	4%	7%
	Mole Valley	15%	30%	10%	77%	16%	0%	2%	3%	5%	1%	13%	4%
	Reigate and Banstead	1%	2%	0%	13%	48%	0%	0%	3%	30%	0%	0%	0%
	Runnymede	17%	0%	0%	0%	0%	87%	27%	11%	0%	0%	27%	7%
	Spelthorne	5%	0%	0%	0%	0%	6%	53%	0%	0%	0%	4%	11%
	Surrey Heath	0%	0%	5%	0%	0%	0%	1%	62%	0%	0%	0%	11%
	Tandridge	0%	0%	0%	3%	22%	0%	1%	0%	65%	0%	0%	26%
	Waverley	1%	2%	45%	2%	3%	0%	0%	16%	0%	88%	9%	11%
	Woking	3%	0%	3%	0%	0%	4%	4%	0%	0%	1%	36%	0%
	OOC	0%	4%	2%	0%	0%	0%	0%	0%	0%	0%	0%	N/A

**Table 3: Special School travel patterns by SEN need-type – Primary Provision**

SEN Need Type	Stay in District and attend Maintained Provision	Stay in Quadrant and attend Maintained Provision	Go Out of County	Go to Independent Sector Placements	Travel 6 Miles or More
Cognition & Learning Needs	31%	59%	9%	14%	61%
Social, Emotional & Mental Health Needs	11%	29%	34%	41%	90%
Communication & Interaction Needs	31%	53%	19%	32%	69%
Sensory & or Physical Needs	14%	22%	57%	43%	78%
Total	28%	51%	19%	28%	69%

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**Table 4: Special Schools travel patterns by SEN need-type – Secondary Provision**

SEN Need Type	Stay in District and attend Maintained Provision	Stay in Quadrant and attend Maintained Provision	Go Out of County	Go to Independent Sector Placements	Travel 6 Miles or More
Cognition & Learning Needs	34%	57%	10%	18%	47%
Social, Emotional & Mental Health Needs	15%	31%	32%	42%	83%
Communication & Interaction Needs	26%	47%	19%	38%	68%
Sensory & or Physical Needs	18%	43%	44%	37%	76%
Total	27%	48%	19%	32%	64%

**Table 5: Special Schools travel patterns by SEN need-type – Total**

SEN Need Type	Stay in District and attend Maintained Provision	Stay in Quadrant and attend Maintained Provision	Go Out of County	Go to Independent Sector Placements	Travel 6 Miles or More
Cognition & Learning Needs	33%	58%	10%	17%	52%
Social, Emotional & Mental Health Needs	14%	31%	33%	42%	85%
Communication & Interaction Needs	28%	50%	19%	36%	68%
Sensory & or Physical Needs	17%	36%	48%	39%	76%
Total	27%	49%	19%	31%	66%

**Table 6: Specialist SEN Units in Mainstream Primary Schools travel patterns by SEN need-type**

SEN Need Type	Stay in District and attend Maintained Provision	Stay in Quadrant and attend Maintained Provision	Go Out of County	Go to Independent Sector Placements	Travel 6 Miles or More
Cognition & Learning Needs	69%	87%	0%	0%	25%
Social, Emotional & Mental Health Needs	57%	64%	0%	0%	43%
Communication & Interaction Needs	57%	80%	1%	0%	37%
Sensory & or Physical Needs	48%	61%	2%	0%	44%
Total	58%	78%	1%	0%	36%

**Table 7: Specialist SEN Units in Mainstream Secondary Schools travel patterns by SEN need-type**

SEN Need Type	Stay in District and attend Maintained Provision	Stay in Quadrant and attend Maintained Provision	Go Out of County	Go to Independent Sector Placements	Travel 6 Miles or More
Cognition & Learning Needs	64%	91%	0%	0%	18%
Social, Emotional & Mental Health Needs	33%	58%	0%	0%	25%
Communication & Interaction Needs	63%	84%	0%	0%	22%
Sensory & or Physical Needs	42%	61%	0%	0%	61%
Total	57%	79%	0%	0%	28%

**Table 8: Specialist SEN Units in Mainstream Primary & Secondary Schools travel patterns by SEN need-type – Total**

SEN Need Type	Stay in District and attend Maintained Provision	Stay in Quadrant and attend Maintained Provision	Go Out of County	Go to Independent Sector Placements	Travel 6 Miles or More
Cognition & Learning Needs	68%	88%	0%	0%	24%
Social, Emotional & Mental Health Needs	46%	62%	0%	0%	35%
Communication & Interaction Needs	59%	81%	1%	0%	33%
Sensory & or Physical Needs	46%	61%	1%	0%	51%
Total	58%	78%	1%	0%	34%