

SEND Reform Quarterly Return Support Session

Date: 7 September 2026

Purpose: Review updated DfE guidance, discuss Annex A changes, clarify reporting requirements, and raise issues identified within the template

Key Discussion Points

1. Quarterly Return Requirements

- Local Authorities and ICBs are required to submit Quarter 1 (April – June) and Quarter (July – September) data.
- Submission deadline is **30 October**.
- The return should be completed using the DfE template without structural amendments.
- Submission will be via the new **FlexForm** portal using a drag-and-drop process.
- Further guidance and a demonstration session on FlexForm are expected before submission.

2. Reporting Periods

- Reporting follows the **financial year**, not the SEND calendar year.
- Quarter 1 covers activity from **1 April to 30 June**.
- Quarter 2 covers activity from **1 July to 30 September**.
- For activity tables, actual activity during the quarter should be reported.
- Financial tables require updated full-year forecasts where revisions have occurred.

3. Forecasting and Revisions

- No retrospective amendments are expected for previously submitted quarters.
- If methodologies change or improve, these changes should be recorded within the assumptions tab and RAG rate updated
- D2I plans to update its forecasting tool to allow authorities to incorporate quarterly updates into longer-term forecasting activity.

4. Data Quality and Confidence Ratings

- Authorities should use assumptions tabs to explain methodologies, limitations and data quality issues.

- DfE recognises that some measures will rely on proxy data, particularly where data sharing and linkage challenges exist.
- Authorities should update confidence ratings and describe plans for improving data quality.

5. Annex A and Provision Categorisation

Key changes highlighted:

- Support bases are no longer reported separately.
- Only specialist bases within mainstream settings are reported.
- Provision categories should be derived primarily from GIAS establishment type classifications.
- UKPRN providers appearing on the Section 41 approved provider list should be classified as specialist post-16 provision.
- Vanessa will share matching resources and lookup work completed to support this categorisation process. This will be shared via email and on D2I SEND Slack Channel.

6. Post-16 Classification Discussion

- There was discussion regarding whether sixth-form pupils in mainstream schools should be reported as mainstream or post-16.
- Current guidance favours a simpler, URN/establishment-type-driven approach.
- Attendees highlighted the need for national consistency to support meaningful benchmarking.
- Further consideration may be required if DfE's future analytical needs become clearer.

7. Welsh Schools

- Welsh establishments are generally reported as "Other".
- Where authorities have sufficient local knowledge to classify provision more accurately, they may do so and document this within the assumptions tab.

9. Additional Support and Engagement

- Questions can be raised through the Data to Insight SEND Slack channel but preferred to be also raised directly to the DfE SEND Advisor allocated to your LA.
- Vanessa will continue to collect issues and questions to raise with DfE.

- Additional support sessions may be arranged on specific topics, including Annex A categorisation and UKPRN matching using Section 41 Approved Provider List.

Questions and Answers:

Q: Would it be possible to record the session?

A: The session is being transcribed and a recap will be shared after the meeting and uploaded to Slack.

Q: There is an odd calculation in line 54 where unit costs are summed up.

A: This will be raised with the department and discussions will take place regarding whether an amended template can be issued.

Q: In Section 10, the formula for the total number by age group is missing and currently displays "0". The cells are protected.

A: This issue will be raised with the department.

Q: Table 3 cell C67 references blank cell B64 instead of calculating the transport total correctly.

A: This issue will also be raised with the department.

Q: These appear to be substantive template issues rather than isolated errors. Can this be fed back to DfE?

A: Yes. A consolidated list of issues will be prepared and discussed with the department.

Q: Table 6 still includes separate rows for Mainstream Post-16 Specialist Provision and Specialist Post-16 Institutions, whereas Annex A only identifies Specialist Post-16.

A: Please ignore the Mainstream Post-16 Specialist Provision row as this category is no longer being reported.

Q: Are pupils in sixth forms attached to academies and mainstream schools included within the mainstream school or academy category?

A: For now, use the Annex A categorisation linked to GIAS establishment type to support consistent benchmarking.

Q: For dual-registered pupils, should reporting reflect the funded provision or the attended provision?

A: Reporting should align with the SEN2 Rank 1 provision category used in the SEN2 return.

Q: Should EY children attending school nurseries be manually reclassified?

A: No. Follow the provision identified through the linked GIAS URN and establishment type.

Q: Would it not be better if DfE simply provided the category mapping directly for authorities to use?

A: Annex A already provides the required categorisation linked to GIAS establishment types.

Q: It is important that DfE SEND Advisers are involved in discussions about the purpose, context and impact of this data collection.

A: SEND Advisers are being engaged through the SEND Implementation Team. Feedback and updates will continue to be shared, and future sessions will include relevant developments where possible.