

Children and Family Services

**Education, Inclusion and Additional Needs –
Placement Market Position and Sufficiency
Statement, 2026-29**

April 2026



Executive Summary

Leicestershire County Council's Children and Family Services aim to provide high-quality support for children, young people, and families. Our goal is for every child in Leicestershire to be safe, cared for, and able to thrive in inclusive communities by working with partners to improve outcomes in health, social care, and education - including those with special educational needs and disabilities - by ensuring effective services are available.

In recent years there has been an unprecedented and increasing demand for education and SEND (Special Educational Needs and Disabilities) support and services. This is not unique to Leicestershire but reflects a national pattern. At the same time, funding for these services has not kept pace with rising demand. This impacts on the ability of Local Authorities to plan and commission new placements – in all types of education settings. This situation is concerning, unsustainable, and does not serve the best interests of children and young people with SEND.

One of the ways that Leicestershire County Council can address some of these challenges is to have a clear understanding of current and future demand for educational placements and support and to then consider the best ways to meet this to meet local strategic priorities and within available public resources. This process is often referred to as 'sufficiency' and adopting this approach will help the Council to better to understand and plan local sufficiency for SEND provision in both mainstream and non-mainstream settings. This will help us to ensure that children and young people with SEND, and their families can access the right educational support and provision at the right time and in the right place.

This, the Education, Inclusion and Additional Needs - Placement Market Position and Sufficiency Statement (MPSS), 2026-29, is our response to this sufficiency challenge and is intended to support a range of different audiences to understand our current position and future sufficiency plans and actions. It uses a variety of sources of data to set out current demand and need for SEND placements in Leicestershire, considers the factors affecting that demand (and forecast demand), provides an overview of current education placement provision in Leicestershire and current use of these provisions, and then sets out sufficiency actions to ensure sustainable future sufficiency to meet local need.

Because we recognise that this MPSS exists in a changing landscape (not least due to the new Government School's white paper and Local Government Reorganisation (LGR)) we intend to publish 6 monthly updates to this MPSS – setting out if the underlying data has changed or reforms mean a new direction for the Council and what this means for our sufficiency actions.

Several key sufficiency themes have been identified in the statement:

- There has been year on year growth since 2025 for requests for Education, Health and Care Plans (EHCPs). There has also led to growth in the number for local SEND services and support – across education, health and social care – and including specialist placements. This pressure is particularly prevalent (now and in future years) for secondary and post-16.
- Broken down by SEND primary need (as set out in the SEND Code of Practice, 2015), in Leicestershire the greatest number of children and young people with an EHCP have a primary need of Communication and Interaction, followed by relatively equal amounts with a primary need of Social and Emotional Mental Health needs and cognition and learning needs.
- Existing provisions – such as Local Area Special Schools, Enhanced Resource Bases, Alternative Provisions (s) and independent specialist settings are experiencing considerable demand, with spikes in use across secondary age children and young people.
- There is an ongoing reliance on non-maintained settings – the Councils School Places Strategy sets out plans to address this and consider what additional mainstream and other settings (such as Enhanced Resource Bases) are needed to reduce this reliance.
- There is no specific variation in primary SEND need across the district and boroughs in the Leicestershire – the split of categories of need is relatively consistent across each area.
- Across SEND and education placements there is inconsistency in how placements have been brokered or purchased and contractual arrangements that have that have historically been put in place for those placements.

The MPSS sets out some high-level actions to address these themes and ensure local sufficiency over the next three years. These include:

- Ensuring compliance across Education and SEND placements to national and local contract regulations
- Closer collaboration between Commissioning and School Place Planning to ensure as a department we are planning and putting in place and supporting a spectrum of support from a range of mainstream and external providers.
- New approaches to the management and review of individual placements (such as new approach to annual reviews) to ensure that placements are delivering against EHCPs and meeting need
- Exploring sustainable planning and development of secondary and post-16 provisions with the external market.
- Understanding fee structures and costs of provisions better – focusing on ensuring value for money across all placement types and appropriate funding to meet need
- Continuing to ensure we collect and improve the quality of our sufficiency data – this will enable more detailed sufficiency planning for the future

Introduction

Leicestershire County Council's Children and Family Services aim to provide high-quality support for children, young people, and families. Our goal is for every child in Leicestershire to be safe, cared for, and able to thrive in inclusive communities by working with partners to improve outcomes in health, social care, and education-including those with special educational needs and disabilities-by ensuring effective services are available.

Leicestershire Children and Family Services Departmental Plan, 2024-26

One Vision: For all children and young people in Leicestershire to be safe, nurtured, loved and supported to succeed in caring and inclusive communities. As a priority, we want to ensure that children and young people have access within their community to good quality, inclusive education that enables them to achieve their full potential and that children and young people who have additional needs and vulnerabilities are supported in the right place, at the right time, in order to narrow the gap with their peers.

Three Ambitions: Building Strong Foundations; Be Safe and Belong; Enjoy and Achieve

[Local policies, procedures and guidance](#)



In recent years there has been an unprecedented and increasing demand for education and SEND (Special Educational Needs and Disabilities) support and services. This is not unique to Leicestershire but reflects a national pattern. As a result, there is a greater need for additional places in both mainstream schools and specialist settings to accommodate children and young people with SEND. However, funding for these services has not kept pace with rising demand and, as a result, many local authorities, including Leicestershire, are facing budget deficits. This impacts on the ability of Local Authorities to plan and commission new placements – in all types of education settings. This situation is concerning, unsustainable, and in many instances may not best serve the interests of children and young people with SEND.

Leicestershire – SEND and Inclusion Strategy, 2024-27

In Leicestershire, SEND is everyone's responsibility. Children and young people achieve better outcomes when we have a clear focus on working together. Whilst there is significant pressure and challenge, our vision is for all children, including those with SEND to thrive, fulfil their potential, belong, and live their best lives within their communities.

The purpose of this strategy is to set out the vision and priorities in Leicestershire for developing support and provision for children and young people aged 0-25 with SEND. Our strategy will be delivered through our five overarching SEND principles which have been co-produced by the Leicestershire SEND and Inclusion Partnership following an evaluation of what is working well and current barriers to achieving our vision for children and young people with SEND in Leicestershire.

The strategy is based 5 key principles:

1. The child and family are at the heart of what we do
2. We will have an accurate understanding of the needs and lived experiences of children and young people with SEND
3. Children and young people with SEND are prepared for successful transition throughout their life
4. Leaders across the SEND partnership will work together to plan, deliver and quality assure Leicestershire's offer
5. We will provide timely and effective support to enable children and young people with SEND to thrive and belong in their communities

<https://www.leicestershire.gov.uk/sites/default/files/2025-02/Draft-Leicestershire-SEND-and-Inclusion-Strategy-2024-27.pdf>

One of the ways that Leicestershire County Council can address some of these challenges is to have a clear understanding of current and future demand for educational placements and support and to then consider the best ways to meet this to meet local strategic priorities and within available public resources. This process is often referred to as 'sufficiency' and adopting this approach will help the Council to better to understand and plan local sufficiency for SEND provision in both mainstream and non-mainstream settings – ensuring that children and young people with SEND, and their families can access the right educational support and provision at the right time and in the right place.

For mainstream primary and secondary school provision, the Council has a statutory duty to ensure there are sufficient school places across the County (see Section 14 of the Education Act 1996) and the Leicestershire Schools Places Strategy (SSP) has been developed to help key stakeholders and partners understand how school places are planned and delivered in Leicestershire (<https://www.leicestershire.gov.uk/education-and-children/schools-colleges-and-academies/school-organisation/school-places-strategy>)

For other types of SEND services and support, it is often necessary to commission and procure these provisions from a variety of external SEND and education providers. This Education, Inclusion and Additional Needs Market Position and Sufficiency Statement (MPSS) sets out our strategic approach to planning and buying many of these services and support. In particular, it will focus on specialist education support that the Council has to buy from the external market, including Alternative Provision (AP) and independent specialist provisions from Primary school age onwards. Early Years sufficiency (which has its own local plan) is out of scope as are health services and many of these are not the responsibility of the Council to commission and fund. SEN transport is also outside the scope of this document though it is recognised that there is an interdependency on where children access their education and support and transport needs/costs .

As our local data collection improves and we understand our sufficiency challenges in greater detail, the focus of this MPSS may shift and expand between 2026 and 2029. The information contained in this report is based on currently available data and analysis; this is an area that we are continuing to focus on and develop to gain better insight. Consequently, we will provide regular and useful updates and will publish online every six months a summary of activity to date and a refresh of key data sources. Where the refreshed data indicates we need to change the scope of this MPSS, our sufficiency priorities and/or actions, this will be explained. This should enable this market position and sufficiency statement to remain up-to-date and therefore an up-to-date source of information to a range of stakeholders, including children and young people and their families, partner organisations and providers. This is particularly important given recent publication of the Government's White Papers, "Every child achieving and thriving" (February 2026 - <https://www.gov.uk/government/publications/every-child-achieving-and-thriving>) and Government consultation, "SEND Reform: Putting Children and Young People First" (February 2026 - <https://www.gov.uk/government/consultations/send-reform-putting-children-and-young-people-first>). We recognise that these reforms and Local Government Reorganisation may well change our longer-term sufficiency planning, but this document represents those sufficiency actions that we consider important right now.

Strategic Background

Our Education and SEND Market Position and Sufficiency Statement does not exist in isolation – it is informed by and is aligned to several other local and regional strategic documents and sources of information, including:

- Leicestershire Joint Strategic Needs Assessment (JSNA) 2022-25 (<https://www.lsr-online.org/jsna>) – please note, a refreshed SEND JSNA chapter is in preparation (early 2026)
- Leicestershire SEND and Inclusion Strategy, 2024-27 (<https://www.leicestershire.gov.uk/sites/default/files/2025-02/Draft-Leicestershire-SEND-and-Inclusion-Strategy-2024-27.pdf>)
- Leicestershire School Places Strategy, 2026-31 (<https://www.leicestershire.gov.uk/education-and-children/schools-colleges-and-academies/school-organisation/school-places-strategy>)
- Children and Families Partnership Plan, 2024-26
- Leicestershire Continuous Improvement Plan, 2023-24 – Achieving Excellence Through Purposeful Practice
- LLR Special Educational Needs and Disability (SEND) Joint Commissioning Strategy 2025-2030 (<https://www.leicester.gov.uk/your-council/policies-plans-and-strategies/social-care-and-education/special-educational-needs-and-disability-send-joint-commissioning-strategy-2025-2030/>)
- Leicestershire Children and Family Services – Short Breaks Statement, August 2025-2026 (<https://www.leicestershire.gov.uk/sites/default/files/2025-11/SEND-short-breaks-statement.pdf>)
- Young Researchers Young Voices Project (<https://www.derby.ac.uk/research/centres-groups/educational-research-and-innovation/inclusion-and-special-educational-needs-research-cluster/action-research-and-lesson-study-for-isend/>)



Commissioned SEND services and Support in Leicestershire – An Overview

In Leicestershire, we currently provide suitable services and support are available to children, young people with SEND and their families and carers in several different ways. These services and support are delivered in Leicestershire in several different ways:

1. Some of are provided directly by the Council and these are often referred to as ‘in-house’ or ‘internal’ services or support. This includes mainstream schools and colleges.
2. Others are planned, put in place and delivered by our partners – such as local Health Services or by Local education providers such as schools and colleges.
3. Further services and support are delivered by organisations outside of the Council (known as the ‘external market’ - including charities, not-for-profit and private businesses). These are often referred to as ‘external provisions/placements’ or ‘commissioned services’. Where the Council works with these organisations it is necessary to procure or buy these services following certain Legislation and National and Local rules and regulations. It is then the responsibility of the Council to monitor and quality assure these services.

There is a range of detailed information published available about some of these different services and support:

- Overview of the range of services available locally is available in the Leicestershire SEND and Inclusion Strategy, 2024-27 (<https://www.leicestershire.gov.uk/sites/default/files/2025-02/Draft-Leicestershire-SEND-and-Inclusion-Strategy-2024-27.pdf>)
- Detailed information about specific provisions (mainstream and specialist) can be found in the ‘SEND Provision in Leicestershire (SPIL) (<https://www.leicestershire.gov.uk/education-and-children/special-educational-needs-and-disability/send-service-developments/send-provision-in-leicestershire-spil>).
- Overview or current and planned mainstream schools and academies and Enhanced Resource Bases (ERBs) can be found in the Leicestershire School places strategy, 2026-2031 (<https://www.leicestershire.gov.uk/education-and-children/schools-colleges-and-academies/school-organisation/school-places-strategy>).

The Council is responsible for the planning, purchasing and monitoring of a range of commissioned services that largely fall under the heading of ‘alternative provision’ (sometimes referred to as ‘AP’) and in the main these are specialist services. They include a range of services from independent specialist schools (non-maintained), private schools, hospital school, tuition, and therapeutic and vocational support. The majority of these are currently spot purchased – that is individual placements are made with external providers as required and to meet the needs of individual children and young people with SEND needs. In some instances, such as tuition, the Council deliver support through a commissioned framework (essentially a preferred provider list and to join this framework providers go through due diligence checks through a competitive bidding process).

The Council also commissions a range of other educational and support services, some of which support children and young people with SEND needs and others support services such as the Specialist Teaching Service and Virtual Support to provide services. Examples of these include buying specialist assessments, equipment and adaptations, training and IT software as well as IT software and access to support materials. The Council also commissions mediation and advice services (with other local authorities in the East Midlands). In addition, the Council has recently

jointly commissioned with a neighbouring Local Authority the services of an external provider to carry out audits of Alternative Provisions (APs) in both Leicester City and Leicestershire. These audits will focus on the Safeguarding and health and Safety arrangements in place at APs and provide reassurance of the quality of provision in place.

In addition to planning and buying these services, the Council is also responsible for monitoring the quality of provisions (a process known as quality assurance) and contract management. Historically, some of this activity has been inconsistent and robust as we would have liked and improving this is an area of focus for the department. In 2025, therefore, a dedicated team within the Children and Family Services Commissioning Service was set up to work with the Education, Inclusion and Additional Needs directorate. This work has been undertaken as part of a wider transformation of commissioning support in the department, known as 'Smarter Commissioning'.

Placement and Provision Level Data:

To provide some context to those services commissioned by the Council for children and young people and an overview of current market usage, as of December 2025) those with an active Education, Health and Care Plans (EHCP) were placed in some of the following settings (note, not all settings represented here):



3299

in mainstream schools or colleges

2126

in local area special schools



558

in Enhanced Resource Bases (ERBs) attracted to mainstream or special schools and colleges



752

in post-16 colleges/provisions

479

in commissioned placements with **74 different Independent Special Schools (ISS)**



224

in commissioned placements with non-Independent school specialist Alternative Provision

Cost of Provision:

The Council is provided with specific funding, through the High Needs Block of the Designated Schools Grant (HNB DSG), from Central government and to be used to meet the Council's statutory duties under the Children and Families Act 2014 and the Education Act 1996. This High Needs funding supports provision for children and young people with special educational needs and disabilities (SEND) who require additional support to participate in education and learning, mainly in schools and colleges, from their early years to age 25.

As has been well publicised locally (and is also true of many Local Authorities nationally), the growing demand for support and education placements is significantly outstripping HNB DSG funding and this is creating a challenging financial situation for the Council. This financial dimension is also relevant to our local sufficiency planning as the cost of different types of provision can inform decisions about what provisions are required locally namely what provisions provide the most cost-effective way of ensuring pupil outcomes and needs are met.

Based on an analysis of actual spend on education placements for children with SEND in the financial year 2024/25 and forecast spend for 2025/26 the following statements about the cost of provision may be made (please note that exact figures are not published as these are considered commercially sensitive data):

- The cost of placing a child or young person in a specialist educational placement (up to Yr 11) is generally more expensive when that placement is provided by an external (non-mainstream) provider. For example, in FY 2024/25 (actual spend), the average cost of a specialist placement in an independent specialist school cost on average three times more than an equivalent placement in a local area special school and more than double the cost of a placement in a Leicestershire Enhanced Resource Base. The same cost variations are also apparent for FY 2025/26 (forecast spend). Whilst it is appreciated that there cannot be a direct comparison between different types of provision as they will generally cater for different levels of need, (and because this analysis is also based on assigning a primary need whereas in reality the presenting needs of children and young people will be more varied and nuanced), this variation in cost of provision is of concern. In particular, it highlights the need to ensure that there are the right number of placements to meet the right type and level of need for all children and young people in Leicestershire and therefore to ensure that the right placements are available at the right time and represent value for money. For example, recent data analysis by the Council suggests that in many cases placements with independent special schools are a result of lack of sufficiency and not necessarily because of the presenting need of the child or young person. Put another way, potentially, if there are not the right types and number of placements available, the Council may be forced to place children in provisions which may not best meet need and which are likely to be more expensive.

- For 16+ provision in Leicestershire, the same observation is also true. For example, the average cost of a 16+ placement with an independent specialist provision in FY 2024/25 (actual spend) was more than three times more expensive than the average cost of a 16+ placement in a local area special school and six and a half times more expensive than 16+ placements in a mainstream school and FE colleges with additional funding due to meet SEND needs. Again, direct comparison between different setting types due to the individual needs of pupils, but that the at 16+ there are again pupils placed in external provisions due to a lack of sufficiency in mainstream or alternative (potentially less costly) settings. Given the predicted growth in demand for placements in secondary and 16+ (as discussed elsewhere in this report) this could further impact on the financial challenges that the Council faces to support this cohort of children and young people.
- Across most settings, the Council is seeing a year-on-year increase in costs for placements. This can also be seen in areas where there isn't an inflationary increase applied (e.g. Local Area Special Schools), and one explanation for this may be that there are either students with higher levels of need moving through the system, or that there is 'band-drift' occurring in the Annual Review processes. At present there is a lack of understanding of what fees constitute (i.e. cost breakdowns) and it is difficult, therefore, for the Council to understand whether current fee structures represent value for money and why there are annual increases beyond general explanations relating to nationally recognised financial challenges (e.g. employee NI; cost of living crisis).
- There has been a noticeable increase in Primary Mainstream costs year-on-year. This could either be due to a higher level of needs of new entrants, or potentially a higher package being agreed for students to take up a mainstream place (including blended packages combining mainstream and alternative provision), who might otherwise have been placed in a specialist provision such as a Local Area Special School or an Enhanced Resource Base.



Summary

As this high-level breakdown of some types of provision shows, in Leicestershire a greater number of children and young people with SEND needs are accessing provision in mainstream or local area special school settings than in commissioned settings. However, and as set out in the Leicestershire SEND and Inclusion Strategy (see 'Current Position' Section, Pg 22: <https://www.leicestershire.gov.uk/sites/default/files/2025-07/SEND-and-Inclusion-Strategy-2025-2028.pdf>), demand for specialist places in Leicestershire is out-stripping places in our Local Area Special Schools and Enhanced Resource Bases). Whilst the Council is seeking to address this through development of further specialist placements in mainstream and Local Area Special School settings, demand continues to grow. This means that reliance on commissioned specialist placements continues to increase and this places increasing pressure on High Needs Block funding as these commissioned placements tend to be more expensive than mainstream and Local Area Special School settings. This situation characterises the current market position in Leicestershire in relation to commissioning of SEND placements.

Smarter Commissioning: Transforming the Way We Work

At the heart of our approach to ensuring placement sufficiency is a focus on robust and consistent commissioning activity. 'Commissioning' is sometimes defined as the process by which an organisation decides how they will leverage the total resources available to make the biggest possible impact on outcomes in the most effective, efficient and sustainable way. Put another way, this means making decisions about how to ensure we get the best outcomes for children, young people and families with the money and resources (such as people) that we have available, ensuring that we are thinking current and future demand when planning services and support to achieve those outcomes.

To do this we need clear commissioning strategies, need to plan in advance what services we need and ensure that we have robust processes in place to monitor the quality of those services, ensuring value for money at all times. In particular, we want to ensure that there is clear and consistent commissioning offer to support the work around education, inclusion and additional needs.

More generally, in Children and Family Services in Leicestershire we will ensure that our commissioning decisions are:

- based on clear evidence for need
- focused on outcomes for children and young people focused on building relationships and working in collaboration with the local market to ensure the delivery of high-quality services and provisions
- compliant with National Public Contract regulations, the Procurement Act 2023 and local procurement and financial spend controls
- appropriately include the voice of children, young people and their families; and
- fully consider equality and diversity (with a particular focus on ensuring that we consider the needs of hard-to-reach groups and those with a protected characteristic under the Equality Act

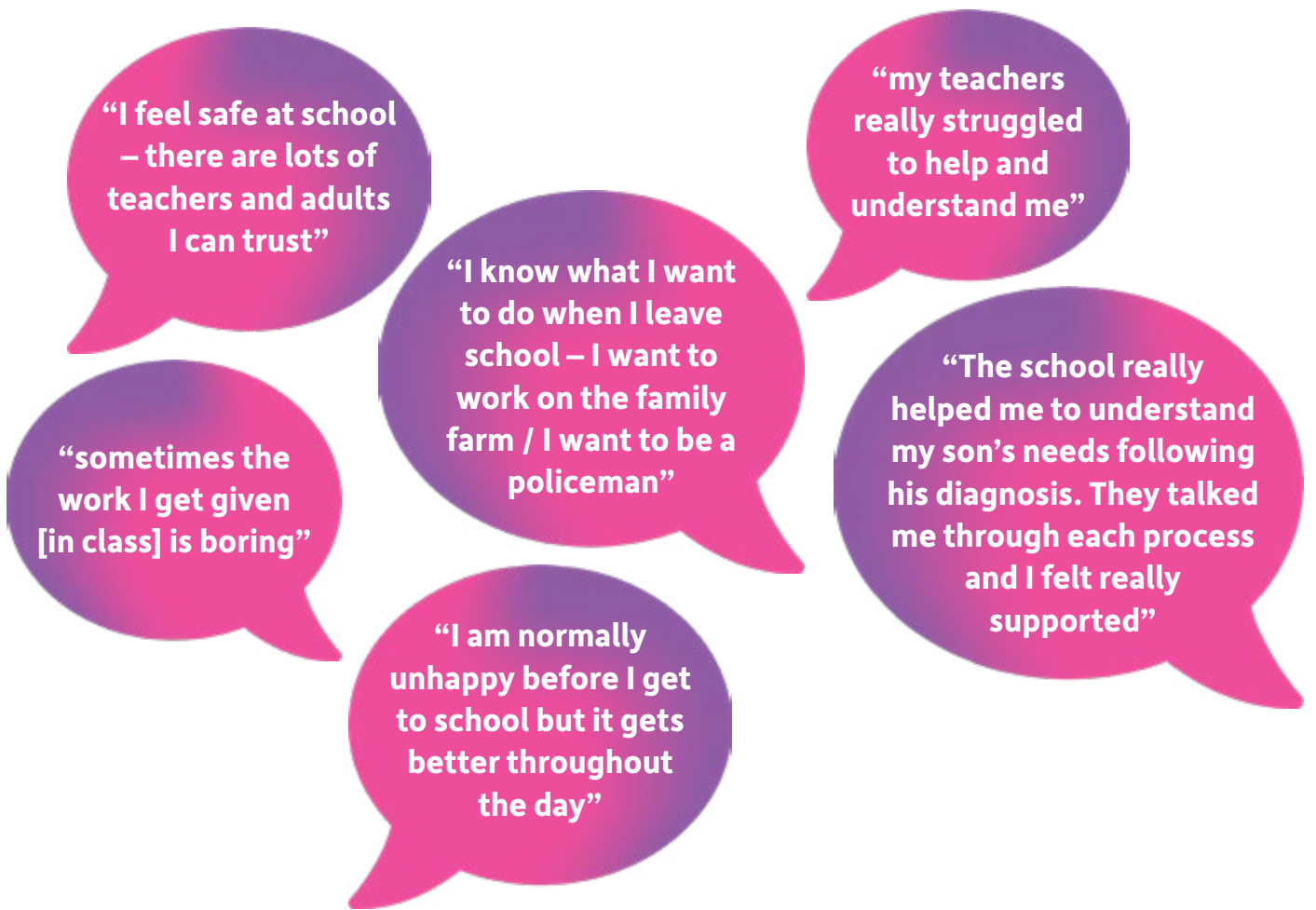
Commissioned SEND services and Support in Leicestershire – Focus on Children and Young People

Feedback is regularly collected from children and young people with SEND, as well as their families and carers. This helps to identify what is important to them and informs the development of educational, health, and social care services and support. The process, sometimes called ‘voice’ work, includes speaking with children and young people receiving services—both through dedicated activities and during quality assurance visits—and collaborating with the local parent carer forum, the Leicestershire SEND Hub.

In the Leicestershire SEND and Inclusion Strategy, 2024-27 (<https://www.leicestershire.gov.uk/sites/default/files/2025-07/SEND-and-Inclusion-Strategy-2025-2028.pdf>) we have already published some key themes identified and feedback provided identified through voice work:

1. Better joint working across Education, Health and Social Care to develop an easier to navigate system
2. Improving delays in assessing and supporting children and young people’s needs
3. Improving timeliness of reviewing and updating EHCPs
4. Improving transitions between education settings
5. Better support for inclusion of children and young people with SEND in mainstream schools

Where we have spoken to children and young people who are accessing support (for example during quality assurance visits in educational settings) they have feedback that they feel safe, that they have plans for their future and they appreciate the support they get from teachers, support staff and their families and friends.



In summary, much of the feedback we have gained suggests that in the main children and young people are happy with the support and services they receive, feel safe and appreciate the help they receive to become independent.

In addition, parents and carers regularly share with the Council that it can take too long for assessments to be undertaken and to receive EHCPs and to confirm placement decisions (where required). It has also been commented that the review of support could be better and the monitoring of placements improved.



Commissioned SEND services and Support in Leicestershire – Focus on Providers

Whilst writing this Market Position and Sufficiency Statement the Council invited education and SEND providers with current placements to complete a short online survey and share feedback on their experience of working with Children and Family Services at Leicestershire County Council. In the survey there was a focus on how providers have found working with operational, commissioning and financial services at the Council as well as questions about what information or action the Council to support providers more in terms of business planning, day-to-day practice and market shaping.

The survey was completed during Summer 2025 by 15 individual providers representing a range of Alternative Provision (such as tutors and independent special schools [ISSs], educational training organisations, day nurseries and short breaks providers.

Key themes noted by providers:

- 57% of respondents rated their relationship with the Children and Family Services Commissioning Service as good or fairly good, while 21% viewed it as neutral or fairly poor.
- Most were satisfied with contract management and quality assurance but less so with individual placement brokerage, provider engagement, and financial processes; provider engagement had the lowest satisfaction.
- Concerns included delays in some processes, lack of Council presence at EHCP reviews, and difficulty contacting the Local Authority, though respondents appreciated quality assurance and flexible partnerships.
- Providers stressed the need for better information from the Council regarding sufficiency, financial data, and commercial opportunities.
- Overall, local providers are eager to collaborate with Leicestershire County Council to address demand and need issues.

“We have always had a good relationship with Leicestershire County Council, staff are polite and helpful and processes are not complicated and are able to access /use”

“We are quality assured by Leicestershire... meetings are generally good and there are supportive conversations”

“We would like to be part of sufficiency planning and strategy”

“[It would be helpful to have] more information sharing to enable stronger partnership working”

Commissioned SEND services and Support in Leicestershire – Need and Demand (Data Analysis)

Demand for commissioned SEND services in Leicestershire is driven by the cohort of children and young people with SEND needs – the services, support and provisions available should meet the needs of that cohort and as that changes (volume or range of needs) then local sufficiency will also need to change.

Broadly speaking then, local sufficiency is driven by a number of different factors, but the most significant can be categorised as follows:

1. Population Change (demographics)
2. Local Housing Growth and Development
3. Demand for EHCPs and Specialist Support

As there is already a large amount of data published about each of these categories in other documents published by the Children and Families department, Leicestershire County Council, only a summary is provided below. Interested readers are, however, signposted to the following for more detail:

- Leicestershire SEND and Inclusion Strategy, 2024-27 (<https://www.leicestershire.gov.uk/sites/default/files/2025-02/Draft-Leicestershire-SEND-and-Inclusion-Strategy-2024-27.pdf>)
- Leicestershire School Places Strategy, 2026-31

Population Change:

- The County has approximately 201,250 children and young people aged under 26 years (29% of the total population). This is expected to grow to 234,329 by 2033 (16.4% increase).
- SEND pupils account for c. 17.2% of the Leicestershire school population. Given expected growth in the population of children and young people aged under 26 years to 2033, this cohort with SEN support or an EHCP in the school population can also be expected to continue to increase.
- The 'bulge' in birthrates locally can be seen to be working its way through the school system, creating a peak in pupil numbers that can be seen in the current Year 5 (primary) pupil cohort. Over coming years this 'bulge' will move into secondary settings. This is a concern as it is predicted that capacity in local secondary settings will be exceeded by 2026/27 because of this demographic trend.

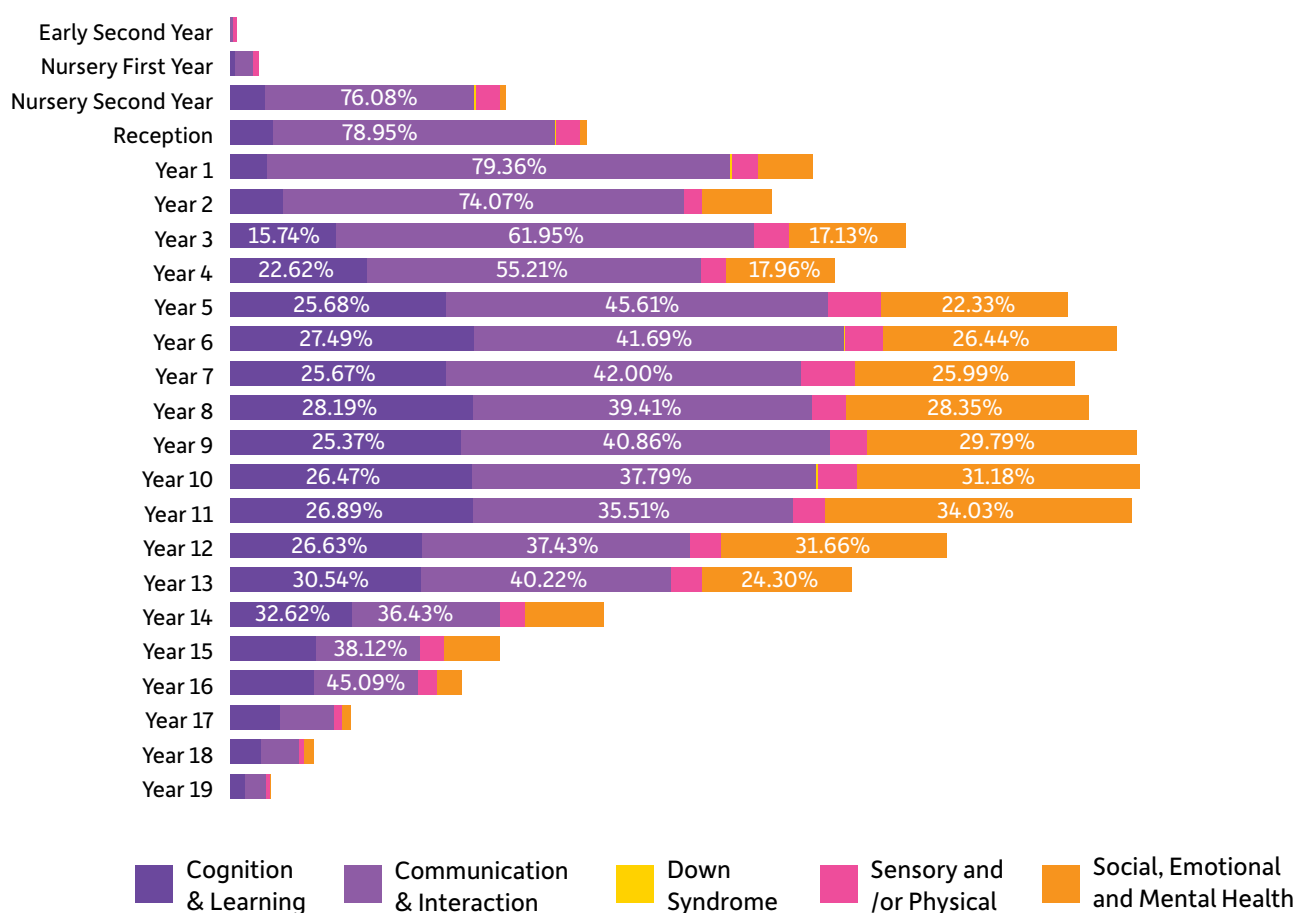
Local Housing Growth and Development

The Council's Housing Needs Assessment (2022) set a target of an additional 52,160 homes by 2036, which equates to an 23.9% increase in numbers of pupils (Primary and Secondary) in the County over the same period. Of those additional 26,748 pupils, 398 are predicted as likely to need specialist provision. This identifies the need to develop further mainstream specialist provision such as Local Area Special Schools and Enhanced Resource Bases attached to mainstream schools and Academies. But, as we know historically non-maintained provisions have also picked up some of this specialist cohort, local housing growth is also likely to increase demand for specialist placements from external providers. Additional housing in the County can also mean families moving into the area with children and young people with existing EHCPs or SEND needs.

Demand for EHCPs and Specialist Support

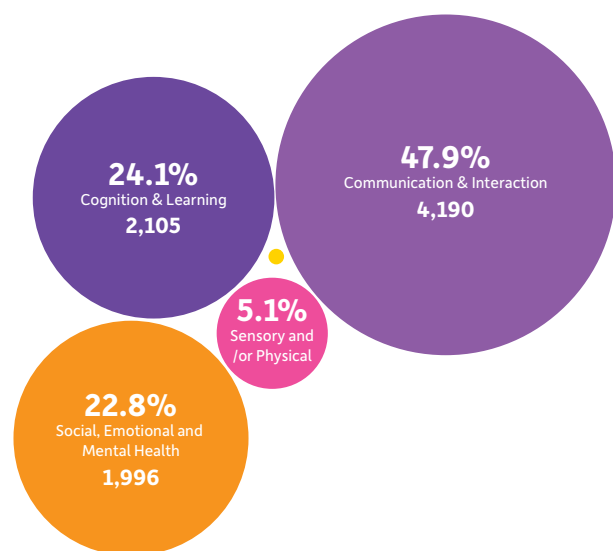
- There is an increasing trend for requests for Education, Health and Care Needs Assessments (EHCNAs) resulting in Education and Health Care Plans (EHCPs) – a 45% increase between 2020 and August 2025, growth that has continued in to 2025 and is not showing sign of plateauing or reducing in the near future. This growth in Leicestershire has been comparable with growth in number of request as and EHCPs observance nationally and with our statistical neighbours – as evidenced by SEN2 data returns, last released April 2024.
- There has been year on year growth since 2024/25 academic year in the overall number of children and young people previously receiving SEN Support who have then ended up with an EHCP being issued .
- This growth in number of active EHCPs has resulted in growth in demand for support and services – this is evidenced by growth in number of specialist placements, demand for local health services and demand for advice and information, for example from the Leicestershire SENDIASS service.
- As noted above (see, 'Local Housing Growth and Development') growth in demand for specialist placements is outstripping local capacity for specialist support and placements in mainstream, Enhanced Resource Bases (ERBs) and Local Area Special School settings. This in turn is leading to increased reliance on commissioned placements with external providers – as many external commissioned placements are more expensive than mainstream and Local Area Special School options, this is placing greater pressure on High Needs Block funding.

A useful breakdown of SEND EHCPs by type of primary need (as set out in the SEND Code of Practice, 2015) is provided below; this data is as of December 2025:



This graphic illustrates that Communication and Interaction is the dominant primary need across all current active EHCPs, with Cognition and Learning and SEMH roughly equal and then Sensory and/or Physical as lowest category of need. The graphic also shows primary SEND need by NCY, with a bulge in secondary (NCY 7-11) but significant numbers coming through from primary age settings. This is consistent with high-level pupil data for the County (SEND and non-SEND needs- see above, 'Population change'). Also noticeable is:

- a cohort of younger children (reception and NCY Years 1 and 2) with a high-number of pupils with identified Communication and Interaction needs and moving through Primary school years.
- a cohort with higher number of pupils with SEMH, Communication and Interaction, and Cognition and Learning needs moving through towards KS4 and post-16 – this will place increased demand on these settings in future years.



In summary, there is ongoing demand for SEND educational places and support in the County – the greatest impact of this is likely to be felt over the next few years in secondary and post-16 settings. Added to this, there are increasing numbers of requests for new EHCPs (and corresponding increase in demand for specialist placements, waiting lists for the Neurodevelopmental Pathway, and other factors such as housing growth in the County) are likely to add to this demand.

Sufficiency Data

The remainder of this section of the MPSS will look at sets of high-level data that provide further detail about local sufficiency needs now and for the future. This data is collated from a number of different sources, such as statutory returns (including SEN2 returns, School censuses etc) but also from data held on internal systems (such as case management systems). We will continue to work on the quality of this data, what data we routinely record, and how it is used for sufficiency planning – and as this develops our ability to understand sufficiency and plan for the future will improve. However the data presented below is hopefully useful to illustrate some of our key pressures and sufficiency needs in Leicestershire and provides an initial evidence base for us to propose some sufficiency actions (see below, ‘Sufficiency Actions’).

Note: where data relates to ‘active EHCPs’ this represents children and young people in a placement with an agreed and current EHCP – it does not include requests or assessments for support or an EHCP. The focus on active EHCPs reflects the fact that this is the cohort of children and young people for whom a commissioned placement with an external provider is considered most likely.

Note: the categories of need shown in the data below are mainly aligned to the four categories of need set out in the SEND Code of Practice (2015): Communication and Interaction, Cognition and Learning, Social, Emotional and Mental Health (SEMh); and, Sensory and/or Physical Needs.

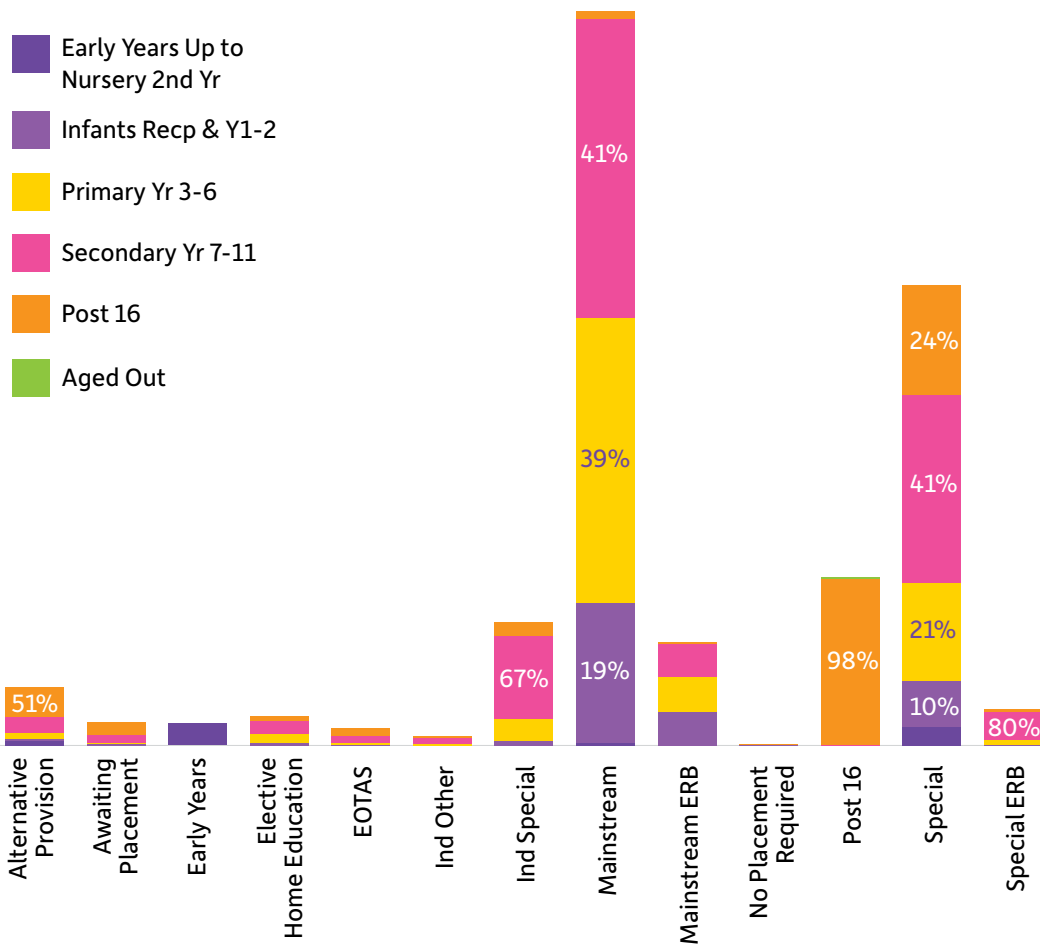


Current Placements (active EHCPs)

Current data shows that whilst in maintained settings there is a fairly wide spread of children and young people with an active EHCP across all National Curriculum Years (NCY) (Years 1-11) and post-16, in terms of specialist placements the greatest proportion are across NCY 7-11 (secondary). When these specialist placements are looked at in more detail, it can be seen that this is particularly true of children and young people placed in Local Area Special Schools and independent specialist provisions (ISS) whereas the greatest proportion of those placed in more general Alternative Provision (AP) are to be found from NCY Year 9 through to post-16. Given that we know that local demographics mean a population ‘bulge’ moving from primary to secondary (see above, ‘Population Change’) this means that it is likely that there will be a continued reliance on specialist external provisions for secondary age children in Leicestershire over the next 5 years.

Current Placements

All Active EHCP current pupils by NCY and Placement Type

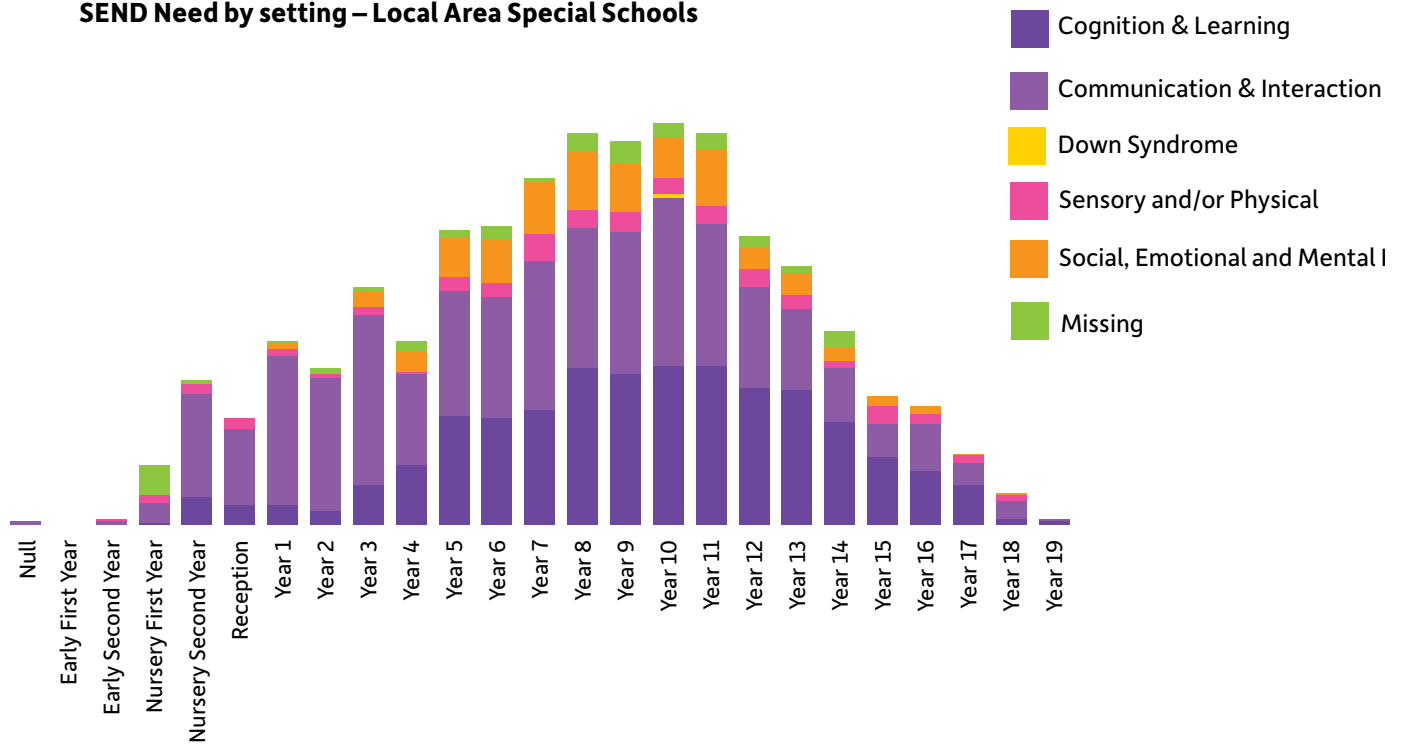


Current SEND Need across Setting Types

The following sets of data provide some insight into current placements in different types of setting by National Curriculum Year (NCY) and SEND Need; there is a particular focus on specialist placements.

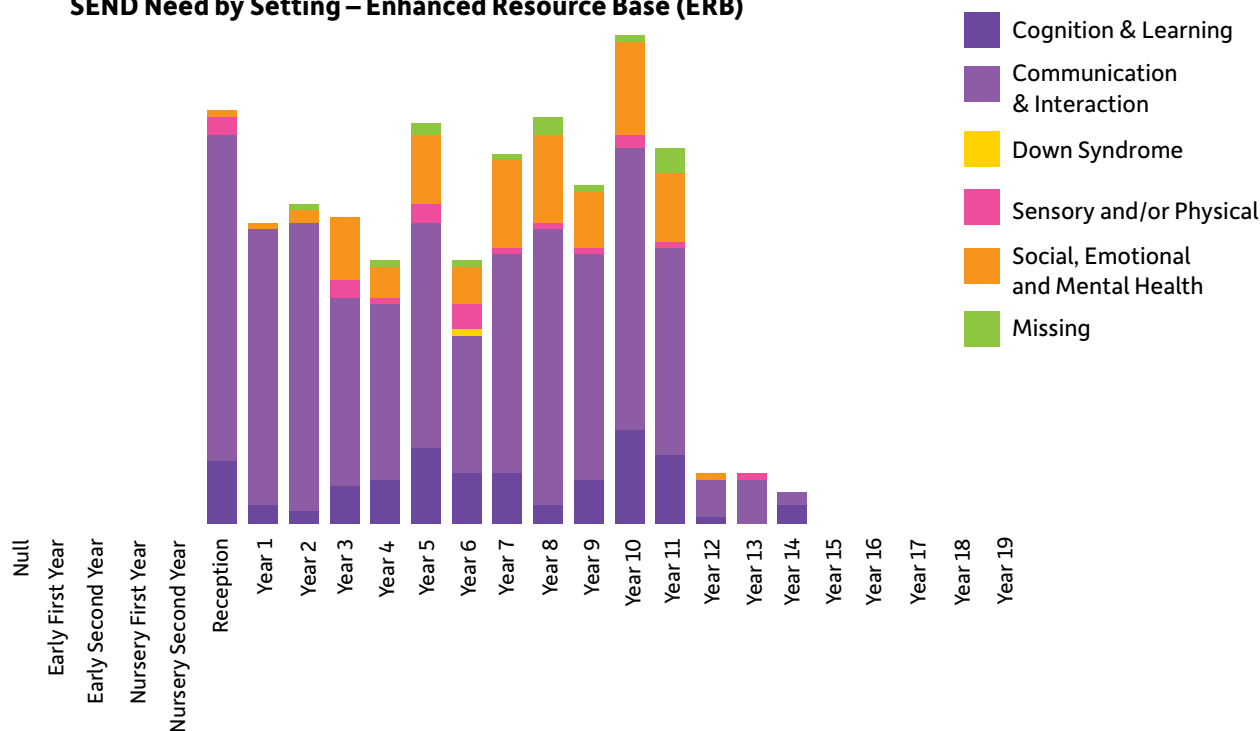
Placements in our Local Area Special Schools (maintained) show that the most placements are to be found across NCY 7-11 (secondary). Within that ‘bulge’ of placements the greatest numbers of placement by need are for pupils with Communication and Interaction and Cognition and Learning as their primary need. Other categories of need show a significantly lower prevalence. At primary school age, the numbers of pupils is greatest amongst those with Communication and Learning as their primary need, though this is more obvious in the younger primary NCY groups (NCYs 1-3). Work is planned from Spring 2026 to better understand forecast demand for Local Area Special School places and to determine the quantity and type of placements required to meet future demand.

SEND Need by setting – Local Area Special Schools



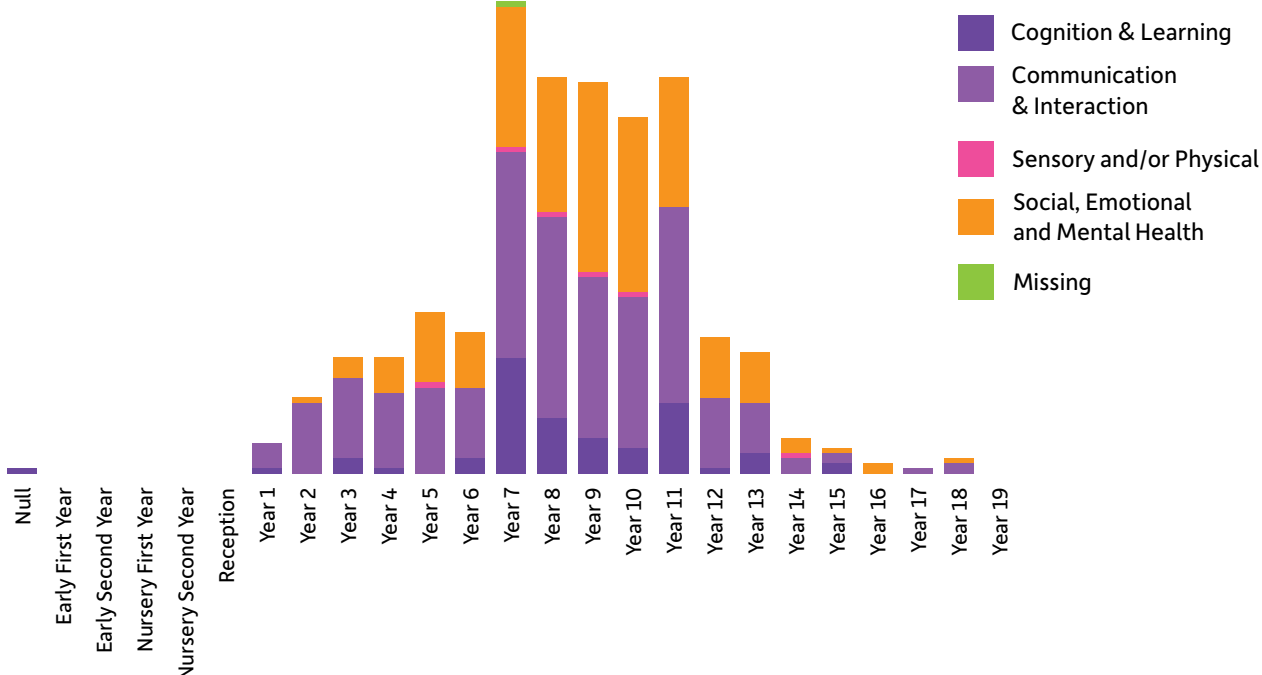
For Enhanced Resource Bases (ERBs) and units attached to Local Area Special School, there is a more equal distribution of pupils across all age groups compared with other specialist setting types. The greatest number of pupils have Communication and Interaction and Cognition and Learning as their primary need. In part, this will reflect how ERBs have been established historically to meet certain types of need. Work commenced in January 2026 to review the current portfolio of ERBs in Leicestershire, focusing on quality specialist support within the mainstream setting and growth and to look at ow best to meet current demand and need in the local population.

SEND Need by Setting – Enhanced Resource Base (ERB)



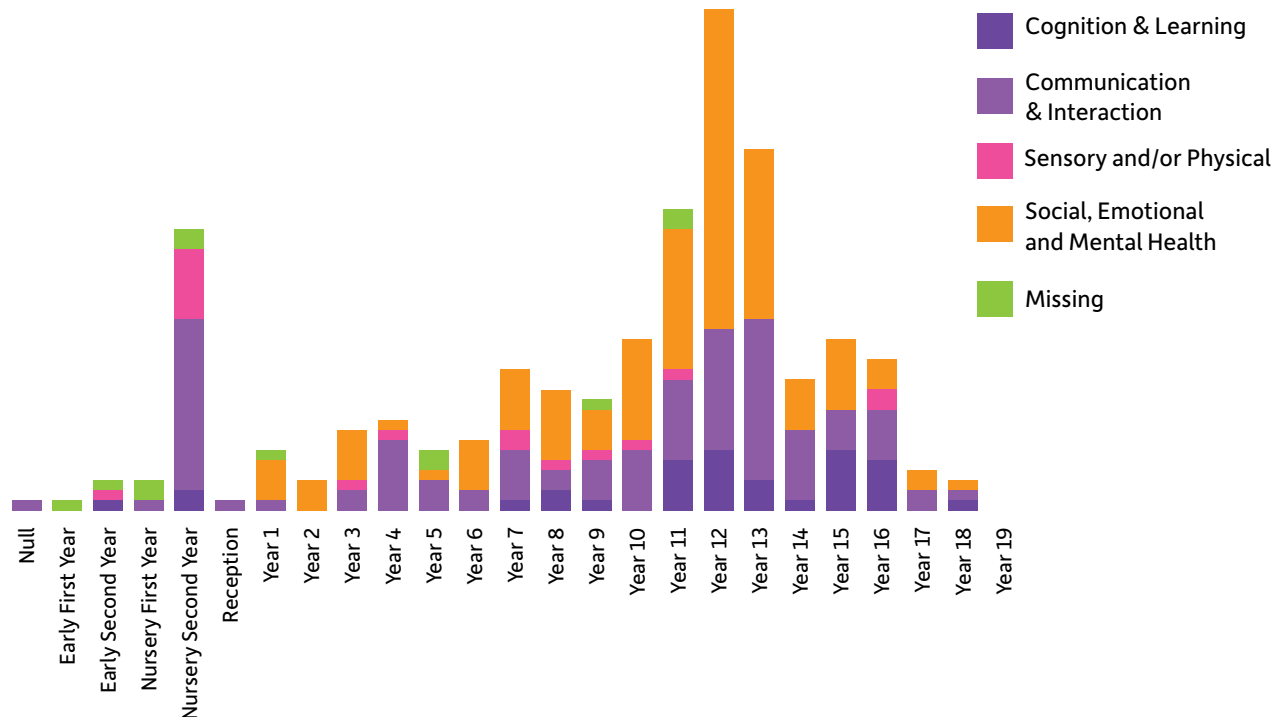
The profile of pupil need by placement in independent specialist provisions (ISS), however, differs. Although the bulk of placements still sits across secondary (NCY 7-11) there is a more equal split between pupils with a primary need of Communication and Learning and SEMH.

SEND Need by Setting – Independent Special School (ISS)



For other types of Alternative Provisions (APs) (that is non-ISS settings) the distribution across NCY is more equal, though there remains a spike in number of placements within secondary. However, and compared to other setting types described here, the proportion of pupils with SEMH with a primary need is generally greater than those with Communication and Interaction needs and relatively lower numbers of those with Cognition and Learning needs.

SEND Need by Setting – Alternative Provisions (APs)

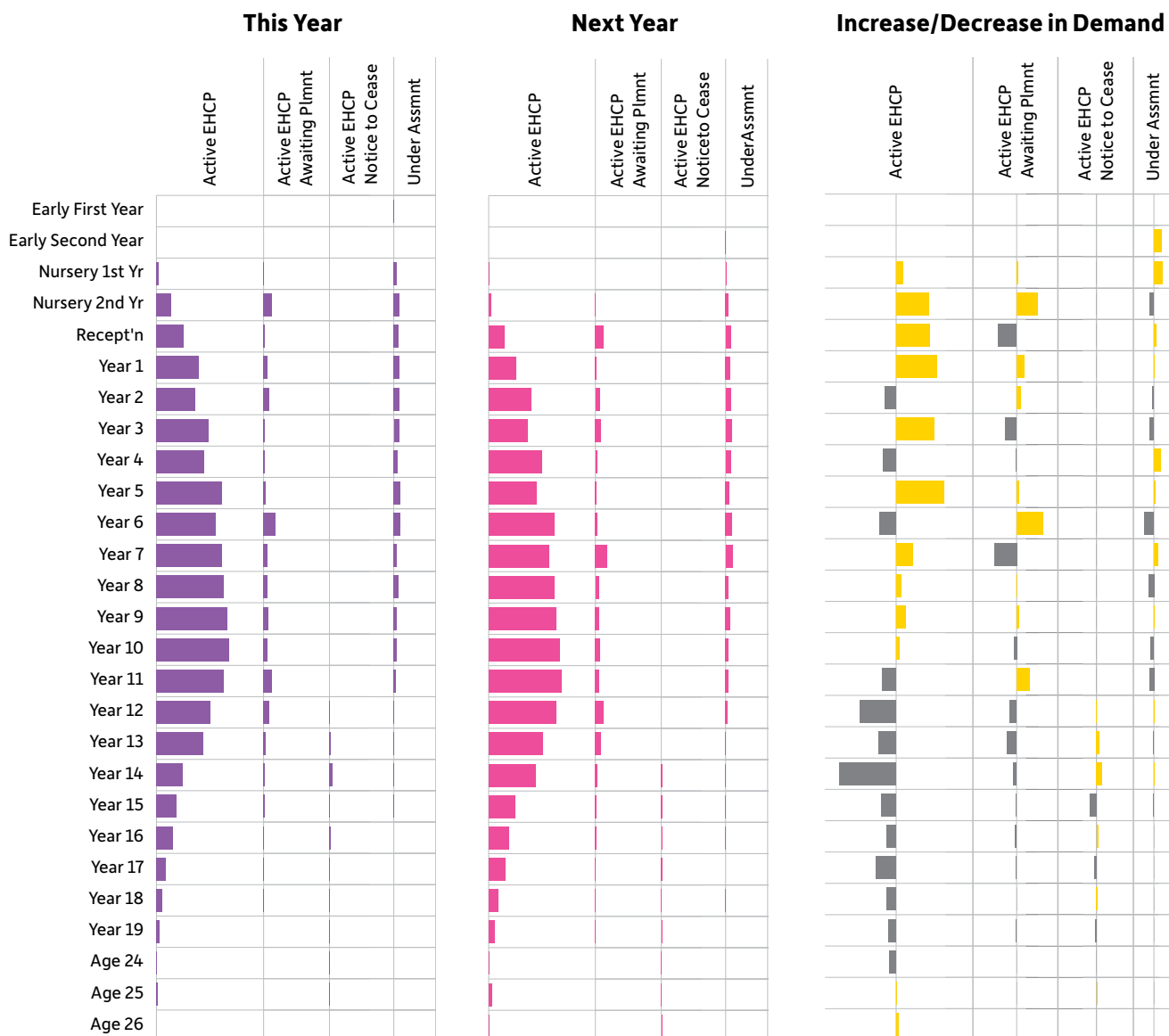


This analysis of current placement data for children and young people with an EHCP by NCY, SEND need and setting type reveals:

1. The majority of placements are for those of secondary age – given that we know that diagnosis is generally greatest amongst those secondary aged pupils due to current health waitlists and that there is demographic evidence to show a bulge of secondary age school children working its way through the system over the next few years, this indicates that demand for specialist placements at secondary level will continue to be a sufficiency issue for some years.
2. When considering need, Communication and Interaction is generally the most prevalent need recorded for pupils in mainstream settings. For commissioned placements with external providers, Communication and Interaction is one of the main categories of need for ISSs, but pupils with SEMH are also represented in significant numbers. This demonstrates a current reliance on commissioned specialist services with external providers to meet demand for SEMH, particularly at secondary level. It is noted though that this analysis is largely dependent on an examination of ‘primary need’ and the presenting needs of children and young people will be more nuanced and not strictly linked to a primary need; the true picture is therefore likely to be more complicated and requires further analysis.
3. As set out in the Leicestershire School Places Strategy, work is ongoing to increase number of places in Enhanced Resource Base (ERBs) and to open a new SEMH school and new Communication and Interaction school. As this work progresses and further work is undertaken to forecast placement demand, there will be a continued focus on the potential impact of the growth in mainstream capacity to reduce reliance on commissioned specialist placements with external providers and/or what commissioning is required to help ease sufficiency pressures as new mainstream provision is built.

School and Setting Demand Data

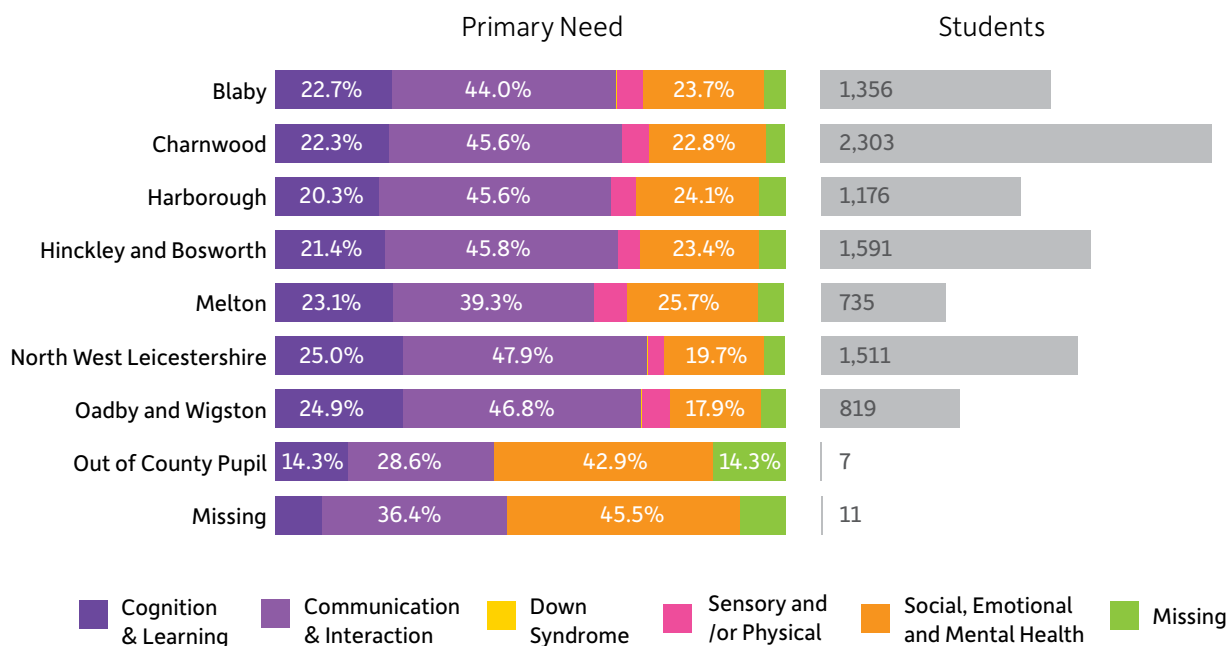
It is also helpful to consider some placement trend data so that a sense of potential increase in demand can be established.



The data shown above sets out where current pupils (2026/27) with active EHCPs are in terms of NCY and where they are predicted to next year (2027/28); this does not take into account other variables such as families moving in to the area or a spike in diagnosis of one or other primary need; it is based in modelling of year groups as they are currently and as they move through subsequent school years.

It can be seen from this graphic that the wave of pupils moving through secondary education is again obvious. The data also shows that demand will increase most significantly for pupils in KS4 and post-16 in coming years (see right hand side of table). This confirms that the current demand on settings for secondary education is likely to continue and a greater demand on KS4 and post-16 provisions in the future. As set out above, for certain categories of need where reliance on the external market is greater (such as SEMH), this is likely to mean need for the Council to work with new providers to meet this demand. Given that we know that number of active EHCPS has grown year on year since 2020 (see above, 'Demand for EHCPs and Specialist Support') and continues to grow, it can be expected that this demand on KS4 and post-16 provisions will also continue to grow in the county.

SEND Need by District (Leicestershire)



Data showing the primary need of children and young people with SEND (with active EHCPs) by each of the district and boroughs in Leicestershire shows relatively little variance across each area. Accepting that there is some data missing concerning primary need (see ‘missing - pink fields), Communication and Interaction is the most prevalent need identified in all areas, with SEMH and Cognition and Learning being the next most prevalent. The only discernible variation in this trend is in Melton district where SEMH is marginally higher than in other areas. This may reflect better identification of SEMH in this area. SEMH is seen to be generally lower as a proportion of all types of need in North West Leicestershire and Oadby and Wigston. Overall, this data indicates that there is no obviously greater demand for provisions to meet a certain type of primary need in any one part of the County.

However, and of note, there are currently no Local Area Special Schools in the Harborough district currently which may mean that children and young people resident in this area and requiring specialist support may be more likely to access an ISS or have to travel further to access relevant support (potentially out of district). This contrasts with current external provisions (e.g. ISS and AP) which are generally found across the County.

Further work is required to understand the relationship between where child and young people are living and where they are accessing their education and other SEND support and the impact on where mainstream and external independent settings are located.

Sufficiency Key Themes:

Throughout this MPSS, a number of key themes relevant to sufficiency planning and commissioning activity; have been identified, summarised as follows:

1. Consistent Contractual Arrangements: There has not always been a dedicated commissioning resource to manage the procurement, brokerage and monitoring of SEND placements (all types). This has now been rectified through introduction of a dedicated Education, Inclusion and Additional Needs Commissioning Team a plan of action (known as 'Smarter Commissioning'). A major focus for this new team over the next couple of years will be a review of current contractual arrangements across SEN placements and exploration of opportunities to ensure that the Council is doing business with external specialist education providers in a manner that is consistent with national legislation and local Contract Procedure Regulations (PCR). Whilst this does not directly affect sufficiency, it is important in terms of how the Council builds and maintains commercial relationships with current and future providers and can plan the commissioning of new contracts to meet future sufficiency demands.
2. Sufficiency: Throughout the MPSS, several trends around specialist education placements have been observed:
 - There has been growing demand for specialist education placements in Leicestershire over the past 5 years and this has only been partly met by mainstream settings (many of which are now at capacity). This has led to a reliance on external providers and whilst in many cases this is appropriate to meeting individual pupil need, in other instances this has been due to a lack of mainstream places.
 - There is a current 'bulge' in demand for specialist education places at secondary level (NCY 7-11). Population data shows that this bulge is likely to continue and as this cohort moves through secondary education will place increasing pressure on Ks4 and post-16 settings in the future.
 - Whilst all four categories of SEND need (as set out in the SEND Code of Practice, 2015) are represented in Leicestershire and relatively equally across all districts and boroughs (based on data from active EHCPs) mainstream settings are not currently meeting all types of need in the quantities required. Noticeable is the reliance on external educational providers to meet the needs of those with SEMH. It is noted though that this analysis is largely dependent on an examination of 'primary need' and the presenting needs of children and young people will be more nuanced and not strictly inked to a primary need. This in turn presents further challenges for planning and delivering right types of provision locally.
 - The cost of external commissioned placements is generally higher than mainstream provision. Whilst this reflects the fact that a lot of externally commissioned provision is for children and young people with a higher-level of SEND needs than those in mainstream settings, challenges with mainstream sufficiency is creating a reliance on more expensive external providers. Furthermore, there is a lack of information relating to the make-up of fees (i.e. cost breakdowns) and this is restricting the ability of the Council to understand value for money. These issues are creating an unsustainable financial position for the Council.



Our Sufficiency Plan – Future Actions

Several future actions responding to the themes above have been identified as well as some additional actions relating to next steps around sufficiency planning and ways of working with the external market:

1. Consistent Contractual Arrangements:

- a. Review of existing contractual arrangements across all current SEND placements – identifying areas where new arrangements are required or existing arrangements to be reviewed and strengthened. This will be done in conjunction with providers and change will be implemented where all parties agree. The aim of this exercise is to ensure that placements are underpinned by contracts or agreements that set out as a minimum what support is to be provide, by whom, for how long and at what cost. It should also set minimum standards in respect of quality of provision and monitoring and review arrangements that the Council will undertake.

The review of all placements and identification of opportunities and risks to this work will be undertaken by June 2026.

- b. Explore opportunities for working with the market differently in the future – the current approach to commissioning SEND educational placements with the external market is currently largely based on spot purchasing arrangements. Given the volume of placements and spend with individual providers it is considered that this work could be commissioned in a different way that is compliant with national legislation, local contract procedure regulations and good practice. This will include consideration of opportunities for new frameworks and contractual arrangements, such as block contracts and also the way we share referrals, broker and monitor placements. We will explore ways in which we can build into contracts opportunities for procurement exercises such as mini-competitions, that allow greater agility and quicker responses to changing sufficiency needs. This will help ensure that all providers are subject to due diligence checks before placements are made, that there are clear expectations about quality standards, fees and quality assurance and monitoring arrangements. This in turn should help ensure better outcomes for children and young people, value for money and development of stronger relationships with the external market. The opportunities assessment will consider short- and longer-term options.

Work to scope out opportunities for new frameworks and other contractual arrangements will commence by June 2026. It is noted that some initial work has commenced by the Council to introduce quality checks around alternative provision through a contract to ensure quality checks of existing Alternative Provision s (non-ISS) and other work is in progress to look at the possibility of a framework for Alternative Provision (these ongoing actions will be taken in to account as part of this wider scoping action).

2. Sufficiency:

- a. Collaboration with School Place Planning – the Council has published its School Place Strategy, 2026-2030. It will be necessary for the Children and Family Services Commissioning Service to work closely with School Planning team to ensure that future commissioning of specialist education placements with external providers is aligned to internal (mainstream) school planning around SEND and SEND support. That is, our commissioning intentions need to part of an overall approach to school place planning across the whole range of education placements and our commissioning decisions be designed to address short- and longer-term planning and sufficiency objectives. This will require internal school place planning processes to be reviewed to ensure they incorporate Commissioning colleagues that there is an overarching sufficiency plan across mainstream and externally commissioned placements.

Work to set up closer alignment between School Place Planning and Commissioning to be set up by May 2026. Review of processes and how to coordinate planning processes to be completed and implemented by July 2026 .





- b. New approaches to Case Management – we have started to review our approach to individual casement, introducing more rigours approach to the review of cases (including annual reviews) and closer working between SENA case managers and settings to ensure that children and young people are getting their needs met. Work primarily within the SENA service – commenced January 2026 and is ongoing.
- c. KS4 and Post-16 Provision Planning – data set out in this statement has shown that there is currently pressure on secondary school level placements and that in future years this cohort of pupils, including those with SEND needs are likely to require provision/support in KS4 and post-16 settings. We need to start preparing for this and ensuring there are the right sorts of provisions (which will largely be through externally commissioned options) available to meet this future demand. Work to model the cohort moving towards post-16 needs to be undertaken and gap-analysis against current capacity undertaken followed by consideration of what commissioned services may need to be put in place to meet demand.

Scoping work to be undertaken by July 2026 and options to address demand by August 2026.

- d. Sufficiency Data – as noted elsewhere in this statement, work is continuing within the department to improve our data collection, visibility and analysis to enable better sufficiency planning in the future. This will also better support other processes aligned to placements, such as payment processes as our base data round placements will be improved. For example, new or improved datasets are also required to better understand location of provisions in relation to where children and young people are living and also further data about waiting lists for different types of provisions. More detailed data will also help us to understand better the presenting needs of children and young people, allowing us to move away from a reliance on primary need to plan and deliver provisions. Ongoing work to improve data collection, data quality and how it feeds into sufficiency planning for the future, including ongoing alignment with mainstream school sufficiency planning through the School Places Strategy and associated actions.

3. Other Actions:

- a. Understanding Fees Better – the Council wishes to understand placement fee structures better and to move to a position of greater financial transparency around placement costs. Work will be initiated to look at how we can obtain more consistent cost breakdowns and an evidenced-based approach to discussing fees with providers both at the time of placing and during the life of a placement. This may be done through changes to our procurement and brokerage processes but also using tools to support better negotiations. For example, the department has begun to use the cost calculator ‘Care Cubed’ to help us better understand fees associated with placements for Children Looked After (see, for more detail, Leicestershire County Council Children and Family Services, Children’s Social Care – Placement Market Position and Sufficiency Statement, 2024-27: <https://trixcms.trixonline.co.uk/api/assets/llrcs-leicestershire/f0bbc419-776d-4857-8e33-137fb3d865ae/children-s-social-care-placement-market-position-and-sufficiency-statement-2024-27.pdf>) The provider who we have purchased Care Cubed from has indicated that a module specifically for education placements may be available in the near future. Subject to this development, the department may start using Care Cubed to assist in the brokerage of new placements, fee negotiation and contract monitoring and review processes. Where any changes are made to process or approach this will be fully communicated to providers and where appropriate, be reflected in any existing or new contractual arrangements we have with the market.



A detailed plan for internal use will be developed to support the delivery and monitoring of these actions. Reporting against this action plan will take place in several different ways:

- Where appropriate, review of actions and progress against targets as part of monthly internal Improvement Cycle Meetings (ICMs) led by the Commissioning Service
- Incorporation of key commissioning actions into the Children and Family Services Commissioning Service Delivery Plan – reviewed quarterly by the Departmental Management Team (DMT)
- Quarterly summary reports to the Education, Inclusion and Additional Needs Senior Management Team (SMT) Performance meeting) to provide an update on progress against each priority and identify any risks or barriers to achieving the actions and targets set out in this statement
- Regular updates every 6 months available online providing the market and other interested stakeholders with a report on progress against the action plan and to inform providers of any changes to our data and /or actions
- Updates to providers on progress against the Sufficiency and Market Position Statement through existing and/or newly planned collaboration and provider events.

And finally... we are keen to hear the views of providers and suppliers about our Education & SEND Market Position and Sufficiency Statement

Are there other bits of data that would be of interest to you? Are there areas of provision you want to know more?

If so, please contact us at: CFScommissioningsupport@leics.gov.uk. We won't reply to individual responses but as themes emerge we will provide updates to you in the six-monthly updates that will accompany this document.

