



Notice of Meeting of

**SCRUTINY COMMITTEE - CHILDRENS AND FAMILIES**

**Thursday, 4 May 2023 at 10.00 am**

**Luttrell Room - County Hall, Taunton TA1 4DY**

To: The members of the Scrutiny Committee - Childrens and Families

Chair:	Councillor Leigh Redman	
Vice-Chair:	Councillor Oliver Patrick	
Councillor Suria Aujla	Councillor Jason Baker	Councillor Simon Carswell
Councillor Peter Clayton	Councillor Andy Hadley	Councillor John Hunt
Councillor Jenny Kenton	Councillor Martin Lovell	Councillor Frances Nicholson
Councillor Evie Potts- Jones	Councillor Jeny Snell	Ruth Hobbs Co-opted member
The Revd Tobie Osmond Co-opted member	Eileen Tipper Co-opted member	

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For further information about the meeting, including how to join the meeting virtually, please contact Democratic Services on (01823) 357628 or email: [democraticservicesteam@somerset.gov.uk](mailto:democraticservicesteam@somerset.gov.uk).

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This meeting will be open to the public and press, subject to the passing of any resolution under the Local Government Act 1972, Schedule 12A: Access to Information.

The meeting will be webcast and an audio recording made.

Issued by (the Proper Officer) on Tuesday, 25 April 2023

# **AGENDA**

**Scrutiny Committee - Childrens and Families - 10.00 am Thursday, 4 May 2023**

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## **1 Apologies for Absence**

To receive any apologies for absence.

## **2 Declarations of Interest (Pages 13 - 14)**

To receive and note any declarations of disclosable pecuniary or prejudicial or personal interests in respect of any matters included on the agenda for consideration at this meeting.

(The personal interests of Councillors of Somerset Council, Town or Parish Councils and other Local Authorities will automatically be recorded in the minutes.)

## **3 Minutes of former SCC Scrutiny for Policies, Children & Families Committee held on 6 March 2023 (Pages 15 - 22)**

To approve the minutes of the former SCC Scrutiny for Policies, Children and Families Committee held on 6 March 2023.

#### **4 Public Question Time**

The Chair to advise the Committee of any items on which members of the public have requested to speak and advise those members of the public present of the details of the Council's public participation scheme.

For those members of the public who have submitted any questions or statements, please note, a three minute time limit applies to each speaker and you will be asked to speak before Councillors debate the issue.

We are now live webcasting most of our committee meetings and you are welcome to view and listen to the discussion. The link to each webcast will be available on the meeting webpage, please see details under 'click here to join online meeting'.

#### **5 Scrutiny Committee - Children and Families Work Programme (Pages 23 - 34)**

To receive an update from the Service Manager. To assist the discussion, the following documents are attached:-

- (a) The Committee's work programme
- (b) The Committee's outcome tracker
- (c) Summary meeting overview of the former SCC Scrutiny for Policies, Children and Families (2022/2023)

Please use the following link to view the latest Executive Forward Plan of planned key decisions that have been published on the Council's website - [Executive Forward Plan](#)

#### **6 LA Maintained Schools Core Offer - update / response from last meeting and 2023/24 budgets (Pages 35 - 66)**

To consider briefing on Core Offer (a copy of the Core Offer booklet is attached).

This item will be led by the Council's Service Director – Education Partnerships and Skills, Amelia Walker.

Note – the Chair will allow 25 minutes for this agenda item.

**7 Proposed Steering Group (Task Group) on education standards (Pages 67 - 70)**

To consider and to discuss the proposal and draft Terms of Reference.

This item will be led by the Council's Service Director – Education Partnerships and Skills, Amelia Walker.

For background on this item, refer to discussions at the last meeting of the Committee – Education for Life Strategy ([see agenda item 7](#))

Note – the Chair will allow 25 minutes for this agenda item.

**8 SEND Strategy and the Accelerated Progress Plan (APP) (Pages 71 - 114)**

To consider Report.

This item will be led by the Council's Service Director Inclusion, Dr Rob Hart and Deputy Director Commissioning, NHS Somerset, Andrew Keefe.

Note – the Chair will allow 30 minutes for this agenda item.

**9 Reforms in children's social care - draft consultation response (To Follow)**

To consider Report.

This item will be led by the Council's Assistant Director – Community and Strategy, Paul Shallcross.

Note – the Chair will allow 25 minutes for this agenda item.

**10 Task and Finish Group - sufficiency of external placements - initial response from Executive (To Follow)**

To consider the initial response from the Executive.

The Committee considered and agreed the report of the External Placements Task and Finish Group at the meeting held on 6 March 2023.

Click on this link to view the report considered and agreed at the meeting on 6 March 2023 - [External Placements Task and Finish Group](#)

**11 Task and Finish Group - home to school transport**

To receive verbal update.

**12 Items for Information - Standing Item**

This is a standing agenda item and will provide details of information sent to Committee members in between meetings, that cover the Committee's policy areas.

(a) Information on Children and Families Board

(b) Information on the 'Education for Life' event – circulated on 28 March 2023: - To find out more about Somerset Education for Life Strategy, visit the Council's website on this link - [Education for Life Strategy \(somerset.gov.uk\)](https://www.somerset.gov.uk/education-for-life)

If Committee members have any questions or comments on the information, please contact the Committee Administrator on [democraticservicesteam@somerset.gov.uk](mailto:democraticservicesteam@somerset.gov.uk) in the first instance and before the date of the meeting.

## Guidance notes for the meeting

### 1. **Council Public Meetings**

The legislation that governs Council meetings requires that committee meetings are held face-to-face. The requirement is for members of the committee and key supporting officers (report authors and statutory officers) to attend in person, along with some provision for any public speakers. Provision will be made wherever possible for those who do not need to attend in person including the public and press who wish to view the meeting to be able to do so virtually.

### 2. **Inspection of Papers**

Any person wishing to inspect minutes, reports, or the background papers for any item on the agenda should contact Democratic Services at [democraticserviceteam@somerset.gov.uk](mailto:democraticserviceteam@somerset.gov.uk) or telephone 01823 357628. They can also be accessed via the council's website on [www.somerset.gov.uk/agendasandpapers](http://www.somerset.gov.uk/agendasandpapers).

### 3. **Members' Code of Conduct requirements**

When considering the declaration of interests and their actions as a councillor, Members are reminded of the requirements of the Members' Code of Conduct and the underpinning Principles of Public Life: Honesty; Integrity; Selflessness; Objectivity; Accountability; Openness; Leadership. The Code of Conduct can be viewed at: [Code of Conduct](#)

### 4. **Minutes of the Meeting**

Details of the issues discussed, and recommendations made at the meeting will be set out in the minutes, which the Committee will be asked to approve as a correct record at its next meeting.

### 5. **Public Question Time**

If you wish to speak or ask a question about any matter on the Committee's agenda please contact Democratic Services by 12noon providing 3 clear working days before the meeting. (for example, for a meeting being held on a Wednesday, the deadline will be 12noon on the Thursday prior to the meeting) Email [democraticserviceteam@somerset.gov.uk](mailto:democraticserviceteam@somerset.gov.uk) or telephone 01823 357628.

Members of public wishing to speak or ask a question will need to attend in person or if unable can submit their question or statement in writing for an officer to read out, or alternatively can attend the meeting online.

A slot for Public Question Time is set aside near the beginning of the meeting, after the minutes of the previous meeting have been agreed. However, questions or statements about any matter on the agenda for this meeting may be taken at the time when each matter is considered. You may also present a petition on any matter within the Committee's remit.

You must direct your questions and comments through the Chair. You may not take a direct part in the debate. The Chair will decide when public participation is to finish.

If an item on the agenda is contentious, with many people wishing to attend the meeting, a representative should be nominated to present the views of a group.

## **6. Meeting Etiquette for participants**

- Only speak when invited to do so by the Chair.
- Mute your microphone when you are not talking.
- Switch off video if you are not speaking.
- Speak clearly (if you are not using video then please state your name)
- If you're referring to a specific page, mention the page number.
- There is a facility in Microsoft Teams under the ellipsis button called turn on live captions which provides subtitles on the screen.

## **7. Exclusion of Press & Public**

If when considering an item on the agenda, the Committee may consider it appropriate to pass a resolution under Section 100A (4) Schedule 12A of the Local Government Act 1972 that the press and public be excluded from the meeting on the basis that if they were present during the business to be transacted there would be a likelihood of disclosure of exempt information, as defined under the terms of the Act.

If there are members of the public and press listening to the open part of the meeting, then the Democratic Services Officer will, at the appropriate time, ask participants to leave the meeting when any exempt or confidential information is about to be discussed.

## **8. Recording of meetings**

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## **Information about the Committee**

This Scrutiny Committee covers the full range of functions covered by the Lead Member for Children and Families. The key focus of the Committee is to assist the Lead Member, the Executive, the Council and its partners to improve the life chances of all children in Somerset through effective and joined up approaches to the delivery of services.

The membership of the Committee includes 2 co-opted church representatives, 2 co-opted parent governor representatives, 2 school governor representatives and 1 representative from the Schools Forum. These co-opted members have voting rights on education matters.

The Committee has a useful 'glossary of terms' document, and this can be found on the website on the following link – [Glossary of Terms](#)

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Suria Aujla	Bridgwater Town Council
Jason Baker	Chard Town Council
Lee Baker	Cheddon Fitzpaine Parish Council / Taunton Shadow Town Council
Marcus Barr	Wellington Town Council
Mike Best	Crewkerne Town Council
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Hazel Prior-Sankey	Taunton Shadow Town Council
Wes Read	Yeovil Town Council
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Andy Soughton	Yeovil Town Council
Richard Wilkins	Curry Rivel Parish Council
Dave Woan	Yeovil Town Council
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**Their memberships of Parish or Town Councils will be taken as being declared by these Councillors to be Personal Interests in the business of the Somerset Council meeting and need not be declared verbally.**

**Any Unitary Councillor who has a Prejudicial Interest by virtue of their Membership of a Parish or Town Council, or who has a special involvement by virtue of being a Parish or Town Councillor, in a matter to be discussed by the Somerset Council will be expected to declare that prejudicial interest personally or bring to the attention of the Somerset Council meeting their special involvement.**

**H CLARKE, Unitary Solicitor, April 2023**

## SCRUTINY FOR POLICIES, CHILDREN AND FAMILIES COMMITTEE

Minutes of a Meeting of the Scrutiny for Policies, Children and Families Committee held in the Luttrell Room - County Hall, Taunton, on Monday 6 March 2023 at 1.00 pm

**Present:** Cllr L Redman (Chair), Cllr O Patrick (Vice-Chair), Cllr S Aujla, Cllr J Baker, Cllr A Hadley, Cllr B Height, Cllr J Hunt, Cllr J Kenton, Cllr M Lovell, Cllr L Trimnell (substitute for Cllr S Hart), Cllr E Potts-Jones (attended virtually) and Cllr S Carswell (attended virtually)

The Revd. T Osmond (attended virtually) Ruth Hobbs and E Tipper - co-opted members

**Other Members present:** Cllr T Munt and Cllr F Nicholson

**Other members present virtually:** Cllr S Hart, Cllr T Munt, Cllr F Nicholson, Cllr M Chilcott, Cllr N Clark, Cllr A Dingwall, Cllr M Kravis, Cllr K Pearce, Cllr G Slocombe and Cllr G Wren

**Apologies for absence:** Cllr J Snell

1 **Declarations of Interest** - Agenda Item 2

There were no new declarations of interest made at the meeting.

2 **Minutes from the previous meeting held on 16 January 2023** - Agenda Item 3

The Minutes of the meeting held on Monday 16 January 2023 were approved and signed as a correct record.

3 **Public Question Time** - Agenda Item 4

There were no questions asked, statements made or petitions presented.

4 **Scrutiny for Policies, Children and Families Committee Work Programme** - Agenda Item 5

The Committee considered and noted the Committee's current work programme and outcome tracker and the Executive's Forward Plan of planned key decisions in the coming months.

During discussions at the meeting, it was noted that the next meeting has been scheduled for Thursday 4 May 2023, beginning at 10 am. The meeting dates for the remainder of the Municipal Year will be finalised in consultation with the Chair.

## 5 **Joint Local Area SEND Inspection Outcomes and update on SEND Green Paper** - Agenda Item 6

The Committee received a report and PowerPoint presentation from the Council's Head of SEND, Claire Merchant-Jones on the recent Joint Local Area SEND Inspection outcomes. The revisit inspection took place between 28 November and 1 December 2022 and the Committee received a copy of the revisit inspection report.

As a result of the re-inspection, Ofsted and CQC judged that the area had made sufficient progress in addressing seven of the significant weaknesses identified during the 2020 inspection. Examples of improvements reported:

- A strong commitment to working together with partners including families to improve area services.
- Sustained improvements to the timeliness and quality of education, health, and care plans.
- An improved autism pathway including a pre-assessment pathway that schools can refer into.
- Improvements in early years special educational needs and disabilities (SEND) services that have helped to improve parental confidence in their children's readiness for nursery and school.
- Development of new enhanced SEND provision within some mainstream schools.

Ofsted and CQC judged that the area had not made sufficient progress in addressing two of the significant weaknesses identified during the 2020 inspection. Examples of further improvement needed:

- Too many children and young people requiring SEND support have a poor experience.
- For those children with an Education, Health & Care Plan (EHCP), too often they do not receive the provision that is set out in their plan.
- The rate of exclusion from schools in Somerset for children and young people with SEND continues to be too high.
- High rates of repeat suspensions and imposition of long-term part-time timetables was reported.

Ms Merchant-Jones outlined the next steps, which are: -

- the area is required to develop and implement an Accelerated Progress Plan (APP) to address the remaining two areas of weakness by Tuesday 21<sup>st</sup> March 2023. Work on this will be 'at pace.'
- The two-year programme of activity within the Written Statement of Action (WSOA) will end.
- Activities that remain outstanding and a priority will form part of the plan for delivery of the new SEND Strategy that will be published in Spring 2023.



- Governance arrangements to change to reflect closure of WSoA and development of the new Children and Families Board.

Ms Merchant-Jones also provided a brief update in the response to the [SEND Green Paper, published on 2 March 2023](#). This sets out plans to change the SEND and alternative provision system in England.

The Committee made a number of comments, which were responded to at the meeting:

- Question about future inspection arrangements and reporting mechanism for the APP – *Ms Merchant-Jones confirmed that there will not be a revisit or inspection from Ofsted / CQC to assess progress and impact of the APP; a new area SEND inspection framework for England came into place in January 2023 - all areas in England will be inspected under this framework within 5 years – as have an APP, Somerset can expect to be inspected within the first 3 years of this new framework, but not while we are implementing the APP; outlined the changes to SEND governance arrangements - the SEND Partnership Board will continue with revised terms of reference and will report into the Integrated Care System Children and Families Board (and this reports to the Integrated Care System Somerset Board). The SEND Improvement Board will stay in place until the APP is signed off.*
- It would be helpful to have a flow chart showing the reporting mechanism for the Children and Families Board, its terms of reference and membership and how the views of children and young people are represented on the Integrated Care Board. It would also be helpful to receive information on what scrutiny *should* look at.
- Inspection arrangements and framework – would be helpful to get a briefing on this at some stage.
- Congratulated team on the revisit inspection outcomes and progress made – *have made progress especially on strategic work, but still work to be done / impact on families and the focus is on this in the APP.*
- Questions about EHCP and why some children and young people aren't receiving provision – *will identify actions and work around provision in EHCP's; there are number of reasons why not being implemented – can be around skill / understanding on what being asked of schools and capacity in SEND team to check. The APP has a clear action on this and this work is starting immediately.*
- Question about the APP and when it will 'go live' – *confirmed this needs to be submitted by 21 March 2023, the focus is on addressing the remaining two areas of weakness; have year to implement and deliver actions; will be tight / pacey action plan.*

It was AGREED that the Committee receive an update on the new Inspection Framework and the APP in 4 months. The Committee has previously agreed that the SEND Strategy will be come to Scrutiny.

On behalf of the Committee, the Chair thanked Ms Merchant-Jones for the update and presentation.

## 6 'Education for Life' Strategy - Agenda Item 7

The Committee received a presentation from the Council's Assistant Director Education Partnerships and Skills, Amelia Walker on an 'Education for Life' Strategy for Somerset 2023 – 2028.

Ms Walker provided the background context to the development of the Strategy, what steps need to be taken, the implementation plan and outlined the 5-year plan goals, which are:

- Goal 1 – Improved access to support in the early years of life so that every child is ready to start school confidently.
- Goal 2 - Increased inclusion in all schools and in our communities so every child is included in their school 100% of the time.
- Goal 3 - Strong and supportive leadership capacity within and between Somerset schools so that improvement is sustainable, and educational outcomes are improved in every key phase.
- Goal 4 - Young people have access to further and higher education in the county where they can develop adaptable skills so they can join and progress in the workforce in Somerset.

Ms Walker outlined the year one proposed priorities which are – the best start in life; thriving schools; great futures and how the work will be driven, evaluated, and explained the new governance groups – Education System Leadership Group and Education for Life Board. It was proposed that there be a strong link between scrutiny and the Education for Life Board and that the Committee consider having a Task Group on education standards. Ms Walker also advised about the Somerset Education for Life Strategy launch event which will be held on 21 March 2023.

The Committee made a number of comments, which were responded to at the meeting:

- Question as to whether schools are on board / have been involved in the development – *confirmed that have the Education Strategy Group in place for a year and asked the local authority to lead on developing a strategy. The outline draft went to all the Schools Groups and has been developed as discussions have gone on. Everyone has seen the final draft and everyone appears to be content that it is something that they could sign up to.*
- What has changed and how will this benefit our young people – *haven't before engaged the wider community, schools and strategic leadership (MATs, SAT and so on) to the right degree and it's about relationships and building trust; also, the proposals include formal governance not*

*there previously which will help – more structured and transparent. This with smaller projects, done together will show success in those relationships, which will hopefully build trust and confidence and take us to the forward years in a way that can build bigger, more dramatic improvements for children and young people.*

- Strategy and relationships with Academies – *it's around the 'community' and power of relationships and connections and mutual accountability. Have contracted the 'Centre for Education and Youth' to build an evaluation framework based on national data and research evidence so that we are able to track outcomes over a period / over the five-year period – will be transparent and will provide hard data. Also mentioned the role of the regional DfE team, to hold Trusts to account; our relationship with the Regional Schools Commissioner needs to be strong.*
- Questions about independent schools, early years settings and middle schools – *advised that Principals from 3 independent schools had attended meeting held the previous week and had been positive meeting, so there is beginning / basis of enthusiasm to work with the local authority; Early Years sector – there are 514 providers and have met and briefed representatives from those communities; referred to 3 tier 'islands' and that whilst not all areas are same, KS2 outcomes are lower and West Somerset pressures are different to Frome's for example.*
- Diocese of Bath and Wells; resources for this and not sure Core Offer is solution – *resourcing is big and complex issue; the Executive member said that she had spoken with the Bishop and the education adviser and is confident will be able to face strained situation financially; make most of resources have.*
- Rate of academisation / concern – *is around making mixed economy work better / shared solution.*
- How is voice of child and young person reflected in this work – *the Children & Young People's Plan reflects verry strong views from children; the Education for Life strategy has involved professional thus far and there is work still to do to connect these.*
- The Committee asked to see the proposed terms of reference of the Task Group on education standards at the next meeting and will then consider how best to link into this work.

On behalf of the Committee, the Chair thanked Ms Walker for the presentation and asked that details about the launch event on 21 March 2023 be circulated.

## 7 **LA Maintained Schools – Core Offer – update** – Agenda Item 8

The Committee received an update from the Council's Assistant Director Education Partnerships and Skills, Amelia Walker on the LA Maintained School, Core Offer.

This outlined the background to the proposals and changes made following extensive reflection and feedback. In terms of next steps, officers have: -

- Met with phase leaders (Wed 1 March)
- Briefings for heads and governors (2/3 March)
- Issuing to individual schools (6 March) – Decision survey; New high-level statements; New 'ready-reckoner'
- Uploading bespoke packages (ongoing from 5 March)
- Deadline for response is Friday 10 March
- Once have responses, will review – seeking 100% sign up following positive responses from school leaders in the previous week. There are some possible mitigations if this is not achieved but remain hopeful can achieve a collaborative consensus.

The Committee made a number of comments and asked detailed questions about the core offer and the changes proposed, which were responded to at the meeting:

- Proposals have changed since were last considered and how will schools cope – *schools have given broad agreement to the principle to core offer and 5%, what has been problematic is the funding.*
- Concern about costs to schools and pleased listened to the feedback; now have concern about the hole in the departments' budget being 'made up' by schools and £350k interest – *clarified that the £350K is a one-off return into budget only and will not happen again so is a 'one year deal' for schools.*
- What will happen if schools don't buy in to this and is there a Plan B / contingency – *have gone from low trust system to trust and will know position on 10 March and will take stock; the Executive member said that she was optimistic that will go though and if doesn't will review the whole budget.*
- Feeling that money is going to bureaucracy, not children – *have identified mitigation if some aren't happy but stressed that support for infrastructure matters; the 5% charge is the right thing to do and if schools don't get support it does end up affecting children.*
- Recognise that conversation have not been easy; now that final figures are presented, is there a risk the schools won't agree; schools be torn between schools budget and the need; pressure of in-year academisation; what is quality assurance (QA) like for the services – *have been very difficult conversations and thanked all those involved; been professional in challenging circumstances; QA – will do with schools; team already bearing fruit; spoke about academisation process (2030 policy was aspiration by government).*
- Schools will already have prepared their budgets and the 29% increase (funding gap) on core offer will have massive implications; need to find another way – *acknowledged have been difficult conversations and perfect storm of pressures – loss of the Monitoring & Brokering grant*

*and inflationary pressures; some schools have higher level of reserves and others do not – small surplus is the ideal place to be.*

- Schools and local authority are 'between rock and hard place' with this; worried about tight deadline (is it realistic) and query about messaging to schools; top slice if negotiations fail? – *most schools should be looped in and will get personal message; top slice is backstop and would consult school system before did that.*

The Committee requested that this revised offer goes back to the Executive at the first opportunity to allow them to review the changes.

The Committee further recognises the value of the Core Offer for schools and endorses the goals and intended outcomes of implementing the Core Offer whilst recognising the dilemma that has been caused by funding reductions to local authority budgets and inflationary pressures. The Committee highlights its ongoing concerns about how the transition will be funded, for both sides, and the potential funding gap.

The Committee requested that a response comes back to the next meeting in May 2023.

## 8 **Scrutiny Committee Task and Finish Groups - update** - Agenda Item 9

The Committee received an update on the Task and Finish Groups: -

### Sufficiency of external placements

The Committee considered the report which outlined the findings of the Task and Finish Group and supported the recommendations to the Executive member for Children and Families.

### Home to School Transport

The Transport Review (Home to School & SEND) will be complete by April and include the Task and Finish Group in deliberations. Richard Hall, who is undertaking the transport review will meet the Task and Finish group to discuss this and a meeting is being organised.

## 9 **Items for Information - Standing Item** - Agenda Item 10

The Committee noted the following items for information: -

- (a) Email sent regarding '[Government unveils reforms in children's social care](#)' – on 3 February 2023  
*(the deadline to respond is 4 May 2023 and have added the proposed consultation response to the forward work plan of the Committee)*
- (b) Overview of Ofsted annual conversation - slides circulated on 9 February 2023
- (c) Academisation – update - information circulated on 3 March 2023

10 **Any other urgent items of business** - Agenda Item 11

There were no other items of business.

**(The meeting ended at 4.05 pm)**

**CHAIR**

## Scrutiny Committee - Children and Families Work Plan 2023 - 2024

Overarching themes	Committee meeting dates / proposed agenda items	Lead Officer/Item Lead
<b>Outstanding items from 2022/ 2023</b>		
<b>Workshop - to be scheduled</b>		
Universal Education	<b>The disadvantage gap</b> - what we know and options to address, to include health impact of inequalities in education	Public Health, SEND, social workers, case studies, wider health organisations, FSM and pupil premium data
<b>Possible workshop with Adults &amp; Health Scrutiny</b>		
	Self-harm / mental health issues	
	Transition arrangements – preparing for adulthood	
<b>Thursday 4 May 2023 @ 10am</b>		
Education Partnerships & Skills	<b>LA Maintained Schools Core Offer – update / response from last meeting and 2023/24 budgets</b>	Service Director - Education Partnerships and Skills Amelia Walker
Education Partnerships & Skills	<b>Terms of reference of the proposed Task Group on education standards</b>	Service Director - Education Partnerships and Skills Amelia Walker
Inclusion	<b>SEND Strategy and the Accelerated Progress Plan (APP)</b>	Service Director - Inclusion Dr Rob Hart and Deputy Director for Commissioning, NHS Somerset, Andrew Keefe
Social Care	<b>Reforms in children’s social care – draft consultation response</b>	Assistant Director – Community & Strategy, Paul Shallcross
	<b>Task and Finish Group – sufficiency of external placements – initial response from Executive</b>	Cllr Munt / Claire Winter
	<b>Task and Finish Group – home to school transport – verbal update</b>	Dr Rob Hart
	<b>Items for Information – Standing Item</b> (a) Information on Children and Families Board (b) Feedback on the ‘Education for Life’ launch event	

The focus for the Committee is – what impact does this have on the children in Somerset?

## Scrutiny Committee - Children and Families Work Plan 2023 - 2024

<b>Wednesday 12 July 2023 @ 10am</b>		
	Updated on Children’s Transformation Programme	Executive Director of Children and Family Services Claire Winter
	Update on Homes & Horizons	Strategic Manager, Daniel Moncrieff
	Progress update on Ofsted AP; ‘Life story work’	Executive Director of Children and Family Services Claire Winter
	School Financial Balances	Service Director - Education Partnerships and Skills Amelia Walker
	Adverse Childhood Experiences (ACE’s) - <b>Trauma Informed Somerset</b> practice model and implementation	Assistant Director Commissioning, Richard Selwyn
Education Partnerships & Skills	Frome Model – provisional item	Service Director - Education Partnerships and Skills Amelia Walker
<b>Wednesday 13 September 2023 @ 10am</b>		
Education Partnerships & Skills	LA maintained schools core offer – update	Service Director - Education Partnerships and Skills Amelia Walker

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- School Transport policy / Post-16 Travel Policy – Somerset Ticket – to be scheduled.
- Children missing out on education (numbers, who, reasons) – to be scheduled.
- Evaluation of the West Somerset Opportunity Area – to be scheduled.

### Future meeting dates

- Wednesday 15 November 2023 @ 10am
- Wednesday 10 January 2024 @ 10am
- Wednesday 13 March 2024 @ 10am
- Wednesday 15 May 2024 @ 10am

The focus for the Committee is – what impact does this have on the children in Somerset?



# Scrutiny Committee - Children and Families Work Plan 2023 - 2024

## Universal Education

- Pupil place planning
- Disadvantage gap
- Academisation
- LA maintained capacity and support

## SEND and Inclusion

- Attendance
- Accelerated Progress Plan (Joint Local Area SEND Inspection)
- SEND & Alternative Provision
- SEND Strategy

## Social Care and Commissioning

- Family safeguarding
- Early Help
- Placement sufficiency
- Strategic partnership
- The Care Review

## Cross-cutting items:

- Long-term financial planning that improves outcomes for children (MTP)
- Involving young people and the community in scrutiny
- Mental health and emotional wellbeing (with health partners)
- Medium Term Financial Plan (MTFP) – Children & Families Budgets

**Note:** Members of the Scrutiny Committee and all other Members of Somerset County Council are invited to contribute items for inclusion in the work programme. Please contact Democratic Services (01823) 357628 & [democraticservicesteam@somerset.gov.uk](mailto:democraticservicesteam@somerset.gov.uk) who will assist you in submitting your item.

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## Scrutiny Committee - Children & Families Outcome Tracker 2022 - 23

Agenda items	Lead / Owner	Agreed Outcome	RAG Status
<b>3 October 2022</b>			
Home to School Transport	Phil Curd John Perrett	<p>(a) noted the update and current position and proposed next steps and development</p> <p>(b) agreed to add school transport to the Committee's work plan for refreshed Council policy (to reflect statutory guidance and possible discretionary changes</p> <p>(c) agreed that the Chair and Vice Chair to discuss further a possible Task and Finish Group for SEND transport, to include provision for pre and post school club attendance, for example</p>	<p><b>To be scheduled</b></p> <p><b>To be resumed after external review</b> T&amp;F agreed @ November '22 mtg</p>
<b>12 December 2022</b>			
LA maintained schools core offer business case	Amelia Walker	<p>Pre Executive item</p> <p>Considered proposals for changing the current support offer, ahead of consideration by the Executive (on 14 December).</p> <p>The Committee welcomed the presentation and were generally supportive of the proposed direction of travel and proposals for enhancing the Councils relationship with Somerset Schools.</p> <p>The Committee accepted the proposals and endorsed their presentation to the Executive at its meeting on 14 December 2022 by the Lead Member noting the contingency fund for schools is increased from £7k to £17.5k and requested:</p> <ul style="list-style-type: none"> <li>• The committee were generally supportive of the adoption of option 3; and</li> <li>• That the proposals be monitored with regular reports to ensure mitigation where necessary and to limit any negative, detrimental impact to Children, Schools and Schools Staff and that an update report be provided 6 months after implementation (October 2023).</li> </ul>	<p><b>Agreed update to Oct 2023 mtg</b> <b>Update taken to March 2023 mtg,</b></p>
<b>16 January 2023</b>			

The focus for the Committee is – 'what impact does this have on the children in Somerset'?

## Scrutiny Committee - Children & Families Outcome Tracker 2022 - 23

Update on Task & Finish Groups		<p>Verbal update</p> <p><u>Sufficiency of External Placements</u> - The Task and Finish Group has held further meetings and looked at the external placements budget information. The Group will be meeting again this week to consider their draft report and findings and recommendations to Executive. NOTED.</p> <p><u>Home to School Transport</u> - AGREED that the Task and Finish Group on Home to School Transport will be paused. This was agreed as an external review has been commissioned by the service to consider home to school transport provision. It is envisaged currently that this external review will be concluded by the end of March 2023 and by pausing the Task and Finish Group, will avoid duplicating work.</p>	<b>Update at March 2023 mtg</b>
Scrutiny update on Ofsted Action Plan	Paul Shallcross	<p><a href="#">PowerPoint presentation</a> on the Ofsted Action Plan and progress made.</p> <p>Covered the two named areas for improvement, which are – placement sufficiency (which is also a national issue) and which is being considered by the Committee’s Task and Finish Group; the take-up of return to home interviews and which is also being considered as a separate agenda item at the meeting; and other key areas of focus, such as the early help demand management work and strategy discussions and audit work. AGREED that the Life Story Work, which is taking place for the majority of children looked after, and data around that, will be an agenda item at a future meeting.</p>	<b>Completed</b>  <b>Update to June / July '23 mtg</b>
Return Home Interview Process	Lise Bird	<p>Outlined the work being done in response to the Ofsted findings on the take up of <a href="#">return home interviews</a>, with improved use of data to inform individual and service planning.</p> <p>Provided an overview of the numbers of missing reports / episodes and the increase in demand, managing risk and the main actions taken including rolling out of the <a href="#">Philomena Protocol</a> and training and the review and reworking of the return home interview form to ensure capture of all information gathered allowing effective data reporting. Missing Return Interviews are completed by the small sub team within the Family Intervention Service. Ms Bird also highlighted the actions still required and in progress and shared some case examples.</p>	<b>Completed</b>

The focus for the Committee is – ‘what impact does this have on the children in Somerset?’

## Scrutiny Committee - Children & Families Outcome Tracker 2022 - 23

Adverse Childhood Experiences (ACE's) - <b>Trauma Informed Somerset</b> practice model and implementation	Vikki Hearn	<p><a href="#">Workshop item</a></p> <p>Trauma Informed Charter being developed – to be shared.</p> <p>Coordinator position being recruited to pull together training resources and training plan for the next two years and to be linked with the development and progression of the Children and Young People's Mental Health Transformation Plan</p> <p>Progress update in 6 months'</p>	<p><b>Completed</b></p> <p><b>Update to June / July '23 mtg</b></p>
<b>6 March 2023</b>			
Joint Local Area SEND Inspection Outcomes and update on SEND Green Paper	Claire Merchant-Jones	<p>Received a report and PowerPoint presentation from the Council's Head of SEND, Claire Merchant-Jones on the recent Joint Local Area SEND Inspection outcomes. The revisit inspection took place between 28 November and 1 December 2022 and the Committee received a copy of the revisit inspection report; also received update on the response to the <a href="#">SEND Green Paper, published on 2 March 2023</a>. This sets out plans to change the special educational needs and disabilities (SEND) and alternative provision system in England.</p> <p>It was AGREED that the Committee receive an update on the new Inspection Framework and the APP in 4 months. The Committee has previously agreed that the SEND Strategy will be come to Scrutiny.</p> <p>The Committee additionally commented that a flow chart would be helpful, showing the reporting mechanism for the Children &amp; Families Board, its terms of reference and membership and how the views of children and young people are represented on the Integrated Care Board.</p>	<p><b>Completed</b></p> <p><b>Update to May '23 mtg</b></p>
Education for Life Strategy	Amelia Walker	<p>Received a presentation from the Council's Assistant Director Education Partnerships and Skills, Amelia Walker on an Education for Life Strategy for Somerset 2023 – 2028.</p> <p>Asked to see proposed terms of reference of the task Group on education standards.</p> <p>Asked for details of the launch event on 21 March 2023.</p>	<p><b>Completed</b></p> <p><b>Update to May '23 mtg</b></p>

The focus for the Committee is – 'what impact does this have on the children in Somerset'?



## Scrutiny Committee - Children & Families Outcome Tracker 2022 - 23

Completed	Action complete and will be removed from tracker for next meeting
Pending	Action on-going or plans in place to address.
Incomplete	No action currently in place with a minimum of 3 months since action agreed.

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## Meetings Overview 2022 – 2023 of the former Scrutiny for Policies, Children and Families Committee

The Committee held 8 formal meeting and considered a broad number of issues at its meetings in the 2022 – 2023 Municipal Year, and these have included: -

Topic	Meeting (s)
training session for members of the Committee and priorities	20 June 2022
Overview of Family Safeguarding in Somerset	20 June 2022
School Place Planning	20 June 2022
Education and Inclusion Services redesign	25 July 2022
Budgetary pressures in Children’s Services, and creation of 2 Task and Finish Groups – sufficiency of external placements and home to school transport	5 September 2022 3 October 2022 7 November 2022 12 December 2022 16 January 2022 6 March 2023
Involved in the Task and Finish Group on scrutiny function for new Somerset Council	7 November 2022 12 December 2022
2022 Key Stage assessment results for Somerset – initial results and details on outcomes	5 September 2022 7 November 2022
Academisation – moving towards 2030	5 September 2022
Ofsted Inspection Result – Children’s Social Care Services and updates on the post Ofsted service planning and action plan	3 October 2022 7 November 2022 16 January 2023
SEND strategy and development and the Joint local Area SEND Inspection outcomes	3 October 2022 6 March 2023
pre executive / scrutiny on LA Maintained Schools Core Offer and business case	7 November 2022 12 December 2022 6 March 2023
Involved in the Task and Finish Group on scrutiny function for new Somerset Council	7 November 2022
Somerset Connect and links to Frome LCN development	12 December 2022
Workshop item on Adverse Childhood Experiences (ACE’s) – Trauma Informed Somerset / model and implementation across Somerset	16 January 2023
Return home interviews process and progress	16 January 2023
‘Education for Life’ Strategy	6 March 2023
Considered the work plan, outcome tracker, Executive Forward Plan	Each meeting
items for information	Each meeting

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## Briefing note

**Title:** LA Maintained School Core Offer

**Date:** April 2023

**Prepared by:** Amelia Walker

**Role:** Assistant Director  
Education, Partnerships and  
Skills

<b>Intended audience:</b>			
Internal	Partner organisation	Public	Confidential
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### Purpose

To provide elected members with a high-level overview of the current situation, as well as more detailed background for information.

### Background

1. There are 133 LA Maintained Schools in the county out of a total 269 state-funded schools (the rest of the schools are academies that either sit alone or in a multi-academy trust).
2. The Core Offer is a bundled package of services from the council to LA Maintained Schools. This is a new approach to charging services which is designed to improve the transparency and quality of the support the council provides to its schools.
3. The first offer went to schools in January. Following feedback from schools that they felt the first offer was unaffordable, a revised offer was produced at reduced cost. This was considered acceptable by school leaders and is now being implemented.

### Key information

4. The Core Offer for LA Maintained Schools went live on 1 April 2023.
5. We anticipate that all schools will have gone through the process of selecting their business manager hours (where applicable) and checking out their Base package shortly after the Easter holiday.
6. We have committed to take steps to change our practices to ensure that how we work with schools is 'with' them not 'to' them. We are also making service improvements and putting in new forms of accountability.

### Proposals, actions, next steps

7. The Core Offer raised concerns about school budgets. We were able to bring down the cost but it has become clear that the budgetary issue is part of a much larger national picture of



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income through the National Funding Formula that is significantly below cost due to the sharp inflationary rises in the pay award, utilities and contracts.

8. We have established four working parties made up of council staff and school leaders to analyse budgets. We are also liaising with other local authorities and national organisations to understand the wider picture.
9. In relation to our service improvements and changes to accountability, this term we are taking forward:
  - a. New service standards
  - b. Recruitment of strong headteachers and governors who have an interest in supporting other schools
  - c. New headteacher briefings – the first session will have a focus on compliance



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## Detailed Background Briefing

### *History*

1. In previous years support for LA Maintained Schools has been provided from five different sources:
  - a. Services bought from council teams under the trading name 'Support Services for Education' (SSE)
  - b. Services bought from third party traders, brokered through the council
  - c. Support funded specifically for LA Maintained schools by the government through the Dedicated Schools Grant (Local Authority Monitoring and Brokering Grant)
  - d. Support funded for all schools by the government through the Dedicated Schools Grant (Central Schools Services Block and Historic Commitments)
  - e. Services paid for by topslicing LA Maintained School budgets following consultation and a vote at Schools Forum (De-delegated and Education Functions)
2. In the 2023/24 budget, two of these sources of funding are cut: Local Authority Monitoring and Brokering Grant in its entirety (£513,000) and 20% from Historic Commitments (£650,000). In order to preserve services that support schools, it was essential to re-design the financial arrangements between the council and schools. It was also desirable to create more transparency about the financial basis for support to schools, as there was a lack of shared understanding about arrangements.
3. Starting in November 2021, the council undertook a series of briefings with schools and recruited a group of schools to participate in research to better understand the needs in schools and help devise arrangements. An external contractor, TPX Impact, provided specialist advice and capacity to deliver the research and make recommendations. A further survey was conducted with schools in September 2022 to test a long-list of possible activities to include within a bundled offer of support.

### *Statutory context*

4. Local authorities are required to fulfil certain functions in relation to education, and in particular for maintained schools, as set out in [Statutory guidance on the roles and responsibilities of the Director of Children's Services and the Lead Member for Children's Services](#):
  - a. take rapid and decisive **action in relation to poorly performing schools**, including using their intervention powers with regard to maintained schools and considering alternative structural and operational solutions;
  - b. develop robust **school improvement strategies**, including choosing whether to offer such services in a competitive and open school improvement market, working beyond local authority boundaries;
  - c. promote high standards in education by supporting **effective school to school collaboration and providing local leadership** for tackling issues needing attention

which cut across more than one school, such as poor performance in a particular subject area across a cluster of schools;

- d. support maintained schools in delivering an appropriate **National Curriculum** and early years providers in meeting the requirements of the **Early Years Foundation Stage** (as outlined in the EYFS Statutory Framework);
  - e. establish a **schools forum** for their area, maintain a scheme for financing maintained schools and provide financial information; and
  - f. undertake specified responsibilities in relation to **staffing and governance** of maintained schools.
5. Because of the statutory requirements that local authorities hold, there are a wide range of responsibilities which can, with the agreement of Schools Forum, be topsliced from maintained school budgets. This is known as de-delegation. Services that can be de-delegated are set out in [Pre-16 schools funding: local authority guidance for 2023 to 2024 Section 50.2](#):
- School improvement
  - Statutory and regulatory duties
  - Education welfare
  - Asset management
  - Central support services
  - Premature retirement and redundancy
  - Monitoring national curriculum assessment
  - Administrative costs and overheads

### *Design considerations*

6. At a national level, support of this kind is provided to academies by multi-academy trusts (MATs). A [2022 benchmarking report](#) found that the level of topslice has risen in recent years and the majority of MATs charge between 4-7%. Therefore, aiming to provide services at a level of funding that reflects this is desirable.
7. In developing a Core Offer, council officers took into account the following feedback from schools:
  - a. Many schools want to remain as LA maintained schools and to see that family of schools flourish.
  - b. The LA wants to support its LA family of schools to stay within the LA family and to be the very best that schools can be.
  - c. Schools should be able to get the support they need, when they need it, regardless of other factors.
  - d. It makes sense to work towards a charge for support that is comparable to a trust charge (eg 5%), at a future time when schools can afford it.
  - e. There are services the LA provides that schools rely on and highly value, and it would be detrimental to school quality if these were to be taken away.

- f. There have been gaps and issues in the support schools have received in the past, and the LA needs to work with schools to achieve a more consistently good experience.
8. While services could properly be de-delegated and the cost simply be removed from school budgets with a vote at Schools Forum, with the significant increases in costs this would have lacked transparency and ownership. The benefit of the trading 'buy back' is that it engages every single school in the decision-making process and is fully transparent about costs and benefits.
  9. The research with schools demonstrated that there were two very different patterns of need in schools. There were a group of services that were delivered to all or the vast majority of schools, and a second group of services that were used by a smaller number of schools but in some cases to a very high level. The latter were 'business manager' services in ICT, Property and Finance where some schools had in-house staff or established contracts and therefore bought very little support, and others did not have this resource and therefore had a high level of buy back. To reflect this, the Core Offer was split into two elements, a Base package which was designed to focus on statutory elements and compliance in all schools, and a Business Manager package with a variable level of support, designed for a smaller number of schools in need of this kind of external expertise.

### *Charging*

10. The total cost of the Core Offer was based on the following calculation:

Income from LA maintained schools in 22/23	2,596,960
Income from De-delegated/Education Functions in 22/23	2,040,320
Already agreed by Schools Forum in November 2022:	
• Monitoring and Brokering Grant	513,000
• De-delegated/Education Functions inflationary uplift	213,800
10% Inflationary uplift on traded income	259,696
Headteacher Support Service	65,700
In-year academisation impact (37.5%)	75,000

11. The stated goal which has been backed by schools is to reach a level of charge of 5% of budget (excepting supplementary grants). This is not achievable for most schools in the short term and therefore a cap has been applied of 29% increase from the level of charge in 2022/23. This is a significant increase in cost, but reflects the removal of grant funding and the sharp increase in inflation in the current year.
12. Business Manager hours are sold in blocks of ten hours at a rate of £700. Schools can top up their hours during the year and carry them over if unused.
13. Some services were not deemed suitable for inclusion in the Core Offer and remain available to purchase alongside, in the same way as for academies and schools outside of Somerset.



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### *VA Schools*

14. We are seeking legal advice on Voluntary Aided schools as this process has raised some concerns about the statutory position of these schools in relation to health and safety and accountability.
15. However, we have been briefed by the Diocese of Bath and Wells on the status of VA schools, and the implication of this is as follows:
  - a. The only financial difference is the organisation which receives the Capital grant for condition (Diocese not LA).
  - b. In accountability terms a VA school is the employer, not the LA.
  - c. In all other regards, VA schools are LA maintained schools.
16. To protect schools and the LA in the context of potential risk to pupils or staff, and in the absence of legal clarification and an agreed shared position between the Diocese, LA and schools, we should not distinguish VA schools in any way from any other school in funding, trading or provision of services and therefore the Core Offer does not distinguish VA schools from other schools. This does not entail the council accepting liability that property rests with the governing body of these schools.
17. VA schools are required to purchase condition reports from a third party provider through a contract negotiated by the Diocese. Therefore all VA schools have been offered 5 additional days Business Manager hours as compensation.



# Revised Core Offer



For All LA Maintained & VA Schools



# Overview

Welcome to the Core Offer 2023/24

Thank you to all the school-based colleagues who have helped to shape this combined service package known as the "**Core Offer**". The Core Offer sets out the financial relationship between Somerset LA Maintained Schools and Somerset Council as of 1 April 2023.

As we move forward together, we will continue to work hard to do serve the children of Somerset. We will build a strong and confident family of schools, based on some key principles that reflect our shared assessment of where we are and where we want to get to together:

- Many schools want to remain as LA maintained schools and to see that family of schools flourish.
- The LA wants to support schools to stay within the LA family when that is their choice, and to be the very best that schools can be.
- Schools should be able to get the support they need, when they need it, regardless of other factors.
- It makes sense to work towards a charge for support that is comparable to a trust charge (eg 5%), at a future time when schools can afford it
- There are services the LA provides that schools rely on and highly value, and it would be detrimental to school quality if these were to be taken away.
- There is work to be done to ensure that the experience of schools of LA services is that they are always valuable and more consistently good.



# About The Offer

The Core Offer bundles all the key services into two main packages: the **Base Package** and **Business Manager Package**.

Both packages commenced from the 1st April 2023 and will follow the financial year to align with school and LA budgeting. Services that are included within the Core Offer and that had been bought for the academic year 2022/23 will not be charged for the summer term. This offer is for all LA maintained schools, regardless of status. In the very small number of instances where there are exceptions (for example in relation to free hours for Voluntary Aided schools) these are clearly indicated. The inclusion of Voluntary Aided schools in this offer does not in any way absolve governing bodies of these schools of their liabilities or responsibilities as the employer.



## Base and Business Manager Packages

There are **TWO** key elements to the Core Offer, the Base and Business Manager package.

The **Base** package is designed for all schools and includes all the statutory functions of the local authority in relation to LA maintained schools, as well as the basic services that have in the past been bought by the overwhelming majority of schools every year. The focus of this package is on ensuring every school is supported to be compliant and deliver basic minimum standards for the children of Somerset.

All the elements of the Base package are eligible for de-delegation. This means that they have been identified by the government as being essential for the effective functioning of schools and could therefore be topsliced from school budgets with the permission of Schools Forums. In Somerset, we have elected not to use de-delegation for the Base package, because using trading and the annual buy back is a more transparent process for every school.

The **Business Manager** package covers Property, ICT and Finance expertise. In some schools, there are staff or contracts in place and therefore those schools do not need to access this support. In other schools, these may be essential relationships that enable the smooth functioning of the school. Therefore, the Business Manager package is fully flexible to the needs of an individual school. Time is available to purchase in bundles of 10 hours at a cost of £700 per bundle.

## Bespoke Services

As well as providing you with the Base and Business Manager Packages, we will continue to provide and offer all LA Maintained Schools our Bespoke services.

These services are discretionary (e.g., Music, Outdoors Centres, eLIM Ed Tech, Educational Psychology Service) and are charged based on an individual school basis. Bespoke Services retain the same buy back window as in past years, which aligns with the academic year. These services will run from September 2023-September 2024.

If you would like to see your school's current buy back for these services, you can either access your contract reports (through the SSE website) or email **SSE@somerset.gov.uk**

# Services Included In The Base Offer

These services were previously bought by schools through the traded buy-back:

Team	Deliverables
<b>CATERING</b>	<ul style="list-style-type: none"> <li>• Where you have previously purchased the catering audit service, it will be assumed you still require this support. To reduce costs we have not planned for other schools to receive this service.</li> </ul>
<b>DATA PROTECTION</b>	<ul style="list-style-type: none"> <li>• Advice and support for all Data Protection and Information Governance issues</li> <li>• Support to manage Subject Access Requests and Freedom of Information requests</li> <li>• Termly Data Protection network meetings</li> <li>• Training for staff (face to face or online), including cyber security risks</li> <li>• Crisis support to manage data breaches and contact with parents, legal representatives, and the Information Commissioner's Office</li> <li>• Support to complete Data Protection Impact Assessments for new projects</li> <li>• Risk-based targeted annual audits of UK GDPR compliance.</li> </ul>
<b>EXCHEQUER</b>	<ul style="list-style-type: none"> <li>• Payment of supplier invoices through an interface direct from MIS into the County Council's corporate ICT system</li> <li>• Cashiering and Accounts Receivable services</li> <li>• Provision of procurement cards</li> </ul>



# Services Included in The Base Offer - cont

Team	Deliverables
<p><b>EDUCATION FINANCIAL SERVICES</b></p>	<p><b>Base Package</b></p> <ul style="list-style-type: none"> <li>• A designated Senior Finance Officer</li> <li>• Guidance books, updates to pay awards, national insurance tables and superannuation rates, termly newsletters and circulars providing updates on relevant financial issues.</li> <li>• Budget planning and financial reporting templates for schools using SIMS FMS</li> <li>• Resolution of non-payroll queries reported using the Education Financial Services query service which have been identified as part of the monthly reconciliation process.</li> <li>• Pre-printed order stationery, listing Conditions of Contract, which must be used for printed orders.</li> </ul> <p><b>Staffing Budget</b></p> <ul style="list-style-type: none"> <li>• Professional advice in reviewing staff contracts to ensure accuracy of information when planning this key area of the school budget.</li> </ul> <p><b>Financial Monitoring and Reporting</b></p> <ul style="list-style-type: none"> <li>• Advice and support in preparing ONE detailed Financial Report which provides a clear picture of the school's financial position in a format suitable for presentation to the Governing Body.</li> </ul> <p>OR</p> <ul style="list-style-type: none"> <li>• A review of a completed financial report including advice and recommendations where necessary before the report is presented to school leaders.</li> </ul> <p><b>Year End Closed of Accounts and completion of Consistent Financial Reporting Return (CFR)</b></p> <ul style="list-style-type: none"> <li>• We will provide comprehensive year end closing support which is compliant with the Financial Management Scheme and the Consistent Financial Reporting framework.</li> </ul>

# Services Included In The Base Offer - cont

Team	Deliverables
<p><b>GOVERNANCE SERVICES</b></p>	<ul style="list-style-type: none"> <li>• Recruitment of governors/trustees and professional clerks.</li> <li>• Board management tool (database) for clerks to use and update.</li> <li>• Provision of clear information about minimum standards for leaders and governors to self-assess compliance.</li> <li>• Resources and advice by the helpline, email and online</li> <li>• Facilitation* of reviews of governance and help to implement recommendations</li> <li>• Briefings and networks for chairs, governors and clerks</li> <li>• Annual full board minutes review</li> <li>• Online Governor Module for clerks</li> <li>• Significant discount with one of our partner organisations such as The Key for School Governors and GovernorHub or TheSchoolBus</li> </ul> <p><b>*Facilitation means that we organise the activity but the contractor costs for providing the review are charged to your school budget. All facilitation is based on need and therefore schools who wish to make their own compliant arrangements may do so.</b></p>
<p><b>HR ADMIN &amp; PAYROLL</b></p>	<ul style="list-style-type: none"> <li>• Fully managed statutorily compliant payroll service. Ensuring all staff (permanent, fixed term, casual and ad hoc workers) are paid accurately and on time</li> <li>• Fully compliant pensions administration including TP/LGPS and other pension provider regulations</li> <li>• Full pensions auto enrolment service to include production and dispatch of all correspondence and triannual review</li> <li>• Production of contractual paperwork</li> </ul>

## Services Included In The Base Offer - cont

Team	Deliverables
<p><b>HR ADMIN &amp; PAYROLL - cont</b></p>	<ul style="list-style-type: none"> <li>• Production of employee letters in respect of family/sickness absence entitlement</li> <li>• Provision of pay-related monthly costing and data load files</li> <li>• Advice and guidance in relation to pay, HR process, or staffing transactions</li> </ul>
<p><b>HR ADVISORY</b></p>	<ul style="list-style-type: none"> <li>• Policy advice and guidance and resources to support Leadership and Management (HR, Governance and Safeguarding)</li> <li>• Advice and support in managing all aspects of employee relation casework via telephone, email or face to face</li> <li>• Designated HR Advisor and access to duty line during term time</li> <li>• Provision of clear information about minimum standards for leaders and governors to self-assess compliance (HR, Governance and Safeguarding) Risk-based targeted audits of safeguarding practice, including Single Central Record</li> <li>• Provision for the local authority to exercise its' statutory duties in respect of HR</li> <li>• Delivery of commissioned training in HR</li> <li>• Support with TUPE transfers</li> </ul>
<p><b>LEGAL</b></p>	<ul style="list-style-type: none"> <li>• Confidential access by referral to lawyers who are local government experts</li> <li>• Facilitated access to specialist providers where needed</li> </ul> <p><b>Access to advice is provided on the basis of need. Complex cases requiring extensive support may be charged on a negotiated, case by case basis, or may be eligible for funding via the central contingency fund.</b></p>



## Services Included in The Base Offer - cont

Team	Deliverables
<p><b>MIS SUPPORT</b></p>	<ul style="list-style-type: none"> <li>• Daily monitoring of server performance and technical fixes where required to ensure automated statutory data returns are operational.</li> <li>• Management and support to ensure that data flows smoothly between Schools and the LA where there is an established Management Information System.</li> <li>• Expert advice to support MIS Incidents, logged through a self-service helpdesk (response times managed in accordance with our service level agreement).</li> <li>• Expert guidance on all areas of the MIS (essential for ensuring basic functionality and effective use of the MIS).</li> <li>• Technical support including upgrades, transfer of finance files, and resolving system failures where required.</li> <li>• Use of tools that enable remote access to school systems by advisors</li> <li>• Priority functionality support during inspections or emergency situations</li> <li>• Support with MIS contracting and management of additional module purchasing.</li> </ul>
<p><b>PLAY EQUIPMENT</b></p>	<ul style="list-style-type: none"> <li>• Play equipment operational safety surveys</li> <li>• Annual written report</li> <li>• A Play Equipment Inspection Service Logbook (guidance notes and record sheets) is supplied for schools to record their daily checks</li> <li>• Training for staff who undertake daily equipment inspection in accordance with RoSPA and HSE recommendations</li> <li>• Maintaining a technical database, which includes records of operation and inspections (which need to be retained for a minimum of 21 years)</li> </ul>

# Services Included In The Base Offer - cont

Team	Deliverables
<p><b>PROPERTY (Education and Corporate Property)</b></p>	<ul style="list-style-type: none"> <li>• Provision of tree risk and safety surveys in accordance with current statutory guidance</li> <li>• Report with advice and recommendations on how to reduce risk</li> <li>• Liaison with tree contractors so that they do the correct works (does not include obtaining Comprehensive biennial property condition survey <b>(Please Note - VA Schools will not receive this - we will compensate this with Five Free Property Business Manager hours)</b>)</li> <li>• Use of TechForge - the new and improved system that is replacing RAMIS</li> <li>• Biennial (property-related) statutory compliance checks and onsite audits</li> <li>• Live monthly monitoring of compliance data entered into TechForge and alerts to schools in relating to breaches or outstanding action</li> <li>• Facilitation* of statutory servicing and compliance checks to plant and equipment including PAT testing &amp; Legionella Risk Assessments. Documents and certificates will be stored in TechForge for you to view.</li> <li>• 24/7 Out of hours helpline for property related emergencies</li> <li>• Facilitation* of repairs via schools chosen contractors</li> <li>• Facilitation* of Safety Glazing Audits</li> <li>• Facilitation* of Display Energy Certificate as required</li> <li>• Maintaining and updating policies for hiring and leasing of land and buildings by third parties</li> </ul> <p><b>*Facilitation means that we organise the activity but the contractor costs for providing the physical works are charged to your school budget. All facilitation is based on need and therefore schools who wish to make their own compliant arrangements may do so.</b></p>

# Services Included In The Base Offer - cont

Team	Deliverables
<b>REFUSE AND RECYCLING</b>	<ul style="list-style-type: none"> <li>• Collection of recycling, food, and other waste material from schools</li> </ul>
<b>SCHOOL LIBRARY SERVICE</b>	<ul style="list-style-type: none"> <li>• Annually schools can borrow 650 books/ project/ topic boxes/ book buddies/ class sets or big books from resource of 170,000 items</li> </ul>
<b>TREE INSPECTIONS</b>	<ul style="list-style-type: none"> <li>• Provision of tree risk and safety surveys in accordance with current statutory guidance</li> <li>• Report with advice and recommendations on how to reduce risk</li> <li>• Liaison with tree contractors so that they do the correct works (does not include obtaining quotes)</li> </ul> <p><b>Please Note- this is only available to schools who bought this in 2022/23. To reduce costs, we have not planned for other schools to receive this service.</b></p>



# Services Included in the Base Offer

These services were previously funded through top-slicing (de-delegation) or funded by Government :

Team	Deliverables
<p><b>ASBESTOS</b></p>	<ul style="list-style-type: none"> <li>• Delivery of asbestos awareness training to staff in schools built pre-2000.</li> <li>• Delivery of regular re-inspection survey of asbestos containing items in schools. This inspection will be every 1, 2 or 3 years - timing will be based on the risk associated with the asbestos items identified previously. This survey will replace the Asbestos Management Survey which was every 5 years.</li> <li>• Items identified as having deteriorated in condition will be picked up and dealt with by the Asbestos Team.</li> </ul>
<p><b>CARE FIRST</b></p>	<ul style="list-style-type: none"> <li>• Independent specialist counselling; remote or telephone support.</li> <li>• Access to up-to-date information on issues which affect daily life outside</li> <li>• work, including debt management, relationships, stress, money etc.</li> <li>• Management advice and arrangements in supporting staff effectively.</li> </ul>
<p><b>CLEAPPS</b></p>	<ul style="list-style-type: none"> <li>• This is a service that advises on health and safety for design and technology teaching. It provides telephone and email helpline, model risk assessments and CPD.</li> </ul>
<p><b>CONTINGENCY</b></p>	<ul style="list-style-type: none"> <li>• Central fund that supports eligible schools facing unforeseen or unprecedented costs arising in-year, e.g. high tariff legal costs, property emergencies outside the condition programme, emergency provision of leadership capacity in the case of school failure</li> </ul>

# Services Included in the Base Offer- cont

Team	Deliverables
<b>ENTITLEMENTS</b>	<ul style="list-style-type: none"> <li>• The Free School Meals Eligibility team conducts the checks that establish pupil premium entitlement</li> </ul>
<b>FINANCE (Schools Finance and Accountancy Team)</b>	<ul style="list-style-type: none"> <li>• Provision of statutory policy advice and guidance to support leadership and management (Strategic finance)</li> <li>• Provision of analysis and advice in relation to schools in financial difficulties</li> <li>• Overview of financial performance and provision of financial data</li> <li>• Delivery of statutory reporting across all schools</li> </ul>
<b>HEADTEACHER SUPPORT SERVICE</b>	<ul style="list-style-type: none"> <li>• Access to a fully confidential, one to one service of coaching and counselling from qualified staff with school leadership experience.</li> </ul>
<b>HEALTH AND SAFETY</b>	<ul style="list-style-type: none"> <li>• Provision of Fire Risk Assessments every 3 years</li> <li>• Provision of Health &amp; Safety Audits every 3 years</li> <li>• Outdoor Education trip approvals</li> <li>• Access to resources and delivery of some commissioned open-access training in Health &amp; Safety</li> <li>• Provision of Health &amp; Safety policy advice and guidance to support</li> <li>• Leadership and Senior Management</li> <li>• Provision of clear Health &amp; Safety Information about minimum standards for leaders and governors to self-assess compliance</li> </ul>
<b>INSURANCE</b>	<ul style="list-style-type: none"> <li>• Insurance cover and associated advice and support, including managing risks and ensuring that insurance claims are dealt with fairly and swiftly.</li> <li>• The cover will include the following areas:               <ul style="list-style-type: none"> <li>• Public Liability</li> <li>• Employers' Liability</li> <li>• Professional Indemnity</li> </ul> </li> </ul>

# Services Including in the Base Offer- cont

Team	Deliverables
<b>INSURANCE - cont</b>	<ul style="list-style-type: none"> <li>• Hirers' Liability</li> <li>• Personal Accident</li> <li>• Libel and Slander Crime Insurance (enhanced Fidelity Guarantee Insurance – employee and third-party dishonesty)</li> <li>• School Journey/Travel Insurance</li> <li>• Property Insurance</li> <li>• Material Damage cover – Buildings and Contents</li> <li>• Additional Expenses (Business Interruption) cover</li> <li>• Computer Equipment</li> <li>• Money</li> <li>• Engineering inspection provision</li> <li>• Contract Work (Works in progress)</li> <li>• Insurance cover and associated advice and support, including managing risks and ensuring that insurance claims are dealt with fairly and swiftly.</li> <li>•</li> <li>• The cover will include the following areas: For any LA Maintained School requiring motor insurance, we recommend that you contact the service directly to discuss your required cover and costs.</li> </ul>
<b>INTERNAL AUDIT AND AUDIT FEES</b>	<ul style="list-style-type: none"> <li>• Programme of financial audits conducted by the South West Audit Partnership in relation to LA maintained school finances and financial practices</li> <li>• Teachers' Pension Fund annual return audit</li> </ul>
<b>MATERNITY</b>	<ul style="list-style-type: none"> <li>• Central fund that meets the employer costs of maternity pay for qualifying employees</li> </ul>
<b>MODERATION</b>	<ul style="list-style-type: none"> <li>• Statutory Key Stage 1 and Key Stage 2 Assessment moderation</li> </ul>
<b>OCCUPATIONAL HEALTH</b>	<ul style="list-style-type: none"> <li>• Advice and guidance on employees' health at work and the impact of work on their health on the basis of referrals, and particularly in the context of long-term sickness absence.</li> </ul>

# Services Including in the Base Offer- cont

Team	Deliverables
<b>SAFEGUARDING</b>	<ul style="list-style-type: none"> <li>• Advice and guidance regarding safeguarding practice</li> <li>• Termly DSL briefings</li> <li>• Annual Section 175/157 Safeguarding Audit</li> <li>• Safeguarding Evaluations arising from audits, complaints or critical incidents</li> <li>• Investigation of Ofsted complaints about safeguarding in schools directed to the LA</li> </ul>
<b>SCHOOL REDUNDANCY FUND</b>	<ul style="list-style-type: none"> <li>• Central fund that meets the costs of redundancy following reorganisation. The fund covers approved redundancy costs only and does not cover any pension strain costs which would need to be met by the school. Schools must complete a Gateway request form, that is submitted to HR and reviewed by the School Funding Team. If approved the costs are met and paid for from this redundancy pot.</li> </ul>
<b>SIMS LICENSES</b>	<ul style="list-style-type: none"> <li>• Payment of licence fees for SIMS (or other providers up to the value of an equivalent SIMS license) * This does not include any modules purchased directly.</li> </ul>
<b>STATUTORY EDUCATION LEADERSHIP SUPPORT</b>	<ul style="list-style-type: none"> <li>• Provision of policy advice and guidance to support leadership and management (including academisation)</li> <li>• Overview of Ofsted forecasting and commissioning of inspection support from relevant teams</li> <li>• Overview of attainment and progress data and communication about standards</li> <li>• Overview of statutory intervention process (warning notices, intervention in schools in challenging circumstances and schools causing concern process)</li> <li>• Termly School Improvement Partner monitoring visits for schools causing concern</li> <li>• Core Group meetings</li> </ul>
<b>TRADE UNION FACILITATION</b>	<ul style="list-style-type: none"> <li>• Central fund that meets the negotiated costs of trade union staff time to deliver trade union duties</li> </ul>

# What Can Use Your Business Manager Hours For?

**Business Manager hours** are available to purchase for additional expert support from **Grounds & Landscape, ICT, Property or Finance**.

The hours can be purchased in blocks of 10 hours for £700 (£70/hour), additional blocks of hours can be bought throughout the year, subject to capacity. Time is recorded in 15 minute intervals and rounded to the nearest 15 minutes. Unused Business Manager hours can be carried over to the next financial year.

Business Manager hours **can not** be refunded in the case of academisation, but academisation will be taken into account in recommending hours at the start of the year.

## Finance (Education Financial Services)

### **New Year preparation in SIMS FMS**

- A review of the financial accounts structure in SIMS FMS to ensure it meets the need of the school and is compliant with the Financial Management Scheme and the Consistent Financial Reporting framework.

### **Comprehensive Budget Planning**

- To compliment the support offered with planning the Staffing Budget as part of the Core Offer Base Package, we will provide advice and guidance in completing the non-staffing budget, ensuring a fully costed, financially compliant comprehensive budget plan is completed in a clear format suitable for presentation to school leaders.

### **Comprehensive Budget Planning and presentation to the Governing Body**

- As detailed under Comprehensive Budget Planning but including presentation of the Comprehensive Budget Plan to the Governing Body for approval.

### **Budget Plan Checks**

- A Senior Finance Officer will review the completed budget plan and offer recommendations where necessary before the plan is presented to school leaders.

### **Confirming the Budget on SIMS FMS**

- Ensures the approved budget detail is entered accurately in SIMS FMS, balances to the School Budget Share and is fixed in SIMS FMS.

### **Financial Reporting**

- Support with producing one Financial Report can be accessed as part of the Core Offer Base Package. Business Manager hours are therefore available for support in completing up to two additional Financial Reports during the financial year.

### **Financial Reporting and presentation to the Governing Body**

- As detailed under Financial Reporting but including presentation of the completed Financial Report(s) to the Governing Body.



# Finance (Education Financial Services)

## **Petty Cash/Imprest end of year Reconciliation and Return**

- We will undertake the annual end of year reconciliation process and complete the end of year return to ensure the school is compliant with the Financial Management Scheme.

## **Completion of the Monthly Reconciliation and Checks**

- Reconciliation is the process of verifying that financial transactions in SIMS FMS match the financial transactions on the Local Authority financial management system and must be undertaken monthly. We will complete this remotely on your behalf.

## **Day to Day Operations (Invoice, Income, PCard, Petty Cash) management on SIMS FMS**

- A remote service that enables effective management in SIMS FMS of invoice and PCard payment, and income and Petty Cash transactions to ensure accuracy of data for financial reporting.

## **Termly Budget Update Forms (BUFs) management on SIMS FMS**

- Each term we will check Budget Update Form information is recorded correctly in SIMS FMS and in line with the agreed Budget to ensure accuracy of information for budget monitoring.

## **Financial Support Visit**

- Financial management advice for finance staff and/or senior school leaders. This time is delivered in blocks of 3 hours 15 minutes and can be delivered individually or in small groups.

## **Finance Policy Review**

- A comprehensive review of the school finance policy to ensure full compliance with the latest financial regulations.

## **Benchmarking**

- Advice in using Benchmarking tools to review spending and inform effective resource management in line with the Schools Financial Value Standard (SFVS) requirements.

## **Audit of Unofficial Funds**

- An independent audit as required by the Financial Management Scheme on an annual basis to demonstrate compliance and transparency in managing these funds.

## **VAT Explained**

- Training for new finance staff in understanding HMRC rules and how they should be applied within school financial management.

## **Training in Day-to-Day Operations**

- Essential training in core financial procedures such as ordering, invoicing, PCard and Petty Cash Management on SIMS FMS for new finance staff.

# Finance (Education Financial Services)

## Training in Monthly Reconciliation and Checks

- Training in completion of the monthly Reconciliation process to ensure accuracy of data to inform financial management monitoring and reporting. This is recommended as a 12-month training package.

## New Headteacher finance package

- An individually tailored package designed to support new headteachers during their first year of headship. The package runs over three consecutive terms and can be started at any point in the year.

## New Finance Staff training package

- Effective financial management training for newly appointed finance staff. This is a bespoke service designed to meet individual requirements.

# Property

## PROPERTY

- Support in considering the effects of accommodating third parties e.g., preschools on school sites
- Developing and advising on energy management strategy
- Legionella temperature testing
- Meetings and advice on all property matters
- Feasibility studies
- H&S premises inspection (previously every three years)
- Risk assessment health check
- Fire advisory visit (not Fire risk assessments)
- Additional property & health and safety support relating to your premises



# Grounds & Landscape

## GROUNDS & LANDSCAPE

- Support and advice on grounds-related issues and potential improvement projects
- Liaise with contractors to provide quotations to carry out any required works relating to tree inspections
- Liaise with contractors to provide quotations to carry out any required works relating to play equipment inspections
- Assistance with applying for Conservation Area or Tree Preservation Consent.
- Responding to complaints from neighbours to the school regarding trees issue

## ICT

### ICT

- External compliance checks against DfE and Ofsted Standards.
- Access to an in-house team of ICT specialists and School Visits. Supporting schools in considering and developing their ICT strategy and infrastructure to ensure they effectively use technology - in and out of the classroom.
- Schools website, building, hosting, supporting, and update service - ensuring full DfE and Ofsted compliance
- Microsoft 365 Support - fully managed support package - email, OneDrive, SharePoint, and cloud services
- Schools Development and rolling ICT Business Plan, quarterly visits to all schools offering technical and practical support and advice on DfE funding and support for the school.
- Procurement Best Practice Price Benchmarking service - guaranteeing schools' best purchase price on all ICT Equipment (send us your quote, and we will try and find it cheaper)
- ICT Project Management Services, all aspects of Project Management - Small or large
- ICT Purchases, Builds, Installation, and Compatibility.



# Additional Services Provided - Not Funded By Schools (either LA or Grant-Funded)

Please note the provision of this support may be in development and may not be available from 1 April. Some support may have been reduced in scope in order to reduce costs to schools.

Service	Deliverable
<p><b>ADMISSIONS AND ENTITLEMENTS</b></p>	<ul style="list-style-type: none"> <li>• Fulfil all statutory responsibilities in relation to school admission and appeals acting as the admission authority for VC and Community schools in relation to both admissions to the year of entry and in-year admissions</li> <li>• Operating the coordinated scheme for admission to the year of entry for all schools and academies.</li> </ul>
<p><b>CAREERS AND PATHWAYS</b></p>	<ul style="list-style-type: none"> <li>• Support to Careers Leaders and Advisors with a range of Careers related activities including the TalentEd Academy programme, Careers staff CPD events and careers events</li> <li>• Latest Careers legislation information rollout, including how it impacts on schools and colleges</li> <li>• Development and rollout of Careers and pathways curriculum, information and resources</li> <li>• Developing links and opportunities between schools &amp; colleges and key employers across Somerset to provide opportunities for young people to understand and experience the world of work and key employment sectors in Somerset</li> <li>• Linking the work of the Somerset CEC Hub and the Somerset EBP to provide comprehensive information, programmes and support to schools &amp; colleges</li> <li>• Developing Supported Employment options for our young people with SEND across Somerset</li> <li>• Linking with employers to develop opportunities for Careers and curriculum design and implementation</li> <li>• Support to ensure that schools and colleges continue to fulfil and sustain their Gatsby Benchmark requirements</li> </ul>

# Additional Services Provided - Not Funded By Schools (either LA or Grant-Funded) - cont

Service	Deliverable
<b>CAREERS AND PATHWAYS - cont</b>	<ul style="list-style-type: none"> <li>• Support to ensure that young people have the widest range of appropriate Post-16 options and can make a positive and confident transition into their Post 16 and Post 18 lives, including for our most vulnerable young people</li> <li>• Providing a supportive network to support the building of a self-supporting and forward-thinking group of Careers practitioners, at all key stages.</li> </ul>
<b>CRISIS COMMS</b>	<p>In the event of an emergency or crisis:</p> <ul style="list-style-type: none"> <li>• Provide advice and guidance – on the most appropriate approach to managing media interest.</li> <li>• Field enquiries from the media – allowing the school to divert all media enquiries to the Communications Team who will work with the school to provide an appropriate response.</li> <li>• Prepare and distribute statements – on behalf of the school, drafted in liaison with the school.</li> <li>• Prepare press releases and organise press conferences if required.</li> <li>• Help prepare for interviews (where required) – if agreed as appropriate action. Advise on communications with parents and other stakeholders</li> </ul>
<b>CURRICULUM</b>	<ul style="list-style-type: none"> <li>• Overview of individuals and organisations with curriculum expertise within the county and beyond for schools to collaborate with</li> <li>• Provision of opportunities for curriculum and subject collaboration</li> <li>• Delivery of training in Curriculum or relevant Curriculum Topics</li> <li>• Development and supply of curriculum exemplars to support school-based curriculum development linked to the training offer.</li> </ul>
<b>CORPORATE PROPERTY</b>	<ul style="list-style-type: none"> <li>• Annual consultation and bidding process between schools and corporate property to determine the highest priority condition items to be nominated for condition fund investment.</li> </ul>

# Additional Services Provided - Not Funded By Schools (either LA or Grant-Funded) - cont

Service	Deliverable
<p><b>CORPORATE PROPERTY - cont</b></p>	<ul style="list-style-type: none"> <li>• Data overview of (property-related) compliance and the condition of the school estate, including potential for decarbonisation where available.</li> <li>• Data will be held in an online Technology Forge database (TF) where schools can access and manage property data.</li> </ul>
<p><b>EDUCATION LEADERSHIP SUPPORT</b></p>	<ul style="list-style-type: none"> <li>• School to School Support programme for focused areas for development (This work is in development and a more detailed description of how this support will work will be shared in the coming months. This includes ongoing recruitment of new support partners from within the LA maintained school community.)</li> <li>• Pre-OFSTED Visits and follow up support</li> <li>• Induction and succession planning across schools</li> <li>• Headteacher 'Keeping in Touch' calls</li> <li>• Recruitment strategy and actions to improve recruitment and retention</li> <li>• Provision of standardised social media collateral, templates, and documentation to support recruitment</li> <li>• Headteacher Recruitment Support</li> </ul>
<p><b>EDUCATION PLACES</b></p>	<ul style="list-style-type: none"> <li>• Statutory duties relating to the planning, provision and allocation of school places by planning and managing the provision of school places through the production and analysis of school organisation data</li> <li>• Coordination of the annual SCAP return to the DfE which covers capacity, forecasts and capital spend</li> <li>• Review of existing school provisions and the exploration of different options</li> <li>• Ensuring that there are sufficient childcare places to meet the needs of parents and carers in Somerset and enough places for all eligible children to take up the early years' entitlement</li> </ul>
<p><b>EDUCATION PROPERTY &amp; GROUNDS AND LANDSCAPE</b></p>	<ul style="list-style-type: none"> <li>• Procurement and management of government-funded maintenance, Schools Access Initiative (SAI), decarbonisation and improvement projects</li> </ul>

## Additional Services Provided - Not Funded By Schools (either LA or Grant-Funded) - cont

Service	Deliverable
<p><b>EDUCATION RELATIONSHIPS AND INTERVENTION</b></p>	<ul style="list-style-type: none"> <li>• Dedicated Relationship Manager who acts as a single point of contact for the school and connects the school to people, organisations, and services</li> <li>• Direct capacity or brokerage of support on a targeted basis in relation to crises or pressures (inadequate judgement, unexpected leadership absence, safeguarding incident)</li> <li>• Commissioning and or brokering of specialist advice on a routine basis in relation to identified needs</li> <li>• Back up support from a flexible Relationship Management team for first line contact</li> <li>• Record-keeping system and intelligence gathering that ensures everyone working with a school has access to up-to-date information about activities, contacts and needs</li> <li>• Management of complaints and concerns about schools</li> <li>• Commissioning of suite of appropriate communications including bulletin, information online, virtual and face to face events</li> </ul>
<p><b>HR ADVISORY</b></p>	<ul style="list-style-type: none"> <li>• TUPE transfer support for academisation process</li> </ul>
<p><b>Safeguarding</b></p>	<ul style="list-style-type: none"> <li>• Work in collaboration with other schools and services within the Local Authority to develop plans and support for schools where improvements are required to ensure children are kept safe and safeguarding requirements are met.</li> <li>• LA Officers will attend multi-agency forums and mapping meetings to support planning around vulnerable groups and individuals within schools, homes, and the wider communities.</li> </ul>
<p><b>Training</b></p>	<ul style="list-style-type: none"> <li>• Moderation training for KS1 and KS2</li> <li>• Unlimited pre-recorded 'bite-sized' training to cover all the essential elements of leadership, management, education, SEND and behaviour. This is in development and therefore not all elements will be available from 1 April 2023.</li> </ul>

# Services NOT Included In The Core Offer

Service	Deliverable
<p><b>ED TECH</b></p>	<p>The eLIM EdTech team provide a range of support in both the Computing Curriculum and Online Safety.</p> <ul style="list-style-type: none"> <li>• Bespoke subject leader development for Computing and/or Online Safety</li> <li>• Analysis and action planning for schools using 360safe for Online Safety self-review, including accreditation support</li> <li>• Termly network meetings/workshops for Computing and Online Safety leaders</li> <li>• Whole staff and governor Online Safety training (pre-recorded or live)</li> <li>• Full range of Computing Curriculum CPD in partnership with the National Centre for Computing Education and Somerset Computing Hub - for all levels of Computing confidence</li> <li>• New Wessex Computing Curriculum - full coverage of the Computing National Curriculum for KS1 and KS2, with continuous provision resources for EYFS</li> <li>• ActiveBYTES Online Safety Scheme of Work for EYFS, KS1 and KS2</li> </ul>
<p><b>EDUCATION PROPERTY</b></p>	<ul style="list-style-type: none"> <li>• Procurement and management of school-funded maintenance, SEND accessibility, decarbonisation and improvement projects</li> </ul>
<p><b>GROUND &amp; LANDSCAPE</b></p>	<p>TREES</p> <ul style="list-style-type: none"> <li>• If you don't currently buy the Tree Risk &amp; Safety package it will <b>not</b> be included in the base package, but you can still buy this as a traded package from the SSE website.</li> </ul> <p>PLAY EQUIPMENT</p> <ul style="list-style-type: none"> <li>• Design and Project Management for new play equipment installations.</li> </ul> <p>GROUND CONTRACT</p> <ul style="list-style-type: none"> <li>• The Grounds Maintenance Contract Package is still available for all LA schools from the SSE website</li> </ul> <p>PROJECTS</p> <ul style="list-style-type: none"> <li>• School funded landscape, play and sports design projects</li> </ul>



# Services NOT Included In The Core Offer - cont

Service	Deliverable
<b>GOVERNANCE SERVICES</b>	<ul style="list-style-type: none"> <li>• Full training and development programme (live face to face or online), which offers continued professional development, reflecting current national initiatives, facilitated through e-learning and face-to-face sessions (available as pay-as-you-go or unlimited online development package)</li> <li>• Standard or bespoke whole board training sessions developed to meet your specific needs and delivered at your school/ choice of venue</li> <li>• Contractor costs of external review of governance</li> </ul>
<b>HR ADVISORY</b>	<ul style="list-style-type: none"> <li>• Individual bespoke training</li> </ul>
<b>Inclusion</b>	<ul style="list-style-type: none"> <li>• All services that relate to inclusion, including Educational Psychology and training, is sold separately. We can consider whether putting some support in the Core Offer in future would save schools money, but at present it is not included.</li> </ul>
<b>Music</b>	<ul style="list-style-type: none"> <li>• Music is charged for based on an individual school basis and in accordance with the National Plan for Music Education.</li> </ul>
<b>SAFEGUARDING</b>	<ul style="list-style-type: none"> <li>• Bespoke Safeguarding audits</li> </ul>
<b>SCHOOLS LIBRARY SERVICE</b>	<ul style="list-style-type: none"> <li>• Schools can choose to upgrade, at an additional cost to our Silver 3 or Gold packages if required</li> </ul>
<b>SOMERSET AND SOUTHWEST MUTUAL FUND</b>	<ul style="list-style-type: none"> <li>• Staff absence scheme</li> </ul>
<b>TRAINING</b>	<ul style="list-style-type: none"> <li>• More in-depth or bespoke training for individual schools or groups of schools can be purchased separately. Please get in touch to discuss your requirements. This includes existing training offers from SCIL or other SC affiliated training providers or apprenticeships/ accredited or HEI (Higher Educational Institute) courses.</li> <li>• Subsidised additional moderation training package for EYFS Profile</li> </ul>

# Key Contact Details

✉ **Email:** [sse@somerset.gov.uk](mailto:sse@somerset.gov.uk)

☎ **Tel:** 0300 123 7365

🌐 **Website:** [www.supportservicesforeducation.co.uk](http://www.supportservicesforeducation.co.uk)

🐦 For the latest news and updates follow us on Twitter [@SSESomerset](https://twitter.com/SSESomerset)

**If you would like to discuss the Core Offer in more detail,  
then please do not hesitate to get in touch.**



Draft

## Children & Families Board Best Start in Life Steering Group

(reporting, for information, to the Scrutiny Committee - Children & Families)

### Terms of Reference

#### Purpose

consider: is a meeting necessary? / can the work be done effectively another way? / does this duplicate something that happens elsewhere?

- To review performance data
- To report to Scrutiny Committee – Children and Families, on strengths, trends and areas of concern
- To engage with system leaders to seek intelligence on effectiveness of interactions
- To take overview of lessons from Independent Complaints Panel

#### Agenda

consider: is the item necessary? / can the work be done effectively another way? / does this duplicate something that happens elsewhere? what is the expected outcome (to help focus discussion and prioritise time)? / how much time is required for different agenda items (including time for discussion & breakout groups)?

**Standing items**  
(at every meeting)

- i. Action log update / review of outstanding actions
- ii. Data Dashboard. Review performance data
- iii. Independent Complaints Panel
- iv. Plan for escalation and reporting to Scrutiny Committee – Children and Families
- v. Communications and relationships
- vi. Risks and Issues
- vii. Any Other Business

**Other regular items**  
(i.e at regular intervals)

- Review terms of reference (annually)

**One-off agenda items**  
(as required)

- As need identified

**How will the agenda be compiled and finalised?**

- 

#### Recording / Outputs

proportionate to the meeting, including type of minutes / notes / plans / logs; format - Word / OneNote / Excel; timescales for sign-off, storage & distribution requirements; communication requirements

**Meeting record**  
(including case recording)

Formal minutes will be taken during the meeting and, where appropriate, published via the Education for Life webpages.

**Action plan / log**

An action log will be maintained.

Communication from / to other meeting	The Sub Committee will report to the Scrutiny Committee - Children & Families on a quarterly basis and will have the ability to escalate and recommend agenda items for Scrutiny. The quarterly report will also be shared with the Education for Life Board.
<b>Logistics</b> including frequency & duration / type (virtual / face-to-face / hybrid) / appropriate timescales for notice, preparation and follow-up	
Frequency	Monthly
Duration	Up to 2 hours
Type (virtual / face-to-face / hybrid – or combination and what that looks like)	<input type="checkbox"/> Virtual <input type="checkbox"/> face-to-face <input type="checkbox"/> Hybrid <input checked="" type="checkbox"/> <b>Combination:</b> prioritising face-to-face, with virtual meetings where this is logistically challenging.
Timescale for invitations (minimum requirements)	To be booked for the following academic year during the summer term.
Timescale for pre-meeting papers: (minimum requirements to allow for preparation)	One week prior to meeting
Timescale for post-meeting papers: (minimum requirements to allow for follow-up)	One week after meeting
Other logistical requirements	The Council will provide the Programme Management, Data Collection and Business Support for these meetings.
<b>Attendees</b> including regular members, people who attend for specific standing items and cover arrangements	
Full members (by job title)	To be appointed by Scrutiny Committee – Children. 3-5 attendees needed and to include rep from Parent Carer Forum.
Ad hoc / contributing members (by job title)	As the need is identified
Cover arrangements e.g. Where a standing attendee cannot make the meeting, a deputy representative should be identified in advance and briefed about area/service issues to be raised.	Quoracy is set at 3 of the attendees. The meeting will not be quorate if there are fewer than 3 people present.
<b>Chairing Arrangements</b> including vice chair where appropriate and cover arrangements	

Co-Chairs (by job title)	TBC following identification of attendees
<b>Expectation of participants</b> before the meeting / during the meeting / after the meeting	
Pre-meeting (preparation)	<ul style="list-style-type: none"> <li>• Timely response to meeting organisers</li> <li>• Read agenda papers, look at data dashboard and complete any other pre-meeting tasks before the meeting.</li> </ul>
In-meeting (participation)	<ul style="list-style-type: none"> <li>• Presenters to provide clear information and plan for ratification.</li> <li>• Active engagement in discussions and agree next steps.</li> </ul>
Post-meeting (follow-up)	<ul style="list-style-type: none"> <li>• Follow-up actions you are responsible for.</li> <li>• Panel members will feedback to Scrutiny Committee – Children and Families about specific actions required, ensuring that actions have been completed within set timescales.</li> </ul>

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# SEND Strategy

Special Educational Needs and/or Disabilities









# SEND Strategy

## Foreword:

In Somerset we believe that children and young people with special educational needs and disabilities (SEND) are everyone's business. Our ambition is for every child and young person with SEND to receive an inclusive education and access the opportunities and support they need to lead and achieve their best in life.

Our SEND Strategy 2023 – 2026 has been co-produced with children and young people with SEND and parent carers. This involved an extensive engagement and consultation period, documenting the views and ideas expressed at listening events and reviewing feedback over the past 18 months. The views of these experts by experience are critical to this strategy's success.

We believe that by working together with Somerset Parent Carer Forum and the Unstoppables (participation group for children and young people with SEND in Somerset), as well as other interested individuals, we can deliver our SEND Strategy ambitions for children, young people and their families.

There are some key changes that we feel will make a real difference to the lives of our SEND community in Somerset. These are the underpinning activities which we know will help children, young people, and families to feel a difference:

- A “local first” approach to education provision so that children can access education in their community
- A network of community hubs where families can access the help and support they need as early as possible
- A mental health and emotional wellbeing portal to help children and young people access the right support at the right time
- A commitment to working together to ensure our children and young people are prepared for their future, including housing and career opportunities

This strategy has been developed during unprecedented times having emerged from the Covid-19 pandemic and whilst entering a cost-of-living crisis. In addition, over the next year there will be significant changes in the SEND system with changes arising from the national Special Educational Needs and Alternative Provision (AP) Improvement Plan. We believe strongly that our culture of collaboration across health, social care and education will also enable us to deliver this strategy despite these trials.

**Shelagh Meldrum and Claire Winter**





# Introduction

This strategy has been developed with the help and involvement of Somerset children and young people with SEND and their families. This strategy sets out how the Somerset SEND partnership will work together.

## **The Somerset SEND Partnership includes:**

- Somerset Council
- NHS Somerset
- Education providers: schools, early years, further education providers
- Somerset Parent Carer Forum
- The Unstoppables
- Voluntary, Community, Faith, Social Enterprise

In you are looking for SEND information and support please refer to the [Somerset Local Offer](#).

# Somerset's SEND Local Offer

Somerset's SEND Local Offer is a website full of information on the services available for children and young people up to 25 years with Special Educational Needs and/or Disabilities (SEND) and how to access them. The aim is to help families find the right help at the right time and support them to be the best they can be.

See more at [Somerset's SEND Local Offer](#) or [www.facebook.com/LocalOfferSomerset](http://www.facebook.com/LocalOfferSomerset)

Families and professionals will find understandable, comprehensive, accessible and up-to-date information about the available support and how to access it. It explains how decisions are made and who by. It sets out clear pathways for action and directions about what to do and where to go if things go wrong.

Somerset's SEND Local Offer not only helps advise families, but also promotes local services and businesses. There is an [events calendar](#) and [SEND services directory](#) to help families find things close to their home. The search function allows users to filter results based on postcode and by type, for example support group, information and advice, or leisure.

We aim to make services more responsive to local needs and aspirations by directly involving children and young people with SEND, their parent carers, and service providers in its development and review. Feedback about Somerset's SEND Local Offer is really important.

There is a link at the end of each page **'Is this page useful?'** where you can tell us if there is a problem with information or if something isn't working properly. Or you can email [localoffer@somerset.gov.uk](mailto:localoffer@somerset.gov.uk) or message [@LocalOfferSomerset](#) on Facebook.

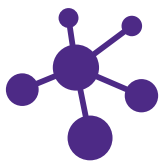
You can find out what has happened as a result of feedback over the year in the [Local Offer Annual Reports](#).

# SEND Vision

We want to be able to move through the world without having to force our way through it.

**My life - not a service.**

## Strategy Themes



### Working together

I can achieve what matters to me because people are working together with me and my family.



### Getting Help as Early as Possible

My family and I can access the right support at the right time.



### Access to the right support and provision

I understand the support and provision that is available to me, and I can access it, if I need it.



### Preparing for the future

I am gaining the right skills and understand my choices to be in control of my future and to achieve the ambitions important to me.

# SEND Outcomes and measuring success

We have worked with children and young people with SEND and their families to understand what is important to live a happy life. They have identified seven key outcomes, which together spell the word ACHIEVE.

- **Ambitious** – pursue my interests and aspirations
- **Connected** – have relationships with people who are important to me
- **Healthy** – access health and wellbeing support when I need it
- **Informed** – make informed choices
- **Educated** – access education and opportunities for lifelong learning
- **Valued** – be heard, have choices and have control over my life
- **Employed** – or have access to money

The outcomes are underpinned by three core things which run through the heart of our strategy.



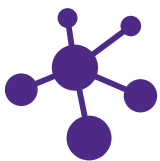
## Empowerment

Children and young people can ACHIEVE their ambitions and aspiration, if given the right opportunities and support.



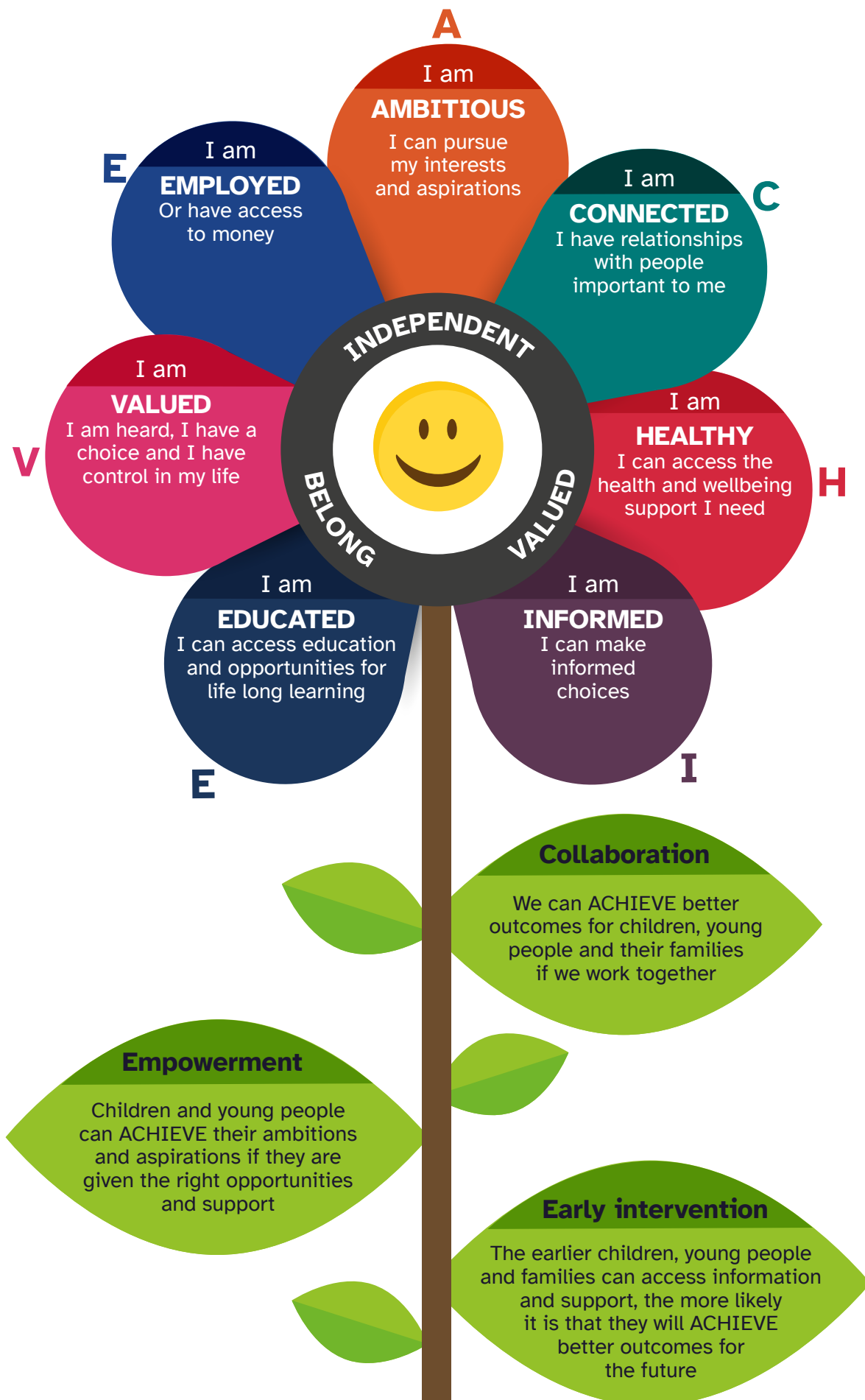
## Early Intervention

The earlier children, young people and their families can access information and support, the more likely it is that they will ACHIEVE better outcomes in the future.



## Collaboration

We ACHIEVE better outcomes for children, young people, and their families if we work together.



# Strategy Themes and Mission Statements

Our strategy sets out what we, as a partnership, will do over the next three years. Each theme is a priority that has been identified through engagement with children, young people, and their families. For each priority we have identified several missions. These are specific commitments that as a partnership we are going work together to achieve.

We will put children and young people at the heart of everything we do - hearing, listening, and responding to them and ensuring they are involved so we can develop brilliant services together.



We will work to understand the needs of parent carers, to support them to fulfil their caring role and champion their voice through the Somerset Parent Carer Forum and SEND participation theme.





# Working together

## I can achieve what matters to me because people are working together with me and my family

- We will improve the way we work together and with you in your community. One of the ways we will do this is by developing effective Community Hubs, a place that you can visit for face-to-face help.
- We will establish Area Inclusion Partnerships that enable schools to better support vulnerable learners.
- We will ensure services work together through local partnerships that bring together schools, support services and others to agree how to use shared resources to help you.
- We will make sure that your information is shared with those working with you, and the roles and responsibilities of those you meet is clear. You will be given the information you need to make a decision and you will be involved in designing any plans that include you.
- We will publish clear information on Somerset's SEND Local Offer about how to access support and how long it may take.
- To better understand your needs and to improve the ways we support you, we will develop systems to listen and learn from feedback and share this knowledge with teams across the partnership.
- We will ensure Somerset's SEND Local Offer to provide updates on changes made based on the feedback we have been given. We will publish the results and actions taken following feedback from families.
- We will make sure we listen and respond to children and young people with SEND and their families. We will collaborate with schools, communities and groups including The Unstoppables.

# Getting help as early as possible

## My family and I can access the right support at the right time

- We will make it easier to access early advice, information and support for special educational needs through Connect Somerset, local community hubs and online guidance. Hubs will use the systems we establish together to regularly gain feedback from families to understand their needs.
- SENCOs and other staff in education settings will have access to support through a dedicated inclusion advice phone line, enabling them to identify help and support at an early stage.
- We will use the Somerset Inclusion Tool with schools to establish an offer for schools, addressing gaps in support, sharing knowledge and enabling your child's school to have an open conversation with you about how their needs can be met.
- We will work with you and the professionals supporting you to develop a joined up Speech, Language and Communication offer which will improve support for children from birth, in their early years, at school settings, and at home.
- We will help you and the teams working with you to feel confident to recognise and support trauma in children and young people by implementing a Trauma Informed approach.
- We will promote clear and up-to-date information around mental health support and ensure our services are easily accessible.
- We will work to ensure that gaps in Mental Health support are identified and addressed.



# Access to the right support and provision

## I understand the support and provision that is available to me, and I can access it, if I need it

- We will ensure that you are able to access clear information about when to request a neurodevelopmental assessment (such as autism or ADHD) and how you can participate in making the request. You will be able to access clear information about the process and timeframes for the assessment.
- We will invest in and develop a neurodevelopmental pathway so that if you have an assessment it will be timely and you will receive support throughout the process.
- We will work with schools to promote inclusion by sharing expertise and skills and providing opportunities to learn in a way that suits you. We will work with schools to develop enhanced offers of support in mainstream schools so that you can access education in your local community.
- We will increase the number of specialist places for children with social and emotional mental health needs available to meet needs.
- We will make sure that through our assessment processes you are given the advice you need so that you do not need to seek private reports.
- We will recruit key workers to co-ordinate support for children and young people with a learning disability or autism and their families, so that they can receive the right support to live safely at home.
- We will work with you to understand what you require from short breaks and work with you and the professionals and communities who support you, to put in place a new short breaks offer.
- We will work with schools to put in place enhanced wrap around support for children with additional needs.

# Preparing for the future

## I am gaining the right skills and understand my choices to be in control of my future and to achieve the ambitions important to me

- So that you can live your best life and achieve your goals, we will evaluate the support and guidance available to you and develop it so that you can plan for adult life as early as possible. This includes if you need to transfer to adult services across health and social care.
- You will be supported to be as independent as you can be through work readiness and life skills programmes. We will work with supported employment groups and key partners to improve the employment opportunities available to you.
- We will support you in your next steps whether you choose to continue your education, take up employment or training after you leave school.
- You and your family will be able to get support to be as healthy as you can be. This will be supported by local partnerships including; education, health, care and the voluntary, community, faith and social enterprise (VCFSE) sectors.
- We will have clear guidance about career options available from year 7. We will audit what's already available in schools, including where they already work with the local community. We will monitor effective careers delivery using 'Compass' a careers benchmark tool.
- As part of developing our housing strategies we will work with you to understand what you need to live as independently as possible, including in your own home, flat or shared living. Based on what you tell us, we will develop a refreshed and accessible housing offer in a location that is right for you.





# How we will make this happen and monitor it

**Delivery of this strategy will be overseen by the Somerset SEND Partnership Board containing the following members from across the local area**

- Representation for young people with SEND - Engagement & Participation officer
- Somerset Somerset Parent Carer Forum
- NHS Somerset
- Somerset Council
- Somerset NHS Foundation Trust
- SENCO & Pre-school, Early years setting representative
- School Association of Primary Heads (SAPH)
- School Association of Secondary Heads (SASH)
- Special Educational Needs Somerset Expertise (SEN-se)
- Post-16 education representative
- Designated Clinical Officer (DCO)
- Spark Somerset

**SEND Partners will provide regular reports to the SEND Partnership Board on progress against the agreed mission**

## The Somerset SEND Charter

The partnership is responsible for making a positive difference for children and young people with SEND and their families. They will do this through meeting the aims of the SEND charter.

The SEND charter is a written document which outlines our promise to deliver excellent SEND services for children and young people in Somerset. This document was developed with children, young people and families and sets out our commitment to the delivery of excellent SEND services.

# The Somerset Special Educational Needs and Disabilities (SEND) 0-25 charter

## Principles from SEND Charter

All SEND practitioners become Leaders of SEND, working together to ensure that we consider and involve children and young people with SEND and their families in everything we do and deliver excellent child and family centred provisions across Somerset.

The SEND Charter is not about creating new structures or services, but establishing a cohesive, collaborative SEND provision delivered jointly by all partners. We will commit to providing high quality SEND provision by:

- Ensuring our services and staff are accessible and approachable, supporting the use of universal language wherever possible
- Working collaboratively in an open, honest and transparent way
- Nurturing and encouraging positive, flexible and solution focused attitudes
- Working and thinking creatively in a structured and organised way



# Collaborating

The Somerset SEND Partnership has committed to working with children, young people, and their families to design and review services. We will do this through the use of our collaboration framework.

## Collaboration Framework



We will listen and record your thoughts and consider these as part of our work.

This will include surveys, website feedback (such as Somerset's Local Offer), question and answer sessions, listening events, Patient Advice and Liason Service (PALS), complaints and social media.

**Listen to**  
(involve)



We will have a conversation with you so that your thoughts are reflected in the decisions made. We will work together with you to understand your experiences and exchange ideas.

This will include focus groups, themed meetings. This should be a process that happens over time.

**Discuss with**  
(participate)



Participants will be involved from start to finish. We will work together with you to make decisions, design visions, activities and solutions, with you not for you. All views are equal regardless of professional status and all participants will be given the information they need to make informed decisions. Solutions are created, overseen and reviewed by the whole group.

**Do together**  
(co-design/co-produce)

## Inform

At all stages we will keep you updated about Special Educational Needs and/or Disabilities (SEND). For example SEND weekly news, Somerset's Local Offer, social media, leaflets, posters, carers information points and Parent Carer Forum.

## Feedback

We will tell you how your involvement has been used and the outcomes. You will be able to see the difference that your involvement has made.

This will include follow up emails, you said and we did information, reports and documents.

## Evaluate

We will review the number of people we involve and the difference it has made. All organisations will be expected to evaluate this.

For example how have they engaged and if it has worked.





# Collaboration Framework

## Listen to (involve)

We will listen and record your thoughts and consider these as part of our work.

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## Evaluate

We will review the number of people we involve and the difference it has made. All organisations will be expected to evaluate this.

For example how have they engaged and if it has worked.

# Why have we selected the themes for our strategy?

The Somerset SEND Partners have worked together with parent carers, young people with SEND, schools, early years and further education providers, health commissioners and providers and social care services to explore the key improvement themes which should remain a focus over the next three years. This work and some key documents outlined below have informed the development of these themes.

## What children, young people and their families are telling us

We want you, our families in Somerset to be at the centre of all we do. We know it's important that you remain the lead in your own life. We want to regularly talk to you to understand what is important for you.

### You have told us:

- I want to see strong and trusting relationships across the SEND partnership. There is a lack of information sharing between services (resulting in us having to tell a story more than once).
- I worry that our feedback does not result in positive change. As children, young people and parent carers we are the experts in our lives and our experience should be used to plan future services.
- We need education and health and care services to pledge to support families without prejudice and stigma.
- As children and young people with SEND we are learning to live with the new normal but have struggled through covid with not getting the support we need when we need it. We sometimes felt Isolated and vulnerable.
- I would like you to focus on my strengths and help me to promote my independence for the future. This requires a focus on my extra ability and not my disability. It also involves strengthening my whole family and ensuring support is available for my carers.
- Access to services can feel slow – a week can feel like a year, continuous communication is needed and from listening must come action.
- I like the “team around the child approach”, and I should be included in the team.
- Transparency and accountability are important – be realistic with me and tell me who will I get a response from and when.
- We want to access support as early as possible to help us to develop the tools we need to manage our own children alongside the staff supporting them. Consistency for children is important.
- We want a partnership with support services and not a battleground. Families live this every day, and we are not yet feeling a change.



# Legislation and the national context

The SEND Code of Practice provides statutory guidance on duties, policies, and procedures relating to Part 3 of the Children and Families Act 2014 and associated regulations and applies to England.

The Code of Practice uses the word 'must' to outline a statutory requirement under primary legislation, regulations, or case law. Local area partners must have regard to the Code of Practice when taking a decision.

Where the Code of Practice uses the word 'should' it means that the guidance is considered and that those Local Area Partners will be expected to explain any departure from it.

In March 2023, the Government published the SEND and AP Improvement Plan (Right Support, Right Place, Right Time). This sets out actions that the Government will be taking to address three key challenges:

- Improving outcomes for children and young people with SEND or in alternative provision
- Making it an easier and more positive experience for children, young people and their families to navigate the SEND system
- Achieving value for money within the SEND system

The SEND and AP Improvement Plan sets out proposals to develop a national SEND and AP system with agreed National Standards being developed to improve consistency in early identification of needs and the types of support that will be ordinarily available to respond to children's needs. The Government's plan is to develop this system and these standards between 2023 and the end of 2025, so the delivery of Somerset's SEND Strategy will align with and respond to these developments nationally.

# Somerset - the local context

There has been a strong focus on improving SEND services and provision in Somerset in recent years. From 2020 to 2022 – throughout the Covid-19 pandemic.

Somerset SEND Partnership has worked together to deliver an ambitious programme (the Written Statement of Action) to address weaknesses that were identified by OFSTED and the Care Quality Commission when they inspected Somerset's SEND system in March 2020. This programme focused on improving our culture of inclusion and collaboration, strengthening joint commissioning, inclusive education and communities, and better assessment and planning.

In May 2022 the Partnership asked the Local Government Association (LGA) to review progress in improving SEND services. The LGA review recognised the significant progress that the Somerset SEND Partnership had made since 2020. Nevertheless, the Review recognised that there was still more to be done, **and it made the following recommendations:**

- Partnership leaders should develop and communicate a clear vision and strategy with children and young people's outcomes at its heart.
- Be ambitious and aspirational for children with additional needs from the start. Use the wider organisational changes across local government and the NHS to put children and young people centre stage.
- Build an environment of trust and collaboration by improving the quality and regularity of the dialogue with children, families, and professionals.
- Strengthen the local area data set to identify local need, inform performance, address early identification, and measure outcomes.
- Develop a system wide/ integrated universal early help offer for social, emotional, and mental health (SEMH) and autism.
- Develop a clear understanding of the resources available and how they are accessed by both professionals and parents, building on the lived experiences of parents.
- Improve the level of understanding within the wider workforce of the partnership regarding neurodevelopment.
- Embed (and resource) the **Graduated Response approach**.
- Continue to strengthen the voice of children and young people to raise aspirations and evaluate success.
- Develop a comprehensive SEND partnership workforce strategy.

From 28 November to 1 December 2022, OFSTED and CQC undertook a revisit to Somerset to assess progress since their 2020 inspection. They reported that the area had made sufficient progress in addressing seven of the nine areas of weakness identified in the 2020 inspection.

The report stated that, "leaders across the partnership worked to resolve their differences and come together to tackle widespread weaknesses". The report noted improvements in how services work together, the offer services available and improved access to support for children and young people.



## Better working together

- Involvement of parent carers in strategic developments
- Spirit of collaboration, mutual trust and support
- System performance information
- Comprehensive strategic needs assessment

## Better offer of services

- Autism pathway
- Specialist education provision
- Education, health and care plans
- Joint commissioning of SEND Information and Advice Service

## Better access to support

- Therapy services
- Reduced waiting times for Portage
- Access to social care advice and support
- Schools taking lead on EHC requests

The revisit identified that there are two areas where we have not yet made sufficient progress. Firstly, there is still more to be done to improve to consistency of practice in identifying and supporting children with SEND in all schools and settings across Somerset. What works well for some children and young people, doesn't always happen for all those who need it. Secondly, there are still too many children and young people with SEND in Somerset who miss out on education due to high rates of exclusion and poor inclusive practice.

The SEND Partnership has developed a plan to address these areas, and these will remain a focus as part of this strategy.

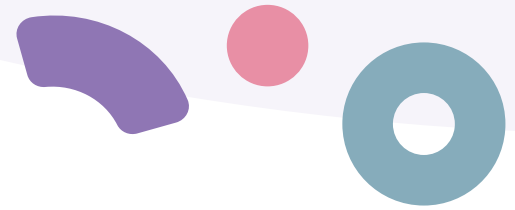
This strategy is about the future of SEND in Somerset – where we go next, and how we build upon the progress that we have made. In developing the Strategy we have taken time to take stock, review where we are and challenge ourselves about what we need to do next.

# Somerset SEND Joint Strategic Needs Assessment (JSNA)

A Joint strategic needs assessment is based on evidence and research and describes the SEND services currently available to children and young people with SEND in Somerset. It is published by both Somerset Council and NHS Somerset.

The SEND JSNA was completed during May - June 2022. **The findings can be summarised as follows:**

- In January 2022 there were approximately 14,500 children and young people living in Somerset identified with SEND, of which over 4,000 had an Education Health and Care Plan (EHCP).
- In Somerset 24% of EHCPs state that the child or young person's primary need is Social, Emotional and Mental Health (SEMH). Nationally this is 15% of all EHCPs.
- This is also reflected in Somerset health service measures, such as higher than average rates of self-harm, alcohol related and substance misuse admissions to hospital.
- In Somerset rates of permanent exclusion and suspension are higher than national average rates. Those with SEMH needs are more likely to be excluded from school.
- As a category of need, SEMH includes a variety conditions and can be short lived as other needs are identified such as neurodevelopmental conditions (e.g. autism) or moderate learning difficulties.
- The number of people with an SEMH need raises the importance of ensuring accurate and early identification. Progressing neurodevelopmental pathways and embedding the graduated response tool will be key moving forward.
- A higher than average number of children and young people with an EHCP have speech, language, and communication difficulties as their primary need. Data is being looked at in more depth to allow us to fully understand this so that resources such as Speech and Language Therapy are available in the right places.
- The data highlights the need for making sure access to appropriate help is local to the families that need it.
- Children living in the most deprived neighbourhoods of Somerset are more than twice as likely to have identified SEND than those living in the least deprived areas. However, there appears to be little association between income deprivation and Autistic Spectrum Condition or Specific Learning Difficulty. This should be explored when targeting services at a local level.



- The analysis shows that around 50% of people with learning disabilities also have a physical health condition.
- In Somerset, boys outnumber girls across most types of need. This is most prevalent in Autistic Spectrum Disorder (78% boys) and Social, Emotional and Mental Health (70% boys). Children, young people and parents tell us that girls sometimes remain undiagnosed or overlooked due to the different ways the condition may present itself in girls. When understanding the effectiveness of the graduated response this may need further research.
- In Somerset, nearly half (47%) of Children Looked After (CLA) have an EHCP. This is above the national average rate of 29%. Partners should seek to understand what might work for Somerset to ensure these children and young people are supported effectively.
- The data we have available for the effectiveness of services which prepare our children and young people for adulthood requires improvement. We have good information regarding the education and training outcomes, but very little with regards to their independent living skills, such as how many transition effectively to adult services and how many are able to live independently when the time is right.
- Listening to the voice of children, young people and their families is vital to ensure services are effectively meeting the identified needs. Parent carers, or children and young people themselves are the experts in their lives and the support they may need.

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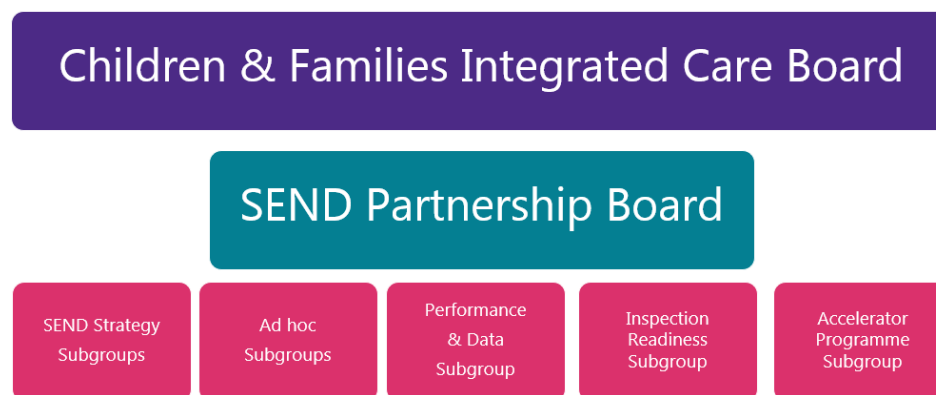
# Somerset Special Educational Needs and Disabilities Accelerated Progress Plan

<b>Name of the Local Area</b>	Somerset
<b>Date of Inspection</b>	28 November – 1 December 2022
<b>Date of Publication of the revisit report</b>	1 February 2023
<b>Accountable Officers from the LA and ICB</b>	Rob Hart (Somerset Council) Andrew Keefe (NHS Somerset)
<b>SEND and NHS England Advisers</b>	Keith Thompson (Department for Education) Rayanna Stephens (NHS England)

## Governance and Accountability

### Governance and accountability structures and processes

#### SEND System Governance



The diagram above sets out governance arrangements for the SEND system in Somerset.

The accelerated progress plan comprises ten numbered actions, each with a number of contributing milestones or activities as bullet points. Each overarching action has a named lead responsible officer (in bold), who is responsible for operational delivery of the agreed action. An **accelerated progress plan (APP) subgroup** will be established as a sub-group of the Somerset SEND Partnership Board that will be responsible for developing the programme plan and overseeing its delivery. The APP Subgroup will comprise action lead officers as well as leads from Council and ICB programme support and performance teams.

The APP Subgroup will be a subgroup of the **SEND Partnership Board**, which is co-chaired by the ICB Deputy Director for Commissioning and the LA Assistant Director for Inclusion and has representation from partners across education providers, council inclusion services, social care, health commissioners and providers, the voluntary sector and the executive lead member for Children's Services. The Delivery Group will provide a monthly progress report to the SEND Partnership Board and escalate any risks or issues. The Partnership Board will be responsible for supporting effective joint working to resolve any issues and risks, as well as monitoring local area performance.

Somerset's SEND System Effectiveness dashboard will be refreshed and updated to summarise the key performance indicators linked to the APP, so that there is regular reporting and monitoring of key performance information.

The SEND Partnership Board reports into the ICS **Children and Families Board**, which is co-chaired by the LA Director of Children's Services and the ICB Chief Nursing Officer, who is the designated ICB executive lead for SEND. The Children and Families Board will receive a quarterly progress report on delivery of the APP, as well as providing an opportunity for any risks and issues to be escalated that cannot be addressed by the Partnership Board.

Somerset Parent Carer Forum will be represented on each of the APP Subgroup, the SEND Partnership Board and the Children and Families Board. Each meeting of the SEND Partnership Board will contain a **focus on lived experience** where the Parent Carer Forum and representatives of young people with SEND in Somerset share insight from engagement with parent carers and young people about areas of focus within the APP.

In addition to reporting progress as above, we will provide six-monthly updates to the Somerset Health and Wellbeing Board and to Children and Families Scrutiny Committee.

## Improvement required as a result of this plan

On revisit, Ofsted/CQC found that insufficient progress had been made against two areas of significant weaknesses outlined in the original Inspection.

Monitoring Improvement		
Area of Weakness:	Success Criteria	Key Performance Indicators (KPI)** and Qualitative Information (QI)**
Poor assessment and meeting of need caused by inconsistent practice, leading to poor outcomes for children and young people with SEND.	There will be consistent practice across Somerset in implementing a graduated response to identifying and supporting children requiring SEND support in line with local guidance. Children and young people with an education health and care plan will receive the provision that is in their plan. Children, young people and families will receive timely access to assessments and receive the right support where there concerns about neurodevelopment and/or emotional wellbeing.	<p>KPI 1: Increase the proportion of CYP receiving SEND Support who have primary need recorded on Capita ONE system.</p> <p>KPI 2: Increase the percentage of school SEND Information Reports that make explicit reference to Somerset Graduated Response</p> <p>KPI 3: Increase the number of schools completing Somerset Inclusion Tool setting readiness measure.</p> <p>KPI 4: Increase the proportion of positive responses from education providers to EHCP consultations.</p> <p>KPI 5: Reduce the waiting time for an assessment for Autism to be triaged (a) and for initial assessment appointment (b)</p> <p>KPI 6: Increase the number of children accessing education at state-maintained specialist settings for children with SEMH needs.</p> <p>KPI 13: Increase the rolling number of children and young people accessing mental health and emotional wellbeing targeted support in school and community settings</p> <p>KPI 14: More children and young people can access Mental Health Support Teams, Community Wellbeing Service, and CAMHS via a single online referral route.</p> <p>QI1: 6-monthly summary report of Ofsted School Inspections relating to SEND arrangements and actions taken to challenge and support those institutions not performing to a satisfactory level.</p>



		<p>QI 2: Themes from Listening Events with parent carers shared at SEND Partnership Board, and actions taken in response.</p> <p>QI 3: 3-monthly summary report of complaints to council and/or ICB relating to SEND</p>
<p>Too many children and young people not accessing education because of the disproportionate use of exclusion and poor inclusive practices across the area.</p>	<p>Children with additional needs or vulnerabilities will be identified early, with schools working together with partner agencies across inclusion, health and social care so that they receive the right support to keep them engaged in education so that they can experience and achieve success.</p>	<p>KPI 7: Reduce the rolling 12-month number of exclusions for all pupils</p> <p>KPI 8: Reduce the proportion of exclusions impacting children with SEND</p> <p>KPI 9: Reduce the number of repeat suspensions for children with SEND</p> <p>KPI 10: The proportion of schools within the top quartile for either exclusions, suspensions, or requests for assessment, that have accessed training and support through the foundation to inclusive practice programme.</p> <p>KPI 11: Number of CYP identified through targeted support project (action 2.2), and proportion remaining in education/ safely at home.</p> <p>KPI 12: Percentage of responses to the system wide feedback questionnaire which show involvement has led to improvement for the child or young person</p> <p>QII 6-monthly summary report of Ofsted School Inspections relating to exclusions, suspensions and/or attendance of pupils with SEND</p> <p>QI 2: Themes from the Unstoppables and Listening Events with parent carers shared at SEND Partnership Board, and actions taken in response.</p>

	<p>QI 3: Case studies/ learning from targeted work to support children identified as vulnerable to exclusion or care.</p> <p>QI 4: Feedback data and evaluation from training, confidence of education staff, case studies, engagement with digital toolkit and resources.</p>
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*\*Chosen KPIs to be high level and relevant – where possible use existing data collection arrangements. All KPIs selected should have a well-defined metric, current and target values (see example). \*\*Qualitative information, obtained through surveys, focus groups, case studies etc.*

*The focus of this plan is each area of weakness from the original inspection where Ofsted/CQC judged that sufficient progress had not been made. For each weakness, identify the actions taken to achieve improvement and the timescales for completing each action.*

<b>Area of weakness identified in the original inspection</b>				
Poor assessment and meeting of need caused by inconsistent practice, leading to poor outcomes for children and young people with SEND.				
Actions designed to lead to improvement				
Action		By when	Responsible officer	Action RAG
1.1	<b>We will improve consistency of identification and support for children with SEND using the graduated response tool so that children and young people needing SEND support have an improved experience and outcomes.</b>	<b>April 2024</b>	<b>Claire Merchant-Jones</b> (Head of SEND, Somerset Council)	
	<ul style="list-style-type: none"> <li>Inclusion Advisory Services will have training and support to make sure that they are able to offer targeted training for education settings across all the four areas of need.</li> </ul>	July 2023	Fiona Turnbull (Somerset Council, Service Manager, Access to Inclusion)	
	<ul style="list-style-type: none"> <li>Analysis of information from the completion of the Somerset Inclusion Tool will be used to deliver targeted</li> </ul>	October 2023	Fiona Turnbull	



	advice and training to settings in relation to the four areas of need, using the Somerset Graduated Response Tool.			
	<ul style="list-style-type: none"> <li>Develop and share guidance about what SEND provision should be “ordinarily available” within mainstream education settings across the four areas of needs including clarifying expectations regarding use of Notional SEN funding, and arrange briefing sessions for all schools to clarify and discuss.</li> </ul>	September 2023	Fiona Turnbull	
	<ul style="list-style-type: none"> <li>All schools to refer to the Somerset Graduated Response Tool and shared expectations regarding what is “ordinarily available” in their SEND information report.</li> </ul>	April 2024	Fiona Turnbull	
	<ul style="list-style-type: none"> <li>Audit and review 10% of cases discussed at decision making panels at 6, 9 and 12 months so that we can be sure that the actions are making a difference regarding the quality of Statutory EHC Assessments requests.</li> </ul>	April 2024	Fiona Turnbull	
1.2	<b>We will engage with education settings and families so that we can be assured that the provision as described in EHC plans is being delivered.</b>	<b>April 2024</b>	<b>Claire Merchant Jones</b> (Head of SEND, Somerset Council)	
	<ul style="list-style-type: none"> <li>Establish system to ensure that all EHCP’s issued from 1<sup>st</sup> January 2023 includes contact with families and educational settings up to 12 weeks after the EHCP is issued. This will ensure that the provision in the EHC plan is being delivered and the child/young person is attending.</li> </ul>	April 2023	Gemma Reeves (Somerset Council, Service Manager Statutory SEND)	

	<ul style="list-style-type: none"> <li>For children and young people who have moved settings as part of a phase transfer process, families and settings will be contacted within the first term to ensure that the provision in the plan is being delivered and the child/young person is attending.</li> </ul>	November 2023	Gemma Reeves	
	<ul style="list-style-type: none"> <li>Annual Review paperwork will be amended to clarify that provision within EHC plans is being delivered.</li> </ul>	September 2023	Gemma Reeves	
	<ul style="list-style-type: none"> <li>Produce guidance for settings clarifying what they should do if they are unable to deliver the provision as described in the EHC plan.</li> </ul>	September 2023	Gemma Reeves	
	<ul style="list-style-type: none"> <li>Implement a new approach to support access to earlier advice and assessments in relation to SALT and OT through the EHC assessment process.</li> </ul>	September 2023	Camilla Hutchings (NHS Somerset, SEND Health Lead/ DCO)	
1.3	<b>We will undertake a 12-month improvement programme to address the remaining gaps in service and continue to evaluate current initiatives to modernise the early intervention service offer for children and young people's mental health in Somerset.</b>	April 2024	<b>Rose Firth</b> (Commissioning Manager for Women, Children and Families, NHS Somerset)	
	<ul style="list-style-type: none"> <li>Recruit a Project Manager to enable the transition from Somerset Big Tent to the improvement programme</li> </ul>	July 2023	Rose Firth	
	<ul style="list-style-type: none"> <li>Recruit Assistant Psychologists, expanding the CAMHS SPA Assessment Team</li> </ul>	September 2023	Dave Smith (SFT CAMHS, Senior Operational Service Manager)	

	<ul style="list-style-type: none"> <li>Engage with Somerset Big Tent quality assured members to clarify the VCSE offer in Somerset</li> </ul>	June 2023	Patrick Worthington (NHS Somerset, CYP Mental Health Commissioner)	
	<ul style="list-style-type: none"> <li>Develop a digital mental health and emotional wellbeing portal for CYP, families and the wider network of support services to improve access.</li> </ul>	June 2023	Dave Smith	
1.4	<b>We will reduce waiting times for assessment of autism and improve support for children and families throughout the assessment process</b>	<b>April 2024</b>	<b>Will Barnwell</b> (Commissioning Manager for Learning Disability and Autism, NHS Somerset)	
	<ul style="list-style-type: none"> <li>Agree a plan and secure investment to reduce waiting times for assessment</li> </ul>	May 2023		
	<ul style="list-style-type: none"> <li>Agree a plan and secure investment to improve support while waiting for an assessment and after diagnosis</li> </ul>	May 2023		
	<ul style="list-style-type: none"> <li>Implement plan with clear waiting list reduction targets</li> </ul>	July 2023	Will Barnwell	
	<ul style="list-style-type: none"> <li>Implement plan for improved coordinated support offer.</li> </ul>	July 2023	Will Barnwell	
	<ul style="list-style-type: none"> <li>Measure progress against waiting list plans and take any required remedial action</li> </ul>	October 2023	Will Barnwell	
	<ul style="list-style-type: none"> <li>Measure progress against improved support plans and take any required remedial action</li> </ul>	March 2024	Will Barnwell	
1.5	<b>We will use training and quality assurance processes to improve the identification of need and provision relating to SEND within social care practice.</b>	<b>October 2023</b>	<b>Jane Sprague (Head of Service Quality)</b>	



			<b>Assurance, Somerset Council)</b>	
	<ul style="list-style-type: none"> <li>Develop training for social care workforce including foster carers (co-produced with families, schools and virtual school) on how to work together across services to support children's education needs to be met.</li> </ul>	August 2023	Principal Social Worker (Sam Mannion)	
	<ul style="list-style-type: none"> <li>Establish a network of Inclusion Champions across children's social care to provide training and Inclusion CPD sessions to the workforce.</li> </ul>	May 2023	Assistant Director CSC (Paul Shallcross)	
	<ul style="list-style-type: none"> <li>Undertake single and multi-agency audit activity in line with the EHCP Joint Quality Assurance Statement of Commitment to identify key themes and areas for improvement. Provide assurance to the EHCP standards group of single agency quality assurance activity, findings and action plans in place to improve assessment of need and provision of support for children with SEND and/or at risk of disengagement from education:             <ul style="list-style-type: none"> <li>Dip Reviews will be undertaken six-monthly to review the quality of Children social care contributions/advice (Appendix E).</li> <li>Practice Evaluation template to be updated to include a section focusing on education, allowing the service to report on progress in this area.</li> </ul> </li> </ul>	June 2023	Head of Service Quality Assurance (Jane Sprague)	
1.6	<b>We will work with the Department for Education Regions Team and trusts to address sufficiency gaps relating to specialist provision for social, emotional and mental health</b>	<b>April 2024</b>	<b>Amy Joynes</b> (Strategic Manager Inclusion Transformation &	

	<b>needs, so that children can have needs met within Somerset maintained settings.</b>		Partnerships, Somerset Council)
	<ul style="list-style-type: none"> <li>• <b>Sky Academy</b> – quality of provision has improved to enable the school to take pupils to capacity (Cabot Learning Federation)</li> </ul>	September 2023	Cabot Learning Federation
	<ul style="list-style-type: none"> <li>• <b>Hill View Academy</b> – Fortnightly meeting established with new trust, DfE regions team, SCC property to secure build moving forward and risk of delays mitigated at speed</li> </ul>	June 2023	Lewis Andrews
	<ul style="list-style-type: none"> <li>• <b>Wells Free School</b> – a trust will be identified through scheduled engagement process with an agreed opening date, defined project milestones, and arrangements in place to monitor project delivery.</li> </ul>	September 2023	Lewis Andrews (Somerset Council, SEND Sufficiency Manager)

<b>Area of weakness identified in the original inspection</b>			
Too many children and young people not accessing education because of the disproportionate use of exclusion and poor inclusive practices across the area.			
Actions designed to lead to improvement			
Action	By when	Responsible officer	Action RAG
2.1 <b>We will develop and roll out foundations of inclusive practice programme, focusing on relational practice, meeting sensory needs and inclusive environments:</b>	<b>December 2023</b>	<b>Tim Cockerill (Somerset Council, Principal Educational Psychologist)</b>	
<ul style="list-style-type: none"> <li>• The sensory processing digital toolkit will be updated to ensure that it effectively supports accurate identification of children's needs and leads to targeted support, with a</li> </ul>	September 2023	Tim Cockerill, Camilla Hutchings	

	clear graduated response and process for accessing specialist advice.			
	<ul style="list-style-type: none"> <li>Through the Autism in Schools project, five schools will pilot the use of a whole school sensory audit tool to support adapting the environment to enable children to access the setting. Learning will be shared with all schools.</li> </ul>	December 2023	Ruth Hobbs (Somerset Parent Carer Forum, CEO)	
	<ul style="list-style-type: none"> <li>As part of a trauma-informed approach, a Somerset strategic framework for behaviour and emotional wellbeing will be developed, outlining clear pathways to support and a new multi-element tool that facilitates accurate identification and meetings of needs.</li> </ul>	June 2023	Tim Cockerill	
	<ul style="list-style-type: none"> <li>A programme of trauma-informed training will be offered to education settings and support will be provided to implement this learning into practice.</li> </ul>	December 2023	Tim Cockerill	
<b>2.2</b>	<b>We will use data and intelligence to identify up to 60 children most at risk of exclusion or care and co-ordinate targeted intensive effective multi agency support.</b>	<b>March 2024</b>	<b>Paul Shallcross (Somerset Council - Assistant Director Children's Social Care)</b>	
	<ul style="list-style-type: none"> <li>Work with schools to identify cohort of children most vulnerable to exclusion or care.</li> </ul>	April 2023	Paul Shallcross	
	<ul style="list-style-type: none"> <li>Use available data to refine target group using key risk factors.</li> </ul>	May 2023	Paul Shallcross	
	<ul style="list-style-type: none"> <li>Coordinate interventions to avoid exclusion.</li> </ul>	May 2023 to March 2024	Kelly Brewer (Head of Service Help & Protection)	

	<ul style="list-style-type: none"> <li>Evaluate individual outcomes using Outcome Star</li> </ul>	From May 2023	Kelly Brewer (Head of Service Help & Protection)	
	<ul style="list-style-type: none"> <li>Identify system learning.</li> </ul>	March 2024	Kelly Brewer (Head of Service Help & Protection)	
<b>2.3</b>	<b>We will use Area Inclusion Partnerships to provide effective multi-agency arrangements for working with schools to identify vulnerable children and commission the right support, prevent escalation and disengagement from education.</b>	<b>December 2023</b>	<b>Julia Ridge</b> (Head of Service Vulnerable Learners, Somerset Council)	
	<ul style="list-style-type: none"> <li>Each area will have an area support team with an area inclusion partnership manager and education engagement officers, responsible for working with schools and partners to identify all children where there is a risk to their engagement in education.</li> </ul>	April 2023	Julia Ridge	
	<ul style="list-style-type: none"> <li>Forums will be set up and meet regularly in each area, involving schools, Inclusion Somerset, Connect Somerset area champions, Family Intervention Service, Mental Health Support Teams and police, to enable joined-up identification and support for learners with additional needs or vulnerabilities.</li> </ul>	June 2023	Julia Ridge	
	<ul style="list-style-type: none"> <li>There will be agreed criteria and processes to identify a lead professional, with defined roles and responsibilities, for children who need it so that multiagency support is coordinated effectively.</li> </ul>	September 2023	Julia Ridge	

	<ul style="list-style-type: none"> <li>Undertake review of pupil referral units and alternative provision, to develop proposals for an enhanced offer of alternative provision and behaviour support offer.</li> </ul>	September 2023	Amy Joynes	
	<ul style="list-style-type: none"> <li>Each Area Inclusion Partnership will agree an area plan which sets out how schools, providers of outreach and alternative provision, and other services will improve inclusive practice and prioritise use of area resources.</li> </ul>	December 2023	Amy Joynes & Julia Ridge	
	<ul style="list-style-type: none"> <li>Establish clear policy, process and pathways for children who are not attending school due to anxiety/mental health to enable them to engage in education</li> </ul>	September 2023	Julia Ridge & Tim Cockrell	
<b>2.4</b>	<b>We will work with a group of 10-20 schools, based on data and intelligence about need and practice, to undertake targeted work to identify and improve systems and processes for supporting children who are vulnerable to exclusion to improve support in these settings.</b>	<b>April 2024</b>	<b>Amy Joynes</b> (Strategic Manager, Inclusion Transformation & Partnerships, Somerset Council)	
	<ul style="list-style-type: none"> <li>Identification of exclusion vulnerability indicators in order to identify the schools where most impact can be made</li> </ul>	May 2023	Sam Baker (Somerset Council, Project Manager)	
	<ul style="list-style-type: none"> <li>Use of Delivering Better Value grant to implement a 'proof of concept' team with evidence of success in inclusion and support for children with SEMH needs in mainstream settings.</li> </ul>	June 2023	Amy Joynes	
	<ul style="list-style-type: none"> <li>Direct working with identified schools to audit current practice across KS2 into KS3 to establish programme of work to improve practise through evidence-based research, included</li> </ul>	September 2023	Pathway programme lead	

seconded Pathway programme lead to lead team. Link with Autism in schools work where the same schools are identified.			
<ul style="list-style-type: none"> <li>Pathway programme to run with fortnightly review on impact for identified cohort of young people</li> </ul>	September 2023 to April 2024	Amy Joynes	
<ul style="list-style-type: none"> <li>KS3 pathway for the identified children established to enable successful phase transition for identified group into mainstream secondary schools</li> </ul>	January 2024	Pathway programme lead	
<ul style="list-style-type: none"> <li>Submission of bid to MTFP to sustain successful working practise into the future</li> </ul>	January 2024	Amy Joynes	

### Risk Register (to be reviewed every 3 months)

Date	Risk	Without mitigation		Mitigation	With mitigation		Progress following action
		Likelihood	Possible Impact		Likelihood	Possible impact	
21/3/23	Demand is greater than staffing or system capacity.	Medium	High	Oversight APP delivery group reporting to the SEND Partnership Board, with oversight from ICS Children & Families Board.	Medium	Medium	
21/3/23	Partner agencies have conflicting or different priorities	Medium	High	Oversight AAP delivery group reporting to the SEND Partnership Board, with oversight from ICS Children & Families Board.	Low	Medium	

21/3/23	Services are unable to recruit appropriate staff within timescales in order to deliver improvements	Medium	Medium	Proactive and rolling recruitment programme for identified high risk posts. Identification of flexible approaches where there are anticipated staffing gaps.	Medium	Low	
21/3/23	Reduction in available funds from one or more partner agencies to deliver improvements	Medium	High	Sign-off and escalation routes to ICS Children & Families Board.	Low	High	
21/3/23	Schools and education providers do not feel sufficient ownership of improvement priorities and plans.	Low	High	Development of Education System Leadership Group as part of Somerset Education Strategy. Representation of school and trust leaders through SEND Partnership Board. Regular engagement with education sector in implementing and evaluating improvements.	Low	Medium	
21/3/23	The expansion of the clinical diagnostic elements of the neuro-development pathway are not sufficiently accompanied by	Medium	High	Additional health funding provided to the Education Psychology Service to support CYP waiting for an assessment.	Medium	Medium	

	pre-diagnostic support in schools						
21/3/23	Difficulties identifying and appointing independent providers with sufficient capacity to support the reduction of the neuro-developmental backlog within the identified timeframes.	Medium	High	Pre-procurement discussions are underway with a number of providers with a view to going live during Q1.	Medium	Medium	
23/4/23	Risk of delays in improvement, rebrokering and development of specialist SEMH provision.	Medium	High	Regular meetings with DfE regions team to develop and oversee agreed project plans for Hill View Academy and new Wells free school.	Low	High	

### Impact Score Card

*This is the summary of all the ways the Local Area will measure the progress and impact of the APP.*

KPI Reference	Baseline	3 months	6 months	12 months
KPI 1: Proportion of CYP receiving SEND support who have area of primary need recorded on Capita	<50% (new measure)	50%	70%	900%



KPI 2: All schools refer to the Somerset Graduated Response Tool and shared expectations regarding what is “ordinarily available” in their SEND information report.	Baseline captured in April 2023 audit of websites	N/A	50%	19%
KPI 3: The number of schools completing Somerset Inclusion Tool setting readiness measure	50 (Feb '23)	100	150	200
KPI 4: The proportion of positive responses from education providers to EHCP consultations	New measure – baseline TBC			
KPI 5: Waiting time for (a) an assessment for Autism to be triaged and (b) for initial assessment appointment, by identifying the most vulnerable CYP.	(a) 19 weeks (b) 24 months	(a) 15 weeks (b) 20 months	(a) 10 weeks (b) 16 months	(a) 6 weeks (b) 12 months
KPI 6: Number of children accessing education at state-maintained specialist settings for children with SEMH needs.	73	80	100	160
KPI 7: Rolling 12-month number of exclusions for all pupils	128 (Feb 2023)	95% of baseline	85% of baseline	75% of baseline
KPI 8: Proportion of exclusions impacting children with SEND	65.6% (Feb 2023)	60%	55%	45%
KPI 9: Number of repeat suspensions (more than 1 period of suspension within a 12-month period) for children with SEND	Baseline TBC			
KPI 10: The proportion of schools within the top quartile for either exclusions, suspensions, or requests for assessment, that have accessed training and support through the foundation to inclusive practice programme.	0%	25%	50%	100%
KPI 11: Number of CYP identified through targeted support project (action 2.2), and proportion remaining in education/ safely at home.	0	25 (80%)	40 (80%)	50 (80%)
KPI 12: Percentage of responses to the system wide feedback questionnaire which show involvement has led to improvement for the child or young person	New measure, baseline TBC			

KPI 13: Expanding the rolling number of CYP accessing mental health and emotional wellbeing targeted support in school and community settings (NHSE and Long Term Plan requirement).	0	Cumulative figure	Cumulative figure	Year end figure = 7,473
KPI 14: CYP and their families can access Mental Health Support Teams, Community Wellbeing Service, and CAMHS via a single online referral route.	New measure	Purchased in Q1	Developed and Launched Q2	Completed

QI Reference/ Date	Summary of Impact Findings
	1. 2. 3.
	1. 2. 3.
	1. 2. 3.

Reference/ Date	Additional Evidence of Impact - Source

