



Thursday, 2 March 2022

INCLUSION AND ADDITIONAL NEEDS PARTNERSHIP STRATEGY 2023-26

Purpose of report:

To provide an update on progress finalising and then implementing the Inclusion and Additional Needs Partnership Strategy 2023-26, and the recommendations agreed by the Committee in December 2022.

Introduction:

1. This report provides a response to the December 2022 Committee recommendations and provides an update on the status of the work to finalise the co-produced strategy and move into implementation.

Finalising the development of the strategy for endorsement

2. Throughout 2022 a refresh of the Inclusion and Additional Needs Partnership Strategy was co-produced with partners, as detailed in the December 2022 Select Committee report. The approach was overseen by the Inclusion and Additional Needs Strategy steering group; membership of the group includes key stakeholders from education, health and social care alongside the voluntary sector and representatives of families and children and young people with additional needs and disabilities.
3. In November 2022 the Additional Needs and Disabilities ('AND') Partnership Board agreed that the strategy reflected the Surrey 'SEND' Local Area self evaluation and endorsed the strategic priorities set out in the strategy. Feedback was also provided with some specific points to strengthen or clarify.
4. In December 2022 the CFLLC Select Committee indicated support for the strategy and provided feedback recommending points to strengthen or clarify in the strategy document as well as associated activities to ensure that the strategy is accessible to children and families and has a positive impact.

5. The Inclusion and Additional Needs Partnership Strategy 2023/26 was updated to incorporate the feedback from both the Partnership Board and the Committee and received a full endorsement from Cabinet on 31 January 2023.
6. Meanwhile, activity has been underway to support the formal adoption and publication of the strategy, and transition to the implementation and monitoring of the strategy.
7. An Easy Read version of the strategy has been commissioned and will be produced by the end of March 2023 and the partnership has co-produced a new logo with children and young people that will be used for the strategy document and implementation activity. Plans are in place for the strategy (including the Easy Read version) to be published on the Surrey Local Offer website and for communications across the partnership and with children and families.
8. The AND Partnership Board has been planning for the effective implementation and monitoring of the strategy, including a review of the draft key performance measures and workshop sessions to further develop action plans. These are expected to be approved in the March 2023 AND Partnership Board, with the first progress reports being prepared for May 2023.
9. The Surrey AND Partnership Board will exercise partnership accountability for the delivery of the strategy.

Response to the CFLLC Select Committee recommendations

10. At Cabinet on 31 January 2023 the Cabinet Member for Education and Lifelong Learning thanked the Committee for supporting the adoption of the Inclusion and Additional Needs Strategy 2023 – 2026. It was noted that the feedback and recommendations of the Committee have been carefully considered, with updates made to the strategy document to strengthen references where appropriate, and activities included in implementation planning.
11. The Director of Education and Lifelong Learning looks forward to bringing relevant data to CFLLC Select Committee meetings to demonstrate progress and impact, and to share any barriers to making progress with the delivery and impact.
12. In terms of the specific recommendations set out in Recommendation 1 (a-e), responses to these are set out below.
13. **Recommendation 1 (a):** The 10 evaluation criteria from the Area SEND framework and handbook have been considered throughout the strategy and used to identify relevant key performance indicators. All evaluation criteria in the Area SEND inspection handbook have been accounted for in the strategy.

14. **Recommendation 1 (b):** We are on track in delivering all of the nine Safety Valve Commitments; Early Help and Inclusion, Education Health and Care (EHC) Assessment and Decisions, Schools' Skills and Capacity, Team Around the School Pilot, Specialist Placement Bandings, Joint Commissioning Strategy, Capital Expansion, Preparation for Adulthood, Partnership Accountability. These are tracked by DfE on a quarterly basis.

- Education and Inclusion are represented at the Home to School Travel Assistance Oversight Board to ensure alignment with strategy and practice. There are eleven 'SEND' relevant recommendations in the Home to School Travel Assistance Learning Review. Each is being monitored and discharged via the Oversight Board.
- There is a strategy action plan in development. This piece of more detailed work is currently being completed and will confirm the measurements. The action plan, including Key Performance Indicators, should be ready for partners to sign off in the first term of 2023.
- High-profile priority recruitment for the Special Educational Needs ('SEN') and Educational Psychology ('EP') service with a central advertising process has been in place since August 2022. As EP capacity is difficult to increase, both nationally and locally, a review of process and how independent EP advice can be utilised is underway. Fortnightly reporting on staffing capacity, staff movement (leavers/new starters/sick or other leave etc.) and actions (when being advertised, when post will be filled, agency cover, other activity to fill gap, impact etc.) are reported to the Assistant Director fortnightly.
- EP staffing capacity to provide statutory advice as part of the EHC Needs Assessment process reduced from 90% in September 2021 to 59% in December 2022, due to staff leaving the service. As of February 2023, staffing capacity has increased slightly to 64%. There is a national shortage of EPs and therefore filling vacancies has been difficult. However, actions undertaken to date include reducing EP commitments for non-statutory work so that 75% of time is focused on providing advices. This has maximised time for statutory work but maintains an early intervention and prevention offer. Locum, associate and agency staff have been secured to build service capacity. There has also been an uplift in the associate/main grade EP pay rate, to be competitive with market forces, to retain associate EPs and attract new EPs. There is an enhanced recruitment approach in place for ongoing recruitment activity to increase team capacity. There is also work underway to explore the use of agency EPs to clear the backlog of advices which from part of the needs assessment process.
- Some of the SEN teams had reduced capacity to 50% at different points over 2022. This significantly impacted their ability to communicate with parents

and schools or complete statutory work. A centrally managed approach to recruitment was initiated during 2022 and we are now at 96% SEN case worker capacity and 92% overall staffing capacity across the service. There is also a standard policy across the SEN team to utilise agency staffing where in the interim while we complete the recruitment process or we have short term staff absence.

- Fortnightly reporting on staffing capacity, staff movement (leavers/new starters/sick or other leave etc.) and actions (when being advertised, when post will be filled, agency cover, other activity to fill gap, impact etc.) are reported to the Assistant Director fortnightly.
15. **Recommendation 1 (c):** Budget has been identified and secured to produce the published version of the strategy in a way that complies with accessibility requirements, as well as an easy read version. This will include the outlined key performance indicators. Two suitable companies have been identified (both have produced documents for SCC recently) that can fulfil the request. An accessible version will be available in February and an easy-read version by March. The easy-read version will be produced taking feedback from young people with additional needs, as well as the parent / carer forum.
16. **Recommendation 1 (d):** The Additional Needs and Disabilities ("AND") Partnership and its overall accountability is now set out much earlier on in the strategy, with the addition of slide 3: "The AND Partnership Board will exercise partnership accountability for the delivery of the strategy."
- I – III. The "AND" Partnership has overall accountability. All the other groups and boards identified will report into the AND Partnership. Slide 25 (previously slide 24) has been updated to clarify: "The AND Partnership Board will exercise partnership accountability for the delivery of the strategy. Each of the delivery governance groups will take responsibility on behalf of the partnership for delivery of the strategic priorities and report back to the Partnership Board on progress and impact. Where there are multiple groups contributing to a strategic theme, they will work collaboratively to ensure that all priorities are covered effectively."
 - As an example, within the Joint Commissioning, Sufficiency and Evaluation theme, the 'SEND' Sufficiency and Commissioning Group will be responsible for oversight of the commissioning priorities set out in the strategy, linking to other groups as appropriate. The 'SEND' Capital Programme Board will be responsible for delivering additional specialist places. Both groups will report into the AND Partnership with overall accountability.

- IV. The above additions enable any parent or young person to easily identify that the Additional Needs and Disabilities Partnership has overall responsibility, and the other groups that will contribute to the priorities in the strategy. The Easy Read version will ensure that this information is accessible.
17. **Recommendation 1 (e):** Facebook live webinars have been rolled out in partnership with Family Voice Surrey to cover the following topics:
 - The role of the SEN Case Officer
 - Education health and care needs assessment process
 - Draft plan
 - Final plan
 - Early Years and Education System ('EYES') demonstration to families
 - Annual and interim review
 - Tribunals
 - Ordinarily Available Provision
 - Personal Budgets and Direct Payments
 - Transition
 - Annual Review paperwork – changes and reasons
 18. In addition to the webinar series, the county-wide SENCo Network has been re-established in partnership with Schools Alliance for Excellence ('SAfE'), who have also been commissioned to develop and deliver a programme of Inclusion and SEN professional development to school staff.
 19. A further programme of short videos and webinars is planned to be published on the Local Offer website, including on the new Ordinarily Available Provision guidance, to include assessment criteria which will be relevant for both families and professionals.
 20. Further, the EYES recording system will help to improve record keeping and communication with families. EYES is a single record IT system which manages individual children's records and related financial transactions. It is being introduced across Children's Families and Lifelong Learning directorate over a phased period and the SEN service has been able to access the system since 25 August 2022. It enables services to work together on individual children's casework and has already brought efficiencies to the education and healthcare needs assessment and plan management process. Access is due to extend to schools and families. The Parent Portal is live on EYES for the checking of eligibility for Free School Meals.

<p>Update on the Safety Valve Agreement</p>
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21. In March 2022 Surrey entered into a Safety Valve agreement with the Department for Education, committing to the delivery of our transformation

plans to improve outcomes for children and young people with additional needs and disabilities and to achieve in year financial sustainability by 2026/27. In achieving the cost containment and transformational changes, the Safety Valve agreement sets out that over the five-year period the DfE will contribute £100m, alongside Surrey County Council contributing £144m from an ear-marked offset reserve, to reduce the deficit on the High Needs Block of the Dedicated Schools Grant. Signing this agreement gave the immediate impact of the Council receiving an additional £40.5m of DSG High Needs Block funding in 2021/22. This meant that the brought forward deficit came down from the previously forecast £118m to £78m.

22. By December 2022, two monitoring check points had been successfully passed with the DfE concluding that Surrey remains on the agreed trajectory. This has resulted in a further £6m in Safety Valve payments, taking the total received from the DfE to £46.5m.
23. In January 2023 the final monitoring report of the financial year 2022/23 was submitted to the DfE, demonstrating that the transformation and financial trajectories remain on track. The report noted that the increased government funding announced for the sector in December 2022 significantly – but not fully – mitigates the increased cost pressures that are being forecast in future years. Feedback on our final monitoring report is expected from the DfE by 31 March 2023, along with the associated payment (expected to be c. £6m).
24. Provided we continue to maintain the agreed trajectory, SCC should not need to add further funds to the offset reserve as we will continue to receive the annual payments of c£12m from the DfE. Both parties will need to continue to monitor funding and inflation rates; if growth and inflation continues to outstrip funding increases then there could be a need to consider re-negotiation in the future.

Conclusions:

25. The recommendations from the Select Committee have been fully considered and are being implemented. Progress on delivering the recommendations will be brought to each Select Committee meeting.

Recommendations:

26. It is recommended that the CFLLC Select Committee notes the updates that were made to the Inclusion and Additional Needs Partnership Strategy 2023/26 and other activities underway to address the recommendations made by the Committee in December 2022.

27. It is recommended that the CFLLC Select Committee receives regular reports on progress and impact in relation to the Select Committee recommendations from December 2022.

Next steps:

Surrey's Inclusion and Additional Needs Partnership Strategy 2023-26 will be formally adopted and published including an Easy Read version, and the Additional Needs and Disabilities Partnership Board will be accountable for the delivery and impact of the strategy.

Further reports and data will be provided to the CFLLC Select Committee to demonstrate progress and impact, as well as any barriers in relation to the Select Committee recommendations from December 2022.

Report contact

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Sources/background papers

[CFLLC Select Committee recommendations relating to the Inclusion and Additional Needs draft strategy, December 2022](#)

[SCC Cabinet response to the Select Committee recommendations, January 2023](#)

[SCC Cabinet report, January 2023: Surrey Inclusion and Additional Needs Strategy](#)

[SCC Cabinet report Appendix 1, January 2023: Surrey Inclusion and Additional Needs Strategy](#)

[Surrey Safety Valve Agreement with the DfE](#)

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