

# APPENDIX I



**MEETING:** Children and Young People Scrutiny Committee

**DATE:** 17<sup>th</sup> March 2022

**SUBJECT:** Update on Project Safety Valve and the Special Educational Needs and Disability Transformation Delivery Plan

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## 1.0 BACKGROUND

- 1.1 Project Safety Valve (PSV) was reported on within Special Educational Needs and Disabilities Annual report, September 2021, <https://councildecisions.bury.gov.uk/ieListDocuments.aspx?CId=328&MId=2958&Ver=4> and will again be included in the 2022 annual report.

**This appendix** focuses on providing an update on both plans and progress on Project Safety Valve, including how Bury is addressing the financial challenge of eliminating the cumulative DSG deficit by 2024/25.

- 1.2 Bury Council has entered into a formal agreement with the DfE on Project Safety Valve which is focused on:
- improving SEND services and the experiences and outcomes for children, young people and their families with identified Special Educational Needs and Disabilities
  - an agreement to eradicate the High Needs Block Deficit by 2024/25.

There are five conditions against which progress and performance are measured in quarterly reports to the DfE:

- **Agreement Condition 1:**  
Strengthen Special Education Needs assessment and placement process
- **Agreement Condition 2:**  
Ensure robust planning for future provision, including reducing the use of independent school placements by increasing the availability and suitability of local provision within Bury. This should include developing a model for forecasting future needs by March 2022.
- **Agreement Condition 3:**  
Improve quality and timeliness of management information to enable evaluation of impact of central services.
- **Agreement Condition 4:**  
Support and drive schools in Bury to meet a higher level of need in a more cost effective way within mainstream settings, while maintaining the quality of provision. Develop a culture in which demand is more effectively managed throughout the authority

- **Agreement Condition 5:**  
Remodel financial practice to ensure accurate contributions from appropriate funding sources by Dec 2021.

We use these conditions as the basis for our delivery plans.

**1.3. The Project Safety Valve Delivery programme is comprised of six interdependent workstreams. They are:**

- Workforce - recruitment to key roles and performance development
- Practice and process - revising the processes of the EHCP team
- Strategy and finance - consultation and changes to top-ups
- Future Provision - planning and implementation of capacity
- Technology and data - development of systems and reporting capabilities
- Graduated approach - development and launch of approach.

1.4 The governance of the PSV programme sits within the wider partnership arrangements for children and young people in Bury. We are also working closely with schools through the Schools Forum and High Needs Funding sub-group, in addition to regular communication through existing programme meetings between Bury Officers and Headteachers. Informal and formal dialogue is being undertaken with relevant Trades Unions and staff representatives.

1.5 Progress against the Project Safety Valve Delivery Plan has been made. Recent examples include:

1. Cleared the backlog of cases waiting over 20 weeks for the first time.
2. Meet the 6-week timescale to enable panels to make informed decisions at pace.
3. Implementing person centred planning meetings; this will grow over the next quarter
4. Co-produced processes including recruitment and selection
5. Co-produced the Graduate Approach document
6. Developed sufficiency plan that identifies the need for additional and/or re-designated RP and SP.
7. Work across partnerships to establish the Free School project, which is on track for pupil admission in September 2023. Capital Programme plans are in place.
8. Implemented LiquidLogic EHM system, including a comprehensive data review and cleansing exercise.
9. Improved data reporting, including visualisation and analysis.
10. Improved governance arrangements to enable development of technology and data,
11. New banding scheme for mainstream top-ups agreed, to take effect from April 2022. Savings are on target.
12. Agreement with special schools to abolish band D+. Projected savings are on track.
13. Reported the review of High Needs Block back to Head Teachers
14. Co-production with Primary Head Teachers to design operational plans to deliver alignment of Early Help locality teams and Inclusion Partnerships
15. After consultation, the Schools Forum has agreed to the maximum 0.5% transfer (£715k) from Schools to HNF block for 2022/23.

## **PROGRESS AGAINST THE TRANSFORMATION PLAN AND FINANCIAL DEFICIT PLAN**

This section of the report details the progress made against each of the agreement conditions

### **2.1 Agreement Condition 1:**

#### **Strengthen Special Education Needs assessment and placement process**

### **2.2 Clearing the backlog of cases**

The team manager reported a backlog of seven cases on 21st February 2022. This performance improvement needs to be sustained through staff training and support to the decision-making process. The impact on overall performance is considerable: we expect to see a reduction in complaints and Quality Assurance concerns, which will enable staff to focus on their current caseload. The impact of this can be seen in the reduction of plans in progress from 258 in January 2021 to 143 in January 2022.

### **2.3 Improvements to the Education Health and Care Plan service**

The team has produced 107 plans within the initial six-week timeframe, 103 of which went to panel on time and with correct and accurate information; this has led to a significant improvement in the pace of the process. The implementation of LiquidLogic has made it easier to monitor and report on progress. Parents are given the required timescale to review and comment on the draft plans. The next priority is to work with parents and stakeholders to review the process so that we can understand the high levels of plan approval.

### **2.4 Transition arrangements**

The Education Health and Care Plan (EHCP) team has successfully implemented the review arrangements for children in transition from nursery to reception and from year 6 to year 7. This was completed on 15th February. The reviews for young people transitioning from year 11 to post 16 will be completed by 15th March. Caseworkers have been involving parents, families and educational stakeholders in the reviews.

### **2.5 Capacity**

The new Education Health and Care Plan (EHCP) team structure has been implemented. Since December four new staff have joined. Another eight are expected to start by the end of April 2022. Effective support has been provided by agency workers. The additional roles we have introduced are focused on managing the planning process, including quality control and family engagement. The aim is to ensure that the experience of children and families is positive, and the number of complaints will be reduced as a result. However, our parents continue to report concerns over caseworker changes and the lack of a key contact. Therefore, workforce stability and workforce development remain a key priority.

LiquidLogic makes it possible to track each case and the progress team members are making. This will help us to foresee delays and address them proactively.

The team will undertake extensive training and development to establish the professional approach that parents and stakeholders should expect. This will include introducing the professional qualification that supports the SEN service.

### **2.6 Children, young people and families: experience and engagement**

Person centred planning meetings are taking place for all new assessments as part of the six-week timetable for gathering information. The emphasis is on co-producing the plan, which will reduce the number of complaints and tribunal cases.

Parents have been involved in the recruitment to posts in the Education Health and Care Plan (EHCP) team. This has included co-designing roles, shortlisting and interviewing candidates. Further work is planned to co-produce induction and onboarding so that the perspective of children and families is foremost in the training.

We have received positive anecdotal feedback from parents who are describing an improvement in their experience of engagement with the team; they report being given information more quickly and with higher levels of accuracy.

However, it is still an inconsistent experience and we are committed to co-producing a pilot to improve the EHCP Process which will include co-producing; advice proformas; revising the plan; revising the process; and involving parents in QA. The aim is to ensure the EHCP process has co-production at its heart and that parents' experience improves and that the EHCP demonstrates person centred multi- agency planning.

## **2.7 Graduated Approach**

The Graduated Approach is on track for launch in the autumn term of 2022 and is detailed in the accompanying SEND update report.

## **2.8 Priorities**

Over the next quarter the priorities are:

- to develop and implement co-production of induction and onboarding arrangements to improve standards and build confidence in the services
- to complete the work on two new sections of the Graduated Approach programme
- to maintain performance standards regarding the backlog of cases
- to build competence in LiquidLogic and start to use it to make decisions
- to review the way panels are working so that they can be supported more effectively
- to invest in the EHCP team, including professional skills
- to review and simplify the EHC planning process.

## **3. Agreement Condition 2:**

**Ensure robust planning for future provision, including reducing the use of independent school placements by increasing the availability and suitability of local provision within Bury. This should include developing a model for forecasting future needs by March 2022.**

### **3.1 Sufficiency model**

The sufficiency modelling process has been completed and gaps in provision have been identified. This identified the need to develop capacity of Resourced Provision for children and young people with identified Autism Spectrum Condition( ASC) as their primary area of need and those with identified Social Emotional Mental Health (SEMH) needs, and additional specialist provision for SEMH at Key Stage 3 and 4 (secondary aged pupils). The sufficiency plan developed identifies the need for additional and/or re-designated Resourced Provision and Specialist provision

### **3.2 Resourced Provision development**

The specification for Autism Spectrum Condition Resourced Provision and Social Emotional Mental Health Resourced Provision has been produced. The RP Specification was shared with an initial shortlist of six primary schools (previously identified in the capital funding submission).

Detailed delivery plans for the establishment of Resourced Provision will be developed on a school by school basis, with roll-out between September 2022 and March 2023. All schools will be informed of the Resourced Provision specification to enable identification of further host schools for Resourced Provision to meet any remaining gaps, including geographical distribution.

### **3.3 Free Special Schools**

The project to develop a Free Special School (80 place secondary Autism Spectrum Condition) is making good progress, involving the Council, Shaw Trust and the DfE delivery team. The project is on schedule for pupil admission in September 2023. Discussions are pending between the Council and the Shaw Trust to identify the first cohort of pupils to the new school in September 2023.

In addition, a specification has been produced for a further Free Special School (60 places secondary Social Emotional Mental Health). A shortlist of sites has been identified, with further work necessary to confirm preferred location. The target date for opening this school is September 2025.

### **3.4 Capital programme**

Capital programme plans have been developed to support the delivery of these schools and services, alongside the relocation of Spring Lane School, Bury's Pupil Referral Unit from its existing site by September 2023, and the delivery of a Free Secondary School for Radcliffe located on the Spring Lane site, to open September 2024.

## **4. Agreement Condition 3:**

**Improve quality and timeliness of management information to enable evaluation of impact of central services.**

### **4.1 Case management**

On 1st February 2022 all active case management record-keeping for the SEN service was migrated onto the LiquidLogic EHM system to provide a single source of case management and case reporting data. Previous spreadsheet case management systems have been archived and retired following data migration and assurance. All members of the ECHP team staff have been fully trained on LiquidLogic, with ongoing one to one support provided. A comprehensive data review and cleansing exercise was undertaken prior to systems migration to update the accuracy of core case data fields, including ethnicity, establishment type, gender, SEN primary and secondary needs and assigned caseworker.

LiquidLogic workflows and forms have been updated and improved to help ensure that core case data is captured consistently and can be monitored through exception reporting. This includes making some fields mandatory, as well as adding additional fields.

Automated dashboards, work trays and report views are now available to all staff on an individual basis to help visualise progress and prioritise effort. Senior team leads, managers and SEN data analysts now have automated live reporting across the team within LiquidLogic to manage the collective cases, identify issues and opportunities and monitor performance.

### **4.2 Data reporting**

The new SEN Data analyst helped prepare the SEN2 and AP census statutory returns for timely analysis, assurance and submission with senior leads. The work involved in data assurance also positively contributed to the systems migration meaning core case notes data is the most accurate and complete that it has been for several years.

The latest monthly data pack (and the final one to use data sourced from multiple spreadsheets) was successfully produced at the start of February. See Appendix C. The improved visualisation and analysis have helped provide valuable new insight to senior service leadership which has directly informed conversations and actions with staff, families and partners. All future data packs will be produced more efficiently using data sourced from LiquidLogic.

### **4.3 Leadership and governance**

A new fortnightly "SEN Data Analysis and Action Forum" has been established. This brings together the new SEN data analyst and service leadership to review information about a) data quality and systems usage b) performance and c) forecasting. The forum began meeting in February and is proving a valuable dedicated space to discuss, decide and evaluate decisions that are informed by data.

A new SEN Data and Technology Systems Governance Group was established in November to bring together leads from SEN Services, the corporate performance team and Children's IT leads to ensure joined-up analysis and action regarding maintaining and improving core systems and

data sets, such as LiquidLogic and statutory returns. This group meets monthly and helps coordinate the successful systems migration.

#### **4.4 Next steps**

The next priority steps regarding improving the quality and timeliness of management information are:

- Upgrading LiquidLogic EHM to include the newly updated SEN2 module to support the service to generate personal level SEN reporting in line with the 2022/23 requirements at any point during the year (aiming for completion by end of March 2022, with records being backdated to Jan 2022)
- Creating and piloting live digital performance dashboards to bring consolidated, real-time insight about key performance indicators to the service (aiming to pilot by April 2022)
- Developing trusted predictive analysis and forecasting reports for individual and team level performance in relation to service strategy. Using the foundation of LiquidLogic data and improvements to demand and financial forecasting modelling frameworks. (aiming to launch and refine by May 2022)

#### **5. Agreement Condition 4:**

**Support and drive schools in Bury to meet a higher level of need in a more cost-effective way within mainstream settings, while maintaining the quality of provision. Develop a culture in which demand is more effectively managed throughout the authority.**

##### **5.1 Top ups and banding.**

A new banding scheme for mainstream school top-ups has been agreed following consultation with all schools and a review by Schools Forum. Assimilation arrangements are in place for implementation from April 2022. All new mainstream school top-ups will be applied via the new banding scheme from April 2022 and existing top-ups will be allocated to the appropriate band. Projected savings are on track.

A review of AP and RP top-ups will start in March 2022. Implementation is planned for September 2022. Top-up values for new RPs will be on the new banding arrangements. Agreement has been reached with Special Schools to abolish Band D+. Interim moderation arrangements will be in place for April 2022. Projected savings are on track. Special schools are completing revised banding allocations. These will be used for budget allocations for April 2022. Projected savings are on track.

##### **5.2 Alignment of Early Help Locality Teams and Inclusion Partnerships.**

Bury completed an initial successful consultation with the Headteacher Reference Group to share proposals in November 2021. Further successful consultation with primary head teachers took place through the Inclusion Partnership meetings across the autumn term to launch proposals in principle.

Co-production activity with primary head teachers is underway (February/March 2022) to design operational plans (3 of 4 meetings completed). Final proposals will be circulated to primary head teachers by the end of March 2022 for trial in the summer term 2022.

A review is planned for the end of the summer term and full operation is planned to take place from September 2022.

The intended impact of this alignment will be in terms of schools being able to access a wider range of support across Education and Social Care more quickly with an outcome of fewer requests for EHC Assessment being submitted by schools.

#### **6. Agreement Condition 5:**

**Remodel financial practice to ensure accurate contributions from appropriate funding sources by Dec 2021.**

### **6.1 High Needs Funding Block**

The review of the High Needs Funding Block is complete and the outcomes were reported to the Schools Forum on 18th January 2022. Report: [Item 6 - Project Safety Valve - Schools' Forum report - January 2022 \(bury.gov.uk\)](#)

The Schools Forum has agreed to the maximum 0.5% transfer (£715k) from Schools to HNF block for 2022/23.

### **6.2 Inclusion Hubs and Partnerships**

Primary and Secondary Inclusion Hubs and Partnerships funding has been reduced by £348k.

### **6.3 Non-statutory support services**

Non-statutory support services will be reduced by £400k from Sept 22, saving £233k in 2022/23. Other non-statutory services have been moved to the General Fund, saving £694k and moving forward will be reviewed.

### **6.4 Top-ups: A review of top-ups for AP and RPs is underway. The changes are due to be implemented from September 2022.**

The volume top-up scheme, which supports schools with a higher proportion of children and young people with EHCPs than the national average, is under review. New proposals will be worked up with the Bury Schools Forum sub-group for implementation from Sept 2022.

## **7.0 CONCLUSION**

Improving Special Educational Needs and Disability Services remains a key priority for Bury Council and Project Safety Valve is a key vehicle to drive that change.

Although challenges remain in the Education Health and Care Planning process progress has been made within formal agreement with the DfE on Project Safety Valve which is focused on both improving SEND services and the experiences and outcomes for children, young people and their families with identified Special Educational Needs and Disabilities and an agreement to eradicate the High Needs Block Deficit by 2024/25.

Progress has been made around ensuring more robust planning for future provision, improved quality and timeliness of management information to enable evaluation of impact of central services. Progress has also been made through the work on the Graduated Approach, the development of Resourced Provision to expand the continuum of provision and the re-evaluation of the Education Health and Care Plan funding arrangements to support schools in Bury to meet a higher level of need in a more cost effective way within mainstream settings. In addition progress has been made on the remodelling of financial practice to ensure accurate contributions from appropriate funding sources

The key priorities for the next phase of Project Safety Valve remain improving the experience and effectiveness of the Education Health and Care Plan process and also ensuring that the challenging financial targets are met.

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### **List of Background Papers:-**

September 2021: Bury Council Annual Report on Special Educational Needs and Disabilities. .  
<https://councildecisions.bury.gov.uk/ieListDocuments.aspx?CId=328&MId=2958&Ver=4>

School Forum Reports on Project Safety Valve.

Summary slide deck: [PowerPoint Presentation \(bury.gov.uk\)](#)

Report: [Item 6 - Project Safety Valve - Schools' Forum report - January 2022 \(bury.gov.uk\)](#)

**Contact Details:-**

Isobel Booler, Director of Education and Skills  
i.booler@bury.gov.uk

Executive Director sign off Date:

JET Meeting Date: