

# MANAGED MOVE PROTOCOL

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## **MANAGED MOVES IN NORTHUMBERLAND**

### **1. BACKGROUND**

Managed moves have been advocated nationally as an alternative to permanent exclusion from school for many years now.

Managed moves involve the young person moving on to a new placement in a planned manner. A change of school can be particularly valuable if it is perceived that a pupil's difficulties are the result of inappropriate peer relationships or if the relationship of trust between parent and school has broken down.

Although schools, parents and pupils have used the idea of a "fresh start" in a new school as an alternative to permanent exclusion for a number of years, experience suggests that when these moves are arranged between the schools themselves (usually at head teacher level) and when they are carefully managed, they have more chance of achieving a successful outcome for the pupil than when the parents attempt to identify an alternative school for their child and to make the transfer arrangements themselves.

In a managed move, the focus is on finding a way forward in response to the pupil's current difficulties – and so the process is a solution-orientated rather than punitive one. However, 'managed moves' should only be considered when a range of other strategies for managing the pupil in the original school have been tried, without success.

For students with EHC Plans, any change of school needs to be through the related review processes and must involve the SEND Team.

N.B. A managed move should only be used when a young person is genuinely at risk of exclusion and not as part of general admission procedures.

### **2. MANAGED MOVES AND THE FAIR ACCESS PROTOCOL**

There are three aspects to Northumberland County Council's Fair Access Protocol: it deals with

- Young people who do not have a school place for one of those reasons stated within the Fair Access Protocol and

- Managed Moves: where a child presents challenging behaviour which place him or her at risk of being permanently excluded from school and a move to another school may enable the child to make a fresh start.

- Offsite direction: Off-site direction is when a governing board of a maintained school requires a pupil to attend another education setting to improve their behaviour. Whilst the legislation does not apply to academies, they can arrange off-site provision for such purposes under their general powers. Where interventions or targeted support have not been successful in improving a pupil's behaviour, off-site direction should be used to arrange time-limited placements at an AP or another mainstream school. During the off-site direction to another school, pupils must be dual registered. Code B should be used for any off-site educational activity, if the provision is an approved educational activity that does not involve the pupil being registered at any other school.

In Northumberland, most managed moves are agreed voluntarily between schools (see below). If the challenges posed by the child's behaviour at the home school are considered to be successfully addressed at the receiving school, the move can become a permanent one. If, however, these challenges posed are considered not to be able to be successfully addressed at the receiving school, the child will return to the home school.

**Applications from a parent for a place for their child at a school at which a managed move has already been offered and failed will not normally be accepted.**

*N. B. where a school, parent and student agree that a managed move is a potential way forward but it has not been possible to secure the agreement of another school to offer the opportunity of a managed move, then an application can be made to the Fair Access Panel to secure a place in another school for that pupil.*

### 3. MANAGED MOVES

**Formal** managed moves in Northumberland can only proceed after the original school has discussed the case with Inclusion Team and, following this discussion, has the agreement of parents/carers that such a move would be in the best interests of their son/daughter.

A managed move:

- May be proposed by the parent or by the school
- Must involve the parent completing a managed move request form as at page 11
- Must be agreed in advance by the schools concerned, the child and the parent
- Is for a fixed period, normally 6 weeks
- Enables education to be provided at the receiving school while the child remains on roll at the home school
- May be terminated at any stage by the Headteacher of the receiving school in circumstances where the behaviour of the child gives rise to significant cause for concern. The child will then return to the home schools immediately
- Will take into account home to school transport implications.

A managed move is not normally appropriate when the child:

- Is a persistent non-attender
- Is seeking a straight forward transfer to another school
- Isn't on the roll of a school or is home educated
- Would **not** return to the home school if the placement is unsuccessful.

Once a managed move has been agreed, the relevant Inclusion Officer will ensure that young person is able to attend the receiving school. This will normally be provided according to the County Council's Home to School Transport Policy.

There have been occasions when two schools have reached an informal agreement to allow a student from one school to have a trial in a second school for reasons other than their being at risk of permanent exclusion. This would NOT be classed as a formal managed move by the LA and transport would not normally be agreed if such moves proved to be successful.

## 4. THE PROCESS

1. Meeting at original school with parents/carers and pupil reviews the strategies to avoid permanent exclusion which have already been implemented and agrees that the best way forward is to seek a “fresh start” at a new school.

Pupil and parental preferences are sought and the realities of the situation discussed. Parents should be made fully aware of their responsibilities regarding transport (see Appendix C) and uniform if a change of school is arranged.

Minutes of the meeting, including a full record of the other strategies which have been used to try to prevent exclusion, are kept on pupil’s file. It may be appropriate to invite other adults who have been involved with the pupil to this meeting and, in some cases, the head teacher may wish to have a member of the Governing Body present (see Appendix D).

Following this meeting, if all parties agree:

2. Original school contacts LA Admissions Team to clarify place availability in relevant year group in neighbouring schools. ]
3. The head teacher makes contact with the head teacher of the ‘new school’, discusses the pupil openly and honestly and secures the school’s agreement to transfer in principle.
4. Parents are requested to complete the LA Managed Moved Request Form (Appendix a). The original school sends this, with accompanying paperwork to the Local Authority (addressed to the Inclusion Team via the exclusion inbox [exclusions@northumberland.gov.uk](mailto:exclusions@northumberland.gov.uk)), including (as a minimum)
  - the pupil’s attendance record
  - behaviour log
  - copies of any Intervention Sheets, IEPs or Pastoral Support Plans
  - current academic attainment data
  - the minutes of the meeting where the decision to seek a managed move was taken (see1 above).
5. Inclusion Team copies Managed Move Request form to the LA’s Admissions Team, who provisionally register child at the new school (whilst retaining the place in the original school), subject to successful 6 week trial.
6. The new school contacts the family and invites parents/carers and pupil in for a meeting. At this meeting, as well as the expectations of the new school and general arrangements for transfer and induction (e.g. uniform requirements, times of school day etc), the pupil’s support needs should be discussed. This initial meeting may be extended to become a ‘supported transfer’ meeting with representatives of the original school and adults who attended the initial planning meeting invited to attend, as well as the parents/carers and pupil. The purpose of the meeting is to agree the type of support from that which could be available, which will optimise the transfer’s success chances (see Section 3 below). A proposed agenda and template for recording the Managed Move Plan are included in within this booklet.

At the conclusion of this meeting, all parties should be clear about what is to happen, by whom and when. In particular, the young person should be clear about what is expected of them if the 'fresh start' is to be successful.

The new school then returns completed **pro-forma A** to the Inclusion Team to confirm receipt of Managed Move Request Form and date of commencement of 6 week trial period.

**Pro-forma B** is forwarded by the new school to the original school to ensure records are transferred. This must include all records relating to Child Protection concerns which may have been held separately from the child's main school record. The following should have been agreed and shared with the pupil and parents, before the pupil joins the school:

- Timetable/class group
- Information re uniform, equipment required etc
- Home/School agreements
- Support arrangements – including any peer support
- Travel/FSM arrangements
- Induction programme – including policies and procedures relating to attendance and punctuality, behaviour, homework

9. The managed move commences as a 6 week trial period. **Parents/carers, original school and Inclusion Team should be notified of any concerns arising during this period.** If at any point, the young person's behaviour is deemed to warrant a fixed period exclusion, liaison with the parents and original school should take place to discuss the continued viability of the Managed Move. The pupil's progress should then be reviewed with parents after two weeks. (N.B If there are extenuating circumstances e.g. illness, during this 6 weeks, this timescale can be extended by agreement).

If the move is deemed to have been successful, the new school returns completed **pro-forma C** to the Inclusion Team to confirm that permanent transfer should proceed.

If the move is deemed to have been unsuccessful, the new school returns completed **pro-forma D** to the Inclusion Team to confirm that permanent transfer should not proceed.

N.B. - In cases where such moves have 'failed', there have been occasions where the student, having experienced 'life' in another school, realises that they want to remain at their original school and so make changes to their behaviour in order to be able to do so.

- 10a) The Inclusion Team liaises with the Business Support Manager to confirm funding to be transferred between original and new schools (where academies are involved as the original / receiving school funding transfer will have to involve invoicing the for the identified amount)
- 11a) Once the move becomes permanent, the pupil's progress should be subject to half-termly reviews, until the pupil is considered settled.

**OR**

- 10b) The Inclusion Team liaises with original school over next steps for young person.

- 11b) Depending on individual circumstances, it may be possible to manage a pupil into an alternative educational setting for a period of time, if continuing in the original school is no longer viable. However, it is also recognised that the pupil may then move on, via a managed move, into a new school from such an alternative programme.

## **5. PRACTICE TO BE AVOIDED**

Good practice and experience suggest that the following should be avoided:

- i) Advising parents to remove their child from roll and “find another school”: this would generally constitute ‘off-rolling’ which this guidance is seeking to avoid. DfE are quite clear that ‘the threat of exclusion must never be used to influence parents to remove their child from school’. Even if a school is aware that parents are considering a change of school for their child, they should **not** remove the child from their roll unless they have absolute confirmation that that child has been admitted to another school.
- ii) Use of permanent exclusion to ‘persuade’ an unwilling parent to accept a managed move.
- iii) Advising parents to remove their child from roll and “educate otherwise”. In practice unless parents are seeking to “educate otherwise” for philosophical, ideological or religious reasons, the education provided is rarely “suitable or efficient”.
- iv) “Tit for Tat” – when schools agree to exchange pupils without due consideration being given to parental and pupil views and preferences not individual support needs.
- v) The transfer of pupils without adequate induction or support.

## **APPENDIX A**

### **A Guide for Parents**

A ‘managed move’ is a way of avoiding exclusion from school. It is being considered for your son/daughter because they are at risk of permanent exclusion and it may be that a fresh start in a new school would avoid this. A change of school can give a young person a chance to develop new and possibly more appropriate friendships. It can also give you, as parents, the chance to develop or establish a positive relationship with staff in another school.

### **How Does a Managed Move work?**

A managed move is only considered after other ways to deal with your child’s behaviour have been tried but have not been successful.

A managed move is voluntary and can only happen if it is agreed by all – your child, yourselves as parents, your child’s current school and the new school you want your child to attend.

Parents often worry about the cost of transport to a new school. If the move is successful, the local authority will fund the cost of transport (using public transport where appropriate) until the end of the school phase your child is in at the time of transfer (provided the new school is far enough away for your child to qualify for home to school transport).

Staff in your child's current school will explain the details to you but, once you have indicated which school you would like your child to move to, the head of the current school will check to see if a place is available and if the new school is prepared to give your child a 6 week 'trial'. If they are, you will need to fill in a 'Managed Move Request Form'.

Once the paperwork is all in place, your child will be allocated a place in the new school on a temporary basis, but will still remain on the roll of the current school.

You (and your child) will then be invited to a meeting in the new school to discuss the proposed move. You will have the chance to ask any questions you have at this meeting and the new school will explain

- start and finish times
- school uniform
- school meal arrangements
- how contact between home and school takes place
- expectations about your child's behaviour
- what support can be in place for your child

A 'Managed Move Plan' will be agreed and you will be given a copy of this. It will include a review date every 2 weeks.

The 6 week trial then starts from an agreed date. If any issues arise regarding your child's behaviour during this period, you should be notified of them. At the end of the 6 weeks, you will receive feedback from the new school and they will tell you if they are prepared to offer a permanent place to your son/daughter.

If the decision is NOT to offer a place, further discussions with your child's original school, also involving a local authority representative, will then take place.

N. B. A place would not normally be allocated should a parent express a preference for their child to attend the school that has already provided them with a managed move opportunity that has been unsuccessful.





**MANAGED MOVES REQUEST FORM**

This application form should only be completed in the case of a request for a managed move. This form should be completed jointly by the Headteacher of the original school and the parent(s) of the child.

It should be completed in black ink and in block capitals and should be accompanied by the minutes of the review meeting at which it was agreed that a managed move would be sought.

The completed form should be returned to the Social Inclusion Officer, Education Other Than at School, County Hall, Morpeth NE61 2EF

**Details of child**

Last Name: \_\_\_\_\_ Date of birth: \_\_\_\_\_

First Name(s): \_\_\_\_\_ Boy or girl: \_\_\_\_\_

Present school: \_\_\_\_\_

Does your child have a Statement of Special Educational Need or is he/she currently being assessed? **Yes / No**

**Details of parent(s) or carer(s)**

Mother/female carer's name: \_\_\_\_\_

Address: \_\_\_\_\_

Postcode: \_\_\_\_\_ Telephone number: \_\_\_\_\_

Father/male carer's name: \_\_\_\_\_

Address: \_\_\_\_\_

Postcode: \_\_\_\_\_ Telephone number: \_\_\_\_\_

With whom does the child normally live? \_\_\_\_\_

## Preferences

1. **First preference of school** **PTO**
2. **Second preference**
3. **Third preference** \_\_\_\_\_

Is your child in public care (i.e. looked after by the Council)?

**Yes / No**

If yes, please give name of social worker \_\_\_\_\_

Please indicate your relationship to the child by ticking one of the following

Parent                       Legal Guardian     Foster Carer                       Social worker

Full name (please print): \_\_\_\_\_

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

## Home to School Transport

The LA will apply the same principles with respect to transport as it does in the case of permanent exclusion i.e. it will accept responsibility for the cost of transport to the next nearest school with a place available, provided this school lies outside the relevant distances specified in the Home to School Transport Policy. This acceptance of financial responsibility will, however, apply only until the end of the school phase the youngster is in at the time of transfer. Pupils subject to a managed move will be expected to access the existing transport network, including public transport, if this meets the journey requirements and that, should they, at some future point, be excluded from this transport because of their failure to adhere to the established code of conduct for acceptable behaviour, it will then become your responsibility as parent to ensure that your child continues to attend school.

N.B. the LA reserves the right to exercise discretion over the funding of transport arrangements for Looked After Children.

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<b>SCHOOL ONLY</b>	Received						
<b>LA ONLY</b>	School	Student ID					
Y Gp Update	DL Sent	PAN					
Y Gp Confirmed	Outcome	Criteria	1		2		3

## APPENDIX C

### INITIAL MEETING

Remember to familiarise yourself with the Managed Move Guidance before the meeting.

#### **Suggested Agenda**

1. Welcome remarks
2. Introductions/apologies
3. Purpose/aims of meeting
4. What the student does well  
(contribution from previous school/ parents/student)
5. Summary of behavioural issues
6. Expectations
  - of new school  
(as well as behavioural expectations, include practical issues eg uniform, start/finish times, travel, school meal arrangements, home-school agreements, induction arrangements)
  - of old school
  - of student
  - of parents
7. Target setting
8. Strategies to support targets
9. Monitoring/feedback/review arrangements
10. Date of next meeting

#### **NB**

The student would not be the subject of a managed move if they did not have behavioural issues. It is entirely reasonable for a receiving school to set out their expectations of the student during the 6 week trial period: ideally these expectations should be translated into a small number of targets for the student, which are then recorded on a 'Managed Move Plan' pro-forma or similar. Support strategies should

also be recorded

After the meeting, remember to complete Form A – return to Social Inclusion Officer, County Hall, Morpeth, NE61 2EF and Form B to the original school.

**MANAGED MOVE PLAN****APPENDIX D**

Date of Initial Meeting:	Name:
	DOB:
	Original School:
	Yr Group:
Present:	Designation:
Main points arising:	
Targets agreed with student: 1. 2. 3.	
Support strategies available	Provided by:
Feedback arrangements	Provided by:
Date/time of next meeting:	

<b>MANAGED MOVE</b>	<b>PRO FORMA A</b>
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To be completed by new school to confirm 6 week trial.

PUPIL'S NAME \_\_\_\_\_ D.O.B. \_\_\_\_\_

ADDRESS \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

ORIGINAL SCHOOL \_\_\_\_\_

NEW SCHOOL \_\_\_\_\_

I confirm receipt of the Managed Move Request Form and attached documentation for the above pupil.

A managed move has been agreed in principle, subject to a satisfactory 6 week trial period.

Date of commencement of 6 week trial \_\_\_\_\_

HEADTEACHER'S NAME \_\_\_\_\_

HEADTEACHER'S SIGNATURE \_\_\_\_\_

DATE \_\_\_\_\_

**Please return to:** Social Inclusion Officer, Education Other Than at School, County Hall, Morpeth NE61 2EF.

RECEIVED, DATE \_\_\_\_\_

COPIED TO ADMISSIONS, DATE \_\_\_\_\_

COPIED TO ORIGINAL SCHOOL, DATE \_\_\_\_\_

**MANAGED MOVE**

**PRO FORMA B**

To be completed by new school to ensure transfer of pupil's school record and Common Transfer File.

PUPIL'S NAME \_\_\_\_\_ D.O.B. \_\_\_\_\_

ADDRESS \_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_

ORIGINAL SCHOOL \_\_\_\_\_

NEW SCHOOL \_\_\_\_\_

The above pupil is to be the subject of a managed move. If the 6 week trial period, is satisfactory, this will become permanent. I would be grateful if the pupil's full school record could be forwarded and their Common Transfer File be transferred, to their new school. **N.B. During the 6 week trial period, the pupil will remain on the roll of the original school and should not be logged as a leaver. However, although not on the roll of the new school at this stage, a place has been reserved for the pupil should the trial period be successful.**

HEADTEACHER'S SIGNATURE \_\_\_\_\_

DATE \_\_\_\_\_

**Please return to:** Headteacher of Original School.

**APPENDIX G**

**MANAGED MOVE**

**PRO FORMA C**

To be completed by new school to confirm permanent transfer.

PUPIL'S NAME \_\_\_\_\_ D.O.B. \_\_\_\_\_

N.C. YEAR (N-Y13) \_\_\_\_ If not full-time, please state number of sessions attended \_\_\_\_

ADDRESS \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

ORIGINAL  
SCHOOL \_\_\_\_\_

NEW  
SCHOOL \_\_\_\_\_

I confirm that, following a 6 week trial period, the above pupil's permanent transfer should now take place. Please arrange for the appropriate transfer of funding.

FORMAL DATE OF TRANSFER \_\_\_\_\_

HEADTEACHER'S NAME \_\_\_\_\_

SIGNATURE \_\_\_\_\_

DATE \_\_\_\_\_

**Please return to:** Social Inclusion Officer, Education Other Than at School, County Hall, Morpeth NE61 2EF

RECEIVED, DATE \_\_\_\_\_



COPIED TO ADMISSIONS, DATE \_\_\_\_\_

COPIED TO FINANCE, DATE \_\_\_\_\_

**APPENDIX H**

**MANAGED MOVE**

**PRO FORMA D**

To be completed by new school to confirm that move will not become permanent.

PUPIL'S NAME \_\_\_\_\_ D.O.B. \_\_\_\_\_

N.C. YEAR (N-Y13) \_\_\_\_

ADDRESS \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

-

\_\_\_\_\_

-

ORIGINAL  
SCHOOL \_\_\_\_\_

NEW  
SCHOOL \_\_\_\_\_

I confirm that, following a 6 week trial period, the above pupil's transfer will not become permanent for the following reasons:

Parents were notified of this decision on (date) \_\_\_\_\_

HEADTEACHER'S NAME \_\_\_\_\_

SIGNATURE \_\_\_\_\_

DATE \_\_\_\_\_ (\_\_\_\_\_  
PTO)

**Please return to:** Social Inclusion Officer, Education Other Than at School, County Hall, Morpeth NE61 2EF

**Please copy to:** Head teacher, Original School.

RECEIVED: DATE \_\_\_\_\_

COPIED TO ADMISSIONS: DATE \_\_\_\_\_

FOLLOW – UP ACTION TAKEN

DATE \_\_\_\_\_

SIGNATURE \_\_\_\_\_

**ADDITIONAL INFORMATION****TRANSPORT**

The LA will apply the same principles with respect to transport as it does in the case of permanent exclusion i.e. it will accept responsibility for the cost of transport to the next nearest school with a place available, provided this school lies outside the relevant distances specified in the Home to School Transport Policy. This acceptance of financial responsibility will, however, apply only until the end of the school phase the youngster is in at the time of transfer. It is the responsibility of the Head teacher of the original school to make parents aware of this; to ensure that they are aware that the pupil will be expected to access the existing transport network, including public transport, if this meets the journey requirements and that, should they, at some future point, be excluded from this transport because of their failure to adhere to the established code of conduct for acceptable behaviour, it will then become the parents' responsibility to ensure that they continue to attend school. N.B. the LA reserves the right to exercise discretion over the funding of transport arrangements for Looked After Children.

**PROFESSIONAL INVOLVEMENT IN THE MANAGED MOVE PROCESS**

Professionals who may be involved with pupils and their parents/carers who could be involved at any stage during the "managed move" process:

SENCO

Mentor or Classroom Assistant

Designated teacher with responsibility for Child Protection/ Looked After Children

Employability & Skills PA

Assigned Educational Psychologist

Member of the Looked After Children's Education (ESLAC) team

Inclusion Team

HINT Team

Education Welfare Officer

Social Worker

YOT Worker

Representative from Children and Young People's Service (CYPS)

**SUPPORT FOR PUPILS**

The following could be considered as support for transferring pupils. The list is not exhaustive and the support can be "mixed and matched" in order to provide an appropriate individualised package:

- Access to the SENCO or specialist SEND teacher for baseline testing and needs assessment
- Specialist SEND teaching support
- Access to a specialist HINT worker
- Access to an Educational Psychologist
- Access to a Employability & Skills PA
- Access to small group support in e.g. social skills or anger management.
- Access to a counsellor
- Access to classroom assistant support
- Support through a Learning Support Unit
- Peer support – e.g. a buddy
- In school support procedures such as report cards, access to a named teacher etc
- Access to after school clubs and activities

## FUNDING

The LA does not hold any funding centrally to support ‘managed moves’. All such funding has been delegated to schools.

When a pupil is to be the subject of a successful approved ‘managed move’, a funding transfer from the original to the new school will follow. The LA will calculate the amount of funding to transfer. If both schools involved are maintained schools, the mechanism used will be an internal transfer enacted by the LA. If, however, the new school is an academy, the LA will notify it of the transfer amount and it will have to raise an invoice to the original school for this amount. The date of transfer will be the date of admission to the new school and the amount transferred will mirror the financial adjustments had the pupil been permanently excluded as detailed in h ii) below.

### ii) Financial Adjustments for Permanently Excluded Pupils

#### 1. Following the Permanent Exclusion of a Pupil

Regulations require that, where a pupil is permanently excluded, the school’s budget share shall be reduced by

$$A \times \frac{B}{52}$$

where:

A = AWPU value appropriate to the age of the pupil at the time of exclusion. This will also include, where appropriate based upon the position of that pupil on the previous January’s School Census return, any additional funding based upon eligibility for free school meals, pupil premium, low attainment and IDACI

B = number of complete weeks remaining in the financial year. However, where an exclusion takes place between 1 April and 31 August and the pupil was due to leave that school by 31 August (e.g. the pupil is in Year 4 in a First School, Year 6 in Primary School, Year 8 in a Middle School or Year 11 or Year 13 in a High School), B = number of complete weeks until 31 August.

## **2. Following the Admission of Permanently Excluded Pupil**

Regulations require that, where a school admits a pupil previously permanently excluded from another school, their budget share shall be increased by

$$D \times \frac{E}{F}$$

where:

D = the amount of budget share removed from the school excluding the pupil in that financial year;

E = number of complete weeks remaining in the financial year following the admission of the pupil; and

F = number of complete weeks remaining in the financial year following the date of exclusion of the pupil from the previous school.