

Notice of Children's Services Overview and Scrutiny Committee



Date: Tuesday, 25 November 2025 at 6.00 pm

Venue: HMS Phoebe, BCP Civic Centre, Bournemouth BH2 6DY

Membership:

Chairman:

Cllr S Carr-Brown

Vice Chairman:

Cllr S Bull

Cllr O Brown
Cllr P Cooper
Cllr D Farr

Cllr E Harman
Cllr B Hitchcock
Cllr S Mackrow

Cllr D Martin
Cllr T Slade
Cllr O Walters

Parent Governor Co-opted Representatives

Diocesan Co-Opted Representatives

Mark Saxby

Youth Parliament Representatives

Ryan Cornish and Elliot Prentice

All Members of the Children's Services Overview and Scrutiny Committee are summoned to attend this meeting to consider the items of business set out on the agenda below.

The press and public are welcome to view the live stream of this meeting at the following link:

<https://democracy.bcpCouncil.gov.uk/ieListDocuments.aspx?MId=6094>

If you would like any further information on the items to be considered at the meeting please contact: Democratic Services on 01202 096660 or email democratic.services@bcpCouncil.gov.uk

Press enquiries should be directed to the Press Office by email at press.office@bcpCouncil.gov.uk or tel: 01202 118686

This notice and all the papers mentioned within it are available at democracy.bcpCouncil.gov.uk

AIDAN DUNN
CHIEF EXECUTIVE

17 November 2025

**DEBATE
NOT HATE**



Available online and
on the Mod.gov app

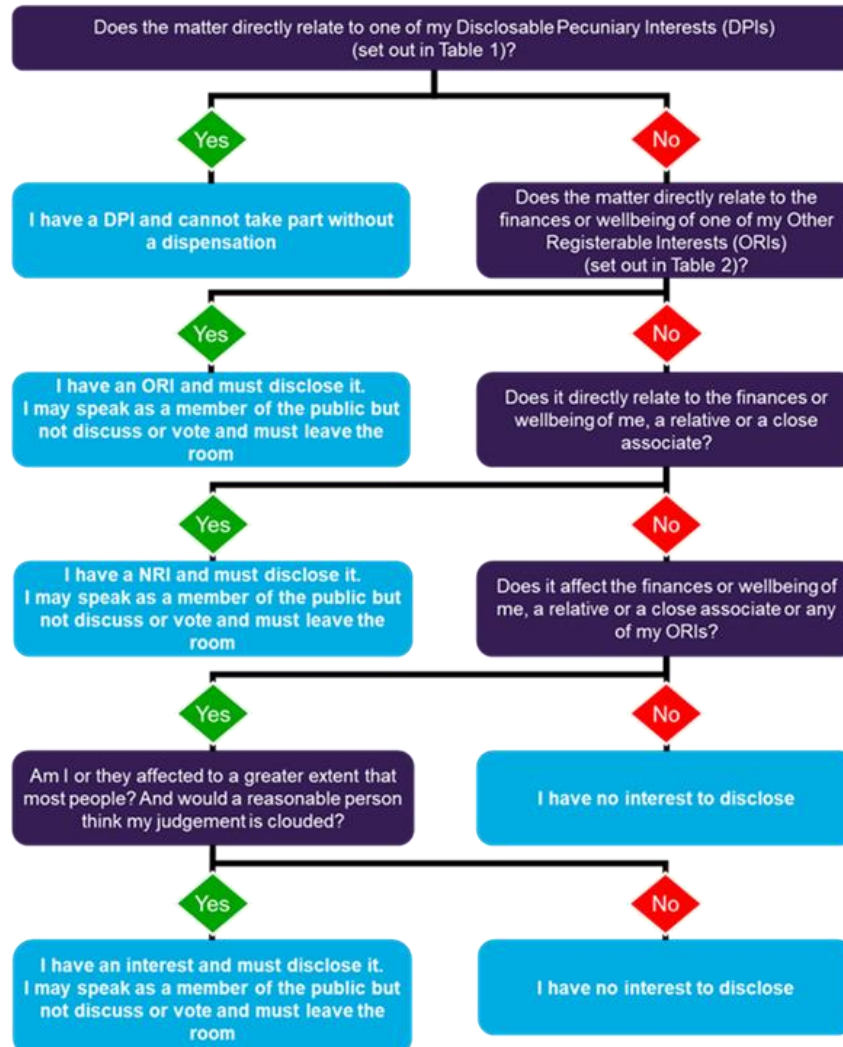


Maintaining and promoting high standards of conduct

Declaring interests at meetings

Familiarise yourself with the Councillor Code of Conduct which can be found in Part 6 of the Council's Constitution.

Before the meeting, read the agenda and reports to see if the matters to be discussed at the meeting concern your interests



What are the principles of bias and pre-determination and how do they affect my participation in the meeting?

Bias and predetermination are common law concepts. If they affect you, your participation in the meeting may call into question the decision arrived at on the item.

Bias Test

In all the circumstances, would it lead a fair minded and informed observer to conclude that there was a real possibility or a real danger that the decision maker was biased?

Predetermination Test

At the time of making the decision, did the decision maker have a closed mind?

If a councillor appears to be biased or to have predetermined their decision, they must NOT participate in the meeting.

For more information or advice please contact the Monitoring Officer

Selflessness

Councillors should act solely in terms of the public interest

Integrity

Councillors must avoid placing themselves under any obligation to people or organisations that might try inappropriately to influence them in their work. They should not act or take decisions in order to gain financial or other material benefits for themselves, their family, or their friends. They must declare and resolve any interests and relationships

Objectivity

Councillors must act and take decisions impartially, fairly and on merit, using the best evidence and without discrimination or bias

Accountability

Councillors are accountable to the public for their decisions and actions and must submit themselves to the scrutiny necessary to ensure this

Openness

Councillors should act and take decisions in an open and transparent manner. Information should not be withheld from the public unless there are clear and lawful reasons for so doing

Honesty & Integrity

Councillors should act with honesty and integrity and should not place themselves in situations where their honesty and integrity may be questioned

Leadership

Councillors should exhibit these principles in their own behaviour. They should actively promote and robustly support the principles and be willing to challenge poor behaviour wherever it occurs

AGENDA

Items to be considered while the meeting is open to the public

1. Apologies

To receive any apologies for absence from Councillors.

2. Substitute Members

To receive information on any changes in the membership of the Committee.

Note – When a member of a Committee is unable to attend a meeting of a Committee or Sub-Committee, the relevant Political Group Leader (or their nominated representative) may, by notice to the Monitoring Officer (or their nominated representative) prior to the meeting, appoint a substitute member from within the same Political Group. The contact details on the front of this agenda should be used for notifications.

3. Declarations of Interests

Councillors are requested to declare any interests on items included in this agenda. Please refer to the workflow on the preceding page for guidance.

Declarations received will be reported at the meeting.

4. Minutes

7 - 20

To confirm and sign as a correct record the minutes of the Meeting held on 15 September 2025.

a) Action Sheet

21 - 26

To consider any outstanding actions.

5. Public Issues

To receive any public questions, statements or petitions submitted in accordance with the Constitution. Further information on the requirements for submitting these is available to view at the following link:-

<https://democracy.bcpccouncil.gov.uk/documents/s2305/Public%20Items%20-%20Meeting%20Procedure%20Rules.pdf>

The deadline for the submission of public questions is 3 clear working days before the meeting.

The deadline for the submission of a statement is midday the working day before the meeting.

The deadline for the submission of a petition is 10 working days before the meeting.

6. Members of Youth Parliament Update

To receive a verbal update from the Members of Youth Parliament (MYPs).

ITEMS OF BUSINESS

- | | |
|--|----------------------|
| <p>7. Verbal update from John Coughlan on SEND improvement Journey
To receive a verbal update from John Coughlan regarding the SEND Improvement Journey.</p> | <p>Verbal Report</p> |
| <p>8. KLOE High Needs Dedicated Schools Grant Expenditure: Benchmarking and Strategic Direction</p> <p>This report responds to a request from the Children's Services Overview and Scrutiny Committee key line of enquiry to benchmark BCP Council's High Needs Block spend and strategic direction against similar local authorities. The purpose is to better understand the wider context of the Council's High Needs deficit and identify potential strategies for improvement.</p> <p>This report provides a strategic overview of BCP Council's High Needs Block position. It also contains comparative data and insights together with an evaluation of the effectiveness of measures taken to address the accumulated Dedicated Schools Grant (DSG) deficit.</p> <p>The report aims to support informed decision-making and provide assurance that all reasonable actions are being considered to address the financial challenges within the High Needs Block. improve financial sustainability and outcomes for children and young people with Special Educational Needs and Disabilities (SEND).</p> | <p>27 - 58</p> |
| <p>9. Permanent Exclusions and Suspensions</p> <p>This report provides an analysis of permanent exclusions and suspensions across Bournemouth, Christchurch and Poole (BCP), with a focus on trends over time, comparisons with national and regional data, and the disproportionate impact on vulnerable groups.</p> <p>Permanent exclusions in BCP have increased significantly in recent years, particularly in secondary and special schools. Pupils with special educational needs (SEND), those eligible for free school meals (FSM), and children with Education, Health and Care Plans (EHCPs) are consistently overrepresented in exclusion data. While national guidance emphasises that exclusions must be lawful, reasonable, and proportionate, BCP's figures indicate that these groups continue to face higher rates of exclusion than their peers.</p> <p>Suspensions have also risen sharply, with BCP's rates exceeding national, Southwest, and statistical neighbour averages across most phases. The number of pupils receiving one or more suspensions has nearly doubled since 2019/20, with the highest rates observed among pupils with EHCPs and those eligible for FSM.</p> <p>This report summarises the policy landscape and national challenges, sets out the council's strategic intent and framework for action and provides benchmarking data for permanent exclusions by phase, SEND status, and FSM eligibility, followed by a focus on suspensions data across the same</p> | <p>59 - 78</p> |

dimensions. The analysis aligns with the ambitions of BCP's Children and Young People's Partnership Plan, which sets out a vision for every child to lead a fulfilling and happy life. Reducing exclusions and improving outcomes for vulnerable learners remains a shared priority across the partnership and this is central to the work we have been doing to develop a BCP Belonging Strategy.

10. Home to School Transport

79 - 148

This report presents the findings of a strategic review undertaken by an external provider into the Local Authority's home to school transport arrangements focussing on our arrangements and provision for children and young people pupils with special educational needs and disabilities (SEND). The key objective of the review was to identify strategic and operational opportunities that support the development of independent travel options and make improvements to how home-to-school transport is delivered with a focus on potential efficiencies and service improvement.

It identifies key opportunities to introduce travel options that meet individual needs and help prepare young people for adulthood and promote long-term independence. Key issues include the complexity of transport arrangements, market capacity challenges, and the need for improved commissioning models that deliver better outcomes and value for money. The report presents a range of options and opportunities for future delivery and contained details of the investment necessary to achieve cashable savings and cost avoidance.

This report seeks approval to proceed with a formal tendering exercise to commission an external provider to implement a phased delivery of change proposals that encourage independent travel, build independence and reduce journey times for children and young people. The approach will be supportive of young people's development to help young people gain confidence and practical skills for travelling safely on their own will result in making school transport more efficient and sustainable.

Items for Information

11. SEND Sufficiency Strategy

149 - 166

This report provides an overview of the Special Educational Needs and Disabilities (SEND) Sufficiency Strategy 2024-2026. The SEND Sufficiency Strategy is a key part of the Council's work to deliver a sustainable and stable system, working in partnership to ensure that the needs of children and young people are met, without escalating costs, and supporting delivery of the High Needs Block of the Dedicated Schools Grant (DSG) Recovery Plan. The strategy is based on updated SEND projections presented in this year's annual school capacity return.

Given the scale of our immediate challenge, the SEND Sufficiency Strategy describes the actions we have been taking to respond to pressures in the system over a 2-year period. Details of our progress are contained in this report together with a summary of the key themes and strands of work that will be incorporated in a new refreshed SEND and

Alternative Provision Improvement Plan that is being developed for publication in May 2026.

12. Children's Services Key Performance Indicators Q1 2025-26	167 - 170
This report provides a performance update for the period April – June 2025 (Quarter 1 2025-26) for the key performance indicators relating to Children's Services as detailed in the Corporate Performance Scorecard. It should be noted that these are our amended KPIs and targets for the new financial year. They are based on our previous KPIs and therefore the focus, alignment to corporate priorities and ambitions have not changed. However, minor changes have been made to improve accuracy, clarity and to align with our internal reporting (which is also reviewed annually and set against national comparators whenever possible).	
13. Overview and Scrutiny Annual Report	171 - 262
This is the annual report of the Statutory Scrutiny Officer on Overview and Scrutiny (O&S) activity within BCP Council. There is a requirement to report on the work of O&S to the O&S Board and Committees and then to Council. This promotes visibility of the O&S function and Council ownership of activity and any improvements required. The annual report contains a summary and analysis of O&S activity during 2024-25, reflections on working practices and identified improvements to strengthen the O&S function. This report version is for consideration by the O&S Board and O&S committees, providing opportunity for comment prior to the supply of the final report to Council. The Council will be the decision maker on any recommendations for change within the report. The final report to Council will be updated to incorporate the views of the O&S Board and Committees on these recommendations.	
14. Children's Services O&S Data Use Toolkit	263 - 280
To adopt the Data Use Toolkit and implement it immediately to strengthen Overview & Scrutiny processes.	
15. Portfolio Holder Update	
To receive a verbal update from the Portfolio Holder for Children and Young People.	
16. Work Plan	281 - 290
The Overview and Scrutiny (O&S) Committee is asked to consider and identify work priorities for publication in a Work Plan.	

No other items of business can be considered unless the Chairman decides the matter is urgent for reasons that must be specified and recorded in the Minutes.

BOURNEMOUTH, CHRISTCHURCH AND POOLE COUNCIL
CHILDREN'S SERVICES OVERVIEW AND SCRUTINY COMMITTEE

Minutes of the Meeting held on 15 September 2025 at 6.00 pm

Present:-

Cllr S Carr-Brown – Chair

Present: Cllr O Brown, Cllr P Cooper, Cllr D Farr, Cllr E Harman,
Cllr S Mackrow, Cllr D Martin, Cllr T Slade, Cllr O Walters and
Cllr S Armstrong.

Also in attendance: P Martin, Parent Governor Representative
M Saxby, Diocesan Representative
L Bedwell, Deputy Member of Youth Parliament

16. Apologies

Apologies were received from Cllr Simon Bull.

17. Substitute Members

Cllr Sara Armstrong substituted for Cllr Simon Bull on this occasion.

18. Declarations of Interests

Cllr Armstrong declared that she was employed by an alternative provider provision who delivered Education and Health Care Plans (EHCPs) and would therefore leave the meeting following the conclusion of Agenda Item 7.

Cllr Mackrow declared a personal interest as a close family member is in receipt of an EHCP and accessed alternative provision.

Cllr Walters declared a personal interest as his wife worked for Dorset CAMHS.

19. Minutes

The minutes of the meeting held on 10 June 2025 were confirmed as an accurate record and signed by the Chair.

20. Action Sheet

The Chair highlighted the action sheet and advised the Committee that items highlighted in yellow would be removed.

21. Public Issues

The following questions and statement were received from Mr Adam Sofianos with the answers from the Portfolio Holder set out in response:

Question 1 – Agenda Item 9: Alternative Provision Improvement Plan

The data provided in the paper is alarming.

1372 children are accessing Alternative Provision – a headcount larger than all but 4 schools in BCP. 95% of these have SEN. 15% have been in AP for 3 or more years.

Equally critical is the experience of children during placement. At November 2024's meeting I requested some data on this, but was told it would be provided at a later meeting. 10 months later, I'm not aware of a full response.

So: what is the current overall rate for APs within BCP, for:

- i) sessions missed,
- ii) pupil distance travelled,
- iii) the proportion of pupils allocated places within 6 schooldays of exclusion, as required by law?
- iv) And of the current AP placements, what proportion is being fulfilled through an online provision?

[Ref for Nov 24:

<https://democracy.bcpccouncil.gov.uk/mgAi.aspx?ID=17866>]

Response from the Portfolio Holder:

- i) Attendance: We are currently implementing a system for capturing the attendance of children and young people who are placed in unregistered provision and not on a school roll. Attendance for State funded Alternative Provision Schools 2024/25 Academic Year:

Christchurch	Learning	Centre	–	50.38%
The Quay School				64.3%

National Average – 41.7% (2022/23 - latest Published from the DfE)

- ii) Some providers offer provision in different locations, so we are not able to currently report on this.
- iii) Of the 108 C&YP that went on to alternative provision in the 2024/25 academic year, 48% (52 C&YP) were allocated places within 6 school days of the exclusion. This is a figure that we are not happy with and we are addressing this through our service improvements.
- iv) We aren't able to currently report on this due to some providers offering online and face to face provision or a mixture of the two. We are setting up methods on how we can capture this going forward and aiming to implement this by October half term.

Question 2 – Agenda Item 8: SEND Improvement update

The outlook for SEND is grim. Costs continue to rise well above the government's appetite for funding. Service delivery fluctuates. Yet the need among our children is undeniable. Last year in BCP, 97% of needs assessments resulted in a plan. Nationally, over 98% of tribunal hearings end in a win for families.

With mounting political pressure to reduce children's rights, there's the potential for catastrophe. And far from reducing costs, this could turbocharge them.

Across both SEND and AP papers, and in national studies, we see one of the key drivers: that overall, schools and policies are not inclusive enough. But by securing more supportive cultures within schools, the Council could provide some resilience against any future attack on children's rights.

So, how is the Council addressing this, and in particular, what's happening with its Inclusion Strategy?

Response from the Portfolio Holder:

Thank you for your thoughtful and passionate reflection on the current landscape for SEND.

I share your concern about the pressures facing the system and the importance of protecting the rights and futures of our children and young people.

At BCP Council, we recognise that inclusive practice is not the responsibility of individual schools alone—it requires system leadership, shared accountability, and a culture of collaboration across education, health, care, and communities.

Our approach is rooted in partnership and co-production, and we are committed to working alongside schools rather than criticising them. I would like to emphasise that point as my background means that I understand the pressures and workings of schools. Working together always puts Children and young people first.

The Council's approach to inclusion is embedded through our Belonging Strategy, which launched in June 2025.

This strategy sets out our ambition for every child and young person to feel a sense of connection and belonging in their school and community.

It promotes inclusive values, early identification of need, and high-quality provision across all settings.

Our refreshed SEND Improvement Plan (2025–2027) is central to this work. Developed with partners including Parent Carer Forums, NHS Dorset ICB, and education providers, the plan focuses on eight priority areas, including:

- Early Identification and Intervention: Strengthening pathways to ensure children receive support before needs escalate.
- Inclusion: Supporting schools to develop inclusive cultures and practices, with targeted outreach and professional development.
- Communication and Co-production: Ensuring families are active partners in shaping services and provision.

We are also investing in system-wide support through initiatives such as:

- The development of a three-tier Alternative Provision model, aligned with national best practice.
- The creation of an Education Partnership Board, to provide strategic leadership and accountability.
- A renewed focus on trauma-informed and relational approaches, particularly for children with Social, Emotional and Mental Health needs.

We agree that reducing children's rights would be both ethically and economically damaging. Instead, our strategy is to build resilience through inclusive systems, earlier support, and strong relationships—with schools, families, and communities.

We welcome continued dialogue and scrutiny, and we are committed to reporting regularly on progress and impact.

Statement 1 – Agenda Item 11: CSCC Annual Report

On the subject of compliments, I'd like to add mine, for the incredible support given by officers to the Mudeford Wood Playgroup. As members will recall, the Group was given notice to leave its previous premises, and was weeks away from folding. Just before the summer, the Council offered to reopen the vacant Highcliffe Day Centre, and make accommodation for the Group and its families there.

Since then a huge amount of work has been done to get the site ready on time. I visited the Playgroup team recently, as they were putting the final touches together, and it looks amazing.

This is a reminder that the Council's portfolio of properties retains huge community value, and even vacant sites can solve so many challenges.

And it's a great example of what can be done together. I know how grateful everyone is.

22. Members of Youth Parliament Update

A Deputy Member of the Youth Parliament provided an update of all the MYPs recent activities, which included:

- Details were provided of the collation of young people's mental health experiences within schools and how they used the responses to create a video, which included filming at a CAMHS training facility.
- Planned video release for World Mental Health Day (10th October), with Children's Mental Health Week (9–15 February) as a backup.
- Scheduled a webinar the day before the video launch with a taster and Q&A session; and produced a promotional poster.
- Attended the UK Youth Parliament Annual Conference in Brighton in July and shared updates via BCP Council's social media.
- Worked on a Knife Crime Campaign, including planning a rugby/knife crime event with schools, police, and rugby organisations, which had to be postponed, however it had been rescheduled for 1st October at Meyrick Park with confirmed attendance from key stakeholders.
- Explored a pilot program to connect local armed services with young people through martial arts and knife crime education.
- Engaged the Police Crime Commissioner through a social media campaign to share responses with young people.
- Appointed as South West representative to the Youth Select Committee; advocated for standardizing PSHE curricula.
- Travelled to the House of Commons for committee induction and chair candidacy.
- Served on the Nightstop Dorset Board to represent youth perspectives in homelessness planning.
- Led sessions at BCP Youth Forum to gather diverse viewpoints on homelessness.

The Deputy MYP and Participation Worker responded to any questions raised and the Committee welcomed the update and offered to support the MYPs in any way they could.

Before moving on to the items of business, the Chair welcomed Cllr Farr to the Committee as a new member and also highlighted that Democratic Services were undergoing the process of electing new parent governor representatives due to the maximum term being reached by the current one and thanked the parent governor in attendance for all of his contributions to the Committee during his tenure.

The Chair also advised that following advice regarding good practice, it was her hope to invite a Parent Carer Forum representative to attend relevant Committee meetings moving forward. **ACTION.**

23. Children and Young Peoples (CYP) Mental Health (MH) Transformation update

The Head of Children's Services, NHS Dorset, NHS Mental Health Programme Lead and the Consultant Clinical Psychologist/ Clinical Lead presented a report, a copy of which had been circulated to each Member and a copy of which appears as Appendix 'A' to these Minutes in the Minute Book.

The CYP Mental Health Transformation Programme ("Your Mind Your Say") had progressed into the Mobilisation and Implementation phase following full business case approval and Phase 1 funding. Built around the THRIVE Framework, the programme represented a strategic, co-produced model for delivering integrated mental health support across NHS Dorset, Local Authorities, VCSE partners, and schools.

Key priorities included mobilising early help and crisis response teams, expanding community (VCSE) access, Governance had been identified to ensure oversight and alignment with BCP's Early Help Strategy and the Families First Pathfinder.

Funding had been approved, with future investment prioritised for MHST expansion. A Population Health Management dashboard would support outcome tracking and equity monitoring.

CYP and family voices remained central, with feedback mechanisms embedded throughout. Interdependencies such as the Neurodevelopmental Review and Tier 3.5 services were acknowledged but remain outside the programme's direct scope. Crisis alternatives were under review, with youth worker pilots informing future service design.

This transformation marked a significant shift in how mental health services were commissioned and delivered for children and young people in BCP.

The Committee discussed the report, including:

- Members found the presentation insightful and appreciated the context behind the sharp rise in demand and service gaps.
- It was noted that financial constraints were acknowledged, but the focus remained on adapting service delivery to support as many young people as possible.
- The Thrive model was praised for recognising individual journeys and offering a more personalised approach to care.
- Positive developments included reduced assessment and waiting times and increased face-to-face interventions.
- In response to a query about how feedback from users was being gathered, the Committee was advised that engagement with young people and families was embedded throughout the rollout, including regular check-ins and challenge sessions.
- Clarification was provided on how the Thrive model would be practically implemented and how staff were being brought on board.

- Officers explained the four needs groupings within the Thrive model and highlighted the current gap in early help provision.
- Plans were shared to create an integrated front door service, offering a single point of contact for families and professionals across health, education, and social care.
- The Committee was advised that the new service would operate seven days a week, with extended hours to improve accessibility for children and families.
- Recruitment of over 100 staff was planned, alongside workshops and consultations to support the cultural shift required.
- The Committee welcomed the enthusiasm for the model and raised questions about barriers to self-referral and access to youth work and creative activities.
- Officers confirmed that youth workers would be integrated into the early help teams and that digital access options were being explored.
- The importance of trusted, safe information sources was discussed, with plans to involve young people in shaping digital guidance platforms.
- Cornwall and Berkshire were cited as influential partners in developing the model, with Dorset adopting best practices to suit local needs.
- The model was described as flexible and collaborative, with a commitment to whole-system change supported by leadership and the Integrated Care Board.
- In response to a query about the potential increase in referrals and their impact on waiting lists, the Committee was advised that there potentially would be an increased demand but it was emphasised that early intervention would help reduce long-term complexity.
- Efforts were underway to rebalance the system and reduce reliance on long-term therapy.
- In response to a query about transition arrangements from CAMHS to adult mental health services, the Committee was advised that a working group had been established to align transformation programmes and improve transition pathways.
- Concerns were raised about SEND needs and the interface between health and local authority services and it was highlighted that joint commissioning was not yet fully developed but details were provided about ongoing collaboration and future opportunities.
- A question addressed how the impact of the new model would be measured, with the Committee being advised that both internal and external data reporting mechanisms were in place, and that new outcome measures were being explored.
- Empowerment, understanding, and validation were identified as key indicators of success, with plans for regular reviews and family engagement.

RESOLVED that the Committee note the report and request an update be provided in 18 months. (ADD TO THE WORK PLAN).

Voting: Nem. Con.

The Parent Governor Representative and Cllr Armstong left the meeting after the conclusion of this item at 7:30pm.

24. SEND Improvement Update

The Director of Education and Skills presented a report, a copy of which had been circulated to each Member and a copy of which appears as Appendix 'B' to these Minutes in the Minute Book.

The Special Educational Needs and Disability (SEND) Improvement programme of work had made significant progress over the past 6 months, including stabilising the workforce, improving plan quality, and continuing to implement the SEND Sufficiency Strategy. However, challenges remained in maintaining assessment timeliness and managing the growing demand for support at a statutory level.

Key focus areas include:

- Assessment process and timeliness including AI solutions
- Resolving disagreements including Tribunals
- Complaints /Improved communication with our families
- Addressing the high use of Education Other Than At School (EOTAS) and Alternative Provision (AP)
- Improving Co-Production across the system

The Committee discussed the report, including:

- Concerns were raised about the broken national SEND system and the impact of future funding uncertainties.
- Members discussed the importance of sustainability and risk planning, referencing national budget constraints and local inequalities in service access.
- It was noted that national direction supported early intervention and multi-agency collaboration, aligning with local plans to build inclusive leadership and support structures in schools.
- In response to a query, the Committee was advised of the need to provide support before an EHCP becomes necessary, aiming to reduce reliance on top-tier interventions.
- Questions were raised about lobbying efforts and long-term financial planning, with officers confirming ongoing representation at various levels of government.
- Tribunals were discussed as costly and emotionally taxing; early dispute resolution and mediation were highlighted as effective strategies to reduce tribunal rates.

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- Clarification was provided that 26% of EHCP assessment requests came from parents, with the remaining 74% from schools.
- Concerns were expressed about inconsistent school cultures and communication challenges; officers outlined efforts to improve warmth and efficiency in communication.
- Plans to introduce inclusion advisors and a portal for shared access to EHCP information were shared.
- The Committee discussed the importance of supporting schools through outreach, training, and inclusive leadership programmes.
- Staffing levels were reviewed, with permanent staffing reported at 93%; concerns about statutory review timeliness were acknowledged.
- Timeliness of EHCPs was reported at 68.5%, which was above national averages but lower than previous performance; system improvements including AI use were being implemented.
- Officers confirmed that AI would enhance plan consistency and free up staff time for better communication.
- Suggestions were made to explore graduate schemes and immigration sponsorship to address educational psychologist shortages.
- Trading of services to schools was discussed, with the Committee being advised of existing traded elements and ensuring high-quality offers where available where appropriate.
- The Committee explored the role of the ordinarily available provision and graduated approach, with plans to co-produce tools with SENCOs.
- The Inclusion Fund was discussed, with updates on recruitment for inclusion advisors, outreach agreements, and training rollouts.
- Suspension and exclusion data was reviewed; targeted support for schools with higher rates was being implemented.
- Questions were raised about equitable access to services across different SEND groups, and the Committee was advised this could be explored further.
- Concerns were expressed about the need for 800 new specialist places; contingencies including the Parkfield site were being pursued.
- The Committee discussed the importance of early intervention to reduce long-term demand for specialist placements.
- Members asked about data gaps in the dashboard; officers explained term-based reporting and confirmed availability of full-year data.
- The Committee concluded by noting the report and acknowledging the thorough discussion.

The Chair came back to this item later in the meeting to ask the Committee and Officers if they would be agreeable to adding the Inclusion Fund Progress to the work plan for monitoring and there was no dissent. **ADD TO WORK PLAN.**

RESOLVED that Members note the progress and challenges of the SEND Improvement Programme.

Voting: Nem. Con.

25. Alternative Provision Improvement Plan

The Director of Education and Skills presented a report, a copy of which had been circulated to each Member and a copy of which appears as Appendix 'C' to these Minutes in the Minute Book.

The report provided an update on the Local Authority's work to improve the quality, consistency, and oversight of Alternative Provision (AP) for children and young people who were unable to access mainstream education.

In response to national policy direction and local priorities, the Council was developing a three-tier model of AP that promoted early intervention, targeted support, and specialist provision. The model was designed to reduce exclusions, improve outcomes, and ensure that AP was used as a short-term, purposeful intervention rather than a long-term destination.

The report outlined the rationale for change, the options considered, and the preferred approach. It also set out the implications of the proposed model in relation to sustainability, public health, legal compliance, workforce development, and commissioning. The report was presented for information only and provided an overview of progress to date and the next steps in implementation.

The Committee discussed the report, including:

- A member queried the spike in AP placements in Years 7–11 and was informed that this reflected curriculum challenges, mental health issues, and delays in accessing specialist placements.
- Concerns were raised about younger learners in AP and the nature of their provision, which the Committee was advised included therapeutic packages and tutoring.
- Questions were asked about unregistered AP providers, with officers confirming that a new Dorset-wide quality assurance framework was being launched to ensure consistency and oversight.
- The Committee was informed that a multi-agency AP panel had been established to assess individual placements and monitor value for money.
- Tracking of individual children in AP had improved through the use of Welfare Call system and dedicated teams within the SEND service.
- A member raised concerns about attendance rates in AP, which stood at 50% for registered providers, and officers explained the rationale for using Welfare Call to monitor attendance.
- Clarification was provided on the composition of the AP panel and AP working group, which included schools, health, colleges, and parent carer forums.

- The Committee discussed the routes into AP, including exclusions and EHCPs, and officers agreed to provide further data on this breakdown. **ACTION.**
- It was noted that 81% of children in AP had EHCPs, which was not unusual nationally, but the overall number of children in AP was high.
- Questions were raised about the safeguarding and quality audit for AP providers, with officers confirming it was reported to the Education Quality and Performance Board.
- The Committee discussed the implementation of a three-tier AP model and the collaboration required across schools, the local authority, and health partners.
- Officers described engagement with headteachers, trust CEOs, and external trusts to support the AP model and reduce costs.
- The Committee asked about monitoring and quality assurance processes for AP placements, including visits and feedback from children and families.
- It was confirmed that the children's rights and engagement team would be involved in developing these processes.

RECOMMENDED that the Committee support:

- a. the progress made in developing a three-tier model of AP in line with national guidance and local strategic priorities.**
- b. the preferred model and the rationale for its selection, as set out in the options appraisal.**
- c. the next steps in implementation, including further stakeholder engagement, development of service specifications, and alignment with wider SEND and inclusion reforms.**

Voting: Nem. Con

26. BCP Safeguarding Children Partnership Yearly Report 24/25

This report was circulated for information only with no discussion in Committee.

The report for the period April 2024-March 2025 set out that since the dissolution of the 'Pan-Dorset Safeguarding Children Partnership', the new BCP Safeguarding Children Partnership has focussed on implementing new arrangements to fulfil the statutory responsibilities of the three statutory safeguarding partners who had joint responsibility and accountability for the multi-agency safeguarding arrangements in the BCP geographical area. The three statutory safeguarding partners were BCP Council, NHS Dorset ICB and Dorset Police. Within this period of significant change, partners had maintained a focus on safeguarding children and through the new arrangements had gained insights on the effectiveness of how well partners worked together to safeguard local children and young people, and

areas to be developed. Full details of the multi-agency safeguarding arrangements could be seen [here](#).

The report provided an account of:

- What we had done as part of our local arrangements, including any child safeguarding practice review
- Impact of learning from local and national reviews
- How we had applied independent scrutiny to review and challenge our safeguarding practice
- How education partners were engaged with
- Future improvements that could be made as to the effectiveness of local safeguarding arrangements.

The report would be submitted to the [Child Safeguarding Practice Review Panel](#) by 30 September 2025 and would be published on the BCP Safeguarding Children Partnership website.

27. Children's Services Compliments and Complaints Annual Report 2024-25

The report was circulated for information only with no discussion in Committee and provided an update on the compliments, complaints and representations made to BCP Council about Children's Services during 2024-25.

28. Portfolio Holder Update

The Portfolio Holder for Children, Young People, Education and Skills provided an update including:

- Noted that the SEND inspection had still not taken place.
- Highlighted that the Headteachers (Schools) Forum was scheduled for the 29 September 2025.
- Officers met with the DfE to review progress on the Families First Program; feedback was positive and a range of partners were supporting the initiative.
- Confirmed establishment of the new Quality Assurance Board for children's social care, replacing the Improvement Board; significant work had been undertaken to ensure appropriate membership and governance.
- Attendance at both the new Quality Assurance Board and the updated SEND Improvement Board.
- Safeguarding training for all Councillors was scheduled for 28 October; members were asked to emphasise its mandatory nature to colleagues. **ACTION.**
- Welcomed the new Chief Executive on his first day and ensured Children's Services was prioritised.

- Acknowledged release of exam results in August for A/AS/T levels and GCSEs; congratulations were issued via media and provisional results suggested strong performance by BCP schools.
- Noted that validated DfE data would be available in time for the 26 January committee meeting, should members wish to review it.
- Confirmed attendance at the Smartphone-Free Childhood event on 7 October; all schools had been notified and invited.
- Announced the BCP STAR Awards for care-experienced young people aged 16–25, scheduled for Saturday 7 November at the Bournemouth Life Centre.

The Chair thanked the Portfolio Holder for his update.

29. Work Plan

The Committee was asked to consider its work priorities for publication in a Work Plan.

The Chair highlighted the budget item due to come to the November meeting and the suggested topics received and advised that they fell within the inclusion area and SEND overspend and that she would circulate a Key Lines of Enquiry form to the Committee to help shape the report as soon as possible, before sharing with Children's Services. **ACTION.**

The Chair also highlighted two reports due to go to Cabinet in October as the Home to School Transport Policy and Special School Funding Review and that these would be shared with the Committee once published and any comments can be shared with the Chair or taken directly to Cabinet. **ACTION.** The Chair advised the Committee she had requested both Cabinet reports come to the next meeting for a brief update. **ADD TO WORK PLAN.**

The meeting ended at 9.00 pm

CHAIR

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ACTION SHEET – BOURNEMOUTH, CHRISTCHURCH AND POOLE CHILDREN’S SERVICES OVERVIEW AND SCRUTINY COMMITTEE

Updated – 9 10 2025

Minute number	Item and	Action* *Items remain until action completed.	Lead officer	Progress – (when/ where/how update will be provided)	Outcome (where recommendations are made to other bodies)
	19 September 2024				
22	Work plan – CS Budget Working Group Childrens Services Budget Update.pdf	Decision Made: The Committee was advised that officers would provide a breakdown of agency staff and their positions within the service to the Committee. Action – Officers aware	Finance Manager	To be reviewed under new recruitment and retention work following pay and reward.	
	26 November 2024				
41	Work plan – CS Budget Working Group Forward Plan cover report CS Nov 2023.pdf	Decision Made: That the O&S Board recommends that Children’s Services Officers: 1. Increase awareness of school transport options through engagement and co-production with parents and carers, in order to reduce the impact on the school transport budget wherever possible.	Tanya Smith		Paper going to Cabinet in October coming November 2025

		Action – recommendation sent to officers and update requested			
	28 January 2025				
49	Children in Care and Care Experienced Young People Sufficiency Report Children in Care and Care Experienced Young People Sufficiency Report.pdf	Decision Made: The officers agreed to share the final governance and quality assurance framework with the Committee once agreed and signed off as final. Action – Officers aware The Committee agreed to continue discussions outside the meeting regarding the best ways to address the barriers identified in the report and to reach an agreement on how the Committee will receive that information. Action – Officers aware	Head of Children's Commissioning	Work still in progress. Dates to follow.	
	11 March 2025				
	Children and Young People's Partnership Plan 2025-2030 Children and Young Peoples Partnership Plan 2025-2030.pdf	Decision Made: It was agreed that the KPIs for this would be shared with the Committee. Action – Officers aware	Head of Performance, Governance & Systems	KPIs have not yet been agreed. The next meeting is 20 October 2025.	

	Young Peoples Partnership Plan 2025-2030.pdf				
	SEND Improvement Update <u>SEND Improvement Update.pdf</u>	Decision made: The officers agreed to share the full review of the DSG finances as well as the SEND improvement board's response to the review. Action – Officers aware The Committee requested an update on the ongoing work regarding education outside of school and home education and asked that it be shared with the Committee. Action – Officers aware	Director of Education and Skills Interim SEND Improvement Officer		
	10 June 2025				
10	<u>Recommendations from Council - Rebirth of Youth Services</u>	Decision Made: Children's Services agreed to consider when they could provide the report and updated the Committee outside of the meeting. Action – Officers aware	Corporate Director of Children's Services		Action sent to Shirley.
12	<u>Housing for Care Experienced Young People</u>	Decision Made: It was Proposed, Seconded and RECOMMENDED that the Committee seeks assurance that the new Joint Housing protocol has been successfully agreed and is working effectively to ensure our Care Experienced Young People are seeing an	Director of Housing and Communities		Agreed with Housing in meeting that update would come as a committee report in

		improved service and are in receipt of timely advice and safe housing that suits their individual needs and hopes for the future. Action – Officers aware			January - ADDED TO WORK PLAN
	15 September 2025				
22	<u>Members of Youth Parliament Update</u>	Decision Made: The Chair also advised that following advice regarding good practice, it was her hope to invite a Parent Carer Forum representative to attend relevant Committee meetings moving forward. Action – Committee aware		PCF rep been invited to November 2025 meeting.	
25	<u>Alternative Provision Improvement Plan</u> <u>Alternative Provision Improvement Plan Final.pdf</u>	Decision Made: The Committee discussed the routes into AP, including exclusions and EHCPs, and officers agreed to provide further data on this breakdown. Action – Officers aware	Director of Education and Skills		
28	<u>Portfolio Holder Update</u>	Decision Made: Safeguarding training for all Councillors was scheduled for 28 October; members were asked to emphasise its mandatory nature to colleagues. Action – Committee aware			

29	<u>Work Plan</u>	Decision Made: The Chair highlighted the budget item due to come to the November meeting and the suggested topics received and advised that they fell within the inclusion area and SEND overspend and that she would circulate a Key Lines of Enquiry form to the Committee to help shape the report as soon as possible, before sharing with Children's Services. Action – Committee aware The Chair also highlighted two reports due to go to Cabinet in October as the Home to School Transport Policy and Special School Funding Review and that these would be shared with the Committee once published and any comments can be shared with the Chair or taken directly to Cabinet. Action – Officers aware			

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Report subject	KLOE High Needs Dedicated Schools Grant Expenditure: Benchmarking and Strategic Direction
Meeting date	25 November 2025
Status	Public
Executive Summary	This report responds to a request from the Children's Services Overview and Scrutiny Committee key line of enquiry to benchmark BCP Council's High Needs Block spend and strategic direction against similar local authorities. The purpose is to better understand the wider context of the Council's High Needs deficit and identify potential strategies for improvement. This report provides a strategic overview of BCP Council's High Needs Block position. It also contains comparative data and insights together with an evaluation of the effectiveness of measures taken to address the accumulated Dedicated Schools Grant (DSG) deficit. The report aims to support informed decision-making and provide assurance that all reasonable actions are being considered to address the financial challenges within the High Needs Block. improve financial sustainability and outcomes for children and young people with Special Educational Needs and Disabilities (SEND).
Recommendations	It is RECOMMENDED that the Committee Use the information in the report to support informed decision-making about the measures and actions necessary to improve financial sustainability. The committee is advised to endorse a strategic package of improvement that includes early intervention, strengthened Education Health and Care Plan (EHCP) oversight, expansion of local provision, and improved dispute resolution. These actions are designed to reduce demand pressures, deliver better value for money, and align with an emerging High Needs Block Recovery Plan. The approach demonstrates that the Council is actively pursuing reasonable, evidence-based strategies to address the High Needs Block deficit while improving outcomes for children and young people with SEND.
Reason for recommendations	- To support overview and scrutiny committee's role in testing and challenging the High Needs Block position and to ensure that BCP Council is learning from best practice elsewhere. - To support the delivery of the Statutory Direction to improve SEND Services in BCP.
Portfolio Holder(s):	Richard Burton, Portfolio Holder for Children's Services
Corporate Director	Cathi Hadley, Corporate Director for Children's Services
Report Authors	Lisa Linscott, Director for Education and Skills
Wards	Council-wide
Classification	For Recommendation

1. Purpose

- 1.1 The quarter two budget monitoring report provides an update on the DSG high needs forecast which is indicating a funding gap of £71 million compared with a budgeted gap of £57.5 million. This is largely due to rising demand for support. The cumulative deficit for March 2026 is projected at £183 million.
- 1.2 The Children's Services Overview and Scrutiny Committee has identified key lines of enquiry contained in **Appendix 1** to better understand the wider context of the Council's High Needs deficit and identify potential strategies for improvement. The committee's objective is to understand why BCP Council is experiencing a higher deficit than similar authorities, and to identify actionable solutions. The key questions/lines of enquiry provide the structure for this report including:
- Details of our accumulated DSG deficit and a comparison with other local authorities as appropriate. This report identifies the current activity and associated cost in the SEND system.
 - Details of the action and impact of measures and advice undertaken in BCP,
 - An assessment of the effectiveness of BCP's own measures compared with other authorities.
 - Benchmarking data to help contextualise our problems and help find solutions.

2. National Context

- 2.1 In 2024, the National Audit Office (NAO) published a review of the support for children and young people with special educational needs. High needs deficits have increased significantly in the past 10 years to the point that the financial sustainability of a growing number of local authorities is a concern. For a number of years, central government has allowed local authorities to hold SEND deficits separate from their main revenue accounts, typically referred to as the 'statutory override'. This has been used as a temporary solution to address increasing deficits; however, this cannot be used as a long-term answer.
- 2.2 The NAO report shows that while there has been a 58% real terms increase in DfE high needs funding between 2014/15 and 2024/25 to £10.7 billion, 43% of local authorities will have deficits exceeding or close to their reserves by March 2026. Overall, this contributes to a national cumulative deficit of between £4.3 billion and £4.9 billion. Whilst funding has increased, this has not kept pace with the rise in the number of EHCPs, resulting in funding per plan decreasing by 35% over the same period. The system is both unsustainable financially, and crucially, not delivering outcomes for children despite record spend. State special schools are over capacity, potentially leading to poor outcomes. This may mean children are not in the most appropriate setting, including more expensive independent schools where the number of children with EHCPs increased by 17,000 between 2018/19 and 2023/24. This cost local authorities £2.0 billion in 2022/23, a real-terms increase of 46% from 2018/19. The NAO report concludes that if left unreformed, the SEND system is economically unsustainable. Looking ahead, for 2027/28 there is an estimated mismatch of between £2.9 billion and £3.9 billion when comparing current funding, maintained in real terms, against forecast costs.
- 2.3 SEND tribunal and appeals data underlines how challenging the SEND system has become. Since April 2018, in addition to judgements relating to education provision, the SEND Tribunal has also been able to make non-binding recommendations on the health and social care elements of EHCPs. Statistics from the Ministry of Justice show that in 2023/24, 17,000 outcomes in relation to SEN appeals were recorded, a 43% increase compared with the previous year, 2022/23. Data from 2014/15 shows 3,300 recorded outcomes for SEN appeals meaning that since the 2014 reforms, appeals have increased exponentially by four times (415%). Furthermore, 11,000 SEN appeals were decided by tribunal in 2023/24. This is more than twelve times (1288%) the number in 2014/15 of 792. In 2023-24, nationally the local authority success rate was 1.3% of cases that went to a full hearing, meaning they won only 150 out of 11,157 cases. The increase in appeals is likely due to several factors, including the growth in families seeking assessments, the continued effect of the 2014 SEND reforms, and the expansion of the tribunal's powers to make recommendations on health and social care.

- 2.4 DfE statistics show that the number of EHCPs has increased to unsustainable levels over the past decade, increasing from 240,183 in 2014/15 to 638,745 by January 2025. This is an increase of 166% across this time period, and in the last year alone, January 2024-2025, there has been an increase of 10.8%. In 2024, 105,340 EHC needs assessments were carried out; this is 15.7% more than in 2023. 46.4% of plans were issued within the 20-week statutory timescales. Timeliness has decreased over time as demand has increased. In the 2024/25 academic year there were 482,640 pupils in schools in England with an EHCP. This is an increase of 11.1% from 2023/24. 5.3% of all pupils in England now have an EHCP, an increase of 4.8% from the previous year.
- 2.5 The workforce challenges are widespread, with shortages among services such as speech and language therapists, health visitors and Educational Psychologists (EPs). In 2023, the DfE report into educational psychology services found that 88% of local authorities' Principal EPs reported that they were currently experiencing difficulties recruiting. Early support is essential for helping children thrive and a key moment to build relationships with parents. The statutory requirement for EP advice for all EHCPs means that this valuable resource is deployed for assessment rather than intervention purposes. EPs themselves have called for their role to do more early intervention and systemic work as part of a graduated response to prevent children and young people's needs from escalating, and therefore potentially reducing the demand for EHCPs.
- 2.6 School capacity data from 2023/24 shows that around 8,000 more secondary pupils are on roll in special schools than the reported capacity. Around two thirds of special schools report they are at or over capacity. It is important to acknowledge that current measurements of capacity do not take type of need into account, meaning the real term levels of capacity may be even more stretched. Since 2014/15 there has been an increase of 60% in placements in state-funded special schools, while placements in independent and non-maintained special schools (INMSSs) have risen 132%. Based on the current system, local authorities forecast that the total anticipated number of pupils in years Reception to 11 with an EHCP that will need a place in specialist provision to be an estimated at 273,000 by 2028/29.
- 2.7 The recent LGA and Isos Partnership report on the future of home to school transport shows that in 2023/24, local authorities spent £2.25 billion on transporting children and young people (with or without SEND) to school and college. This figure has grown dramatically over the last decade – by £1.23 billion, which represents 122% increase. The percentage of children eligible on account of their SEN has increased from 32% in 2021 to 40% in 2025. The research suggests that the average cost per child of providing SEND transport is around £9,000 per year compared with an average cost per child of providing mainstream transport of around £3,000 per year. Home to school transport for pupils under 16 with SEND is the highest proportion of expenditure, which, alongside the higher-than-average cost of SEND transport provision, means it accounts for three-quarters (75%) of the growth in expenditure between 2015/16 and 2023/24.
- 2.8 The Isos Partnership research has previously looked at factors that were contributing to higher demand and cost. Those most commonly reported to them by local authorities included:
- Extension of local authority responsibilities to include the 16-25 age range
 - Increased demand for special school places, with pressures on local capacity leading to increased use of placements in the independent/non-maintained sector
 - Reduced inclusivity of (some) mainstream schools
 - Higher rates of school exclusion and use of alternative provision
 - Greater complexity of need (with particular growth in numbers of children with an Autism diagnosis and those with social, emotional and mental health difficulties (SEMH))

While the Isos Partnership research identified some influence of increasing levels of need and demographic changes, a number of the above factors were reported to be linked to the impact of national policy, particularly expectations generated by the national SEND reforms (without funding to match statutory requirements) and increased attainment pressures on mainstream schools (which were making it more difficult for them to prioritise effective provision for SEND and inclusion).

- 2.9 A total of 38 local authorities with the highest deficits (at a point in time) have been on the government's Safety Valve programme, with agreements signed across four rounds between

2020-21 and 2023-24. The government is no longer entering into new agreements for this programme. The program provided significant extra funding in exchange for a commitment to reducing deficits through specific actions. The success rate is not officially published but there are reports that indicate that many councils are struggling to meet their targets. A further 54 local authorities (including BCP Council) have participated in the Delivering Better Value (DBV) Programme, which provided much smaller sums of financial support. The programme has led to a DBV Toolkit being produced which provides guidance on diagnostic and improvement activities. It does not indicate what the financial improvements from the programme were.

3. Background In BCP Council

- 3.1 BCP Council received a statutory direction from the Department for Education (DfE) in February 2024 due to ongoing concerns about its SEND services and the local area partnership. This followed a series of inspections and monitoring visits that highlighted systemic weaknesses in provision, system leadership, and outcomes for children and young people with SEND. A roadmap of our improvement activity is set out in **Appendix 2**. A summary timeline of SEND Improvement and Statutory Direction in BCP Council is as follows:

December 2021 – Initial SEND Inspection

- A joint inspection by Ofsted and the Care Quality Commission (CQC) found significant weaknesses in the local area partnership SEND services.
- The inspection judged the overall effectiveness of the council's SEND provision to be inadequate, citing poor coordination, inconsistent support, and weak strategic oversight.

2022–2023 – Monitoring and Limited Progress

- The DfE conducted monitoring visits throughout 2022 and 2023 to assess progress against the inspection findings.
- Despite some efforts to improve inclusion and early intervention, the council was found to be failing to meet required standards, particularly in EHCP timeliness, parental engagement, and service integration.

February 2024 – Statutory Direction Issued

- The Secretary of State for Education issued a formal statutory direction to BCP Council under the Children and Families Act 2014.
- The direction required BCP Council to work at pace with partners—including NHS Dorset, schools, multi-academy trusts, and parent/carers forums—to improve SEND services.
- A diagnostic review was conducted, leading to the development of a new SEND Improvement Plan focused on system-wide reform.

March 2024 – Scrutiny and Oversight

- The council's Children's Services Overview and Scrutiny Committee reviewed the statutory direction and the improvement plan.
- Key priorities included improving EHCP processes, expanding local provision, and rebuilding trust with families.
- BCP Council began implementing its SEND Improvement Plan, aligning it with its DSG Recovery Plan and Delivering Better Value programme.
- There is robust governance of the SEND Improvement Plan in place, and the Board has an Independent Chair and representation from the DfE at every Board meeting.
- A total of 8 areas of improvement were identified, and these are summarised in **Appendix 3**.
- While some progress was made in expanding local provision and improving inclusion, EHCP growth continued, and tribunal appeals rose.
- The statutory direction remains in place as of late 2025, with ongoing DfE oversight and quarterly progress reporting. BCP Council and the local area partnership is undergoing its local area SEND Inspection at the point of this report being written.

2024 Safety Valve Agreement

- A safety valve agreement was sought and declined by the DfE.
- BCP Council submitted the 15-year plan. Having worked with finance support, the DfE felt that the plan was challenging but realistic. However, the DfE were unable to agree to the 15-year timescale.

December 2024 1% Schools Block transfer

- This was requested and denied by the DfE. However, Schools Forum agreed to a surplus £1.2m being transferred from the Schools Block for use on the development of three projects focused on inclusion:
 - Increased outreach support
 - Training programmes into schools
 - Trial of local authority Inclusion Lead role to support whole school inclusive practice

4.0 Current Status

- 4.1 BCP Council is under monitoring by the DfE and must, with the local area partnership, demonstrate sustained improvement to lift the statutory direction. In October 2025 the DfE conducted a progress review against the written statement of action, in which they found a number of areas of positive progress: ‘..it was clear to witness the significant progress the partnership has made to improve inter and between agency working to deliver better for children and young people with SEND in Bournemouth, Christchurch and Poole (BCP).’ The review found that ‘Over the two-day review, it was evident that the partnership has laid important foundations—through improved collaboration, strengthened governance, a restructured SEND service, and health transformation plans—to drive better outcomes for children and young people. And considering where the partnership has been over the last two years, this is something we recognise and acknowledge.’ However, the review also confirmed that some improvements are yet to yield impact or are in the early stages of delivery. The findings of the review aligned fully with our own self-assessment.
- 4.2 Following a partnership review of the SEND Improvement Plan, an updated SEND and Alternative Provision Improvement Plan has been developed and approved by the SEND Improvement Board in September 2025. This is an indication of the significant progress that has been made against the original plan, and the proactive approach the council and partners have taken to moving the plan on to its next iteration. The plan contains a section on managing resources which explicitly includes action 8.2 to develop and deliver a High Needs Block deficit recovery plan.
- 4.3 The DSG is allocated to councils largely according to relative needs with some elements of historic funding (based on historic actual costs) still working through the system after implementation of the national funding formulae for the different funding blocks of the DSG. BCP Council is in the bottom third of the 151 local authorities in the country in terms of the amount of high needs funding per pupil received from the DfE. The largest element of this funding is being uplifted by the minimum guaranteed percentage each year. This is due to historic funding levels across the three legacy councils being ahead of the current high needs national funding formula calculations. A relatively small amount of high needs funding is based on demand activity. Some other councils will be receiving above minimum increases and improving their relative funding positions. The overall amount of funding allocated to high needs by the DfE must increase significantly and especially in the short term until any national reforms can be developed, considered with stakeholders and start being implemented. The delay to the Schools White Paper shows how difficult this will be.
- 4.4 In terms of DSG funding per mainstream pupil, BCP is in the bottom 10%, being the 14th lowest funding of 151 local authorities. This reflects the relative needs of BCP schools compared with others (in terms of pupil deprivation and attainment, for example), that BCP is a generally low-wage area, BCP has an efficient size of school (fewer schools overall for the number of pupils) and only one school (now closed) has attracted funding for sparsity (allocations which benefit rural counties). Rural counties have historically been a particular focus of the F40 group campaigns for fairer funding, (see the F40 group ([Home - f40](#)) for further information) does also

include conurbations such as York, Wakefield and Plymouth). The tables below compare BCP with the highest and lowest funded local authorities:

- 4.5 To note, tables 1 and 2 below are based on information from the F40 group and used by other Local Authorities to present their position relative to all England authorities.

Table 1: Gross DSG 2025/26

	2025 / 26 Gross DSG	Per Mainstream Pupil	Comment
Lowest funded	Rutland	£7,857.11	BCP is funded 6.46% higher than the lowest funded local authority
14 th lowest out of 151	BCP	£8,364.84	
Highest funded	Camden	£13,255.61	BCP is funded 36.9% lower than the highest funded local authority

Table 2: HNB Funding 2025/26

	2025 / 26 HNB Funding	Per Pupil Allocations	Comment
Lowest funded	East Riding	£968.64	BCP is funded 19.28% higher than the lowest funded local authority
47 th lowest out of 151	BCP	£1,199.93	
Highest funded	Camden	£3,564.95	BCP is funded 66.35% lower than the highest funded local authority

- 4.6 The council is developing an updated High Needs Recovery Plan and associated governance structure. BCP Council's external auditor has confirmed that the Council should:

- Update its DSG management plan and ensure the actions are embedded and monitored. Further action should be identified if the current actions are not having the impact as intended to ensure action is taken at pace
- Continue to monitor the impact of the DSG deficit on the cashflow position
- Ensure it monitors and manages the level of reserves and increase its level of reserves where possible.

- 4.7 To ensure continued progress, strengthening partnerships with our schools remains a key priority. During the Spring and Summer terms of 2025, BCP Council hosted the Belonging Conferences with Early Years Providers and Schools to introduce the Belonging Strategy. Both events featured distinguished BCP and national speakers who led engaging discussions on inclusive practices. As a Local Authority, we are committed to providing appropriate support that empowers providers to address the diverse needs of children and young people. This includes adopting a graduated approach and upholding the core principles of inclusion.

- 4.8 BCP have secured funding from the DfE SEND Intervention Support Fund to drive improvement and transformation within Education Services leading to development in three key areas:

- The BCP graduated approach and Ordinarily Available Provision toolkit to provide timely, high-quality support and services to children and young people through early intervention.
- A sustainable three tier Alternative Provision model based on best practice with improved monitoring and oversight.

- Inclusive whole school practice with the support of an established educational charity (The Difference).

4.9 As part of BCP Council's SEND Sufficiency Strategy, we have delivered 140 additional specialist places during the academic year 2024 – 25 and the plan for delivering beyond this is mapped out in the November report to Children's Services Overview and Scrutiny. We have been gradually reducing the percentage of children in independent non-maintained schools, but it is still above national average, which is why the delivery of the rest of planned growth in specialist places is key.

5. Key Lines of Enquiry – DSG Deficit

5.1 **Accumulated DSG Deficit Comparison:** *Please provide the latest data for BCP's level of accumulated DSG deficit compared with other local authorities.*

The LGA report that the national high needs block funding for SEND rose from £5.3 billion in 2014-15, to £9.4 billion in 2024-25. On top of national funding, councils spent an additional £950 million on SEND expenditure that should have been covered by the DSG in 2023-24 alone (the analysis for actual spend is not yet available for 2024-25).

The LGA estimates that nationally local government's cumulative high needs deficit stands at £3.15 billion for March 2025, noting that this figure would be closer to £4 billion without additional money being invested via the safety valve programme for councils that had the highest deficits at a point in time. Total deficits are projected to rise to £5 billion by 2026. The National Audit Office's (NAO's) recent report, states that 43 per cent of councils are on track to have deficits approaching or exceeding their reserves by March 2026. BCP has already reached that position in March 2025.

National data is not readily available at individual local authority level, and 38 authorities are in the safety valve programme with the benefit of significant additional funding which can make comparisons misleading. However, the comparison of BCP with our statistical neighbours is summarised in table 3 below:

Table 3: Benchmarking of DSG Deficits – BCP Statistical Neighbours for March 2025

DSG Accounts 2024/25	In-Year Deficit/ (Surplus) 2024/25 £000's	Cumulative Deficit/ (Surplus) March 2025 £000's	Final DSG 2024-25 £000	In-Year Deficit / DSG %	Cumulative Deficit/ (Surplus) DSG %
BCP	49,745	113,257	365,830	14%	31%
Southend-on-Sea	4,550	-£7,098	207,763	2%	-3%
East Sussex	£22	-£2,836	508,795	0%	-1%
Kent*	30,315	97,483	1,777,974	2%	5%
West Sussex	52,672	123,206	858,126	6%	14%
Devon*	48,545	167,307	720,542	7%	23%
Bedford	1,532	326	225,561	1%	0%
Milton Keynes	-1,647	-5,055	368,359	0%	-1%
Norfolk*	50,378	131,891	857,973	6%	15%
Bexley*	-3,344	12,991	311,945	-1%	4%
Essex*	34,744	-1,728	1,577,095	2%	0%

Note: Information has been extracted from the draft accounts of these councils. Those marked * have safety valve agreements. Some councils have added general fund contributions towards their deficits as part of their safety valve agreement or otherwise agreed with the DfE. An in-year deficit where the DSG is in credit (such as for Southend-on-Sea) may not be indicating a budget problem but simply the planned spend of reserves.

BCP Council benchmarks high compared with this group, including those without safety valve agreements. The in-year deficit as a proportion of DSG funding is of particular concern as it shows the scale of the problem for BCP Council currently is greater than for other councils.

5.2 **Strategies Used by Other Authorities:** *What strategies have they used to try to minimise their overspend and what have been the associated costs?*

The DfE published DSG management guidance in June 2022: [High needs budgets: effective management in local authorities](#). This document summarises some of the best practices identified at the time that had been adopted by top-performing councils in England to manage high-needs deficits. These practices are drawn from the Department for Education (DfE) research and sector guidance. However, the report states that 'Judging their impacts on the management of high needs funding is a complex task which really requires a more longitudinal evaluation.' And 'It is possible however to provide some quantitative evidence of changes which may help identify practices that have had a particular impact.' It is of note that of the ten 'good practice' local authorities in the report, all ten are reporting a deficit in 2025 / 26. The report cited the following recommendations based on the findings of the case studies, with a brief statement on BCP Council's position in relation to each recommendation:

- **'Local authorities should invest properly in SEND leadership, with dedicated time for strategic functions to avoid constant distractions from operational pressures':** this is built into the SEND Improvement governance in BCP Council. Key leadership roles within Education and Skills have been recruited to and SEND is of a high strategic priority.
- **'Authorities should review their joint commissioning arrangements to support more balanced contributions to high needs provision from the three key services (Education, Health and Social Care)':** there have been some challenges with this, that are being addressed through more robust financial decision-making protocols and commissioning processes. Collaboration with partners informs joint commissioning plans through joint planning and data sharing.
- **'Officers with SEND and Finance responsibilities should have joint accountability for effective management of this area, with high priority given to effective communication and mutual support, building on the positive practices identified in this report.':** Joint accountability is in place and communication is improving but keeping the data up to date for committed expenditure on pupil placements and other costs is challenging for commissioners with the impact on being able to set robust budgets, forecasts and undertake medium term financial planning.
- **'Local authorities should review their capacity for SEND support (and its funding base) to help strengthen their influence on the range of relevant outcomes. They should develop clearer agreements with services which set out commissioning expectations and monitoring arrangements.':** Outreach provided by special schools has been a SEND support service funded by the high needs block over many years. Re-integration officers have also been introduced, and we should be seeing reduced reliance on alternative provision, but this is instead still growing. Early Years support includes area SENCOs, a pupil assessment and outreach service (Dingley's Promise) has recently been introduced, and a portage service has been funded for many years. Support services that schools could purchase had been declining over the years prior to LGR as schools reported that they were too expensive, with these services not reinstated for BCP. There has been a lack of robustness to the monitoring of the services that are commissioned so this has been addressed and going forward more robust monitoring will be in place.
- **'Local authorities should review their current staffing levels and structures for SEND casework and enhance these where necessary, as part of their broader strategy for improving management of high needs expenditure and quality of service delivery.':** A redesign of the SEND Service was completed in 2024, informed by good practice, parents and carers, and financial resource available. The phased pod structure is now embedded and receives positive feedback in terms of the approach. However, the high levels of request for statutory support mean that the teams struggle to meet statutory requirements. This is in line with the picture nationally, and more detail on this is provided later in the report.
- **'Local authorities should review and further develop their approaches to partnership with key stakeholders, taking into account some of the positive practices described in this report (in addition to any broader policy emphasis on this area).':** the work of the local area partnership has significantly improved. The partners have created and embedded a culture of shared values: Trust, Empathy, Belonging, Communication, and Respect. The strengthened partnership working is demonstrated by shared accountability,

clear roles and responsibilities and significant progress in SEND Improvement Board meetings.

- **‘When creating new specialist provision, local authorities should be clear about the expected range and levels of need that this will cater for. They should also consider the potential impact on future demand and whether this can be financially sustained. The case for any proposed development should include detailed projections on the balance between investment and savings.’:** detailed modelling has taken place in relation to SEND sufficiency. Furthermore, BCP Council was already delivering both satellite and resourced provision ahead of this becoming a priority from the DfE. The effectiveness of these provisions requires review.
- **‘With regard to developments in local mainstream provision, investment should be targeted at strengthening inclusion, with impact monitored and evaluated at that level.’:** This is a clear priority across the current development work, evidenced in the SEND and AP Improvement Plan. 100% of schools’ data share, enabling a system leadership approach to addressing the challenges and strengths that the data reveals. Termly Head Teacher Forums enable meaningful discussion and prioritisation of actions in relation to inclusion. The Belonging Strategy is in the course of being delivered.
- **‘Local authorities should set out more clearly their expected pathways for young people with different levels of need, ensure that these are presented earlier and more clearly to young people and their parents, and evaluate quality and outcomes on a more regular basis. Pathways should be realistic but ambitious.’:** some of the pathways have been strengthened as part of the delivery of the previous SEND Improvement Plan. The Balanced System and Early Years support for speech and language needs is a good example of this. However, some pathways are at different stages of development. There is a strong mental health transformation plan in place for example, but this work is only just starting.
- **‘Local authorities should learn from positive examples of innovative approaches to mainstream funding (including the option of greater devolution of resources to individual schools/groups of schools with clear expectations of outcomes).’:** this has not been in place to date. However, as referenced in this report, a shared targeted funding model is being developed, and if approved by Schools Forum and Cabinet, will be able to be delivered.

5.3 **Authorities Not Running a Deficit:** *Are there any such authorities not running a deficit at all? How have they avoided this?*

Within our benchmark group, four councils are not running a DSG deficit. As an example, East Sussex had a small surplus in March 2025 of £2.8m which had been budgeted to carry forward into 2025-26. However, to balance the 2024-25 DSG the council had added £0.7m of its own funding and used £13m of accumulated positive DSG reserves. The council’s 2025-26 high needs budget was balanced with a transfer of £1m from the schools’ block. In June 2025 they reported that a forecast cumulative deficit is expected by the end of 2025/26.

The latest detailed benchmarking available is for the 2024/25 DSG budget and this shows East Sussex spending (detail in appendix 5):

- Below average on high needs places (that is state special school and AP commissioned places are low in the area).
- Below average on top up funding – both mainstream and special schools.
- About average on non-state sector special schools
- Well below average on alternative provision – this is a particular area of concern for BCP with very high spending.
- Well above average for SEND support and inclusion (although this is gross spend as the net budget table considered for 2025-26 in section 10 below was not available). There could be gross budgets included where income is generated from services traded with schools.

5.4 *What funding streams have other LAs accessed to support their SEND function?* They will have received funding support through the Delivering Better Value (DBV) and Safety Valve programmes. BCP Council received support of £1m through the DBV programme to improve SEND services. A local example is Dorset Council, who had a £42 million safety valve agreement in 2022. As at July 2025 they were reporting a forecast outturn of £52.5m overspend

for 2025/26. Adding the historic cumulative deficit position, their revised cumulative deficit is reported as £148.18m.

Local authorities will fund their SEND functions via a combination of general fund revenue resources and DSG funding. There is a regulatory framework and DfE guidance about what aspects can be funded from the DSG and more specifically the high needs block. Pressure on council budgets have led to some councils slimming down or removing some non-statutory services.

6. Engagement and Partnership with Other Authorities

6.1 External Advice and Support: *Have we sought input from anywhere else to advise on possible solutions, such as think tanks, LGA? Since April 2019?*

- a. BCP Council entered the DfE DBV programme.
- b. The Education and Skills Service has had the experience over six years from four different service directors responsible for high needs budgets Each has brought different experiences within a context of a challenging landscape nationally and locally.
- c. The Education and Skills Service collaborates with several different local authorities and national bodies, reaching out to partners with strength in the relevant areas. Examples of this can be seen in the November 2025 report to Overview and Scrutiny Committee on Suspensions and Exclusions and later in this report.
- d. In February 2025 the service secured the support of a highly experienced DfE funded SEND Adviser for the SEND and AP improvement journey and preparation for inspection.
- e. During October 2025 BCP Council SEND Partnership attended the southwest SEND Regional and Collaboration Peer Event which brings together local area partnerships across the Southwest to reflect on current practice, share perspectives, and identify opportunities for collaboration and targeted improvement support.
- f. The current Director of Education and Skills sit on the southwest strategic SEND group of the Southwest Regional Innovation Improvement Alliance (SW RIIA) which focuses on shared challenges and the delivery of the regional SEND Development Plan.
- g. BCP Council secured DfE SEND Improvement funding of up to £600,000. This is being used to deliver on several key priorities within the new SEND and AP Improvement Plan.

6.2 *What work have our officers done with these authorities to share ideas, strategies and plans to try to bring down our deficit?*

The examples below are not exhaustive, but hopefully give some examples of how officers work with other areas:

- Bedford: Bedford are a statistical neighbour and were allocated as a sector led improvement partner to BCP to support improvements in SEND. Examples of their work with BCP Council included supporting the development of an effective SEND Self Evaluation Form (SEF) and supporting the work to review and find a more effective model of banding for funding of EHCPs. This has led to the work to trial the Resource Allocation System of funding which will be presented to Schools Forum and Cabinet for approval in the new year.
- Southampton: We are learning from their cluster model of shared funding, peer collaboration and inclusive practice. An outline was presented to Schools Forum in September for agreement to develop a costed model for formal consideration by Schools Forum and Cabinet. Southampton have agreed to provide ongoing support at no cost. Desktop research also took place in relation to other local areas' models, including Camden, Hertfordshire and Plymouth.
- South Gloucestershire, the Ted Wragg Trust from Devon and the charity The Difference: South Gloucestershire is part of the DfE's funded Change Programme which is used to try out possible improvements to the way things work in the SEND and AP system. We have learnt about the development of their three-tier model of Alternative Provision. Officers also reached out to the Difference and Ted Wragg Trust in Devon. Both have presented to the Head Teacher Forum and are supporting work in relation to the development of the three tier AP model with a multi-agency working group.

- Wiltshire: Wiltshire shared their work to set up Inclusion Advisers to support whole school inclusive practice. This is an initiative which BCP are now trialling using part of the £1.2m schools block surplus, with the recruitment of three Inclusion Leads having taken place in October, with start dates in December and January.

7. Measures we have taken and why we chose those measures over others that were discounted.

- 7.1 Aligned to the 8 areas for Improvement, the council adopted a mix of early intervention, inclusion-focused, and commissioning strategies to manage high needs expenditure. BCP has seen some moderate success, though significant challenges remain. A summary of key measures and their effectiveness are set out below.

Area 1: Strengthen oversight of statutory SEND processes: Key measures to secure improvements across the SEND service are reflected in several areas including:

- Providing timely, high-quality support**
- EHCP Assessment Timeliness and Annual Review Timeliness**
- Measures to Manage the "Yes to Assess" Rate**
- Appeals and Early Dispute Resolution**

a.) Providing timely, high-quality support

- **What:** A focus on compliance in respect of the timeliness of Education, Health and Care Plan (EHCP) assessments, annual reviews, and tribunal management. Details of each of these is set out below. This includes tighter monitoring, improved panel decision-making, and clearer thresholds for support – see also Yes to Assess rate measure below.
- **Why:** Regulatory inefficiencies were contributing to unchecked EHCP growth, inconsistent decision-making, and rising tribunal appeals—all of which drive up high needs costs. By tightening governance and aligning decisions with statutory guidance, councils aimed to ensure resources were allocated fairly and sustainably.
- **Why others were discounted:** Alternatives such as blanket caps on EHCPs or limiting parental requests were deemed legally non-compliant and risked undermining trust. Informal gatekeeping approaches lacked transparency and often led to increased appeals and reputational damage.
- **Effectiveness:** Councils that invested in robust regulatory frameworks—such as South Gloucestershire and Dorset—reported slower EHCP growth, improved consistency in panel decisions, and fewer successful tribunal challenges. However, effectiveness depends on skilled staffing and cross-agency coordination. In some areas, delays in assessments and reviews persist due to workforce shortages, limiting the full impact of these reforms.

b.) EHCP Assessment Timeliness and Annual Review Timeliness

- **What:** EHC Needs Assessment timeliness and quality, annual review timeliness and developing a sustainable EHCP funding model. These actions will help reduce growth of EHCPs at least in line with national averages, ensure that 100% of phase transfer reviews are completed by the February and March deadlines and all other Annual Reviews are completed within 12 months of the issue of an EHCP or the previous annual review.
- A package of measures including the introduction of an EHCP AI writer to reduce administrative burden, improved communication pathways (e.g., FAQs, Local Offer updates), increased staffing and training for EHCCOs, and strengthened partnership working with health and social care to improve timeliness of advice. These are explored in more detail below:
 - **Introduction of AI Solutions:** An EHCP AI writer aims to reduce the administrative burden on EHCCOs, allowing them to maximise their time available for statutory assessment work and improve communication with parents and carers at key stages of the process through an enhanced parent and partnership portal.
 - **Improved Communication Pathways:** Enhancements in communication pathways, such as signposting and FAQ factsheets sent as auto-replies and included on the Local Offer, are being implemented to streamline processes and provide a model for triage.

- **Increased Staffing and Training:** Following a recruitment drive, the SEND Assessment and Review Team will have increased permanency of EHCCOs to over 93%, significantly reducing the reliance on agency workers. A new workforce development program providing robust induction and training for staff has been implemented to support improved recruitment and retention.
- **Partnership Working:** Collaboration with Social Care and Health to increase the timeliness of the provision of their advice as part of the statutory assessment process.
- **Why chosen:** These actions aim to improve statutory compliance, reduce delays in assessment and review processes, and ensure plans are outcome-focused and legally robust. Improving timeliness is also critical to reducing complaints and building trust with families.
- **Why others were discounted:** Reliance on agency staff and manual processes was unsustainable and led to inconsistent quality. One-off interventions without systemic change failed to deliver long-term improvement.
- **Effectiveness:** EHCCO permanency has increased to over 93%, reducing reliance on agency workers. Communication with families has improved, and the AI writer is expected to free up capacity for direct casework. However, timeliness remains variable and is impacted by workforce pressures in partner agencies.

c.) Measures to Manage the "Yes to Assess" Rate

- **What:** A strategic, system-wide approach to ensure EHCP assessments are reserved for cases where they are truly necessary. This includes strengthening decision-making protocols, improving communication with families and schools, and investing in inclusive practices that offer credible alternatives to EHCPs.
- **Why chosen:** Rising "yes to assess" rates contribute to unsustainable growth in EHCPs and high needs expenditure. By focusing on early support and clarity around the EHCP process, councils aim to reduce assessments driven by frustration, misunderstanding, or lack of access to mainstream support.
- **Why others were discounted:** Blanket refusals or arbitrary thresholds risk breaching statutory duties and eroding trust with families. Passive approaches—such as waiting for demand to stabilise—were ineffective and led to increased tribunal appeals and reputational damage.
- **Effectiveness:** Councils implementing this approach, including BCP and Somerset, have seen modest reductions in EHCP request rates and improved satisfaction among schools. However, success depends on consistent messaging, robust alternatives to EHCPs, and ongoing data analysis. In BCP, tracking referral patterns has helped identify schools with high request rates, enabling targeted training and support. Yet, pressures remain due to rising complexity of need and workforce constraints in mainstream settings.

d.) Appeals and Early Dispute Resolution

- **What:** The service has prioritised training for EHCCOs and Appeals Team members to ensure high-quality, transparent, and consistent support for families throughout the assessment and review processes. This includes embedding nationally recognised IPSEA training into staff development and offering Global Mediation to resolve disagreements early. The SEND Tribunal Team has adopted a proactive approach to resolving disputes through Early Dispute Resolution (EDR), mediation, and—where appropriate—Consent Orders. These practices are embedded into casework and staff development, ensuring alignment with sector best practice and a consistent, child-centred approach. Recruitment of additional Tribunal Officers to support their management of the families they are supporting has been a vital component and has provided the additional resources necessary to facilitate increased capacity for personalised engagement with families.
- **Why chosen:** This approach promotes legal accuracy, strengthens relationships with parents and carers, and supports early resolution of disputes. By equipping staff with the skills and confidence to manage appeals effectively, the council aims to reduce the number of cases progressing to Tribunal and maintain a child-centred focus throughout. These measures also support timely and equitable outcomes for families, reduce the emotional toll of formal legal processes, and help ensure that children's needs are addressed without unnecessary delay. By resolving issues early, the service can maintain trust and reduce the escalation of conflict.
- **Why others were discounted:** Heavy reliance on external legal representation was costly and often adversarial, undermining trust with families. Reactive complaint handling failed to

address underlying issues and led to escalating conflict. Informal or inconsistent approaches lacked transparency and accountability. Delayed resolution increased anxiety for families and risked disrupting provision for children.

- **Effectiveness:** Figure 1 sets out that there has been a significant reduction in the necessity for formal Tribunal hearings and accelerated timelines for achieving resolution. Families report improved satisfaction, and children's needs are being met more promptly. The approach has also contributed to a calmer, more collaborative relationship between the Local Authority and families. The number of appeals has decreased, with 30% now settled before reaching Tribunal. There has been a 50% reduction in reliance on solicitors, with LA Officers now representing the service in most cases—with cost avoidance of £95,000. Staff report improved confidence, and families benefit from more consistent and timely communication. Fewer decisions were found in favour of the parents at the Tribunal Hearing when comparing the full years of 2023 and 2024, showing that the LA is moving closer to a position of only going to Tribunal where we are confident that maintaining our original decision is the right one for the child /young person, with robust evidence to support our position.

Figure 1



Area 2: Early Intervention and Inclusion

- **What:** Investment in early years SEND support and graduated response pathways, offering targeted interventions, and improving multi-agency coordination to identify and support children with emerging needs before they escalate.
- **Why chosen:** These measures aim to reduce the number of children requiring formal EHCPs or placement in specialist provision by addressing needs earlier and more effectively. By embedding support within mainstream environments, councils hoped to promote inclusion, reduce long-term costs, and improve outcomes for children with SEND.
- **Why others were discounted:** Reactive models such as waiting for formal diagnoses or EHCPs before offering support were found to be inefficient and costly. They often led to delayed interventions, increased parental dissatisfaction, and higher rates of exclusion and tribunal appeals. Blanket funding increases without targeted support lacked accountability and impact.
- **Effectiveness:** While there are some examples of strong practice of early identification, EHCP growth and mainstream exclusions remain high. This may be indicative that early intervention leads to early identification of SEND needs and equally it could also suggest that inclusion strategies are not yet fully embedded or consistently applied. Workforce shortages, variable school engagement, and rising complexity of need continue to challenge the effectiveness of early intervention models.

Mentoring

- **What:** Mentors to work directly with pupils at risk of exclusion. These roles focus on building relationships, improving attendance, and supporting emotional wellbeing.
- **Why chosen:** Provides low-cost, high-impact relational support that complements academic and behavioural interventions. Builds trust and reduces isolation.
- **Why others were discounted:** Reliance on punitive sanctions or external referrals often failed to address root causes of disengagement. Generic pastoral roles lacked the targeted focus of dedicated mentors.
- **Effectiveness:** Councils like Bristol and Cornwall have seen improved attendance and reduced exclusions among mentored pupils. Sustainability depends on funding and integration with wider inclusion strategies.

Area 3: Parental Engagement and Co-production/Enhanced Partnerships

- **What:** Embedding IPSEA training for EHCCOs and Appeals Team members, improving communication pathways, and promoting early resolution of complaints. The service also offers Global Mediation and aims to concede appeals earlier in the process. The service has prioritised building strong, collaborative relationships with SENDIASS and parent/carers together and parent/cares Forum alongside other key stakeholders. This includes ongoing consultation with families, continuous professional development for staff focused on mediation and constructive dialogue, and a commitment to direct, transparent communication with parents and carers.
- **Why chosen:** These measures are designed to rebuild trust with families, reduce conflict, and ensure that statutory processes are transparent, legally accurate, and child centred. They foster a culture of proactive engagement and early problem resolution, reducing the likelihood of formal disputes and promoting mutual trust. By involving families and advocates in shaping service delivery, the council ensures that provision remains responsive, adaptive, and child centred.
- **Why others were discounted:** Over-reliance on legal representation was costly and adversarial. Passive communication approaches failed to address rising dissatisfaction and complaints. Reactive or transactional approaches to complaints and appeals often escalated tensions and led to costly, adversarial processes. Limited engagement with SENDIASS and families in the past contributed to mistrust and inconsistent service experiences.
- **Effectiveness:** There has been a marked reduction in formal disputes and an increase in early resolution of concerns. Feedback from SENDIASS and families indicates improved confidence in the system, and staff report greater clarity and consistency in managing complex conversations. 30% of appeals are now settled early, and solicitor use has halved. Staff confidence has improved, but further work is needed to embed co-production consistently across all service areas. Parent Carers Together shared feedback on the Partnerships for Inclusion of Neurodiversity in Schools (PINS) project that they've seen positive outcomes, including the creation of community spaces for parents and carers within schools, aimed at fostering support, connection and a sense of belonging. Recent feedback from Parents/Cares Together about the impact of parenthood working is as follows: 'BCP Council and NHS Dorset have strengthened partnership and co-production, embedding trust, empathy, and respect into SEND services. Some families are seeing earlier identification, faster support, and a stronger voice through initiatives like co-designed charters. While progress is encouraging, challenges remain with diagnostic delays, school consistency, and building trust—continued effort is needed to deliver reliable, timely support'.

Area 4: Integrated Multi-Agency Working

- **What:** Strengthened collaboration with Social Care and Health to improve the timeliness of advice for EHCPs and annual reviews. Multi-agency panels and shared training are also being developed, and an Alternative Provision Panel has been developed that reviews and approves referrals to alternative education settings for pupils who are at risk of exclusion or unable to attend mainstream school. The panel typically includes representatives from education, SEND services, social care, and health, ensuring a holistic view of each case.
- **Why chosen:** Integrated working is essential to delivering holistic, timely, and effective support for children with SEND. It also improves the quality of EHCPs and reduces

duplication. The panel model promotes consistency, transparency, and accountability in placement decisions. It ensures that all referrals are scrutinized against clear criteria, that mainstream support has been exhausted, and that the most appropriate and cost-effective provision is selected. It also facilitates earlier identification of unmet needs and encourages schools to retain responsibility for pupils wherever possible.

- **Why others were discounted:** Siloed working led to delays, inconsistent advice, and fragmented support. Informal coordination lacked accountability and sustainability. A school-led referral system was found to result in inconsistent thresholds, inequitable access, and over-reliance on costly independent providers. Automated or paper-based approval processes lacked the professional dialogue and challenge necessary to ensure robust decision-making.
- **Effectiveness:** Progress has been made in aligning timelines and expectations, but capacity issues in partner services continue to impact delivery. Other councils that implemented AP Panels—such as BCP, Devon, and Gloucestershire—have reported reductions in unnecessary placements, improved reintegration rates, and better alignment between provision and pupil need. It is too early to assess effectiveness, but it is anticipated that the panel will contribute to a reduction in new AP placements in 2025–26. However, effectiveness depends on timely meetings, strong multi-agency engagement, and clear escalation routes when consensus cannot be reached.

Area 5: SEND Sufficiency - Local Provision Expansion

- **What:** Councils invest in expanding local special school places and specialist resource bases to meet rising demand for SEND provision. This includes capital development of new facilities, increasing capacity in existing schools, and establishing satellite units or enhanced mainstream support hubs.
- **Why chosen:** Expanding local provision improves SEND sufficiency by ensuring children with complex needs can be educated closer to home. It reduces reliance on costly out-of-area and independent placements, improves continuity of support, and strengthens local accountability for outcomes. New place provision includes new Dingley's Promise centres to improve early intervention for children with special educational needs and disabilities (SEND) in the early years (0–5). Through training, research, and direct support, it helps build inclusive practice in early years settings and supports families navigating the SEND system. The development of additional specialist places has been through co-locating satellites on mainstream school sites and developing resourced provision across the primary phase. Some more graduated provision has also been commissioned in the shape of mainstream plus provision in one of our secondary schools. This provides enhanced funding and training to support complex needs. This includes flexible top-up funding, access to specialist outreach teams, helping to reduce demand for specialist places and promote inclusive practice. This allows schools to respond to need without waiting for formal diagnoses or EHCPs.
- **Why others were discounted:** Over-reliance on independent placements was financially unsustainable and often led to fragmented support. Temporary fixes such as short-term commissioning or transport subsidies failed to address long-term capacity gaps and did not improve local inclusion.
- **Effectiveness:** Councils such as BCP, Devon, and Wiltshire have reported improved placement stability and significant cost avoidance following local provision expansion. In BCP, new specialist provision has provided local places for local children and contributed to small increases in children remaining in mainstream schools and reductions in out-of-area placements. The data show that in February 2025 39.8% of children with an EHCP were in mainstream schools compared with 41.4% in September 2024 and the percentage of children with an EHCP in Independent and Maintained Special schools marginally decreased from 11.3% in September 2024 to 10.8% in September 2025.

Area 6: Workforce Development Strategy

- **What:** A comprehensive workforce development programme, including robust induction for EHCCOs. EHCCO permanency has increased to over 93%. A coordinated approach to upskilling the SEND workforce across education, health, and care sectors. This includes targeted training for SENCOs, teaching assistants, and inclusion leads, as well as recruitment campaigns and retention incentives for specialist staff. An example of strong practice in Early Years is set out below to further highlight the effectiveness of enhanced

training. A restructure of the service also formed an important part of the Workforce Strategy. The staffing restructure has been implemented to address weaknesses and streamline roles, reduce reliance on agency staff, and align capacity with areas of greatest need.

- **Why chosen:** A skilled and confident workforce is essential to delivering inclusive education and reducing reliance on EHCPs and specialist placements. Workforce gaps were identified as a key barrier to implementing early intervention and mainstream support effectively. Reliance on agency staff or short-term contracts was costly and led to inconsistent support. This approach optimises staffing capacity and enhances accountability and delivers better value for money by reducing duplication and ensuring the right expertise is available where it's most impactful.
- **Why others were discounted:** Generic CPD programmes lacked the specialist focus needed for SEND and failed to embed sustainable practice.
- **Effectiveness:** Recruitment and retention have improved, and schools report increased confidence. The impact of new training and outreach models will be reviewed in 2026–27. Councils like BCP and Devon have reported improved staff confidence and reduced turnover in key SEND roles. However, national shortages in educational psychologists and speech and language therapists continue to limit impact. In BCP, recruitment remains a challenge, especially in specialist outreach roles, affecting the scalability of inclusion strategies. The restructure has increased workforce stability, improved case management, and contributed to measurable savings through reduced agency spend and more efficient deployment of resources.

Example Under Workforce Development - Early Years Training

- **What:** Enhanced training and access to early funding streams have been provided to early years providers to support earlier identification of need and timely intervention. Early Years Area SENCOs play a key role in assessing children's needs and advising on whether support can be delivered through SEN Support or requires an EHC Needs Assessment (EHCNA). A comprehensive training offer—delivered both in-person and via recorded sessions—supports settings with the graduated response and the EHCNA process.
- **Why chosen:** Empowering early years providers with the knowledge and tools to identify and respond to emerging needs reduces delays in support and improves outcomes. Strengthening the quality of EHCNA submissions ensures that statutory processes are used appropriately and efficiently, reducing unnecessary assessments and improving the experience for families.
- **Why others were discounted:** Delaying training or relying solely on centralised decision-making led to inconsistent practice and late identification of need. Generic continuing professional development without a SEND focus failed to equip providers with the specific skills required to navigate the graduated response and statutory processes.
- **Effectiveness:** The quality and appropriateness of submitted EHCNA requests has improved significantly, as evidenced by high conversion rates: 95.68% in 2023–24 and 97.90% in 2024–25. This suggests that Early Years settings are better equipped to identify genuine need and engage with statutory processes effectively.

Area 7: Data and Performance Monitoring

- **What:** Implementation of improved data tracking systems, including referral pattern analysis, tribunal outcomes, and EHCP timeliness dashboards. A forensic approach is being taken to identify high-request schools and target support.
- **Why chosen:** Robust data is essential for strategic planning, resource allocation, and identifying areas of pressure or inconsistency. It also supports accountability and continuous improvement.
- **Why others were discounted:** Manual tracking and anecdotal reporting lacked reliability and failed to inform timely decision-making.
- **Effectiveness:** Data insights have enabled targeted interventions and improved visibility of system pressures. However, further integration with partner data systems is needed to support whole-system planning.

Area 8: Financial Sustainability and DSG Recovery

- **What:** A range of system changes outlined above were captured in the SEND Improvement Plan and DSG Recovery Plan, including inclusion-focused funding reforms, local provision expansion, and tighter EHCP oversight.
- **Why chosen:** The Plan drives a fiscal focus to measures designed to promote inclusion in mainstream schools, reduce the reliance on costly independent provision, and bring high needs expenditure under control. It provides a structured framework for accountability and progress monitoring.
- **Why others were discounted:** Ad hoc savings targets or isolated interventions lacked coherence and failed to address systemic drivers of overspend. Without a formal recovery plan, councils risked losing access to Safety Valve funding and facing escalating deficits.
- **Effectiveness:** The recovery plan was intended to position BCP on a more sustainable trajectory. However, EHCP growth has not slowed, and expenditure has increased, suggesting that implementation challenges and rising complexity of need are undermining progress. The plan has improved financial visibility and stakeholder engagement but requires stronger enforcement, investments in systems and infrastructure and change to deliver its intended outcomes.

8. **Effectiveness of Measures:** Evaluation of BCP's actions compared with outcomes in comparator councils.

What assessment is there of how effective such measures have been and have we further investigated why our outcomes may have been different from other areas?

- 8.1 It is extremely difficult to find clear evidence of direct comparison in terms of outcomes, as can be seen from the 2022 DfE report cited earlier, and the complexity of how any improvements were funded, and what council revenue has been contributed for example. Therefore, comparator councils show varied outcomes depending on local context and implementation fidelity.

9 **Next Steps**

- 9.1 The revised SEND and Alternative Provision Plan was approved by the SEND Improvement Board in September 2025. It was revised with partners including Parent Carer Forums, BCP Council, NHS Dorset Integrated Care Board (ICB), education settings and health providers. Actions remain under the eight headings identified under the previous plan:

1. SEND Leadership, Management and Governance
2. Communication and Co-production
3. Early Identification and Intervention
4. Inclusion
5. Pathway
6. Sufficiency
7. Preparation for Adulthood (PfA)
8. Managing Resources

- 9.2 **Highlights:** By way of an extract, highlights of our work and activities are set out below.

- 9.3 The council is working on a range of measures that will help manage demand, impact the trajectory of high needs funding and help stabilise the system. This includes new investment to support schools in creating inclusive environments that meet the needs of all children and young people. Investment is made up of:

- A SEND Intervention Fund: A fund of just under £600,000 as part of a grant allocation following a successful bid for funding from the DfE to support training and early intervention approaches and a new model of alternative provision to promote inclusion in mainstream schools.
- A SEND Inclusion Fund: Funding allocated to the 2025-26 high needs budget based on the decision of Schools Forum in January 2025 to permit the transfer of surplus school block funding to the high need block. The funding is earmarked to support outreach support,

training and the recruitment of Inclusion advisors. Further details of investment are detailed below as part of key actions included in updated SEND and Inclusion Improvement Plan.

- **Belonging Plan:** We are co-producing a Belonging Plan to support the implementation of the Belonging Strategy. Belonging and the development of the Belonging Plan was a key focus at our Education Conference which took place in the summer and was attended by school leaders. Our BCP Youth Forum are also contributing to the development of this plan and are in the process of establishing a working group.
- **Conference – Belonging and Inclusion:** During the summer, the council hosted a well-attended Belonging and *Inclusion Conference*, bringing together school leaders, practitioners, and national experts to share best practice and strengthen our collective response. We are now working with The Difference—a charity focused on inclusive leadership—and the Ted Wragg Trust to embed inclusive practice and build capacity across our schools.
- **Three-Tier Alternative Provision (AP) Model:** With a total investment of £143,000 from the SEND Intervention Fund, the Council is working with the Difference and in partnership with local schools, to develop a model of alternative provision aligned with plans set out in the government's national SEND and AP Plan. A multi-agency working group is in the process of developing a BCP three-tier AP model, which aligns with plans set out in the government's national SEND and AP Plan. The three-tiers will comprise of: Targeted early support within mainstream school, time-limited intensive placements in an alternative provision settings and longer-term placements to support return to mainstream or a sustainable post-16 destination. The model is designed to offer flexible, graduated support for children at risk of exclusion. This model includes:
 - Tier 1: School-led internal provision
 - Tier 2: Commissioned outreach and short-term placements
 - Tier 3: Full-time specialist placements
- Membership of the AP Working Group includes representatives from parent groups, school leaders, AP leaders and BCP officers and is being co-led by 'The Difference', who recently published [What-Works-Four-Tenets-of-Effective-Internal-Alternative-Provision.pdf](#). The council is also engaging with best practice from other areas of the country, for example the Ted Wragg Trust. The discussions from the AP working group are being used to develop a plan to support delivery of the BCP three-tier AP model. The first draft of this delivery plan will be shared at the November's working group meeting.
- **Inclusion Practice in Schools:** We have funded and filled 50 places for our school leaders on 'The Difference's', a leading national education charity, Inclusion Leadership Course. This professional development initiative is designed to help school leaders improve whole-school inclusion, reduce lost learning and enhance outcomes for children and young people with vulnerabilities.
- **Co-production of best practice guidance in relation to Emotionally Based School Non-Attendance (EBSNA):** The council is developing best practice guidance to support schools in responding to Emotionally Based School Non-Attendance (EBSNA). The guidance sets out clear strategies for identifying and addressing emotional barriers to attendance, with a focus on early support, inclusive practice, and multi-agency involvement. It aims to help schools create safe, nurturing environments where pupils feel a sense of belonging and are supported to re-engage with learning.
- **Development of 'Way Forward' meetings:** *Way Forward* meetings are planned to provide structured support and planning when an Education Health and Care Needs Assessment Request (EHCNAR) is declined or a decision is made not to issue an EHCP. These meetings bring together professionals and families to review the child's needs, explore alternative support options, and agree next steps to ensure continued progress and inclusion within education settings.
- **Updating our SEND and Alternative Provision Sufficiency Strategy:** An updated strategy is in development which will incorporate a dedicated secondary-phase focus to address the

growing demand for secondary specialist pathways and alternative provision. This includes support for the implementation of a three-tiered model of AP—ranging from school-led interventions to specialist placements—ensuring a more flexible and graduated response to need. The strategy is being co-developed with partners and informed by data, lived experience, and national best practice, and will be monitored through the SEND Improvement Board to ensure accountability and impact.

- **Development of Ordinarily Available Toolkit:** The council has secured funding to second a school leader, supported by suitably experienced and qualified professionals, to develop ordinarily available provision and the graduated approach across the area. As part of the SEND Intervention Support Fund (grant funding allocated by the DfE via a successful bid application), £215k is set aside for this purpose. The OAP toolkit will be developed as part of the SEND Intervention Support Fund and will help schools distinguish between pupils who can thrive with consistent universal support and those who require additional interventions. Feedback from the June 2024 launch showed that 83% of attendees believed the resource would positively impact their inclusive practice, with the remaining 17% expressing cautious optimism pending further exploration. The seconded leader with the support of a suitably experienced and qualified professional will work to embed OAP across the conurbation.
- **The Graduated Approach:** This approach provides structured guidance for teachers and school leaders to identify, assess, and record the needs of pupils requiring additional or special educational provision. It supports schools in planning appropriate support based on individual needs, reviewing progress systematically and ensuring that interventions are evidence-based and proportionate. By embedding this approach, schools are better equipped to intervene early and consistently, reducing the likelihood of escalation to exclusion.
- **Inclusion Advisor Pilot:** As part of a pilot, we have recently appointed three Inclusion Advisors to support schools develop inclusive practice. The impact of their work will be monitored and evaluated, and if effective this is a model that could be scaled up.
- **Outreach offer:** The Council has commissioned outreach services in partnership with our local special schools to provide support for mainstream schools including specialist advice and support to meet the needs of complex children and/or cohorts within their school. There is further scope for outreach services from our Alternative Providers, and this is being explored.
- **Education Effectiveness Framework:** Working with our local school partners and learning from best practice in other areas, the council is developing a robust Education Effectiveness Framework aimed at driving continuous improvement across all educational settings. The framework will bring together key strands including inclusive practice, targeted support for schools, and a commitment to equity in outcomes for all learners. By working collaboratively with school and MAT leaders, as well as other partners, the framework will provide clear guidance on responsibilities and ensure every child, regardless of background or need, has access to high-quality teaching and learning.
- **Transition:** BCP Council has established a cross-phase transition working group to improve the experience of children and young people as they move between different stages of education. The group focuses on strengthening continuity of support, sharing key information between settings, and promoting a sense of belonging during transitions—particularly for vulnerable learners who may face additional challenges.
- **Admissions Re-design:** Work to progress the project to re-design SEND Admission arrangements will start in November 2025. This is a major piece of work that will significantly improve our placement decision making which is a necessary foundation for commissioning sufficiency of specialist places. The purpose of the redesign is to create a fair, transparent and complaint admissions system for children and young people with an education and Health Care Plan, ensuring appropriate placement decisions are made through improved processes and robust governance arrangements. The project will be implemented in 4 phases over a 7-month period with implementation in from April 2026 and a period of a further 7 months thereafter for continuous review and refinement.

- **Updated In Year Fair Access Protocol:** An updated In-Year Fair Access Protocol is in development to ensure that children requiring school placements outside the standard admissions cycle are supported through a fair, transparent, and timely process. Developed in partnership with a task and finish group of headteachers, the protocol includes a decision-making matrix that enables consistent, objective evaluations of each case. At the heart of this approach is a commitment to child-focused discussion and decision making ensuring that every placement considers the individual needs, circumstances, and best interests of the child. This collaborative framework strengthens inclusion and equity, balancing the needs of pupils and schools while promoting positive outcomes for all learners. After extensive consultation, the new protocol is expected to go live during November 2025.
- **Transitions:** Establishment of a cross-phase transition working group to improve the experience of transitions between phases of education for our children and young people. The working group will identify best practice locally, regionally and nationally to improve outcomes.
- **Way Forward Meetings:** Development of 'Way Forward' meetings when an Education Health Care Needs Assessment Request (EHCNAR) has been declined or a decision not to issue an EHCP has been made to ensure that settings are supported to meet the needs of the child or young person.
- **Multi-agency Belonging Forums:** Implement best practice from other local authorities who have established multi-agency forums as a way for schools to both support each other to meet the needs of children and young people with vulnerabilities and gain support from partner agencies.
- **Pre EHCP funding:** BCP Council is currently developing its thinking around a pre-EHCP funding model to strengthen early intervention and reduce escalation to statutory Education, Health and Care Plans (EHCPs). The aim is to provide timely, targeted support for children with emerging or lower-level SEND needs within mainstream settings, without requiring a full EHCP assessment. The model would offer schools access to additional resources such as specialist input, equipment, or short-term interventions based on clear criteria and evidence of need. Co-produced with schools and parent/carer representatives, the model would be designed to promote inclusion, reduce delays in support, and ensure that children's needs are met earlier and more effectively. The next step is to engage our partners to develop the idea and review best practice in other local authority areas.

9.4 The development of a revised High Needs Deficit Recovery Plan has also been instigated. The Plan is in the early stages of drafting and has the following priority areas, all of which tie in closely to the SEND and AP Improvement Plan:

1. Build skill and capacity to meet need in mainstream
2. Provide support at an earlier stage
3. Develop support while waiting
4. Strengthen support at transition points
5. Deliver SEND sufficiency of places and proactive commissioning
6. Provide timely and high quality statutory support
7. Provide strong financial oversight and governance

New governance of this plan is being developed and will be implemented by January 2026.

10. Benchmark Data and Information

- 10.1 **Financial Benchmarking:** Final benchmarking of all Children's Services budgets for 2025-26 (from the section 251 budget returns) has not yet been released by the DfE.
- 10.2 Provisional information only is available which provides information for BCP only compared with all England information (which may change but this is unlikely to be significant given the scale of national totals), so it is not yet possible to review the current year budgets compared with statistical neighbours or other groups and is indicative only.

- 10.3 Information for 2024-25 budgets has been included in Appendix 5, as comparisons with statistical neighbour information is available, but this is limited to gross expenditure as net expenditure (taking account of fees and charges and other income) is not currently accessible.
- 10.4 The total budgets for BCP DSG gross spend in 2024-25 on high needs are high per head of 0 to 19 population at £908 compared with the national average £718 and statistical neighbours median of £736. The related general fund budgets also benchmark high.
- 10.5 It should be noted that in both the current and previous year that actual DSG expenditure on high needs provision for BCP is much higher than the levels budgeted.
- 10.6 A summary of the information available for 2025-26 budgets is set out in table 4 below.

Table 4: Provisional 2025-26 Benchmarking Table Budget Table (Net) £ per pupil

2025-26	DSG		General Fund					
Provisional All England Comparison	School budgets -place funding delegated to state funded schools	Central high needs budget	Educational psychology service	SEN administration, assessment and coordination and monitoring	Independent Advice and Support Services (Parent partnership), guidance and information	SEN transport Pre 16	SEND transport (aged 16-18)	SEN transport (aged 19-25)
Mean	£173	£799	£24	£44	£4	£190	£97	£15
Median	£171	£777	£23	£39	£3	£172	£77	£8
Maximum	£334	£1,298	£55	£171	£48	£433	£510	£108
Minimum	£0	£0	£0	£0	£0	£0	£0	£0
BCP	£203	£1,261	£26	£70	£6	£246	£201	£22
Denominator	E	E	B	B	B	C	F	G

Denominator - pupil divisors used:

B Total pupils aged 3-19 from maintained schools and all academies.

C Total pupils aged 3-15 from maintained schools and all academies.

E Total population aged between 0-19.

F Total population aged between 16-18.

G Total population aged between 19-25.

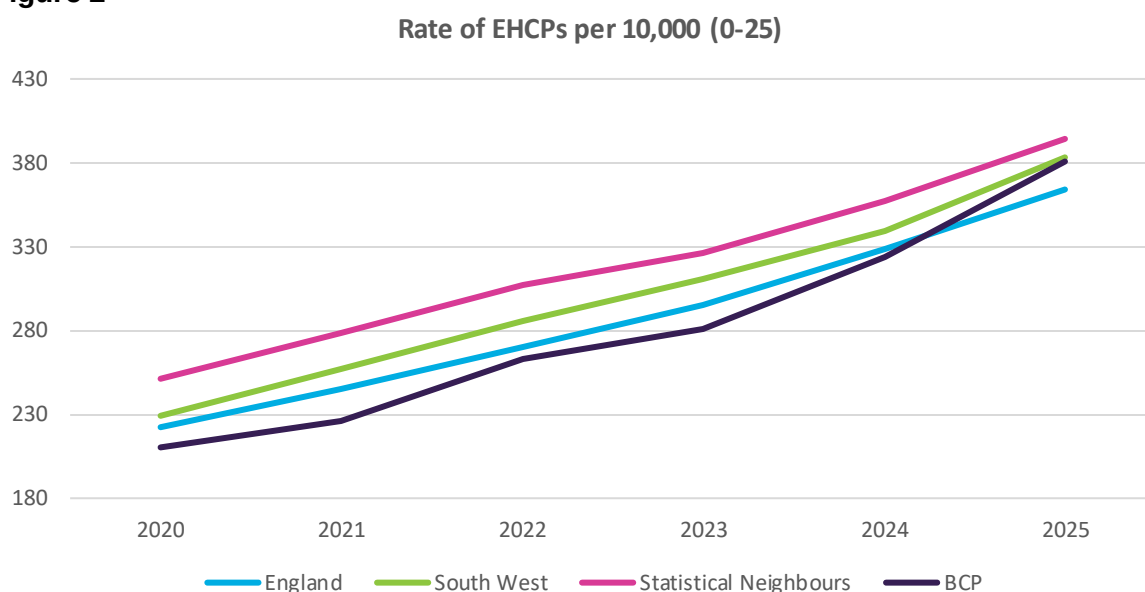
- 10.7 Shaded in the above table are budget areas where BCP expenditure is significantly high compared nationally. Of most concern is that the central high needs budget expenditure is 60% higher than the national average and not far below the national maximum. The main areas of high costs are for non-state special schools and alternative provision (education for children outside of schools, including alternative provision).
- 10.8 Linked to the DSG high needs central spending are also general fund budgets that are similarly high – SEND administration and SEND school transport.

11 Activity Benchmarking

- 11.1 **Latest activity, trend and benchmarking data for EHCPs and permanent exclusions:** This section contains details of the latest trends and benchmarking data to enable comparisons between BCP, our statistical neighbours and the England average. These comparisons help contextual data and provide meaningful comparisons with areas facing similar challenges for the purposes of identifying outliers that may signal issues in provision or policy. The statistical neighbours used for benchmarking in this report are: Bedford, Bexley, Devon, East Sussex, Essex, Kent, Milton Keynes, Norfolk, Southend-on-Sea and West Sussex. Benchmarking data is presented for SEND related performance measures covering growth in the number of EHCPs and timeliness, followed by Inclusion focused performance measures covering exclusions data.

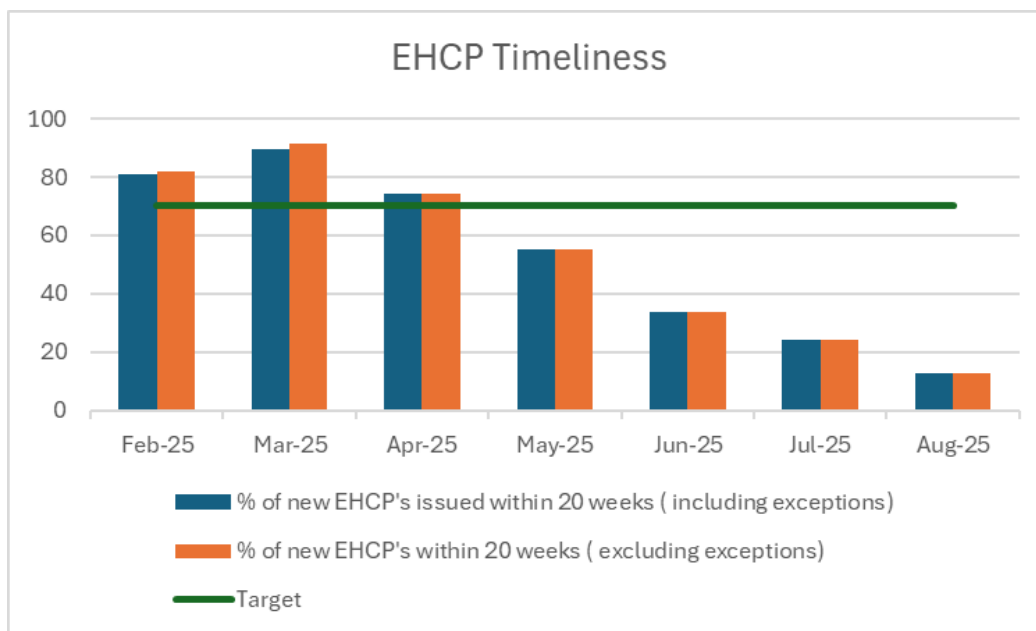
- 11.2 **Rate of EHCPs per 10,000 population (0-25):** The Council's [SEN2] data provides information on both the numbers of children and young people with an EHCP as of January each year. The number of EHCPs is a key cost driver. Each EHCP represents a statutory entitlement to tailored support, often involving specialist provision, therapies, and additional staffing. As the volume of EHCPs increases, more resources are deployed to meet legal obligations, creating an upward pressure on spending.
- 11.3 The data shown in figure 2 below identifies that there has been a significant rise in the rate of Education, Health, and Care Plans (EHCPs). Specifically, BCP's rate of EHCPs (380.8) is now above the England average rate (364.1), whilst remaining below the south west (383.2) and statistical neighbours (394.2) averages. More widely, all comparator groups have seen a consistent rise in the rate of EHCPs over the last 5 years. Key points to note are as follows:
- Bournemouth, Christchurch & Poole (BCP) increased to 380.8, from 210.3 in 2020.
 - England (Eng) increased to 364.1 from 229.2 in 2020.
 - South West (SW) increased to 383.2 from 222.4 in 2020.
 - Statistical Neighbours (SN) increased to 394.2 from 251.2 in 2020.

Figure 2



- 11.4 **EHCP Timeliness:** The Council monitors the timeliness of the number of new EHCPs issued within statutory timescales. The statutory expectation is that all assessments are completed within 20 weeks. Ensuring EHCPs are issued within statutory timeframes helps to manage demand predictably and contain costs. Recent data show that EHCP timeliness is below target and figure 3 below identifies that:
- The % of EHCPs within 20 weeks year to date is 56% this is higher than national at 46.4% and the SW at 25.8%.
 - The % of EHCPs issued exceeding 20 weeks' timeframe was 25.9% in April 2025 to 87.1% in August 2025.
- 11.5 Delays in issuing EHCPs can lead to increased costs in the following ways:
- Families may escalate concerns undermine trust with parents and partners, triggering complaints and legal challenges or tribunal proceedings which are costly to defend and often result in more expensive outcomes.
 - Late plans also disrupt placement planning, forcing reactive decisions that may involve costly interim or out-of-area provisions.
 - timeliness can lead to inefficiencies and duplicated effort across education, health, and social care teams.

Figure 3



- 11.6 **Yes to Assess:** Yes to assess levels refers to the number of assessments that were found to meet statutory thresholds for an assessment. The "yes to assess" rate is a leading indicator of demand within the EHCP system and has direct implications for both operational capacity and financial sustainability. A consistently high rate suggests that a growing proportion of requests for statutory assessment are deemed eligible, which typically leads to an increase in EHCPs and associated costs – see table 5 below. This trend places upward pressure on the high needs budget. Monitoring this rate helps forecast future demand/pressures and informs strategic planning around workforce, placement sufficiency, and early intervention.

Table 5: Number of Assessments that meet statutory thresholds

BCP	2020	2021	2022	2023	2024
Yes to Assess	322	494	619	628	
%	66.9	83.4	74.0	69.5	

- 11.7 **Permanent Exclusions - The impact of exclusions on high needs expenditure:** School exclusions significantly increase high needs expenditure by:

- driving demand for alternative provision, specialist support, and long-term interventions. The costs of alternative education placements are substantially more expensive than mainstream places and reintegration back into mainstream school is always timely or successful.
- Increase pressures on services for children with special educational needs and associated provision. Many excluded pupils have underlying special educational needs. Their exclusion often leads to Education, Health and Care Plans (EHCPs) and sometimes education other than at school provision (EOTAS) which further strain local authority budgets.
- Exclusions increase demand for mental health support, social care involvement, and behavioural interventions, all funded through high needs budgets.
- Excluded pupils are more likely to experience poor educational outcomes, unemployment, and mental health challenges, which translate into higher public spending over time in welfare, healthcare, and criminal justice.

- 11.8 Details of the rate and number of permanent exclusions are provided in the tables below. Table 6 shows the permanent exclusion rate in BCP compared with regional and national benchmarks. It shows:

- BCP's permanent exclusion rate has fluctuated over the six-year period, starting at 0.12 in 2019/20 (12 permanent exclusions per 10,000 children), dipping to 0.09 in 2020/21, then rising sharply to 0.23 in 2022/23.
- Although the rate dropped to 0.17 in 2023/24, the provisional figure for 2024/25 is 0.20. BCP's exclusion rate has consistently exceeded the Southwest regional average, statistical neighbours, and national figures in every year. For example, in 2022/23, BCP's rate of 0.23

was significantly higher than the national 0.11, the South West's 0.13, and statistical neighbours' 0.10.

Table 6: Permanent Exclusion Rate (per 10,000 children)

	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25 (Provisional)
BCP	0.12	0.09	0.14	0.23	0.17	0.20
SW	0.07	0.05	0.09	0.13	0.15	n/a
Stat Neighbour	0.06	0.05	0.07	0.10	0.12	n/a
England	0.06	0.05	0.08	0.11	0.13	n/a

- 11.9 Table 7 shows the number of permanent exclusions. It shows that the number of exclusions increased from 60 in 2019/20 to 119 in 2022/23, before slightly declining to 91 in 2023/24, and then rising again to 105 in the provisional data.

Table 7: Number of Permanent Exclusions

	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25 (Provisional)
BCP	60	48	76	105	91	105

*Data for 2024/25 is currently provisional

- 11.10 **Permanent Exclusions by Phase:** The data in tables 8 and 9 reveals a concentration of permanent exclusions in secondary schools across BCP, with figures rising dramatically from 55 in 2020/21 to a peak of 143 in 2022/23. Although there was a reduction to 111 in 2023/24, the overall volume remains high, indicating persistent challenges in managing behaviour and inclusion at the secondary level. Primary exclusions, while lower in number, have steadily increased—from just 3 in 2021/22 to 13 in 2023/24—suggesting emerging concerns in primary settings that may require proactive intervention.
- 11.11 When comparing exclusion rates by phase against national averages, BCP consistently exceeds national benchmarks, particularly in secondary and special schools. In 2022/23, BCP's secondary exclusion rate reached 0.45, more than double the national rate of 0.22. Although this dropped to 0.34 in 2023/24, it still reflects a disproportionately high use of exclusion.

Table 8: Number of Permanent Exclusions by Phase

	2020/21	2021/22	2022/23	2023/24	2024/25
Primary	8	3	9	13	Not Avail
Secondary	55	81	143	111	Not Avail

2024/25 data is not yet available

Table 9: Rate of Permanent Exclusions by Phase Compared with National

	BCP			National		
	Primary	Secondary	Special	Primary	Secondary	Special
2019/20	0.05	0.20	0.00	0.02	0.13	0.04
2020/21	0.02	0.18	0.10	0.01	0.10	0.03
2021/22	0.01	0.29	0.18	0.02	0.16	0.05
2022/23	0.02	0.45	0.08	0.03	0.22	0.08
2023/24	0.02	0.34	0.00	0.03	0.25	0.08
2024/25*	0.04	0.35	0.30			

*Provisional

- 11.12 **Permanent Exclusions by SEND Status:** Table 10 shows the rate of permanent exclusions by SEND status for all children in BCP compared with national figures. The data reveals a persistent and disproportionate pattern of permanent exclusions among pupils with special educational needs in BCP. Pupils with SEN Support have consistently faced the highest exclusion rates, peaking at 0.85 in 2022/23, more than double the national rate of 0.37 that year.

Although this dropped to 0.52 in 2023/24, the provisional figure for 2024/25 remains elevated at 0.60, indicating ongoing systemic challenges in supporting this group.

- 11.13 Exclusion rates for pupils with an Education, Health and Care Plan (EHCP) in BCP have also risen sharply—from 0.05 in 2020/21 to a provisional 0.56 in 2024/25. This is significantly higher than the national EHCP rate of 0.26 in 2023/24 and suggests that even those with the highest level of statutory support are at increasing risk of exclusion locally. In contrast, pupils without SEND in BCP have consistently lower exclusion rates, aligning more closely with national averages. This widening gap between pupils with SEND and their peers highlights a critical equity issue: children with additional needs are being excluded at rates that far exceed their peers.
- 11.14 The council's data suggests that current systems may not be adequately meeting the needs of SEND pupils, and that exclusion is being used as a response to unmet need rather than as a last resort. Strategic investment in SEND support, staff training, and behaviour pathways will be essential to reversing this trajectory.

Table 10: Permanent Exclusion Rate by SEND Status

	BCP			National		
	EHCP	SEN Support	No SEN	EHCP	SEN Support	No SEN
2019/20	0.18	0.51	0.06	0.10	0.20	0.04
2020/21	0.05	0.34	0.06	0.08	0.15	0.03
2021/22	0.24	0.59	0.07	0.13	0.25	0.05
2022/23	0.27	0.85	0.12	0.20	0.37	0.07
2023/24	0.27	0.52	0.11	0.26	0.41	0.08
2024/25*	0.56	0.60	0.11			

*Provisional

12. SEND Sufficiency

- 12.1 Set out below are details of the specialist places created in recent years. SEND Sufficiency remains a priority in the updated SEND and AP Improvement Plan (references 5.6, 6.1, 6.3 and 6.4). Actions are focussed on increasing the supply of places, improving commissioning arrangements for monitoring the impact through service level agreements and support. In responding to our sufficiency challenges, the Council has delivered an additional 295 places by working with local school leaders to agree to co-locate specialist provisions on mainstream schools. This approach helps to make the best use of the school estate by utilising surplus accommodation in schools thereby sustaining schools experiencing falling rolls. Proposals delivered include resourced provisions, satellite locations and mainstream plus link provision for Year 7 children. Table 11 below sets out the total number delivered plus the number of places in pipeline. Pipeline places are those which are in the commissioning process and are made up of projects that are part of the Round 2 Programme of Expansion.

Table 11: Specialist Place Provision – Number of Places Delivered and in the Pipeline

	22/23	23/24	24/25	25/26	26/27	Total	Total EY/Primary Split	Total Secondary Split
Early Years Assessment Places		12	12			24	24	
Specialist School Places Delivered	46	49	140	60		295	182	113
Places in pipeline				96	128	224	224	
Total Delivered/ In Pipeline	46	61	152	156	128	543	430	113

Note: Numbers filled at the latest census (October 2025 are not available. The council will obtain numbers on roll across each provision in Term 2 and marks the start of a termly data collection from schools to understand the occupancy of our specialist provisions.

- 12.2 In addition to the places in the pipeline, there are opportunities offered by sites that deliver a significant number of places – see table 12 below. The council is still waiting for an update from the DfE on plans for the development of its new special free school previously announced. The LA successfully bid for one of two new special schools. The school will provide 180 specialist places for children and young people with autism aged 3- 18. The school plays an important part in increasing the sufficiency of local specialist places and details are eagerly awaited. The council is also working with the DfE to progress one of the two bids received for the development of specialist places at the former Parkfield School site.

Table 12: Additional Place Opportunities

	Total
New School	180
Parkfield	180
Site locations under review	120
AP	50
Total	410

- 12.3 **Barriers to SEND Sufficiency:** To effectively meet the statutory duty of sufficiency for children with EHCPs, councils must navigate a complex landscape of challenges. While these barriers are significant, there are practical mitigations that can help local authorities respond with agility, creativity, and strategic foresight—ensuring that specialist provision grows in both capacity and quality. Details are contained in **Appendix 4** with particular emphasis on the work necessary to redesign the SEND Admission Arrangements in order to create a strong foundation on which placement decisions can be made ensuring children and young people are able to access the right support at the right time. This work will be vital in enabling a reduction in the number of children and young people who are waiting for a specialist school placement, reducing the volume of consultations being sent to mainstream and special schools and reduce the long-term use of alternative provision placements and the number of children accessing EOTAS as a long term-provision.

Background Papers

The below papers are publicly available or available on request should they be needed.

- Written Statement Of Action 2021
- SEND Statutory Direction 2022
- SEND Statutory Direction 2024
- SEND Improvement Plan 2024 [SEND Improvement plan 2024](#)
-  [High Needs Schools Grant Exp Forecast Cabinet Report 24.docx](#)
- SEND and Alternative Provision Improvement Plan 2025
- Belonging Strategy [Belonging strategy | BCP](#)
- SEND Sufficiency Strategy 2024 [SEND Sufficiency Strategy](#)
- In Year Fair Access Protocol 2025

Appendices

- Appendix 1: Summary of the Key Lines of Enquiry raised by Children's Services Overview and Scrutiny Committee, October 2025
- Appendix 2: Roadmap of BCP's Improvement Journey
- Appendix 3: 8 Areas for Improvement Identified following Inspection
- Appendix 4: Barriers to SEND Sufficiency
- Appendix 5: Budget Benchmarking 2024-25
- Appendix 6: Background information

Key Line of Enquiry: Request from Children's Services Overview and Scrutiny Committee

1. Scrutiny Topic

Benchmarking our High Needs Block spend and strategic direction against similar LA comparators to help understand the wider context and find possible solutions

2. Key Lines Of Enquiry

What are the questions to be answered by this work? Consider the impact that scrutiny can have when selecting questions.

1. Please provide the latest data for the level of accumulated DSG deficit compared with other local authorities.
2. What strategies have they used to try to minimise their overspend and what have been the associated costs?
3. Are there any such authorities not running a deficit at all? How have they avoided this?
4. What work have our officers done with these authorities to share ideas, strategies and plans to try to bring down our deficit?
5. What assessment is there of how effective such measures have been and have we further investigated why our outcomes may have been different from other areas?
6. What funding streams have other LAs accessed to support their SEND function? DBV and Safety Valve
7. Have we sought input from anywhere else to advise on possible solutions, such as think tanks, LGA? Since April 2019:

3. Data and information requests

Benchmarking of all Children's Services budgets for 2025-26 (from the section 251 budget returns when available from the DfE).

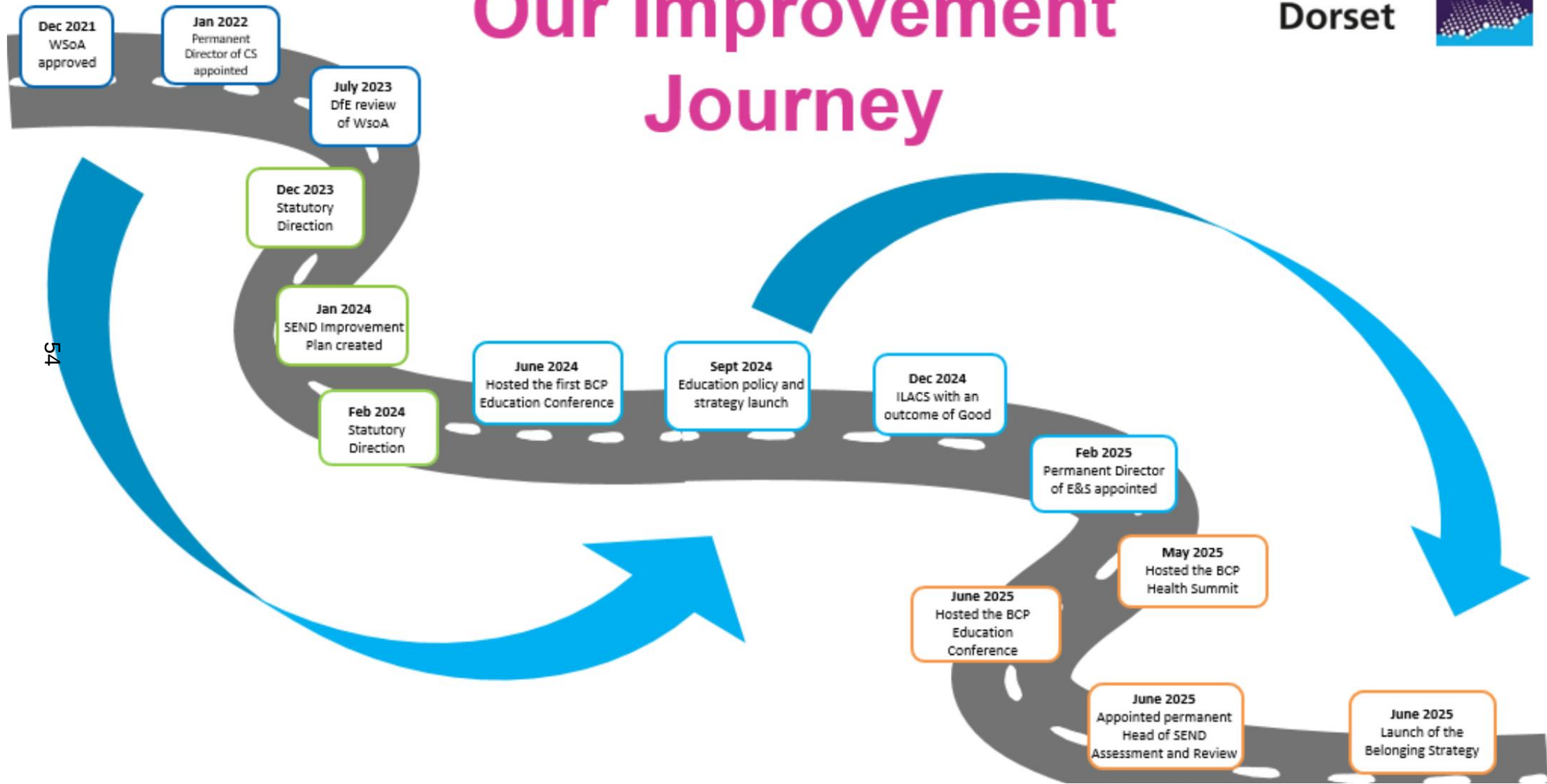
1. Latest activity, trend and benchmarking data for EHCPs and permanent exclusions
2. Summary of high needs places created in recent years and numbers filled at the latest census (October 2025). What have been the barriers to creating more places?
3. Information on the measures we have taken and why we chose those measures over others that were discounted.
4. Assessment of the effectiveness of measures taken and in comparator Councils.

4. Additional information

Given the impact on the wider council financial position, the committee can bring value by providing test and challenge to the area of High Needs Block spending, to gain assurances that all possible actions are being taken to address this challenge. To effectively scrutinise the spend within Children's Services, the committee first seeks to understand why we are running such a high deficit within our High Needs Block when other, similar local authorities are not. A deep dive benchmarking exercise will help contextualise our problems and help find solutions.



Our Improvement Journey



1. Leadership, Management and Governance

Strengthen strategic leadership and accountability across SEND services.

2. Communication and Coproduction

Improve transparency and co-production with families, schools, and partners.

3. Early Identification and Intervention

Ensure timely identification of needs and access to early support.

4. Inclusion

Embed inclusive practices across all education settings.

5. Pathway

Develop clear, consistent pathways for children and young people with SEND.

6. Sufficiency

Increase local provision to meet demand and reduce reliance on out-of-area placements.

7. Preparation for Adulthood

Support independence, employment, and life skills for young people.

8. Managing Resources

Deliver financial sustainability and value for money while improving outcomes.

Barriers to SEND Sufficiency

- **Rising Demand for EHCPs:** The number of children and young people with Education, Health and Care Plans (EHCPs) has grown rapidly in recent years, outpacing the development of new specialist places. This demand is driven by better identification of needs, increased parental expectations, and a lack of confidence in mainstream inclusion. *Mitigations:* Develop long-term sufficiency strategies with robust forecasting, ensure strategies are in place that focus on early intervention and strengthen mainstream inclusion to reduce pressure on specialist settings and ensure regulatory performance is strong.
- **Complexity of Needs:** Children with EHCPs often have highly individualised and complex needs, requiring bespoke environments and multidisciplinary support. This makes it harder to scale provision quickly or apply a one-size-fits-all approach. *Mitigations:* Invest in workforce development
- **Limited Capital and Revenue Funding:** Building or expanding specialist settings requires significant investment. While the DfE provides High Needs Provision Capital Allocations, these often fall short of covering the scale of need. Even when capital is available, councils must fund ongoing staffing and operational costs, which are rising due to inflation and increased complexity of needs. *Mitigations:* Benchmark funding models and adjust to ensure funding models are sustainable. Maximize opportunities for investment by bidding for new schools and plan for the co-location of specialist provision on mainstream school sites.
- **Planning and Site Availability:** Finding suitable land or buildings for new specialist provision can be difficult, especially in urban or high-demand areas. Planning regulations, site constraints, and community opposition can delay or block development. *Mitigations:* Repurpose council-owned assets that could be converted into specialist provision.
- **Specialist Workforce Shortages:** Recruiting and retaining qualified staff—especially for speech and language therapy, educational psychology, and autism support—is a persistent challenge. Workforce gaps delay the opening of new provision and limit the quality of support available. *Mitigations:* Develop a workforce recruitment and retention strategy and invest in workforce development and cross-sector collaboration.
- **Cross-Agency Coordination:** Effective provision depends on collaboration between education, health, and social care. Misalignment between these services can delay placements or limit capacity. Some councils struggle with fragmented commissioning processes or inconsistent support from health partners. *Mitigations:* Joint commissioning frameworks with health and social care to align funding and priorities. Use integrated digital systems to share data and track outcomes across services. Appoint dedicated SEND coordinators or case managers to oversee complex placements and ensure continuity.
- **Legal and Statutory Pressures:** Councils are under an *absolute duty* to secure the provision in an EHCP, as reaffirmed by recent High Court rulings. This legal obligation can lead to costly out-of-area placements when local provision is unavailable, further straining budgets and reducing flexibility to invest locally. *Mitigations:* Maintain a dynamic sufficiency strategy that is regularly reviewed and updated with stakeholder input. Develop robust local placement panels with clear criteria and transparent decision-making. Engage families early and often, building trust and reducing the likelihood of tribunal escalation.
- **Systems and Process - Admissions Re-Design:** Work to progress the project to re-design SEND Admission arrangements will start in November 2025. This is a major piece of work that will significantly improve our placement decision making which is a necessary foundation for commissioning sufficiency of specialist places. The purpose of the redesign is to create a fair, transparent and complaint admissions system for children and young people with an education and Health Care Plan, ensuring appropriate placement decisions are made through improved processes and robust governance arrangements. The project will be implemented in 4 phases over a 7-month period with implementation in from April 2026 and a period of a further 7 months thereafter for continuous review and refinement.

Appendix 5

2024-25 Budget LA Table (Gross) £ per capita - Extract of High Needs Budgets National Average and Statistical Neighbours Pupil divisor is 0-19 population for all budgets	High needs place funding (note 1)	Top-up funding – maintained schools (note 2)	Top-up funding – academies, free schools and colleges (note 2)	Top-up and other funding – non- maintained and independent providers (note 3)	Additional high needs targeted funding for mainstream schools and academies	SEN support services (note 4)	Hospital education services	Other alternative provision services (note 5)	Support for inclusion (note 6)	Special schools and PRUs in financial difficulty	PF/ BSF costs at special schools, AP/ PRUs and Post 16 institutions only	Direct payments (SEN and disability)	Therapies and other health related services	HN TOTAL (note 7)
ENGLAND - Average (mean)	£166	£211	£212	£192	£6	£43	£4	£21	£19	£0	£1	£3	£6	£718
ENGLAND - Average (median)	£160	£195	£215	£178	£0	£39	£2	£17	£12	£0	£0	£0	£1	£679
ENGLAND - Maximum	£339	£693	£480	£623	£133	£143	£31	£94	£159	£2	£36	£24	£74	£1,275
ENGLAND - Minimum	£45	£1	£9	£20	£0	£0	£0	£0	£0	£0	£0	£0	£0	£415
Statistical Neighbours Average (median)	£157	£120	£244	£205	£1	£54	£0	£23	£16	£0	£0	£3	£3	£736
Statistical Neighbours Maximum	£207	£335	£475	£521	£19	£143	£14	£66	£151	£1	£0	£9	£11	£932
Statistical Neighbours Minimum	£123	£22	£69	£70	£0	£24	£0	£0	£4	£0	£0	£0	£0	£548
BCP	£161	£120	£395	£281	£4	£36	£0	£66	£4	£0	£0	£0	£2	£908
Bedford Borough	£123	£107	£249	£90	£19	£73	£14	£22	£16	£0	£0	£0	£8	£599
Southend-on-Sea	£206	£22	£383	£70	£0	£39	£2	£23	£151	£0	£0	£8	£0	£700
Kent	£207	£335	£136	£261	£5	£24	£0	£30	£31	£0	£0	£4	£10	£836
Devon	£137	£186	£192	£322	£7	£43	£5	£33	£10	£0	£0	£9	£3	£811
Milton Keynes	£176	£308	£197	£113	£5	£30	£1	£0	£15	£0	£0	£0	£0	£668
Bexley	£193	£64	£475	£113	£1	£57	£0	£10	£9	£0	£0	£3	£6	£736
West Sussex	£142	£223	£69	£521	£0	£54	£1	£45	£7	£1	£0	£0	£11	£932
Norfolk	£157	£202	£274	£256	£0	£62	£0	£21	£19	£0	£0	£3	£3	£841
East Sussex	£148	£70	£244	£205	£0	£143	£0	£5	£51	£0	£0	£6	£0	£725
Essex	£137	£87	£213	£126	£0	£55	£0	£29	£24	£0	£0	£3	£10	£548

Analysis Summary - overall BCP spend is high per head of 0 to 19 population at £908 compared with the national average £718 and statistical neighbours median of £736.

- Place funding delegated to mainstream schools (bases) and special schools and AP for commissioned places is close to the average for both groups
 - Top up funding to place funding is high compared with both groups (columns taken together as the number of academies in the area will impact on each column)
- The national average is £423 per head of population and BCP £515. The data for statistical neighbours is the median (mid-point) so numbers cannot be summed.
- BCP funding for INMSS is above average national and statistical neighbours
 - BCP SEND support services are below average for both groups
 - Alternative provision is a significant high spend area at 3 times the national average and the highest for statistical neighbours. Note - national and neighbours average being similar.
 - BCP support for inclusion looks low
 - BCP overall spend is high with only West Sussex in the statistical neighbour group above BCP.

2024-25 Budget LA Table (Gross) £ per capita (Extract for General Fund Budgets Related to SEND) (population used - see key)	Educational psychology service (B)	SEN administration, assessment and coordination and monitoring (B)	Independent Advice and Support Services (Parent partnership), guidance and information (B)	Home to school transport (pre-16): SEN transport expenditure (C)	Home to post-16 provision: SEN/ LLDD transport expenditure (aged 16-18) (F)	Home to post-16 provision: SEN/ LLDD transport expenditure (aged 19-25) (G)
National Average and Statistical Neighbours	£25	£39	£4	£166	£85	£13
ENGLAND - Average (median)	£23	£36	£3	£153	£61	£8
ENGLAND - Maximum	£80	£122	£27	£447	£467	£87
ENGLAND - Minimum	£0	£0	£0	£26	£0	£0
Statistical Neighbours Average (median)	£20	£43	£3	£206	£48	£15
Statistical Neighbours Maximum	£29	£101	£7	£362	£343	£38
Statistical Neighbours Minimum	£12	£11	£1	£91	£6	£0
BCP	£29	£69	£7	£206	£48	£8
Bedford Borough	£14	£44	£4	£138	£167	£21
Southend-on-Sea	£17	£39	£4	£91	£6	£0
Kent	£21	£43	£1	£314	£60	£38
Devon	£29	£47	£5	£302	£81	£12
Milton Keynes	£13	£11	£3	£102	£83	£25
Bexley	£18	£30	£2	£179	£43	£22
West Sussex	£24	£25	£2	£225	£16	£0
Norfolk	£20	£101	£2	£362	£343	£0
East Sussex	£12	£75	£5	£255	£42	£21
Essex	£20	£23	£2	£139	£48	£15

Key - Pupil Divisors Used (extract does not use all populations)

- B Total pupils aged 3-19 from maintained schools and all academies.
- C Total pupils aged 3-15 from maintained schools and all academies.
- E Total population aged between 0-19.
- F Total population aged between 16-18.
- G Total population aged between 19-25.

Analysis - SEND related general fund budgets are high compared nationally and with statistical neighbours

Benchmarking for school transport is less reliable as rural counties would be expected to have greater travel distances and higher costs for example

Only the gross budget table is currently available, and parental income will reduce the expenditure shown for transport.

Report subject	Permanent Exclusions and Suspensions
Meeting date	25 November 2025
Status	Public Report
Executive summary	This report provides an analysis of permanent exclusions and suspensions across Bournemouth, Christchurch and Poole (BCP), with a focus on trends over time, comparisons with national and regional data, and the disproportionate impact on vulnerable groups. Permanent exclusions in BCP have increased significantly in recent years, particularly in secondary and special schools. Pupils with special educational needs (SEND), those eligible for free school meals (FSM), and children with Education, Health and Care Plans (EHCPs) are consistently overrepresented in exclusion data. While national guidance emphasises that exclusions must be lawful, reasonable, and proportionate, BCP's figures indicate that these groups continue to face higher rates of exclusion than their peers. Suspensions have also risen sharply, with BCP's rates exceeding national, Southwest, and statistical neighbour averages across most phases. The number of pupils receiving one or more suspensions has nearly doubled since 2019/20, with the highest rates observed among pupils with EHCPs and those eligible for FSM. This report summarises the policy landscape and national challenges, sets out the council's strategic intent and framework for action and provides benchmarking data for permanent exclusions by phase, SEND status, and FSM eligibility, followed by a focus on suspensions data across the same dimensions. The analysis aligns with the ambitions of BCP's Children and Young People's Partnership Plan, which sets out a vision for every child to lead a fulfilling and happy life. Reducing exclusions and improving outcomes for vulnerable learners remains a shared priority across the partnership and this is central to the work we have been doing to develop a BCP Belonging Strategy.
Recommendations	It is RECOMMENDED that: Members note the data presented in this report and endorse the continued development and implementation of BCP Council's strategic approach to reducing exclusions and suspensions. This includes strengthening inclusive practice across schools, improving early intervention for pupils with SEND and those eligible for FSM, and supporting the delivery of the Belonging Strategy. Members are also asked to support enhanced data monitoring and targeted action to address disproportionality, ensuring that all children—particularly the most vulnerable—can access education that enables them to thrive.
Reason for recommendations	The recommendations respond to rising exclusion rates and aim to strengthen inclusive practice across BCP. They support the council's statutory duties under the Education Act 1996 to ensure suitable education for pupils unable to attend school.
Portfolio Holder(s):	Richard Burton
Corporate Director	Cathi Hadley, Director of Children's Services
Report Authors	Tanya Smith, Head of Inclusion, Places and Capital
Wards	Council-wide
Classification	For Recommendation/Decision

Background

1. This report provides a detailed overview of pupil exclusions and suspensions across Bournemouth, Christchurch and Poole (BCP). It is structured in two main sections. The first section focuses on permanent exclusions, offering data-driven commentary on trends over time, differences by school phase, and the impact on pupils with SEND and those eligible for free school meals. The second section examines suspensions, analysing rates and pupil numbers by phase, SEND status, and socioeconomic background. Each section combines statistical insight with contextual analysis to support strategic planning and inform inclusive approaches across the local area.
2. **Policy:** The Education Act 2002 and the Education and Inspections Act 2006 set out statutory duties for local authorities in relation to school exclusions and suspensions. More recently, the Department for Education's 2023 guidance on suspensions and permanent exclusions reinforces these duties, requiring schools to notify the local authority of all permanent exclusions and any exclusion involving a care experienced child, regardless of duration. The guidance outlines procedures for notifying parents and local authorities, arranging education from the sixth day of exclusion, and managing Independent Review Panels. It also encourages local authorities to monitor exclusion data to identify patterns and support schools in reducing disparities. Crucially, it emphasizes that exclusions must be lawful, reasonable, and proportionate, with schools expected to consider the impact on vulnerable pupils, including those with SEND.
3. In line with these statutory responsibilities, BCP Council is notified by schools when a child has been permanently excluded or suspended. The council monitors this data and compares it with regional and national figures to identify key trends and outliers. Evidence shows that the number of children being excluded or suspended in BCP has increased, with the most vulnerable groups—such as those with additional needs or facing social disadvantage—disproportionately affected. National research consistently links exclusion to poorer long-term outcomes, including disengagement from education, employment, or training, and increased risk of involvement in criminal activity.
4. **Local and National Challenges:** Nationally and locally, exclusion data shows a disproportionate impact on children with unmet or undiagnosed social, emotional and mental health needs—often linked to trauma, neurodiversity, or adverse childhood experiences. These children may struggle to regulate their emotions, engage with learning, or form trusting relationships in school. These children often require specialist support, therapeutic input, and tailored approaches to learning and behaviour. Without early intervention and inclusive support, their behaviour can escalate, leading to suspension or permanent exclusion. This pattern highlights exclusions data cannot be viewed in isolation and there is the urgent need for system-wide reform: strengthening SEND provision, building inclusive capacity in schools, and ensuring that exclusion is never the only option available. The volume and complexity of needs exceed the availability of specialist placements and support services has not kept pace and this places significant strain on mainstream schools who report feeling under equipped to manage complex behavioural profiles. In this context, exclusion can become a response—which indicates the system lacks the capacity to offer viable alternatives.
- This report sets out BCP's response to the data and the range of challenges through improved oversight and monitoring of exclusions and suspensions. It also contains details of the latest activity, trends and benchmarking data and information on exclusions and suspensions to enable comparisons between BCP, southwest region and the England average. These comparisons help contextualise the data and provide meaningful comparisons with areas facing similar challenges for the purposes of identifying outliers that may signal issues in practice, provision, policy and/strategic approach. Next steps are summarised at the end of the report to support ongoing monitoring and strategic action

BCP's Strategic Framework

5. **BCP's Oversight and Strategic Framework:** The council has robust arrangements in place for the oversight and monitoring of exclusions and suspensions. Details of our key strategic documents, improvement plans, commissioning arrangements and day to day operational arrangements are set out below.
6. **SEND and Alternative Improvement Plan:** In September 2025, the Council presented its new SEND and Alternative Provision Improvement Plan to the SEND Improvement Board, setting out key

actions necessary to strengthening inclusion, sufficiency, and outcomes across the local area. The plan responds to rising levels of need—particularly around Social, Emotional and Mental Health (SEMH)—and outlines a series of targeted actions to improve early intervention, reduce exclusions and suspensions, and ensure children and young people with SEND can access the right support at the right time. Central to the plan is a commitment to inclusion and belonging, recognising that children thrive when they feel safe, valued, and connected to their school communities. Key priorities include implementing a three-tiered model of alternative provision, enhancing commissioning and quality assurance processes, expanding specialist capacity, and embedding inclusive practice across schools. The plan was co-developed with partners and informed by data, lived experience, and national best practice, and will be monitored through the SEND Improvement Board to ensure accountability and impact.

7. **Children and Young People’s Partnership Plan:** BCP’s recently published Children and Young People’s Plan sets out a clear ambition for all children to feel fulfilled, safe, and able to lead happy, healthy lives. This vision aligns closely with the Belonging Strategy, which focuses on ensuring every child feels valued, included, and connected to their school and community. Together, these strategies reinforce a shared commitment to inclusion, wellbeing, and equity—placing belonging at the heart of what it means to thrive in BCP.
- **Belonging Strategy:** In 2024, BCP Council co-produced a *Belonging Strategy* with children, families, and education partners. This strategy sets out a shared vision for ensuring every child feels safe, valued, and included in their school and community. It has helped shape our wider inclusion agenda and underpins our approach to reducing exclusions. Central to this vision is a commitment to strong partnership working across the local area, ensuring that children are supported by a joined-up system that identifies challenges early, acts swiftly and effectively, and provides sustained support for as long as needed. The strategy is supported with a Belonging Plan which contains a number of joint actions across the partnership to develop and implement evidence-based strategies that reduce exclusions and improve outcomes for all children. Further details are shared in the next steps section of this report.
8. **Commissioning Arrangements:** The council has also worked closely with commissioners to strengthen quality assurance and safeguarding across all tiers of provision. This includes clearer referral pathways, improved oversight of pupil outcomes, and enhanced safeguarding protocols. Consequently, there is confidence that the council’s commissioning processes ensure children receive full-time education from day six of a permanent exclusion, in line with statutory guidance.
9. **Data Sharing Agreements:** We maintain 100% data-sharing coverage across BCP schools, enabling timely and informed discussions around individual cases and broader trends. This collaborative approach ensures that exclusion is always a last resort and that inclusive alternatives are explored wherever possible.
- **Day to Day Operational Arrangements:** The council’s arrangements for managing exclusions and monitoring suspension data is in line with its statutory duties to ensure timely oversight, identify emerging trends, and provide support schools in promoting inclusive practice. The council’s Inclusion Team plays a proactive role in supporting schools to prevent exclusions. Through direct engagement, challenge, and solution-focused planning, the team has helped rescind permanent exclusions and avoid others altogether. Arrangements are summarised below starting with notification from schools:
 - Schools inform the Local Authority of all school suspensions and exclusions and provide other information that will enable appropriate provision to be arranged.
 - The Local Authority arranges alternative provision for children who have been excluded from the 6th day following their exclusion. Their home school is responsible for providing them with education for the first 5 days after the exclusion.
 - Children accessing alternative provision are usually placed within either our Pupil Referral Unit or an Alternative Provision Academy. BCP Council commission 116 places for children that have been excluded from school. The exception to this is when it is assessed that the pupil’s needs could be better met by an alternative provider, there are safeguarding reasons for not doing so or there are insufficient places available at these settings.

Each school is allocated a Link Alternative Education Co-ordinator who:

- Provides advice on alternatives to placing children in alternative provision or exclusion and on when a request for the LA to arrange a suitable education might be appropriate.
- Arranges and monitors alternative education which has been agreed by BCP Council's Alternative Provision Panel and commissioned by the Local Authority.

The Virtual School: The Virtual School has also delivered targeted support for children in our care (CIC), resulting in zero permanent exclusions and reduced suspensions for this vulnerable cohort—demonstrating how data is used to inform and tailor support. The Virtual School works closely with designated teachers, social workers, and school leaders to monitor attendance, behaviour, and progress for children in care. It challenges exclusions where appropriate and ensures that schools explore all reasonable adjustments before considering suspension or permanent exclusion. The team also supports training and capacity-building around trauma-informed practice and attachment-aware approaches, helping schools better understand and respond to the needs of vulnerable learners. The Virtual School's proactive and collaborative approach gives a clear indication of the benefits of a collaborative and targeted approach, trust engagement and capacity training – as summarised below.

- **Strategic and Targeted Interventions** - Sustained reductions in suspensions and improved attendance reflect timely, data-led support for schools of concern through weekly analysis.
 - **School and Trust Engagement** -Stronger leadership accountability between the Virtual School, Heads of Service and Headteachers and shared ownership are ensuring sustainable, consistent responses to pupil needs.
 - **Capacity Building Through Training** - Therapeutic Crisis Intervention (TCI) training for Virtual School staff and enhanced designated teacher training are strengthening whole-school approaches and statutory responsibilities.
- **Performance, Oversight:** Performance is monitored by the Inclusion Service where exclusion and suspensions data is scrutinised. A dashboard of data supports this process and will be further enhanced with an emerging data scorecard which will help further ensure the council's effectiveness is measured against key performance indicators. This ensures that trends are identified early, and that targeted action can be taken. The Inclusion Service submit exception reports through monthly Education Quality and Performance meetings, where discussion is focussed around exceptions and practice, and is where the impact of our approach to reducing permanent exclusions and suspensions is reported and outcomes of children and young people are shared and celebrated. Highlight reports are shared with the Quality and Performance Improvement Board (QPIB) and the SEND Improvement Board (SIB).

Permanent Exclusions – Benchmark Data

10. **Rate of Permanent Exclusions:** Table 1 shows the permanent exclusion rate in BCP compared with regional and national benchmarks. Key points to note are as follows:
- BCP's permanent exclusion rate has fluctuated over the six-year period, starting at 0.12 in 2019/20 (12 permanent exclusions per 10,000 children), dipping to 0.09 in 2020/21, then rising sharply to 0.23 in 2022/23.
 - Although the rate dropped to 0.17 in 2023/24, the provisional figure for 2024/25 is 0.20. BCP's exclusion rate has consistently exceeded the Southwest regional average, statistical neighbours, and national figures in every year. For example, in 2022/23, BCP's rate of 0.23 was significantly higher than England's 0.11, the South West's 0.13, and statistical neighbours' 0.10.
 - The data points to a disproportionate use of permanent exclusion in BCP, raising concerns about the impact on pupils with vulnerabilities and the effectiveness of preventative strategies.

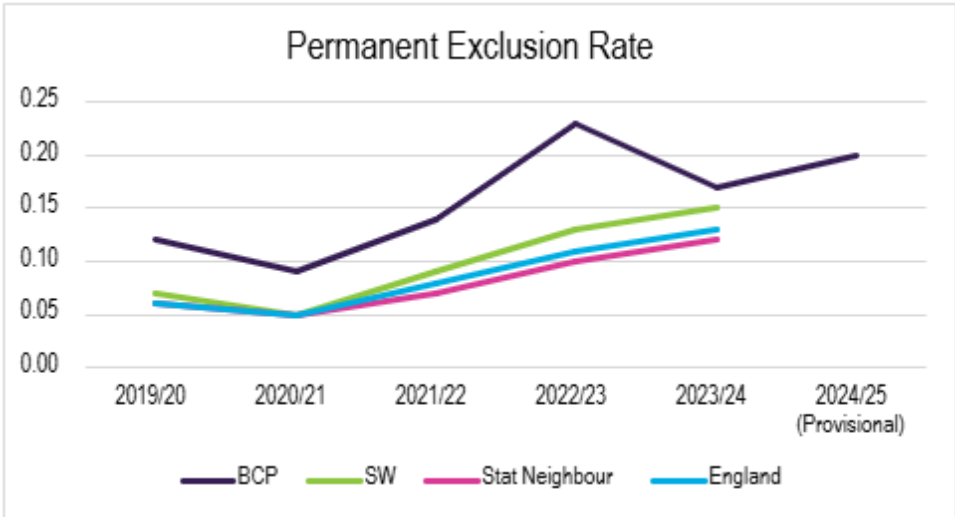
Table 1: Permanent Exclusion Rate (per 10,000 children)

	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25 (Provisional)
BCP	0.12	0.09	0.14	0.23	0.17	0.20
SW	0.07	0.05	0.09	0.13	0.15	n/a
Stat Neighbour	0.06	0.05	0.07	0.10	0.12	n/a
England	0.06	0.05	0.08	0.11	0.13	n/a

11. Table 2 shows the number of exclusions over a 6-year period. The data shows a clear upward trend in permanent exclusions across BCP schools over the past six years, rising from 60 in 2019/20 to a provisional 105 in 2024/25. While there was a temporary dip in 2020/21 (48 exclusions), likely influenced by pandemic-related school closures, the numbers have since escalated with peaks either side of slightly lower numbers in 2023/24. The lower numbers in 2023/24 may reflect the impact of small-scale pilot where additional resources were offered to schools to prevent exclusions.
12. **Deep-Dive 2024/25 Permanent Exclusions:** A deep dive into the data for 2024/25 shows that of the 105 children that were permanently excluded:
- 96 permanent exclusions were from secondary schools, 4 were from special schools, and 5 were from primary schools. Exclusions were spread across a total of 32 schools. The maximum number of permanent exclusions in any one secondary school was 13 followed by 11, 9 and 9 and 7 exclusions for the top five excluding schools.
 - Children in Year Groups 9, 10 and 11 account for a total of 91 exclusions, with Year 11 children reaching the highest number with a total of 34 exclusions.
 - 15 of the 105 children were open to Social Care, 24 had an EHCP and 40 children were receiving SEN support.
 - Just under two thirds of children excluded were boys and 88.6% of those excluded are white British or English. There are no emerging themes in respect of the black and minority ethnic cohort.
 - Persistent or general disruption accounted for 54 exclusions, 20 were for a physical assault against pupil, 17 were drug and alcohol related and 13 were for a physical assault against an adult, 8 were for use or threat of an offensive weapon and the remaining were for verbal or threatening behaviour.
13. The benchmark data suggests systemic challenges to behaviour management, inclusion, or early intervention compared to similar areas. Work to reduce exclusions will rely on the success of multi-agency collaboration and early help. Work to strengthen our local arrangements is underway and further details are provided towards the end of the report.

Table 2: Number Permanent Exclusions

	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25 (Provisional)
BCP	60	48	76	105	91	105



14. **Permanent Exclusions by Phase:** The data table 3 reveals a concentration of permanent exclusions in secondary schools across BCP.
15. When comparing exclusion rates by phase against national averages, BCP consistently exceeds national benchmarks, particularly in secondary and special schools. In 2022/23, BCP's secondary

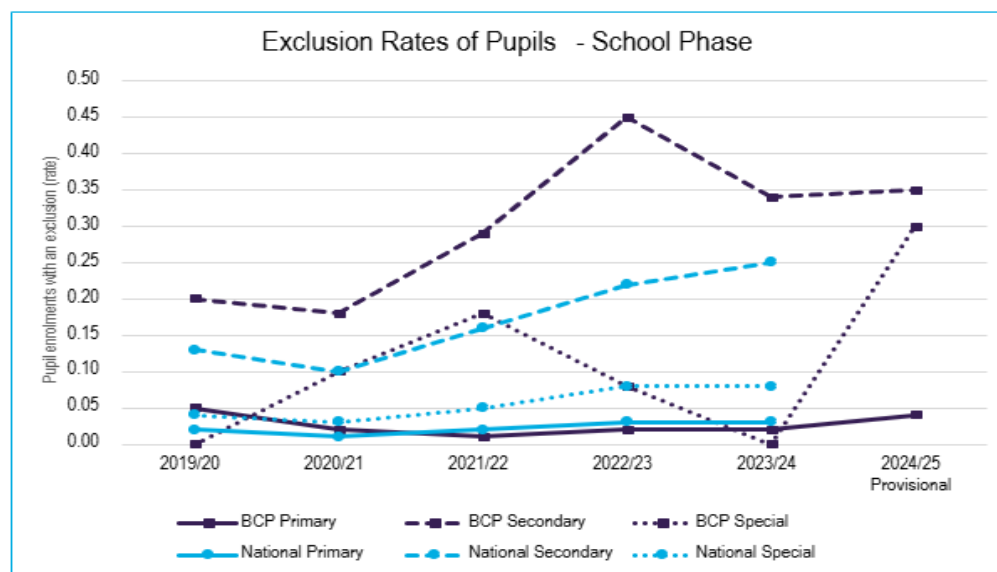
exclusion rate reached 0.45, more than double the national rate of 0.22. Although this dropped to 0.34 in 2023/24, it still reflects a disproportionately high use of exclusion.

16. The most concerning shift is in special schools: after recording no exclusions in 2023/24, the provisional rate for 2024/25 jumps to 0.30—far above previous national averages. This suggests a possible breakdown in inclusive practice or support for pupils with complex needs. This may reflect a small number of exclusions within a relatively small cohort, where even one or two cases can significantly affect the overall rate. It can also indicate the increasing complexity of need among pupils in special schools, particularly where behaviours linked to unmet Social, Emotional and Mental Health (SEMH) needs challenge the capacity of settings to respond.
17. Overall, the data points to a need for targeted support in secondary and special education settings, with a focus on early intervention, inclusive strategies, and multi-agency collaboration to reduce reliance on exclusion as a behavioural response.

Table 3: Rate of Permanent Exclusions by Phase Compared with National

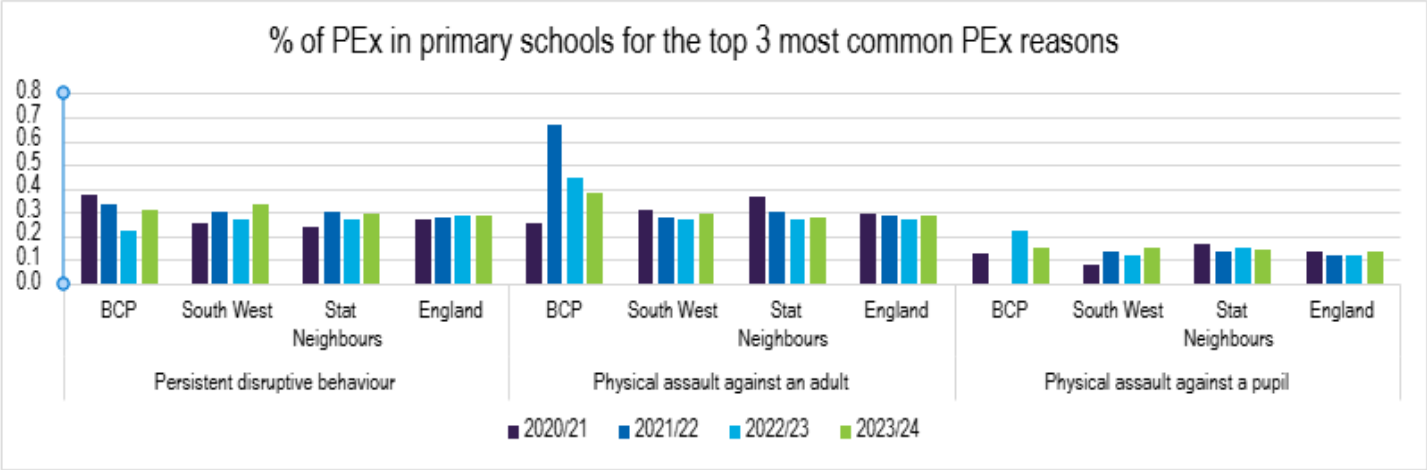
	BCP			National		
	Primary	Secondary	Special	Primary	Secondary	Special
2019/20	0.05	0.20	0.00	0.02	0.13	0.04
2020/21	0.02	0.18	0.10	0.01	0.10	0.03
2021/22	0.01	0.29	0.18	0.02	0.16	0.05
2022/23	0.02	0.45	0.08	0.03	0.22	0.08
2023/24	0.02	0.34	0.00	0.03	0.25	0.08
2024/25*	0.04	0.35	0.30			

*Provisional



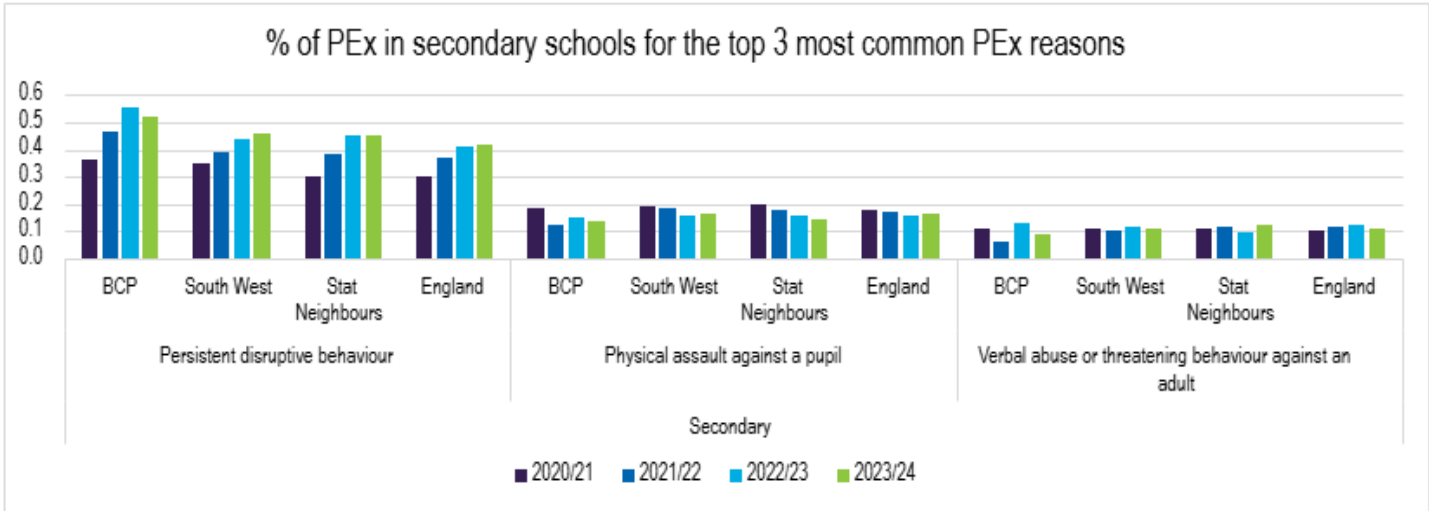
18. **Reasons for Permanent Exclusion in Primary Schools:** The data in the graph below show the 3 most common reasons for permanent exclusions in primary schools. It shows that persistent disruptive behaviour is the leading cause of permanent exclusions in BCP primary schools, with a marked increase between 2020/21 and 2022/23. While other regions—including the Southwest, statistical neighbours, and England—show relatively stable rates for this reason, BCP’s spike suggests that behaviour management challenges in primary settings may be escalating locally.
19. Physical assault against an adult also stands out in BCP, particularly in 2021/22, where the percentage far exceeds that of other regions. Although this figure declines in subsequent years, it remains notably higher than comparative benchmarks, indicating a need for targeted support and early intervention strategies to address emotional regulation in younger pupils.
20. In contrast, physical assault against a pupil remains low and consistent across all regions and years, suggesting that peer-on-peer violence is not a primary driver of exclusions in primary settings. This stability may reflect effective peer mediation or supervision practices, but it also underscores that adult-directed aggression and disruptive behaviour are the more pressing concerns in BCP.

21. Overall, the data points to a need for strengthened primary behaviour support, trauma-informed approaches, and staff training to prevent and reduce exclusions driven by persistent disruption and adult-directed aggression.



22. The data in the graph below show the three most common reasons for permanent exclusions in secondary schools. The data highlights persistent disruptive behaviour, physical assault against a pupil, and verbal abuse or threatening behaviour against an adult as the three most common reasons for permanent exclusions in BCP secondary schools. Across the four-year period, BCP's rates have consistently exceeded regional, statistical neighbour, and national averages, particularly for disruptive behaviour. Key points to note are as follows:

- Persistent Disruptive Behaviour:** This remains the most frequent reason for permanent exclusion in BCP, with rates rising from 36.4% in 2020/21 to a peak of 55.2% in 2022/23, before slightly declining to 52.3% in 2023/24. These figures are consistently higher than those for the Southwest and England, indicating a significant and ongoing challenge in managing behaviour in secondary classrooms.
- Physical Assault Against a Pupil:** BCP's rates for this reason have fluctuated, starting at 18.2% in 2020/21, dropping to 12.3% in 2021/22, then rising again to 15.4% in 2022/23 before settling at 13.5% in 2023/24. While generally in line with or slightly below regional and national averages, the variation suggests a need for continued focus on peer conflict and violence prevention.
- Verbal Abuse or Threatening Behaviour Against an Adult:** BCP's figures for this category have remained relatively low and below national averages, ranging from 6.2% in 2021/22 to 13.3% in 2022/23, before declining again to 9.0% in 2023/24. Although less prevalent than other reasons, this behaviour still warrants attention given its impact on staff wellbeing and school climate.



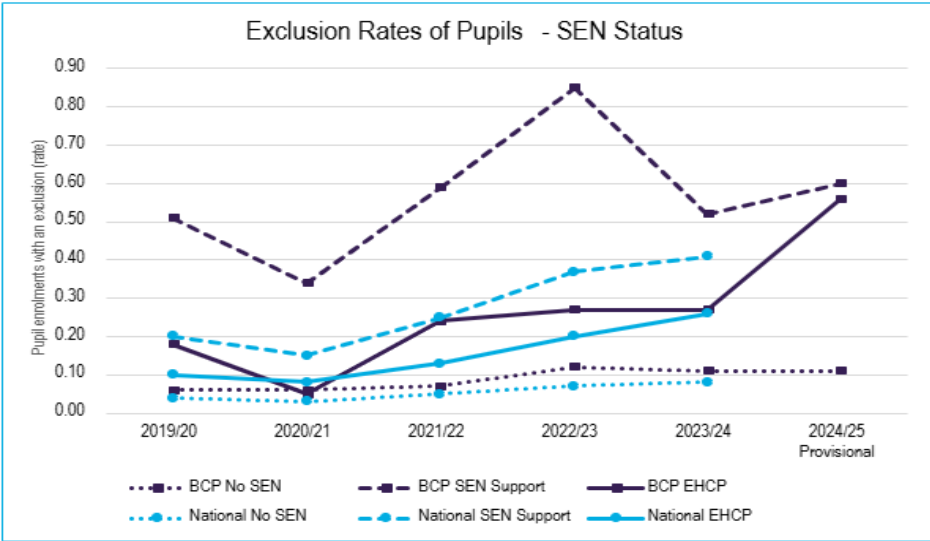
23. **Permanent Exclusions by SEND Status:** Table 4 shows the rate of permanent exclusions by SEND status for all children in BCP compared with national figures. The data reveals a persistent and disproportionate pattern of permanent exclusions among pupils with special educational needs in BCP. Pupils on SEN Support have consistently faced the highest exclusion rates, peaking at 0.85 in 2022/23, more than double the national rate of 0.37 that year. Although this dropped to 0.52 in 2023/24, the provisional figure for 2024/25 remains elevated at 0.60, indicating ongoing systemic challenges in supporting this group.

24. Exclusion rates for pupils with an Education, Health and Care Plan (EHCP) in BCP have also risen sharply—from 0.05 in 2020/21 to a provisional 0.56 in 2024/25. This is significantly higher than the national EHCP rate of 0.26 in 2023/24 and suggests that even those with the highest level of statutory support are at increasing risk of exclusion locally.
25. In contrast, pupils without SEND in BCP have consistently lower exclusion rates, aligning more closely with national averages. This widening gap between SEND and non-SEND pupils highlights a critical equity issue: children with additional needs are being excluded at rates that far exceed their peers.
26. The council's data suggests that current systems may not be adequately meeting the needs of SEND pupils, and that exclusion is being used as a response to unmet need rather than as a last resort. Strategic investment in SEND support, staff training, and behaviour pathways will be essential to reversing this trajectory.

Table 4: Permanent Exclusion Rate by SEND Status

	BCP			National		
	EHCP	SEN Support	No SEN	EHCP	SEN Support	No SEN
2019/20	0.18	0.51	0.06	0.10	0.20	0.04
2020/21	0.05	0.34	0.06	0.08	0.15	0.03
2021/22	0.24	0.59	0.07	0.13	0.25	0.05
2022/23	0.27	0.85	0.12	0.20	0.37	0.07
2023/24	0.27	0.52	0.11	0.26	0.41	0.08
2024/25*	0.56	0.60	0.11			

*Provisional

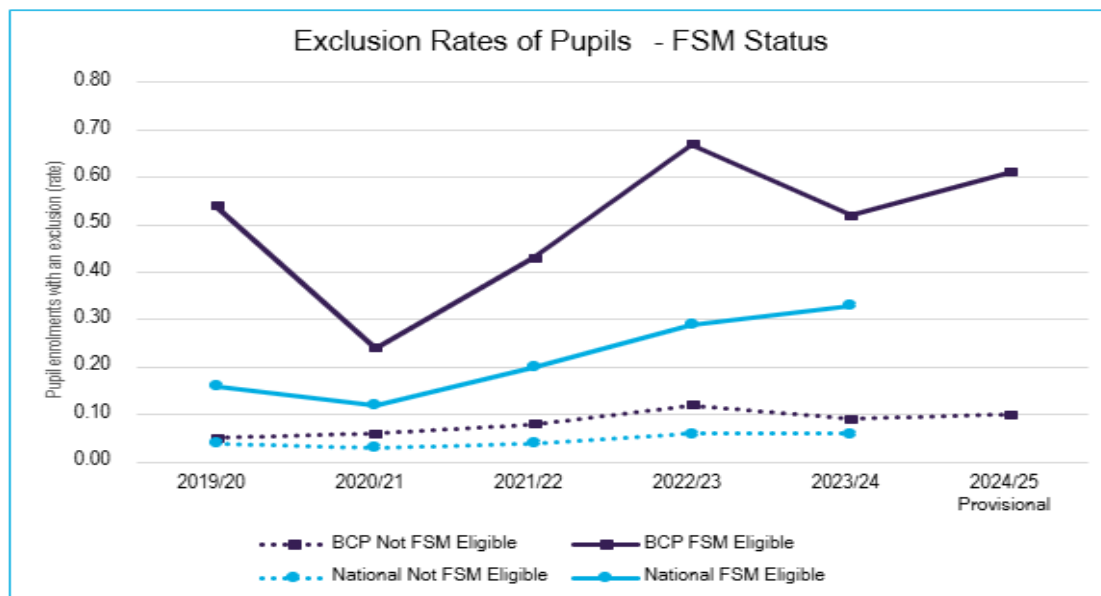


27. **Permanent Exclusion Rate for Children Eligible for Free School Meals:** The data in Table 5 highlights disparity in permanent exclusion rates between children eligible for free school meals (FSM) and their non-FSM peers in BCP. Across all years, FSM-eligible pupils in BCP are excluded at rates significantly higher than both the national average and their non-FSM counterparts. For example, in 2022/23, the exclusion rate for FSM pupils in BCP reached 0.67—more than double the national rate of 0.29, and over five times the rate for non-FSM pupils locally.
28. While there was a slight dip in 2023/24 to 0.52, the provisional figure for 2024/25 shows a renewed increase to 0.61, suggesting that exclusion remains a systemic issue for disadvantaged pupils. In contrast, exclusion rates for non-FSM pupils in BCP have remained relatively low and stable, fluctuating between 0.05 and 0.12 over the six-year period.
29. This pattern reflects a broader national concern about the intersection of poverty and exclusion, but BCP's figures indicate a more acute local challenge. This identifies socioeconomic disadvantage as a key risk factor for exclusion and calls for targeted, multi-agency interventions. For BCP, this data underscores the urgent need to strengthen inclusive practices, embed equity-focused behaviour policies, and ensure that schools are supported to address the underlying causes of disruption—rather than resorting to exclusion for children already facing disadvantage.

Table 5: Permanent Exclusion Rate for Children Eligible for Free School Meals

	BCP		National	
	FSM Eligible	Not FSM Eligible	FSM Eligible	Not FSM Eligible
2019/20	0.54	0.05	0.16	0.04
2020/21	0.24	0.06	0.12	0.03
2021/22	0.43	0.08	0.20	0.04
2022/23	0.67	0.12	0.29	0.06
2023/24	0.52	0.09	0.33	0.06
2024/25*	0.61	0.10		

*Provisional. Note: Data is not available for Southwest regional local authorities or statistical neighbours.



Suspensions

30. **Suspensions Rate:** Tables 6 and 7 show the suspension rate and the number of suspensions in BCP compared with regional and national benchmarks. Key points to note are as follows:

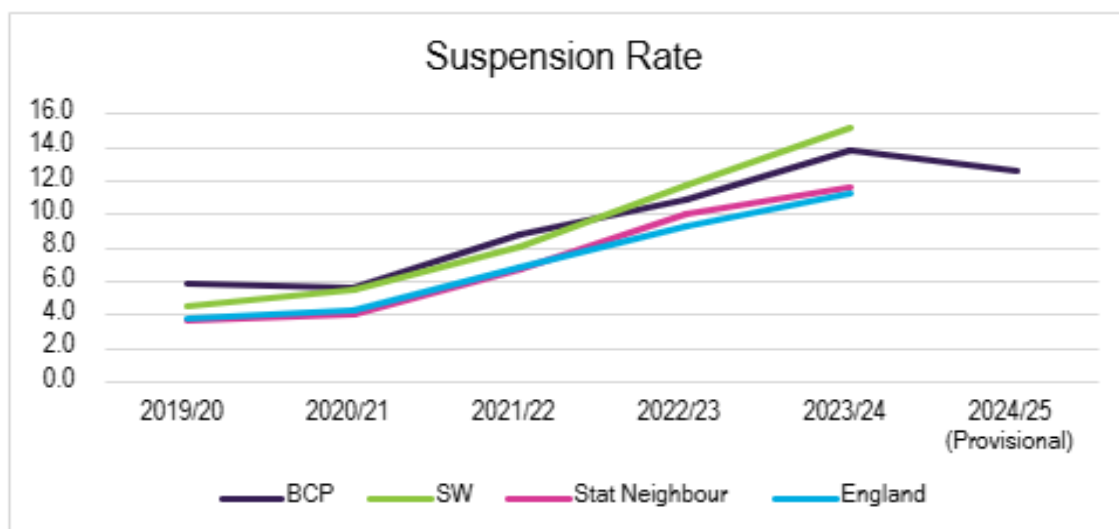
- This data reveals a clear and sustained rise in suspension rates across BCP over the past six years, with figures consistently exceeding national, regional, and statistical neighbour averages. BCP's suspension rate increased from 5.9 in 2019/20 to a peak of 13.9 in 2023/24, before a slight dip to 12.6 in the provisional 2024/25 data. This trajectory suggests that exclusionary practices—particularly short-term removals—are being used more frequently as a behavioural response.
- The total number of suspensions in BCP more than doubled from 3,017 in 2019/20 to 7,347 in 2023/24, reflecting not just a higher rate but a broader systemic reliance on suspension. While the Southwest region also shows a rising trend, BCP's figures are consistently above the national average, indicating that local factors—such as policy, support capacity, or school culture—may be contributing to the elevated use of suspensions.
- This further highlights the need for early intervention and inclusive strategies to reduce reliance on exclusions. The slight reduction in the provisional 2024/25 data may signal the beginning of a shift, but the overall volume remains high. To address this, BCP may need to strengthen behaviour support systems, invest in staff training, and expand access to preventative services that reduce the need for suspension.

Table 6: Suspension Rate

	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25 (Provisional)
BCP	5.9	5.7	8.8	11.0	13.9	12.6
SW	4.6	5.5	8.1	11.7	15.2	n/a
Stat Neighbour	3.7	4.1	6.8	10.0	11.7	n/a
England	3.8	4.3	6.9	9.3	11.3	n/a

Table 7: Number of Suspensions

	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25 (Provisional)
BCP	3017	2947	4633	5787	7347	6617



31. **Deep-Dive 2024/25 Suspensions:** A deep dive into the data for 2024/25 shows that there were 6,617 suspensions across primary, secondary and special schools resulting in 24,449 sessions lost affecting 2,022 children. The data show that:

- Sessions lost in Year Groups 10, 11, and 12 account for 88.9% of sessions lost in BCP.
- 190 of the 2,022 children with suspensions were open to Social Care, 432 had an EHCP and 535 children were receiving SEN support.
- Two thirds of children suspended were boys
- Persistent or general disruption accounted for 1056 suspensions, 598 were for a physical assault against pupil, 464 were for verbal abuse/threatening behaviour, 231 were for a physical assault against an adult, 178 were drug and alcohol related, 126 were verbal abuse/threatening behaviour against a pupil, 105 were damage related, 81 was for racist abuse, 76 related to the use or threat of an offensive weapon and residual reasons are made up of bullying, inappropriate use of IT, theft, sexual misconduct, abuse against sexual orientation and gender identify.

32. **1+ Suspensions Rate:** Table 8 shows the suspension rate in BCP for children with one or more suspensions compared with regional and national benchmarks. Key points to note are as follows:

- This data shows a steady increase in the proportion of pupils receiving one or more suspensions in BCP over the past six years, rising from 2.2% in 2019/20 to a peak of 4.0% in 2023/24, with a slight dip to 3.9% in the provisional 2024/25 figures. This mirrors national and regional trends. With the exception of 2023/24 BCP's rates have consistently tracked just above the England average.
- The Southwest region and statistical neighbours also show upward trajectories, but BCP's figures remain among the highest, particularly in recent years. This indicates that a growing number of pupils are experiencing repeated suspensions, which may reflect underlying behavioural, social, or unmet educational needs.
- It is vital to identify children at risk of repeated exclusion and intervene early with targeted support. BCP's data reinforces this need, pointing to the value of multi-agency collaboration,

restorative approaches, and inclusive behaviour policies to reduce recurrence and improve outcomes for affected pupils.

Table 8: 1+Suspensions Rate

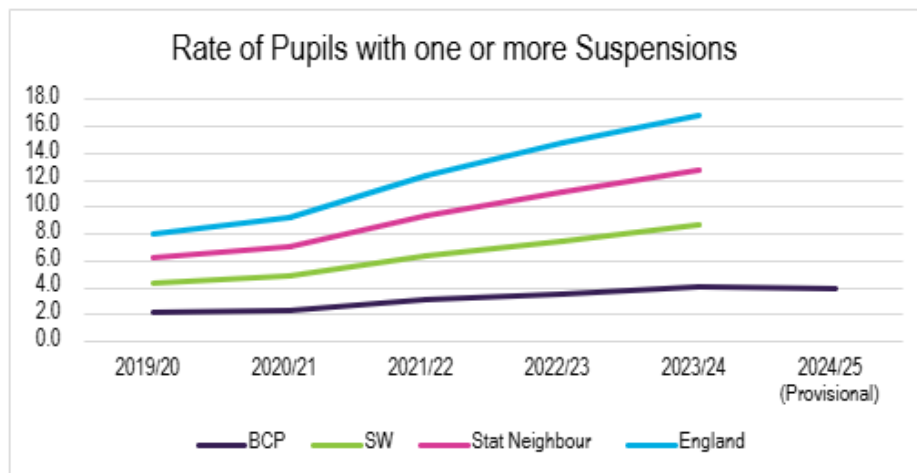
	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25 (Provisional)
BCP	2.2	2.4	3.1	3.5	4.0	3.9
SW	2.1	2.5	3.3	4.0	4.6	n/a
Stat Neighbour	1.9	2.2	3.0	3.7	4.1	n/a
England	1.9	2.2	3.0	3.6	4.0	n/a

33. **Number of Children with 1+ Suspensions:** Table 9 shows the number of suspensions for children with one plus suspensions compared with regional and national benchmarks. It shows:

- A clear and sustained increase in the number of pupils in BCP who have experienced one or more suspensions over the past six years. From 1,143 pupils in 2019/20, the figure rose steadily each year, peaking at 2,131 in 2023/24—nearly doubling over the period. Although the provisional figure for 2024/25 shows a slight decline to 2,017, the overall trend remains significantly elevated.
- This upward trajectory suggests that a growing proportion of pupils are being repeatedly suspended, which may reflect deeper behavioural challenges, unmet needs, or systemic reliance on exclusionary discipline. The increase aligns with broader patterns seen in the suspension rate data, reinforcing concerns about the cumulative impact of repeated suspensions on pupil engagement, attainment, and wellbeing.
- It is important to identify children at risk of repeated exclusion and intervene early with targeted, multi-agency support. BCP's data highlights the urgency of embedding preventative strategies and ensuring schools have access to timely and effective support services to reduce recurrence and improve outcomes.

Table 9: Number of pupils with 1 or more suspensions

	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25 (Provisional)
BCP	1143	1226	1630	1837	2131	2017

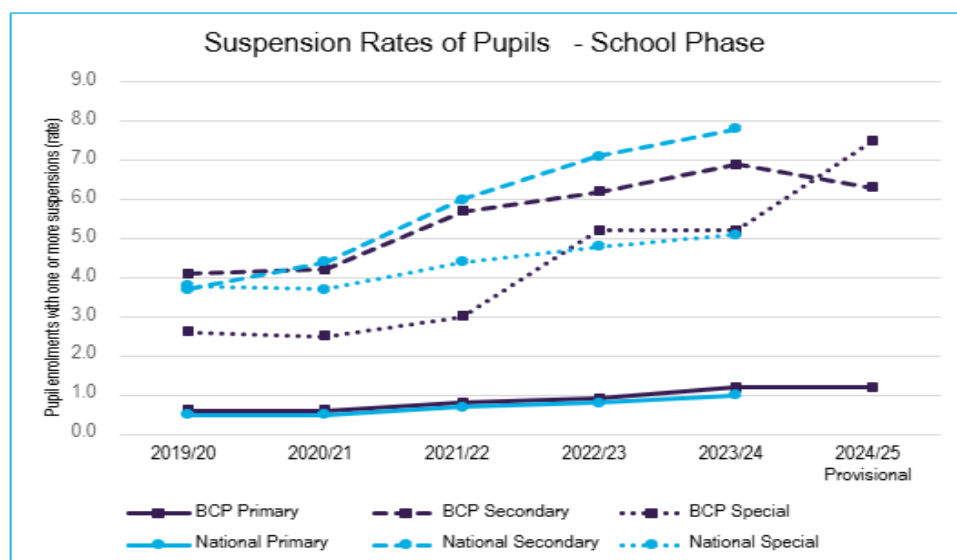


34. **Rate of Suspensions by Phase:** Table 10 sets out the rate of children with one or more suspensions by phase. It highlights a consistent upward trend in the proportion of pupils receiving one or more suspensions across all phases in BCP, with particularly sharp increases in special and secondary settings.
35. In primary schools, BCP's suspension rate rose from 0.6% in 2019/20 to 1.2% by 2023/24, doubling over five years and slightly exceeding national and statistical neighbour averages. This suggests growing challenges in early education, possibly linked to unmet needs or post-pandemic developmental impacts. BCP ranks 147th out of 153 local authorities in England for primary school suspension rates, according to the Local Authority Interactive Tool (LAIT), highlighting a significant area of concern and placing BCP in quartile D.

36. Secondary schools show the highest rates overall, with BCP climbing from 4.1% in 2019/20 to a peak of 6.9% in 2023/24. Although the provisional 2024/25 figure shows a slight dip to 6.3%, BCP remains consistently below the Southwest and national averages in this phase, which may reflect either effective interventions or differing thresholds for suspension.
37. The most striking trend is in special schools, where BCP's rate rose from 2.6% in 2019/20 to a provisional 7.5% in 2024/25.
38. These patterns emphasize the importance of inclusive practice, early help, and multi-agency collaboration. For BCP, the data suggests an urgent need to review behaviour policies and support structures across all phases—particularly in special schools—to reduce reliance on suspension and improve outcomes for vulnerable learners.

Table 10: Pupil enrolments with one or more suspensions (rate) by Phase

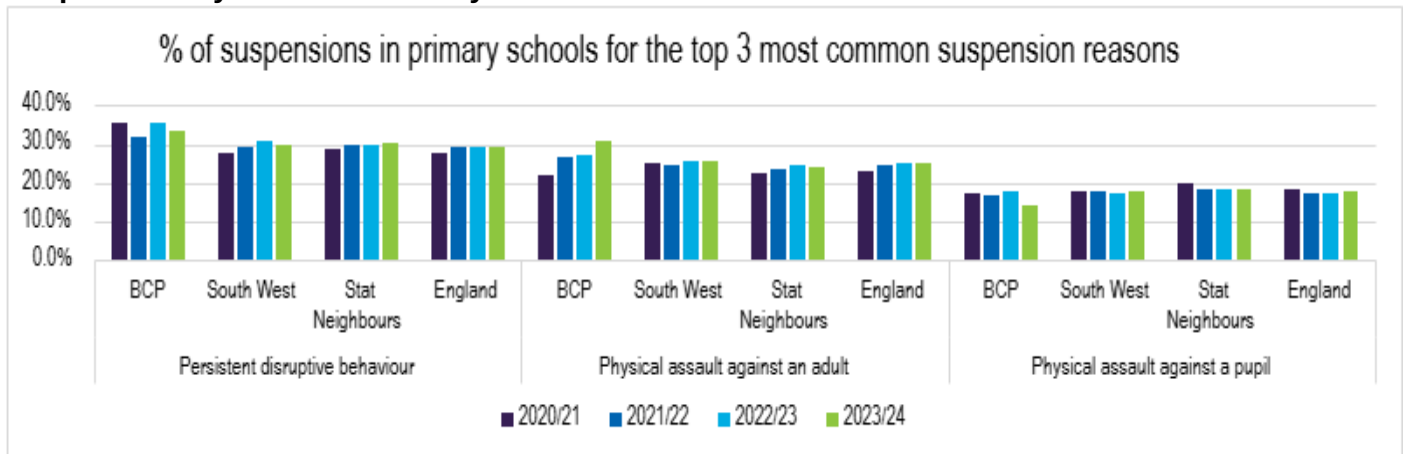
	BCP			National			Southwest			Stat Neighbours		
	Primary	Sec	Special	Primary	Sec	Special	Primary	Sec	Special	Primary	Sec	Special
2019/20	0.6	4.1	2.6	0.5	3.7	3.8	0.7	3.9	4.4	0.6	3.5	3.9
2020/21	0.6	4.2	2.5	0.5	4.4	3.7	0.7	4.8	4.7	0.6	4.1	3.8
2021/22	0.8	5.7	3.0	0.7	6.0	4.4	0.8	6.3	5.2	0.8	5.7	4.4
2022/23	0.9	6.2	5.2	0.8	7.1	4.8	1.0	7.6	5.5	1.0	7.0	4.8
2023/24	1.2	6.9	5.2	1.0	7.8	5.1	1.3	8.5	6.7	1.2	7.6	5.7
2024/25 Prov	1.2	6.3	7.5									



39. The graph below shows the three most common suspension reasons in primary schools. Across the four-year period, BCP's rates for these reasons have generally exceeded regional, statistical neighbour, and national averages. Key points to note for each reason are as follows:

- **Persistent Disruptive Behaviour:** This remains the most frequent reason for suspension in BCP, with rates consistently above comparator areas. In 2022/23, 35.6% of suspensions were due to disruptive behaviour, compared to 30.7% in the Southwest and 29.2% nationally. Although the rate dipped slightly in 2023/24 to 33.4%, it still reflects a higher-than-average reliance on suspension for classroom disruption.
- **Physical Assault Against an Adult:** BCP has seen a steady increase in suspensions for this reason, rising from 22.1% in 2020/21 to 31.1% in 2023/24. This is significantly higher than both regional and national averages, which remained around 25%. The upward trend suggests growing concerns around pupil aggression towards staff and other adults in school settings.
- **Physical Assault Against a Pupil:** While this category has remained relatively stable nationally, BCP's figures show a slight decline—from 17.2% in 2020/21 to 14.0% in 2023/24. Despite being lower than the national average in the most recent year, it still represents a notable proportion of suspensions and highlights the need for continued focus on peer conflict resolution.

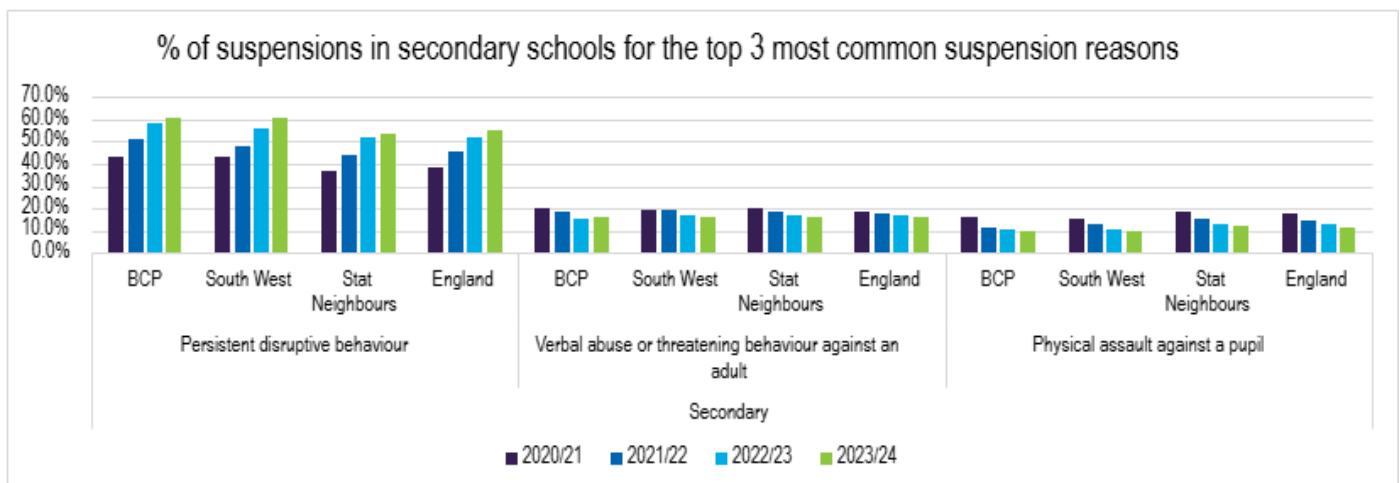
Suspensions by Reason – Primary



40. The graph below shows the three most common suspension reasons in secondary schools. The data reveals consistent patterns in the reasons for suspensions in BCP secondary schools, with persistent disruptive behaviour, verbal abuse or threatening behaviour against an adult, and physical assault against a pupil being the most common suspension reasons. BCP's rates in these categories have generally exceeded regional, statistical neighbour, and national averages over the four-year period. Key points to note for each reason are as follows:

- **Persistent Disruptive Behaviour:** This remains the dominant reason for suspensions in BCP secondary schools, with a steady year-on-year increase from 43.3% in 2020/21 to 60.5% in 2023/24. These figures are consistently above national and comparator averages, indicating a significant and growing challenge in managing classroom behaviour and maintaining learning environments.
- **Verbal Abuse or Threatening Behaviour Against an Adult:** BCP's rates for this reason have remained relatively stable, ranging from 14.9% to 19.9% across the period. While broadly in line with regional and national averages, the persistently high proportion suggests ongoing concerns around pupil interactions with staff and authority figures.
- **Physical Assault Against a Pupil:** This category has shown a downward trend in BCP, falling from 16.2% in 2020/21 to 9.4% in 2023/24. Although this decline is notable, BCP's rates remain slightly below national and regional averages, which may reflect improvements in peer conflict management or shifts in reporting and categorisation.

Suspensions by Reason – Secondary



41. **Suspensions by SEND Status:** Table 11 shows a widening disparity in suspension rates by SEND status in BCP, particularly for pupils with Education, Health and Care Plans (EHCPs). It shows:

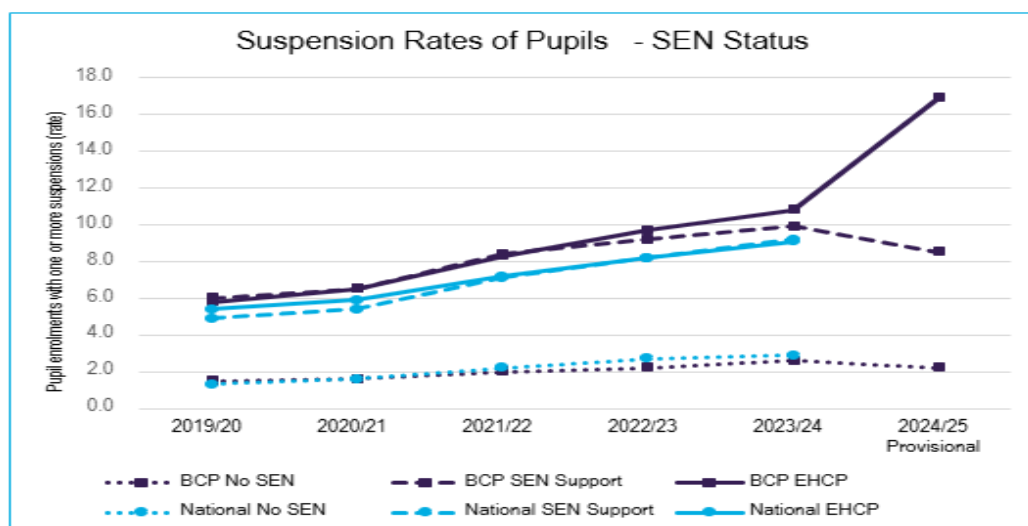
- From 2019/20 to 2023/24, suspension rates for pupils with EHCPs in BCP rose from 5.8 to 10.8, already exceeding national and regional averages. However, the provisional figure for 2024/25 shows a dramatic spike to 16.9, nearly double the previous year and far above any comparator. This suggests a significant breakdown in inclusive practice and raises serious

questions about how pupils with the highest level of statutory support are being managed in mainstream and specialist settings.

- Pupils with SEN Support also face elevated suspension rates, consistently above those without SEND and often above national and regional benchmarks. Although the rate for pupils with SEN Support in BCP dropped slightly to 8.5 in the provisional 2024/25 data, it remains more than three times the rate for pupils with no SEND.
- Pupils without SEND have the lowest suspension rates across all years and regions, reinforcing the pattern that children with additional needs are disproportionately affected.
- These trends emphasize the need for trauma-informed approaches, staff training, and multi-agency support to reduce suspensions among pupils with SEND. The data signals an urgent need to review behaviour policies, strengthen early intervention, and ensure that schools are equipped to meet the needs of SEND learners without resorting to suspension.

Table 11: Suspensions by SEND Status **Provisional*

	BCP			National			Southwest			Stat Neighbours		
	EHCP	SEN Support	No SEN	EHCP	SEN Support	No SEN	EHCP	SEN Support	No SEN	EHCP	SEN Support	No SEN
2019/20	5.8	6.0	1.5	5.4	4.9	1.3	7.1	5.8	1.3	5.8	5.1	1.3
2020/21	6.5	6.5	1.6	5.9	5.4	1.6	8.5	6.5	1.7	6.3	5.8	1.5
2021/22	8.3	8.4	2.0	7.2	7.1	2.2	9.6	8.1	2.2	7.5	7.6	2.1
2022/23	9.7	9.2	2.2	8.2	8.2	2.7	10.7	9.8	2.7	8.5	9.2	2.6
2023/24	10.8	9.9	2.6	9.1	9.2	2.9	12.0	11.3	3.0	10.0	10.3	2.8
2024/25*	16.9	8.5	2.2									



42. **Suspensions for Children Eligible for Free School Meals:** Tables 12 reveals a persistent and widening disparity in suspension rates between pupils eligible for free school meals (FSM) and their peers not eligible for FSM in BCP. Key points to note are as follows:

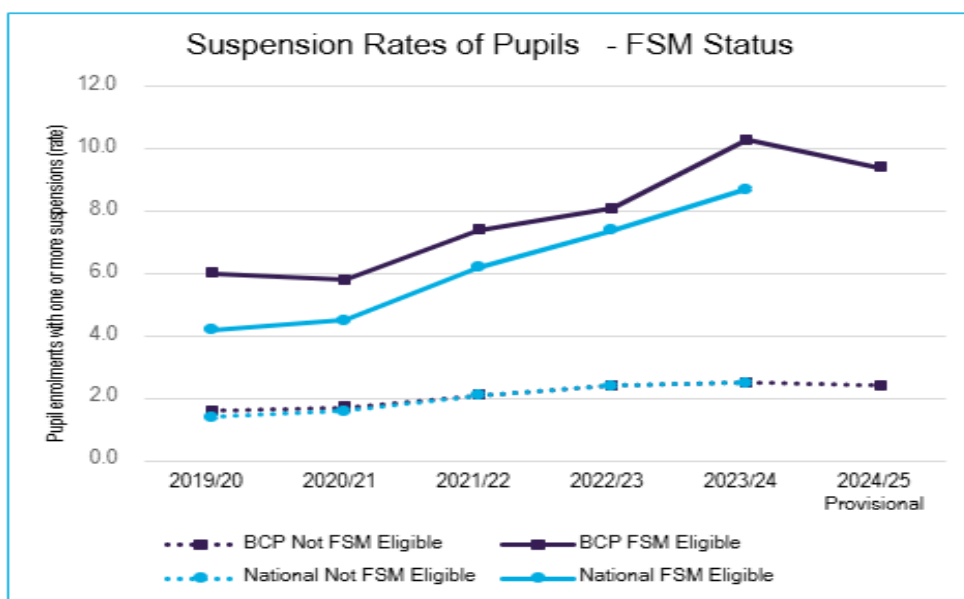
- From 2019/20 to 2023/24, pupils eligible for FSM in BCP experienced a steep rise in suspension rates—from 6.0 to 10.3—while rates for pupils not eligible for FSM remained relatively stable, fluctuating between 1.6 and 2.5. The provisional figure for 2024/25 shows a slight decline for pupils eligible for FSM to 9.4, but the gap remains stark.
- Compared to national, Southwest, and statistical neighbour averages, BCP consistently records higher suspension rates for pupils eligible for FSM. For instance, in 2023/24, BCP's rate of 10.3 exceeds the national average of 8.7 and the South West's 10.9, indicating that socioeconomic disadvantage is a more acute predictor of exclusionary discipline in BCP than elsewhere.
- This pattern suggests that pupils eligible for FSM are disproportionately affected by behavioural sanctions, which may reflect deeper systemic issues such as unmet needs, lack of early intervention, or inconsistent application of inclusive practices. Similar to the national picture, poverty is a key risk factor for exclusion.
- For BCP, this data underscores the need to embed equity-focused behaviour policies, strengthen pastoral and family support, and ensure that schools are equipped to address the

root causes of disruption—rather than relying on suspension for pupils already facing disadvantage.

Table 12: Suspensions for Children Eligible for Free School Meals

	BCP		National		Southwest		Stat Neighbours	
	FSM Eligible	Not FSM Eligible	FSM Eligible	Not FSM Eligible	FSM Eligible	Not FSM Eligible	FSM Eligible	Not FSM Eligible
2019/20	6.0	1.6	4.2	1.4	5.3	1.5	4.6	1.4
2020/21	5.8	1.7	4.5	1.6	5.9	1.8	4.9	1.6
2021/22	7.4	2.1	6.2	2.1	7.5	2.3	6.6	2.1
2022/23	8.1	2.4	7.4	2.4	9.1	2.7	8.1	2.6
2023/24	10.3	2.5	8.7	2.5	10.9	3.0	9.5	2.7
2024/25*	9.4	2.4						

*Provisional



39. Next Steps - Strategic Approach to System Improvement: BCP Council recognises the urgent need to reduce permanent exclusions and suspensions and improve outcomes for children and young people with vulnerabilities. Next steps are as follows:

- **Belonging Plan:** We are co-producing the Belonging Plan which delivers on the priorities in the Belonging Strategy. Belonging and the development of the Belonging Plan was a key focus at our Education Conference which took place in the summer and was attended by school leaders. Our BCP Youth Forum are also contributing to the development of this plan and are in the process of establishing a working group.
- **Conference – Belonging and Inclusion:** During the summer, the council hosted a well-attended Belonging and *Inclusion Conference*, bringing together school leaders, practitioners, and national experts to share best practice and strengthen our collective response. We are now working with *The Difference*—a national charity focused on inclusive leadership—and the *Ted Wragg Trust* to embed inclusive practice and build capacity across our schools. Furthermore, we have delivered a professional development workshop on belonging for Children's Services staff.
- **Three-Tier Alternative Provision (AP) Model** A multi-agency working group is in the process of developing a BCP three-tier AP model, which aligns with plans set out in the government's national SEND and AP Plan. The three-tiers will comprise of: Targeted early support within mainstream school, time-limited intensive placements in an alternative provision settings and longer-term placements to support return to mainstream or a sustainable post-16 destination. The model is designed to offer flexible, graduated support for children at risk of exclusion. This model includes:

- Tier 1: School-led internal provision
 - Tier 2: Commissioned outreach and short-term placements
 - Tier 3: Full-time specialist placements
- Membership of the AP Working Group includes representatives from parent groups, school leaders, AP leaders and BCP officers and is being co-led by 'The Difference', who recently published [What-Works-Four-Tenets-of-Effective-Internal-Alternative-Provision.pdf](#). The council is also engaging with best practice from other areas of the country, for example the Ted Wragg Trust from Devon, and South Gloucestershire Council who are part of the DfE's Change Programme. The discussions from the AP working group are being used to develop a plan to support delivery of the BCP three-tier AP model. The first draft of this delivery plan will be shared at the November's working group meeting.
 - **Inclusion Practice in Schools:** We have funded (via DfE SEND Improvement funding) and filled 50 places for our school leaders on 'The Difference's' Inclusion Leadership Course. This professional development initiative is designed to help school leaders improve whole-school inclusion, reduce lost learning and enhance outcomes for children and young people with vulnerabilities.
 - **Updating our SEND and Alternative Provision Sufficiency Strategy:** An updated strategy is in development which will incorporate a dedicated secondary-phase focus to address the growing demand for secondary specialist pathways and alternative provision. The strategy is being co-developed with partners and informed by data, lived experience, and national best practice, and will be monitored through the SEND Improvement Board to ensure accountability and impact.
 - **Development of Ordinarily Available Provision and Graduated Approach Toolkit:** The council has secured funding to second a school leader, supported by suitably experienced and qualified professionals, to develop ordinarily available provision and the graduated approach across the area. The toolkit will help schools distinguish between pupils who can thrive with consistent universal support and those who require additional interventions. The seconded leader with the support of a suitably experienced and qualified professional will work to embed ordinarily available provision across the conurbation. This approach provides structured guidance for teachers and school leaders to identify, assess, and record the needs of pupils requiring additional or special educational provision. It supports schools in planning appropriate support based on individual needs, reviewing progress systematically and ensuring that interventions are evidence-based and proportionate. By embedding this approach, schools are better equipped to intervene early and consistently, reducing the likelihood of escalation to exclusion.
 - **Inclusion Leads Pilot:** As part of a pilot utilising schools block surplus funding, we have recently appointed three Inclusion Leads to support schools develop inclusive practice. The impact of their work will be monitored and evaluated, and if effective this is a model that could be scaled up. The approach is in line with the likely direction of travel of the government's White Paper on SEND.
 - **Outreach offer:** The Council has commissioned outreach services in partnership with our local special schools to provide support for mainstream schools including specialist advice and support to meet the needs of complex children and/or cohorts within their school. There is further scope for outreach services from our Alternative Providers, and this is being explored. The model aims to support schools to build their skill and capacity to meet need at an earlier stage.
 - **Education Effectiveness Framework:** Working with our local school partners and learning from best practice in other areas, the council is developing a robust Education Effectiveness Framework aimed at driving continuous improvement across all educational settings. The framework will bring together key strands including inclusive practice, targeted support for schools, and a commitment to equity in outcomes for all learners. By working collaboratively with school and MAT leaders, as well as other partners, the framework will provide clear guidance on responsibilities and ensure every child, regardless of background or need, has access to high-quality education.

- **Co-production of best practice guidance in relation to Emotionally Based School Non-Attendance (EBSNA):** The council is developing best practice guidance to support schools in responding to Emotionally Based School Non-Attendance (EBSNA). The guidance sets out clear strategies for identifying and addressing emotional barriers to attendance, with a focus on early support, inclusive practice, and multi-agency involvement. It aims to help schools create safe, nurturing environments where pupils feel a sense of belonging and are supported to re-engage with learning.
- **Development of 'Way Forward' meetings:** Way Forward meetings are planned to provide structured support and planning when an Education Health and Care Needs Assessment Request (EHCNAR) is declined, or a decision is made not to issue an EHCP. These meetings bring together practitioners and families to review the child's needs, explore alternative support options, and agree next steps to ensure continued progress and inclusion within education settings.
- **Admissions Re-design:** Work to progress the project to re-design SEND Admission arrangements will start in November 2025. This is a major piece of work that will significantly improve our placement decision making which is a necessary foundation for commissioning sufficiency of specialist places. The purpose of the redesign is to create a fair, transparent and compliant admissions system for children and young people with an Education Health and Care Plan, ensuring appropriate placement decisions are made through improved processes and robust governance arrangements. The project will be implemented in four phases over a 7-month period with implementation from April 2026 and a period of a further 7 months thereafter for continuous review and refinement.
- **Updated In Year Fair Access Protocol:** An updated In-Year Fair Access Protocol is in development to ensure that children requiring school placements outside the standard admissions cycle are supported through a fair, transparent, and timely process. Developed in partnership with a task and finish group of headteachers, the protocol includes a decision-making matrix that enables consistent, objective evaluations of each case. At the heart of this approach is a commitment to child-focused discussion and decision making ensuring that every placement considers the individual needs, circumstances, and best interests of the child. This collaborative framework strengthens inclusion and equity, balancing the needs of pupils and schools while promoting positive outcomes for all learners. After extensive consultation, the new protocol is expected to go live during November 2025.
- **Transitions:** Establishment of a cross-phase transition working group to improve the experience of transitions between phases of education for our children and young people. The working group will identify best practice locally, regionally and nationally to improve outcomes.
- **Multi-agency Belonging Forums:** Implement best practice from other local authorities who have established multi-agency forums as a way for schools to both support each other to meet the needs of children and young people with vulnerabilities and gain support from partner agencies.
- **Targeted funding model:** BCP Council is currently developing its thinking around a schools' cluster model of shared funding, peer collaboration and inclusive practice to strengthen early intervention and reduce escalation to statutory Education, Health and Care Plans (EHCPs). The aim is to provide timely, targeted support for children with emerging or lower-level SEND needs within mainstream settings, without requiring a full EHCP assessment. The model would offer schools access to additional resources such as specialist input, equipment, or short-term interventions based on clear criteria and evidence of need. Co-produced with schools and parent/carer representatives, the model would be designed to promote inclusion, reduce delays in support, and ensure that children's needs are met earlier and more effectively. The next step is to engage our partners to develop the idea and establish what a costed model would look like. Best practice in other local authority areas has also been sought, and Southampton LA are working with us to share the learning from their model.

Financial Implications

43. The delivery plan will include invest-to-save proposals requiring upfront investment, with projected savings over an initial three-year period. Funding will be required for:
- Commissioning and developing tiered AP placements
 - Training and rollout of the Graduated Approach and OAP across all schools
 - Partnership work with external organisations (e.g. The Difference, Ted Wragg Trust)
44. Budget implications span financial years 2025/26 to 2027/28 and will be drawn from the High Needs Budget and funding obtained from the DfE's SEND Improvement Fund. Details of the headline annual savings and investments required in each year based on a 2025 starting point will be developed and costed as part of the DSG Recovery Plan. Potential Savings result from
- A reduction in exclusions and associated costs (e.g. transport, AP placements, tribunal processes)
 - Improved outcomes for vulnerable pupils, reducing future demand on social care, youth justice, and post-16 support service
 - A reduction in the need for unregistered and costly AP as more needs are met by schools

Summary of Legal Implications

45. The council's legal considerations underscore the importance of robust governance, consistent application of policy, and a clear audit trail when managing exclusions and suspensions. The headline legal implications are summarised below.
46. **Statutory Duties Under the Education Act 1996:** Under Section 19, local authorities must arrange suitable full-time education for pupils of compulsory school age who are excluded or otherwise unable to attend school. Failure to meet this duty could result in legal challenge or judicial review.
47. **Compliance with Exclusions Guidance:** Schools and the local authority must adhere to the Department for Education's statutory guidance on suspensions and permanent exclusions. This includes ensuring exclusions are lawful, reasonable, and proportionate, and that pupils and parents are informed of their rights to appeal.
48. **Equality Act 2010:** The council and schools must ensure that exclusion practices do not discriminate against pupils with protected characteristics, including disability, race, or SEND. Failure to make reasonable adjustments for pupils with SEND could result in claims of unlawful discrimination.
49. **SEND Code of Practice (2015):** The local authority has a legal duty to ensure that children with special educational needs receive appropriate support and that exclusions are not used as a substitute for unmet needs. Excluding a pupil without first considering and implementing reasonable adjustments may breach statutory obligations.
50. **Human Rights Act 1998:** Exclusion decisions must respect pupils' rights under the European Convention on Human Rights, particularly the right to education (Article 2 of Protocol 1) and the right to a fair hearing (Article 6).
51. **Data Protection and Information Sharing:** Monitoring and sharing exclusion data must comply with the UK GDPR and Data Protection Act 2018, ensuring that personal data is processed lawfully, fairly, and transparently.

Summary of Human Resources Implications

52. There are a range of resource implications for BCP Council in implementing its strategic framework to reduce exclusions and suspensions. These highlight the need for strategic workforce planning to ensure the council and schools are equipped to deliver inclusive education effectively and sustainably.
- **Workforce Capacity and Skills:** Upskilling existing staff—particularly in areas such as trauma-informed practice, restorative approaches, and inclusive pedagogy—will be essential.

Educational psychologists, specialist teachers, and inclusion officers may need expanded roles or increased capacity.

- **Training and Professional Development:** Recruitment and Retention: Recruitment of skilled professionals to deliver and oversee the tiered Alternative Provision model. Additional staffing may be required to support early intervention, data monitoring, and delivery of targeted support. Ongoing CPD (Continuing Professional Development) for school staff and council teams to embed the Graduated Approach and Ordinarily Available Provision (OAP). Joint training with strategic partners (e.g. The Difference, Ted Wragg Trust) to promote consistent inclusive practice across settings.
- **Cross-Agency Collaboration:** Strengthening multi-disciplinary working between education, health, and social care will require clear roles, shared protocols, and joint planning time.

Summary of Sustainability Impact

53. The proposed strategic framework to reduce exclusions and suspensions supports long-term sustainability by promoting inclusive education and reducing reliance on costly alternative provision placements. By investing in early intervention and strengthening mainstream support, the council aims to improve educational outcomes, reduce social inequalities, and minimise future demand on specialist services. This approach contributes to a more resilient education system and aligns with broader sustainability goals, including community cohesion and economic inclusion.

Summary of Public Health Implications

54. Reducing exclusions and suspensions has direct public health benefits, particularly for children and young people at risk of poor mental health, social isolation, and disengagement from education. The framework promotes early identification of need and access to appropriate support, which can mitigate adverse childhood experiences and reduce long-term health inequalities. Collaborative working with health partners ensures that pupils with emotional, behavioural, or neurodevelopmental needs receive timely interventions, contributing to improved wellbeing and safeguarding outcomes.

Summary of Equality Implications

55. The strategy is designed to advance equality by addressing disproportionality in exclusion rates among pupils with special educational needs, those eligible for free school meals, and children from minority ethnic backgrounds. Tools such as the Graduated Approach and Ordinarily Available Provision (OAP) help schools deliver consistent, inclusive support and make reasonable adjustments. The council will monitor data to ensure that exclusion practices do not discriminate and that all children have equitable access to education and support.

Background Papers

- Children and Young People's Partnership Plan 2025
- Belonging Strategy 2024
- SEND Improvement and Alternative Provision Plan 2025
- SEND Sufficiency Strategy May 2024
- In Year Fair Access Protocol 2025

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Report subject	Home to School Transport
Meeting date	26 November 2025
Status	Public Report
Executive summary	This report presents the findings of a strategic review undertaken by an external provider into the Local Authority's home to school transport arrangements focussing on our arrangements and provision for children and young people pupils with special educational needs and disabilities (SEND). The key objective of the review was to identify strategic and operational opportunities that support the development of independent travel options and make improvements to how home-to-school transport is delivered with a focus on potential efficiencies and service improvement. It identifies key opportunities to introduce travel options that meet individual needs and help prepare young people for adulthood and promote long-term independence. Key issues include the complexity of transport arrangements, market capacity challenges, and the need for improved commissioning models that deliver better outcomes and value for money. The report presents a range of options and opportunities for future delivery and contained details of the investment necessary to achieve cashable savings and cost avoidance. This report seeks approval to proceed with a formal tendering exercise to commission an external provider to implement a phased delivery of change proposals that encourage independent travel, build independence and reduce journey times for children and young people. The approach will be supportive of young people's development to help young people gain confidence and practical skills for travelling safely on their own will result in making school transport more efficient and sustainable.
Recommendations	It is RECOMMENDED that CABINET: Agree to tender an external provider to deliver a transformation project over three years with a total cost of £1.5 million funded by the flexible use of capital receipts to deliver service improvements and by the end of the project on-going savings in SEND school transport projected at £3 million (net of additional resource requirement).
Reason for recommendations	The recommended approach promotes independence by equipping children and young people with essential travel skills, while addressing rising complexity and cost pressures. A phased delivery plan ensures smooth transition, co-production with families, and ongoing evaluation. By building internal resilience and leveraging external expertise where needed, the Council retains strategic control and delivers a more sustainable, value-for-money service—reducing long-term costs and improving outcomes.
Portfolio Holder(s):	Richard Burton
Corporate Director	Cathi Hadley, Director of Children's Services
Report Authors	Tanya Smith, Head of Inclusion, Places and Capital
Wards	Council-wide

Classification	For Recommendation/Decision
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Background

1. Local authorities have a statutory duty under the Education Act 1996 to provide free home to school transport for eligible children and young people. This includes those who live beyond the statutory walking distance, have special educational needs or disabilities (SEND), or face other qualifying circumstances. The duty ensures that children can access suitable education without barriers related to travel.
2. The council currently provides home to school transport for 1,639 SEND passengers on a day-to-day basis. In recent years, the Council has experienced significant growth in demand for home to school transport, particularly for children and young people with SEND. This increase reflects broader demographic changes, rising levels of need, and growing parental expectations around personalised transport solutions.
3. This trend is mirrored nationally, with many local authorities reporting escalating costs and operational pressures in delivering SEND transport. The council's SEND home to school transport expenditure in 2024/25 was £13.8m with the budget for 2025/26 being £16.4m million. This budget in the current MTFP is projected to grow to £21.8m by 2028/29.
4. The key driver for the increased demand in passenger numbers has been an increase to the number of children with an EHCP which has increased by 45% since 2021/22 to 4,837. The service has largely mirrored that of other local authority operations across England and Wales. Increasing pressure has been created by a rising number of children entitled to transport which has been largely driven by growing numbers. This has combined with more costly external taxi and bus supply for inflationary and other operational reasons.

5. The 2024/25 outturn and 2025/26 budget and forecast

Budget Category	2024/25 Outturn £million	2025/26 Budget £million	2025/26 Forecast £million
Staff Costs - Passenger Assistants (PAs)	2.3	2.3	2.3
Staff Costs Recharge - Transport Team	0.4	0.4	0.4
Client Travel	0.5	0.6	0.5
Private Contract Hire - Taxi	6.8	9.3	9.6
Private Contract Hire - Minibus	3.9	3.9	3.8
Total expenditure	14.0	16.5	16.6
Income	(0.1)	(0.1)	(0.1)
Next Expenditure	13.8	16.4	16.5

6. The 19% increase in 2025/26 compared with the previous year outturn reflects that the EHCP backlog that existed until the final quarter of last year had suppressed the demand for transport with a £0.3m underspend against budget recorded for 2024/25. This expenditure has caught up in 2025/26. The current year budget allowed for a further significant increase in EHCP demand throughout the year plus inflationary pressures totalling £2.1 million. The pay award initially budgeted centrally was distributed to services in quarter two and is reflected in the staff costs in the above table.
7. The current MTFP presented to October Cabinet allows for a further £1.8 million of growth each year over the next three years (39% in total) to 2028/29 for pupil travel costs, the annual pay award for staff costs continuing to be budgeted centrally.
8. The latest service estimate for EHCP growth for the relevant SEND cohort potentially eligible for school transport is under review.
9. To address these challenges, the council commissioned a headline review of its home to school transport arrangements with a focus on operational opportunities that support the development of independent travel options for children and young people with SEND. The review, undertaken by Edge Public Solutions, identifies opportunities to promote independent travel and includes measures designed to improve the delivery and sustainability of the service with associated

opportunities for cost efficiencies. The review sets out a proposed three-year transformation strategy comprising a timeline, clear recommendations and investment implications in systems and permanent resources. A full report of the review is set out at Appendix 1.

Issues

10. The home to school transport function is delivered with input and cooperation from and between the Children's Services and Environment Directorates. Duties and responsibilities are the responsibility of various Education, Social Care and Passenger Transport services. Essentially, assessment of eligibility for assistance with travel costs from home to school is undertaken by the Admissions and Transport team working across the directorate and with the SEND service where assessments and placements decisions are taken for children with additional needs. The budget and policy are the responsibility of the Education service while the day-to-day travel arrangements and commissioning functions sit within the Passenger Transport unit (see page 10 of the report for details). The overall performance of the service is summarised on pages 10-15 and headline capability and gaps are included in Appendix B of the consultant's report in Appendix 1.
11. A summary of the report's key findings is set out in an executive summary on pages 6-7. This identifies:
 - BCP performs similarly to other progressive authorities and has put into place many initiatives in recent years to improve control of demand and service delivery.
 - There is a commendable eligibility assessment regime which clearly contributes to only 33% of children with an EHCP receiving transport which is lower than expected when comparing to other authorities.
 - Respective teams with an involvement in delivering the home to school transport function have been hampered by poor systems and are at full capacity delivering a demanding service.
 - The report identifies activity to achieve service transformation over the next 3 years and deliver an annual financial impact of £2.7 million from 2028/29.
 - Each key initiative will require careful phasing to allow time to properly implement in a sustainable and low risk manner over 2-3 years.
 - Savings should be considered separately from cost avoidance, which is the impact of applying the efficiencies to predicted new demand and cost growth.
 - Successful delivery of the changes and efficiencies will be dependent on fully implementing initiatives involving supply management and commissioning activities, policy changes, investment in independent travel training and governance.
 - Implementation will present a significant challenge and be dependent on five critical building blocks necessary for sustainable delivery namely, political and officer buy-in, parent/carer understanding of the rationale and the benefits of the programme and delivering a positive message to parents and schools communicated as a period of transition (pages 6-9 of the report).
 - Investment in resources will be necessary to properly support and deliver the implementation; including to ensure schools, parents and passenger needs and expectations are managed. There will also be a requirement for additional investment in systems and permanent resources as contained in the financial implications paragraph 26 and the human resource implications set out in paragraphs 35-38.
12. Opportunities to secure efficiencies in supply management and procurement are outlined in pages 17- 25 and include opportunities in the following areas:
 - Supply management and procurement
 - Routing
 - Group/safe pick-up
 - Supply of passenger assistants
13. An overview of assessment and policy is provided on pages 26 – 33 including observations, challenges and operational complexities. It highlights a limited re-assessment regime and opportunities to strengthen this. It also details proposals for assessment of single person journeys, moving away from door-to-door transport, promotion of personal travel budgets and policy change in respect of Post 16 travel, specifically, a proposal to review charges for Post 16 passengers to cover some of the cost of their journey. Details of the role of independent travel training and a

proposed model are set out on pages 34 – 36. The robustness of the policy is contained on page 37 and include some more minor changes to enforce parental responsibility and promote independence and manage parental expectations.

14. **Resources Necessary for Implementation:** Details of the resources and expertise necessary to implement a phased delivery plan of proposed changes is provided on pages 38 – 46 in the Consultant's report. The total ongoing cost implications comprise staffing costs totalling £160k and these are summarised in the financial implications and resource implications sections in this report.
15. **Implementation Timeline:** A timeline of key activity over the next 2 years to implement proposals is provided on page 44 of the report. The timelines in the report are indicative at this stage and may need some level of refinement. In particular, it will be important to manage expectations about the typical timescales involved in implementing substantive changes to the home to school transport policy. This reflects that information and guidance which help inform decisions about onward school or college placements must also be available during the autumn in each academic year. It therefore follows that the process to implement changes to policy need to be co-produced, consulted upon and formally approved well advance and typically begin almost two years prior to the point of admission. The table below helps to illustrate this in more detail. Note: regardless of whether the admission is resolved through the School Admissions Code or the SEND Code of Practice, transition planning starts in the autumn for admission in the following academic year.

Timescales involved in making changes to policy

Activity	Duration	Timeline
Initial Report to Cabinet		25 November 2025
Commission an external partner	8-12 weeks	January – March 2026
Review data	4 weeks	April 2026
Co production of policy changes	6-8 weeks	April – May 2026
Consultation/Collate responses	6-8 weeks	June – July 2026
Cabinet Approval	6 weeks	September 2026
New policy published and applicable for new starters with existing users ageing through*	September 2026 ready for families making their decision for following September 2027	New policy effective from September 2027 if consultation and decision making align. If the autumn window for a decision is not met, the new policy will be implemented from September 2028.

16. **Delivery Model:** A summary of delivery models is provided on page 43 showing the rationale for commissioning external support working in partnership with the council and pros and cons of internal/external resources including an outline cost comparison.
17. **Initiatives for Change - Recommendations:** A summary of recommendations is provided on pages 47-48.

Options Appraisal

18. **Option 1:** Do Nothing -Maintain Current Arrangements
 - Advantages: No disruption to current service; avoids short-term political or operational risk.
 - Disadvantages: Fails to address rising costs, inefficiencies, and increasing demand; does not include options to support children to travel independently, does not meet the council's strategic objectives for transformation or value for money.
 - Conclusion: Not recommended.
19. **Option 2:** Proceed to a formal tendering process to commission an external provider to deliver the recommended changes contained in the external report which form the basis of a 3-year programme of transformation as set out in a phased delivery plan.
 - Advantages: Delivers comprehensive transformation over three years; addresses demand, cost, and quality; aligns with national best practice.

- Disadvantages: Requires upfront investment; some proposals may be politically sensitive; requires formal procurement process which may impact timescales/
- Formal tendering may result in a bid award to a new supplier which could impact costs/initial investment and opportunities for savings.
- Conclusion: Recommended option, subject to robust tendering/commissioning.

Consultation

20. **Engaging with Parents/Carers:** The council has been thinking carefully about how best to engage and communicate the range of possible proposals designed to promote independence. This recognises that early and effective consultation is vital to securing the support of parents, carers and all stakeholders. Undoubtedly, effective communication involves clearly outlining the rationale for change, listening to concerns, and collaboratively exploring solutions that place children at the centre of decision making. For this purpose and as an initial step, the council has met with representatives of Parents/Carers Together who agreed to gather the views of parents/carers on proposed policy changes designed to promote independent travel. As a result, feedback on the each of the project proposals will be feedback to the council and following this, further work will be undertaken with BCP Parents/Carers to support conversations with families and stakeholders in line with the timescales of the delivery plan.
21. **Communications Plan:** In advance of a decision on the recommended option and led by our Corporate Communications Team, the council has begun shaping a communication approach to ensure parents, carers, and other stakeholders are kept informed and involved as proposals develop. It is planned that the approach will comprise:
 - A distinct focus on changes that promote independent skills for life
 - Inclusive decision-making and targeted information sessions
 - Regular communication to all stakeholders and formal periods of consultation
 - Proactive and coordinated press releases and associated handling plan
22. **Consultation Requirements for Policy Changes:** Any substantive changes to home to school transport policy particularly those affecting eligibility, service models, or parental responsibilities must be subject to public consultation. This ensures:
 - Parents and carers understand their rights and responsibilities.
 - Stakeholders can provide feedback on proposed changes.
 - The Council meets its duty to act transparently and fairly.
23. **Consultation Aligned to School Admissions and Transition:** Home to school transport policy is closely linked to school admissions. Regardless of whether the admission is resolved through the School Admissions Code or the SEND Code of Practice, transition planning starts in the autumn for admission in the following academic year. This means that information and guidance which help to determine an onward school or college placement must also be available during the autumn in each academic year. It therefore follows that any changes to policy need to be co-produced, consulted upon and agreed as part of the democratic decision-making process by the autumn in any year. The School Admissions Code 2021 requires local authorities to ensure that parents are provided with clear, accessible information about transport eligibility when expressing school preferences. This includes:
 - Definitions of “nearest suitable school” for preference, travel and transport purposes.
 - The impact of stating a preference for a school that does not meet transport eligibility criteria.
 - How transport policies may affect access to school and an emphasis to encourage parents/cares to consider how they will get their children to school when expressing their school preferences.
24. This information must be included in composite prospectuses (School Admissions Guide) and published annually to support informed parental decision-making during the admissions process. Failure to provide this information may disadvantage families and undermine fair access to education. Consultation should be timed to align with the school admissions cycle to allow families to make informed choices. Local authorities must ensure that transport arrangements are suitable, safe, and enable access to education.

Summary of Financial Implications

25. The delivery plan includes invest-to-save proposals requiring upfront investment, with projected savings over a three-year period. It shows that an investment of £1.49m is required for project management, consultation, and delivery of system changes. Budget implications span financial years 2026/27 to 2028/29. As this is a transformation programme that will lead to savings, funding for the investment can be provided through the flexible use of capital receipts, a government policy that has been extended to March 2030.
26. Details of the headline annual savings and investments required in each year are based on a late 2025/26 starting point now (page 5 in the report). The following table is an extract, and further details are contained in the detailed financial plan contained on page 49-50 of the report, section 8 items 11 and 12 in the table.

Opportunity for Cash Savings

	2026/27	2027/28	2028/29	Total 26/27–28/29	2029/30 Ongoing position
	£000's	£000's	£000's	£000's	£000's
Savings and Efficiencies –Note 1	576	2,611	3,167	6,354	3,167
Total Investment Required	(558)	(497)	(439)	(1,494)	
Ongoing Resource Implications					(160)
Net Cash Saving After Investment	18	2,114	2,728	4,860	3,007

Note 1 - The savings figures in the above table are the reductions from the current level of budget and are the absolute values to include in the MTFP.

The cost avoidance figures in the consultant's report are indicative only based on one possible scenario for EHCP growth estimates and inflation applied to all costs, including staff costs that have not risen according to this EHCP growth trajectory and where pay awards are budgeted centrally. The final cost avoidance figures to be assumed does not impact on the savings and efficiencies in the above table or the level of investment required to achieve them. It will impact on the overall budget required each year with this budget growth requirement still under review.

Summary of Legal Implications

27. **Statutory Duty to Provide Home to School Transport:** Local authorities have a legal obligation under the Education Act 1996 to provide free home-to-school transport for eligible children. Any changes must ensure continued compliance with these duties, particularly for children with special educational needs (SEN), disabilities, or those living beyond statutory walking distances.
28. **Equality and Non-Discrimination:** Under the Equality Act 2010, the council must ensure that changes do not disproportionately disadvantage protected groups. This includes conducting a robust Equality Impact Assessment (EIA) at the appropriate stage to identify and mitigate potential adverse effects. While an initial Equality Impact Assessment (EIA) screening has been initiated, it is recognised that the process is at a very early stage. A full assessment will be more appropriately timed once proposals have been further developed and shaped through co-production and informed by the appointment of external consultancy support. Any detailed analysis will need to align with the specific proposals and be based on current data relating to children and young people travelling at that point in time.
29. **Duty to Consult:** There is a legal requirement to consult meaningfully with affected parties—especially parents, carers, and schools—before implementing significant changes. Failure to do so could expose the council to legal challenge on grounds of procedural unfairness.
30. **Human Rights Considerations:** Changes must respect the rights of children and families under the Human Rights Act 1998, particularly the right to education and the right to private and family life. Any perceived infringement must be proportionate and justified.
31. **Data Protection and Privacy:** If proposals involve collecting or using personal data (e.g., travel patterns, health information), compliance with UK GDPR and the Data Protection Act 2018 is essential, including transparency and appropriate safeguards.

32. **Contractual and Procurement Implications:** If changes affect existing transport contracts or require new services, procurement rules and contractual obligations must be carefully managed to avoid breach or legal disputes.
33. The proposed three-year delivery strategy constitutes a significant programme of work. In accordance with the public contracts' regulations, the Council must undertake a competitive tendering process to commission an external provider. Note: a direct award to the external consultant firm engaged for the purposes of producing the attached review report is not permissible unless specific exemptions apply, which is not the case here. The procurement process must ensure:
- Transparency and equal treatment of bidders.
 - Value for money and legal compliance.
 - Alignment with commissioning timelines to avoid delays in implementation.
34. **The SEND White Paper:** The "SEND Review: Right Support, Right Place, Right Time" White Paper has been delayed until 2026. Local authorities anticipated that the White Paper would address several long-standing challenges in the SEND system, including unsustainable growth in SEND transport costs. Key expectations included:
- **Clarification of Eligibility Criteria:** Councils sought clearer guidance on statutory duties, especially around post-16 transport and independent placements, which often drive high costs.
 - **Flexibility in Delivery Models:** Proposals were expected to support travel training, personal travel budgets, and phased independence models to reduce reliance on specialist transport.
 - **Improved Commissioning and Market Shaping:** Authorities wanted support to develop local provision and reduce long-distance travel, which contributes to rising costs and carbon emissions.
 - **Data and Benchmarking Tools:** Better national data collection and benchmarking to help councils compare costs and identify efficiencies.
35. The impact of the Delay to the White Paper until early 2026 means that there is no formal national mandate to reform transport policy or indeed help manage several long-standing challenges in the SEND system which impacts on growth and sustainability. In the meantime, local authorities continue to face rising demand and rely on sector-led guidance, such as the ADCS and ADEPT joint report (Nov 2023), which calls for legislative reform and better alignment between SEND and transport policy.

Summary of Human Resources Implications

36. The report emphasises there are a range of resource intensive activities (page 36) and sets out the requirements of successful implementation in terms of leadership, governance and additional permanent temporary/fixed term support (page 41-42). Namely successful implementation will require:
- Strong leadership to drive progress,
 - Clear governance to ensure accountability,
 - Additional permanent team resources, and
 - Temporary fixed-term support to manage and execute key initiatives beyond daily operations.
37. Adequate resources and expertise are critical to ensuring the sustainable delivery of resource-intensive initiatives. These efforts aim to achieve annual efficiencies and cost reductions. Additional support will establish the foundational elements for successful service transformation, including:
- Building a performance-driven culture,
 - Strengthening governance frameworks,
 - Refining strategic priorities,
 - Enhancing communication,
 - Managing customer expectations, and
 - Supporting team development.

38. While precise resource requirements are challenging to predict, experience suggests the following full-time equivalent (FTE) resource levels over the three-year transformation period at a cost of £160k. Newly appointed staff will deliver travel training and team resources focussing on the development of a training contract and re assessment and compliance including the arrangements for providing personal travel budgets.

Year Resources (FTE)

1	3–5
2	3–5
3	1–3

39. Resource demands will fluctuate, with peaks during procurement events and quieter periods thereafter. Training and change management support will be required. An Equality Impact Assessment will be completed to assess the impact on affected groups.

Summary of Sustainability Impact

40. Improved transport planning may reduce unnecessary journeys and promote more sustainable travel options. The transformation plan includes consideration of environmental impact and carbon reduction.

Summary of Public Health Implications

41. Efficient and reliable transport supports attendance and wellbeing for children with SEND. The plan aims to reduce stress for families and improve access to education.

Summary of Risk Assessment

42. Risks include political sensitivity, stakeholder resistance, and procurement delays. Mitigation includes phased implementation, clear communication, and alignment with statutory timelines.

Background Papers

Edge Public Solutions Strategic Review Report July 2025

Appendices

Appendix 1: Edge Public Solutions Strategic Review Report July 2025

By virtue of paragraph(s) 3 of Part 1 of Schedule 12A
of the Local Government Act 1972.

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Report Subject	SEND Sufficiency Strategy 2023/24 – 2025/26
Meeting date	25 November 2025
Status	For Review
Executive summary	This report provides an overview of the Special Educational Needs and Disabilities (SEND) Sufficiency Strategy 2024-2026. The SEND Sufficiency Strategy is a key part of the Council's work to deliver a sustainable and stable system, working in partnership to ensure that the needs of children and young people are met, without escalating costs, and supporting delivery of the High Needs Block of the Dedicated Schools Grant (DSG) Recovery Plan. The strategy is based on updated SEND projections presented in this year's annual school capacity return. Given the scale of our immediate challenge, the SEND Sufficiency Strategy describes the actions we have been taking to respond to pressures in the system over a 2-year period. Details of our progress are contained in this report together with a summary of the key themes and strands of work that will be incorporated in a new refreshed SEND and Alternative Provision Improvement Plan that is being developed for publication in May 2026.
Recommendations	It is RECOMMENDED that: Members: 1. Note the growth and pressures across the system and the priorities identified to address these. 2. Review the progress to date and note the next steps which will feature in a new and refreshed SEND and Alternative Provision Sufficiency Strategy ready for approval in May 2026.
Reason for recommendations	The SEND Sufficiency Strategy 2024–2026 outlines the Council's response to rising demand and financial pressures within the SEND system. It supports the Council's statutory duty to ensure sufficient and appropriate education provision for children and young people with Special Educational Needs and Disabilities. The strategy contributes to the delivery of a sustainable and inclusive system by aligning provision with projected needs, improving commissioning practices, and reducing unit costs of provision.
Portfolio Holder(s):	Richard Burton
Corporate Director	Cathi Hadley, Director of Children's Services
Report Authors	Tanya Smith, Head of Inclusion, Places and Capital
Wards	Council-wide
Classification	For Recommendation/Decision

1. Background

- 1.1 The SEND Sufficiency Strategy provides an important overview as to how the Council intends to respond to increasing demand for services and provision for children and young people with additional needs and disabilities. It sets out our plan for delivering capacity to address supply issues in the short to medium term, ensuring there is access to high quality, locally accessible places and pathways from early years to adulthood for children and young people when they need it in the most efficient way.
- 1.2 The SEND Sufficiency Strategy is a key part of the Council's work to deliver a sustainable and stable system, getting local partners and stakeholders working in the best possible way within the current system to ensure that the needs of children and young people are met, without escalating costs, and supporting delivery of the High Needs Block Recovery Plan. Given the scale of our immediate challenge, the Sufficiency Strategy describes the actions we are taking now to respond to pressures in the system over the course of two years 2023/24 – 2025/26.

2. SEND Sufficiency - Overview

- 2.1 **Strategy Aims:** SEND sufficiency means having enough of the right accommodation and services, in the right places to effectively and appropriately meet the needs of children and families in Bournemouth, Christchurch and Poole. This also includes the quality of services, ensuring they are making a positive difference to the lives of children and young people. Our aim is to promote an inclusive system that:
- Enables children and young people to fulfil their potential
 - Improves outcomes driven by earlier identification of needs and evidence-based targeted support to meet needs promptly, including mental health support
 - Is supported and trusted by our parents/carers
 - Is financially sustainable - spending is directed to support early intervention away from costly specialist provision & high-quality services are delivered within budget.
- 2.2 **Our Model of Provision:** The council believes that children should be educated locally wherever possible within their communities, enabling children to be with other children in their local area and access wider curriculum opportunities locally.
- 2.3 Working with parents/carers and our local partners in education, health and social care, we will continue to provide access to local, quality specialist places and increase the availability of these to offer a full range of provision. This represents a continuum of provision to meet a range of needs, and it starts with ordinarily available provision in our mainstream schools offering a graduated response to meeting the needs of all children i.e. a fully inclusive mainstream school. Further, the continuum offers bespoke and resource base provisions co-located with mainstream schools and designated units and special school places across our specialist school estate. The full range of provision delivered by this strategy is set out in the diagram below.

Full range of provision in BCP



**Special School Places includes expansion on satellite sites co-located with mainstream schools*

- 2.4 **Guiding Principles:** The principles which guide this work are as follows:

- ✓ Provide the right support, right time, right place as part of a system-wide approach to support a graduated response, reduce the volume of needs assessments, manage demand and growth in Education Health and Care Plans (EHCPs).

- ✓ Investment to promote inclusion and accessibility in mainstream schools so that more children with an EHCP remain in mainstream schools and reduce reliance on Independent and non-maintained Special Schools (INMSS).
- ✓ Improving collaboration and data sharing with partners around SEND to improve early identification of need.
- ✓ A sense of belonging with clear pathways throughout education to ensure pupils are placed in the right learning environment so that they can excel.
- ✓ Work together cross phase and in partnership with schools and trusts – emphasis on collaboration between schools and trusts
- ✓ Ensuring that provisions are available to children and young people in each key stage
- ✓ Creating a sustainable and equitable model of local school placements for children and young people with EHCP's
- ✓ Ensuring that children and young people with EHCP's have access to good quality education provision that is mindful of unit costs of provision
- ✓ Availability of a clear and transparent admissions process to aid decision making
- ✓ Developing parent confidence in local provision and mainstream school support with clear information available to families so they can make informed decisions for their child or young person.

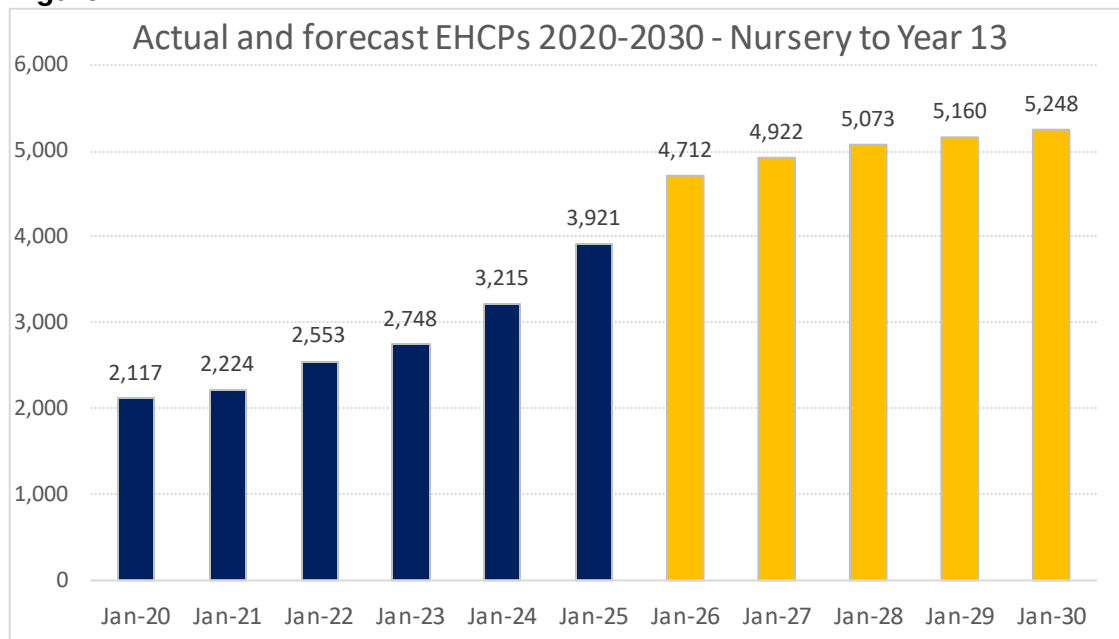
3. Current Pressures and Challenges

- 3.1 This section of the report highlights the rising demand for Education, Health and Care Plan (EHCP) places across all educational phases—mainstream, specialist, post-16, and alternative provision—driven by complex, system-wide factors. The Council's ability to meet its sufficiency duty is increasingly challenged by rapid growth in EHCP prevalence, particularly in secondary and early years phases, requiring coordinated transformation across the SEND system. Strategic planning must be viewed in the wider context of linked initiatives, with pressures compounded by limited capacity, funding constraints, workforce shortages, and the need for timely multi-agency collaboration.
- 3.2 In common with other local authorities across England, the local SEND system is facing a series of mounting pressures that require urgent and coordinated strategic response. Rising exclusion rates and increasing demand for alternative provision—particularly among children with multiple vulnerabilities such as those in care—underscore the need for more inclusive and responsive services. A shortage of specialist school places is driving greater reliance on Education Otherwise Than at School (EOTAS), independent non-maintained specialist placements, and alternative provision, further intensifying financial pressures. Challenges extend beyond education into the transition to adulthood, where local employment and training opportunities for young people with SEND remain insufficient, hindering long-term outcomes.
- 3.3 Despite these challenges, the mixed economy of provision continues to play a vital role in maintaining a diverse and resilient local offer. However, the Council must now focus on reducing the unit cost of provision while ensuring that placements deliver both quality and value for money, as part of a broader transformation agenda to secure sufficiency and sustainability across the SEND system.

4. Key Trends

- 4.1 **Forecast Growth in Demand:** In line with the trend nationally, BCP Council has experienced a substantial and sustained increase in the number of EHCPs. The chart below (Figure 1) shows actual and forecasted Education, Health and Care Plans (EHCPs) for pupils from Nursery to Year 13 between 2020 and 2030. The data is split with actual figures (2020–2025) in shown by the blue bars and forecast figures (2026–2030) in yellow bars. It shows that EHCP numbers have grown steadily from 2,117 in Jan 2020 to 3,921 in Jan 2025. This represents an 85% increase over five years, indicating strong upward pressure on SEND provision. From Jan 2026 onwards, the forecast predicts a sharper rise, reaching 5,248 by Jan 2030. That's an additional 1,327 plans over five years, or roughly 27% growth from 2025 to 2030. Overall growth shows a total increase from 2,117 to 5,248. This is a 148% growth over the decade which suggests a more than doubling of EHCPs, which will significantly impact resource planning. The drivers behind this growth are outlined in Section 6.

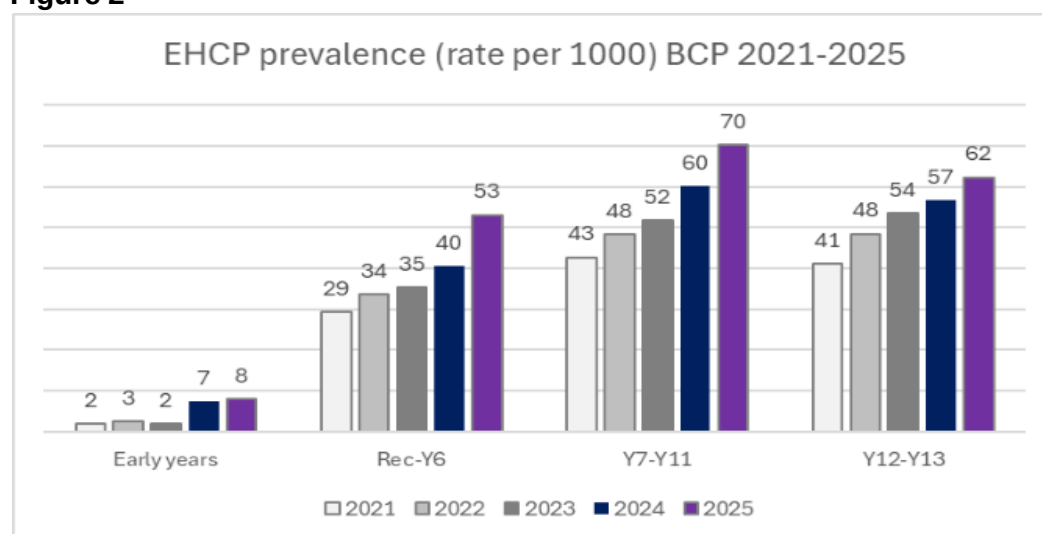
Figure 1



Note: Multiple scenarios have been modelled, with the primary forecast suggesting that the accelerated growth observed will continue for at least one more year. This projection reflects current trends and allows time for new processes and behavioural changes to take effect. From 2026–27 onwards, the forecast assumes a gradual reduction in growth rates, aligning with the strategic objective to slow EHCP cohort expansion and acknowledging that the current pace of growth is not sustainable in the long term.

- 4.2 **EHCP prevalence:** The graph below (Figure 2) shows a clear year-on-year increase in the prevalence of EHCPs across all age groups in BCP from 2021 to 2025. The most significant growth is seen in the secondary age group (Years 7–11), rising from 43 per 1000 in 2021 to 70 per 1000 in 2025, indicating growing demand for SEND support during adolescence. Early Years also show a sharp rise—from 2 to 8 per 1000—suggesting earlier identification and intervention for young children with special educational needs. Despite these figures supporting the upward trend in growth, it is thought that the association between demographic changes and EHC prevalence is weak. Prevalence tends to be more strongly associated with changes in policy, practice, and behaviours across the system of partners and stakeholders.

Figure 2



- 4.3 **Growth by Provision Type:** The implications of growth by provision type on the demand for places is shown in the graph below (Figure 2). Figures are based on the current pattern of provision in BCP and assume a changed pattern of provision to a future [desired] state. The future state assumes more children with an EHCP remain in mainstream, fewer children are placed in INMSS and attend maintained and no maintained specialist places and fewer

children in bespoke 'other' provisions). The graph helps to identify the total number of children requiring places based on the existing proportional split in children attending mainstream and specialist provisions. The difference between the current pattern and the projected pattern in 2029/30 means that over the next 5 years there is a need to commission an additional 1100 places by September 2029/30 and mainstream inclusion of a further 1000 children. Details are contained in the table below (Figure 4).

Figure 3

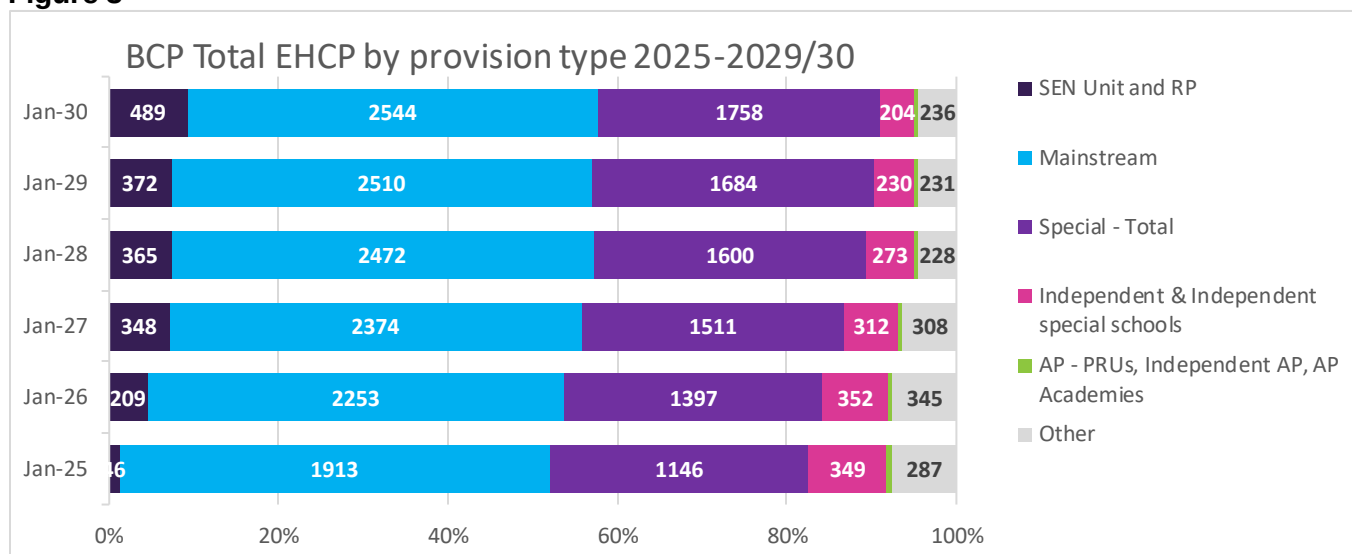


Figure 4: Additional Places Required

Type of Provision	5 Year -Demand for Places
SEN Unit and RP	437
Mainstream	1040
Special - Total	693
Independent & Independent special schools	-71
AP - PRUs, Independent AP, AP Academies	11
Other	-10
TOTAL	2099

Note: Minus figures indicate avoidance of placement necessary to achieve a changed pattern of provision.

- 4.4 **Post 16 Pattern of Provision:** Figure 5 shows the number of post-16 learners with an EHCP currently on roll and the forecast demand through to January 2030. It shows a projected 48% increase in EHCPs between January 2025 and January 2030.

Figure 5

Forecast EHCP's	Jan 2025 (Actual)	Jan 2026	Jan 2027	Jan 28	Jan 29	Jan 30
Year 12-13	578	711	843	918	899	879

Forecasts for Years 12 and 13 are based on cohort survival trends. Projections for post-19 learners require further refinement, as the same methodology cannot be applied. This work is underway.

- 4.5 The pattern of provision for Post 16 young people with an EHCP shows that BCP Council has a higher proportion of post-16 learners with EHCPs in specialist provisions compared to both the national and southwest regional averages, with relatively fewer placed in mainstream settings. Details on the council's Post-16 EHCP pattern of provision (Jan 2025) is as follows:

- 62% of post-16 learners with an EHCP are on roll in specialist provision (special schools, independent specialist colleges)
- 38% of post-16 learners with an EHCP are on roll in mainstream provision (FE colleges, sixth forms).

4.6 According to the Department for Education's 2025 statistics:

- Nationally, around 42% of post-16 learners with EHCPs are placed in mainstream FE colleges or sixth forms, while 58% attend specialist settings, including special schools and independent specialist colleges.
- In the southwest region, the proportion in mainstream settings is slightly higher, at approximately 45%, with 55% in specialist provision.

4.7 This means that:

- BCP Council places a majority of Post-16 EHCP learners in specialist settings, including special schools and independent specialist colleges which impact on the transition into local provision.
- The mainstream proportion is notably lower than both the national and regional averages, reflecting a greater reliance on specialist provision to meet complex needs.
- The lower mainstream placement rate suggests limited capacity or confidence in mainstream FE settings to support learners with EHCPs.
- It also underscores the importance of BCP's SEN capital investment in expanding pathways for children and young people at age post 14.

4.8 **Needs Assessment – Alternative Provision:** BCP Council has experienced high levels of permanent exclusions, particularly at secondary level, which has placed increasing pressure on existing Alternative Provision (AP) services. This prompted a strategic needs assessment to inform the development of additional provision and evaluate gaps in provision, learner profiles, and future demand. Findings from this assessment are guiding the creation of additional registered AP settings, with a focus on:

- **Primary Phase Support:** Providing options to support our primary leaders to help respond to a range of complex needs
- **Quality Assured Provision:** Ensuring provision is Ofsted-registered and quality-assured
- **Registered Providers:** Reducing reliance on unregistered or short-term placements to rebalance provision working with our registered providers
- **Tailored Support and Re-integration:** Delivering creative ways to meet the needs of learners requiring tailored support due to Social, Emotional and Mental Health (SEMH) needs and re-engage children back into mainstream education and improve outcomes. Currently there are limited reintegration routes which impacts the progression of young people
- **Diversify Pathways for Learners:** Diversifying AP pathways, including vocational options and therapeutic support, to better meet the needs of excluded and at-risk pupils and increasing capacity for Key Stage 3 and Key Stage 4 learners.
- **Transition and reducing Not in Education, Employment or Training (NEET):** Focusing on transition and engagement with post 16 provision and addressing low attendance for pupils with EHCPs which drop off as pupils progress through secondary school (by year 11 this is 72%)
- **Sustainable Unit Costs of Provision:** Reducing unit costs of provision to create sustainable services and support

5. Our Approach – Delivering our Two-Year Strategy

5.1 This strategy draws on different sources of data, insights and perspectives necessary to understand the strategic needs of our local community. Working with parents, carers and our partners to best understand the mix and range of services we need for children across Education, Health and Care, we are making progress with our sufficiency duty. Thus far, we have:

- **Data and Evidence:** Reviewed our data and evidence base necessary to achieve a strategic overview of the needs of our children and young people.
- **Communication and Engagement:** Improved communication and strengthened partnerships necessary to help to re-establish BCP as a strong and trusted system leader.

- **Co-production:** Held SEND Sufficiency and Inclusion workshops, events and conferences with our partners in education and parents/carers where our challenges and aspirations have been shared widely and all partners have added their expertise and insights.
- **Governance:** Developed a SEND Programme Board to ensure strong governance and oversight.
- **Lived Experience:** Understood the impact of our sufficiency actions on the lived experiences of our children and families via locality meetings where families gave their feedback about the availability of local provision and what this means to them.
- **Capital Investment:** Maximised capital funding to support the development and delivery of new and additional places.
- **Local Offer:** Enhanced information on the Local Offer so it is clear what provision is available.

5.2 **Two Priorities** Reflecting the scale of the challenge, the strategy sets out two priorities. They are as follows:

- (i) **Early Identification, intervention and inclusion:** Providing the right support, right time, right place as part of a system wide approach to support a graduated response, reduce the volume of needs assessments, manage demand and growth in EHCPs. This includes investment to promote inclusion and accessibility in mainstream schools. It also includes a requirement to improve collaboration and data sharing with partners around SEND to improve early identification of need.
- (ii) **Access to Sufficient, local, high-quality places:** Investment to increase the sufficiency of specialist places for children and young people with SEND and those who require alternative provision with cost avoidance in high needs expenditure. Priorities include:
 - Increasing places for children and young people with a focus on autism and social, emotional and mental health
 - Ensuring more EHCP children remain in mainstream at secondary school
 - Enabling our special schools to support our mainstream schools in the development of new provisions
 - Ensure that more young people post 16 are accessing education in mainstream settings and increase pathways for learners post 14
 - Investing in alternative provision that meets a range of needs aligned to the work of the Belonging Strategy and thereby reducing numbers of children in longer term Alternative Provision.
 - Developing Service Level Agreements (SLAs) that are outcomes focussed, are monitored and demonstrate delivery against our High Needs Recovery Plan i.e. cost avoidance and lower unit costs focussed on the cost of placements rather than plans.
 - Ensuring that data, systems and processes support the delivery of places

6. What have we delivered so far?

6.1 A range of actions designed to secure improvements in early identification, intervention and inclusion were delivered in our SEND Improvement Plan and further activities are also embedded in the newly refreshed SEND and Alternative Improvement Plan approved by the SEND Improvement Board in September 2025. Actions in the updated plan are more detailed and draw in strands of work across the service.

6.2 **Specialist Places Delivered:** In responding to our sufficiency challenges, the Council has delivered 24 additional early years assessment places and an additional 295 places by working with local school leaders to agree to co-locate specialist provisions in mainstream schools. This approach helps to make the best use of the school estate by utilising surplus accommodation in schools thereby sustaining schools experiencing falling rolls. Proposals delivered include resourced provisions, satellite locations and mainstream plus link provision for Year 7 children. The majority of places created are for children with autism though they also include places for children with speech, language and communication needs and social emotional and mental health needs. The new Resourced Provisions are helping to provide

alternative pathways for children with an Education and Health Care Plan to access the support they need in a mainstream setting. This will help ensure that more children remain in mainstream provision which is an important part of creating a sustainable and balanced pattern of provision. The table below (Figure 6) sets out the total number of places delivered by phase. The table also shows the number of places in pipeline. Pipeline places are those which are in the commissioning process and are made up of projects that are part of the current commissioning round.

Figure 6: Specialist Place Provision – Number of Places Delivered and, in the pipeline,

	22/23	23/24	24/25	25/26	26/27	Total	Total EY/Primary Split	Total Secondary Split
Early Years Assessment Places		12	12			24	24	
Specialist School Places Delivered	46	49	140	60		295	182	113
Places in pipeline				96	128	224	224	
Total Delivered/ In Pipeline	46	61	152	156	128	543	430	113

- 6.3 **DfE's Special Free School Programme:** The council is still waiting for an update from the Department for Education (DfE) on funding for the development of its new special free school previously announced. The LA successfully bid for one of two new special schools. The school will provide 180 specialist places for children and young people with autism aged 3-18. The school plays an important part in increasing the sufficiency of local specialist places and details are eagerly awaited.
- 6.4 **Special School Outreach Provision:** As part of the commissioning process, an outreach offer from special schools is supporting maintained schools to strengthen and expand their resourced provisions by sharing expertise, strategies, and tailored advice and support to school leaders, SENCOs and teaching and support staff. The offer is helping schools embed inclusive practice in the development of their resourced provisions and benefit from professional learning exchanges focused on SEND pedagogy, therapeutic approaches, and behaviour support. This collaborative model strengthens local provision and ensures pupils with complex needs can thrive in their community schools.
- 6.5 **Post 14 Pathways:** Efforts to increase places for Post 16 learners are summarised below. This sets out the number of places commissioned for the current academic year and summarises the work that is underway to increase pathways for learners:
- Linwood Post 16 Satellite at the former Ted Webster Community Centre providing a total of 60 places for 2025/26. This provision complements the existing Post 16 offer at Linwood which includes its CHI provision - '*Classroom in the Heart of Industry*' (CHI).
 - Supported internships continue to grow and improve with 70+ places from an initial 18 commissioned in 2022. There is also one internship specifically for those young people who want to set up their own businesses which will be an important new route.
- 6.6 **Post 19:** Currently, we are supporting 547 young people aged 19 and over with EHCPs, and this figure is expected to rise in line with the overall growth trend. The extension of EHCP eligibility to age 25 under the 2014 SEND reforms has created a significant and ongoing sufficiency and funding challenge. A child who received an EHCP at age five in 2014 is now 16 and may require support for up to nine more years. Crucially, no additional high needs funding was allocated to local authorities to meet this extended responsibility, meaning the financial burden has grown without a corresponding increase in resources. This has direct implications for sufficiency planning, and our work to commission appropriate pathways and creates a three-fold pressure as follows:
- **First**, the high volume of learners continuing education beyond age 16, often in specialist provision. This poses a sufficiency challenge since specialist placements for post-19 learners are limited, and the market is under strain, requiring proactive commissioning and partnership development.
 - **Second**, the extended duration of support up to age 25, which significantly increases costs over time while managing escalating costs within a static funding envelope. This reflects that the funding model has not evolved to reflect the extended statutory duty,

leaving local authorities to absorb costs for up to nine additional years per learner without any uplift in high needs block allocations

- **Third:** Extended participation also drives up associated costs such as SEND transport, which often escalates for post-19 learners due to longer travel distances and bespoke arrangements.

6.7 Our focus is on developing sustainable pathways and details of the actions necessary balance sufficiency, quality, and financial sustainability while meeting statutory duties and supporting positive outcomes for young people are contained in the Next Steps section of the report.

6.8 **Commissioning:** The council has been actively improving commissioning processes by embedding a more strategic, outcomes-led approach to the development of SLAs and contracts. This includes aligning SLAs with the fiscal benefits that will feed into the updated High Needs Recovery Plan, focusing on cost-effective delivery, and ensuring that funding reflects the actual cost of placements rather than the number of EHCPs. Commissioning teams have introduced clearer performance metrics, strengthened monitoring frameworks, and engaged providers in co-producing SLAs that drive accountability, quality, and value for money across specialist provision.

6.9 **Ensuring Data and Systems Support the Delivery of Places:** The council continues to improve how we capture, record and use live data to understand the connection between our assessment, placement and educational practice and demand within the system and the impact and experience for children and families. Important in this is to stay curious, unpack some of the key things we know about children and young people with additional needs and disabilities and how things might change over time with deep dives. This includes capturing implications for sufficiency and decisions about what places are needed and where, arising from front door activity including:

- Outcomes following annual review affecting placements
- Planning and anticipating demand arising from Education Health and Care Needs Assessment and front door experience
- Planning for transition points involving the process of reviewing the cohort
- The impact of placement decisions on the costs of home to school travel
- Data obtained from occupancy of existing provisions to ensure existing specialist provision is being fully utilised.
- Conduct regular needs assessments to identify the number and type of SEND places required for future planning continues and this includes a focus on improving forecast data for rising Reception children from Early Years.

6.10 **Admissions Re-design:** As part of the work necessary to improve systems and processes, work has been underway to gain support for a project to redesign the admissions system. The project has since gained the approval of the Corporate Management Board and the SEND Programme Board. This is a major piece of work that will significantly improve our placement decision making which is a necessary foundation for commissioning sufficiency of specialist places. The purpose of the redesign is to create a fair, transparent and complaint admissions system for children and young people with an EHCP, ensuring appropriate placement decisions are made through improved processes and robust governance arrangements. Key objectives of this work are as follows:

- **Policy Framework:** To develop and implement a clear and consistent special admissions policy for SEND placements in special provision and resourced provision.
- **Operational Framework:** To build a robust operational framework supporting sufficiency planning, placement decision-making, and school accountability.
- **Process:** To make the placement process more equitable and sustainable, ensuring that decisions are based on clear evidence of need and applied consistently across all settings.
- **Systems:** To develop effective systems for recording, managing, and acting on data relating to admissions, placements, and sufficiency pressures.
- To ensure the timely and appropriate placement of children and young people, including those currently unplaced.

- **Right Placement, Right Time:** To reduce the number of children and young people in incorrect placements therefore preventing placement break downs and additional school moves.
- **Urgency and Priority of Placements:** To prioritise those that are urgent placement needs and those that can be incorporated into a longer-term plan, using the Unique Identifier data.
- **Quality Assurance:** To support a Quality Assurance Framework that can scrutinise provisions creating joint accountability for high quality provision.
- **Transparency and Communications:** To drive transparency and quality of communication to all stakeholders including parents, ensuring consistency and quality across all stages of special admissions.

6.11 The Admissions Re-design project was initiated in November 2025 and is being implemented in 2 phases with implementation from April 2026 followed by a period of a full year to test, review, refine and embed up until August 2027. An overview of the implementation plan is provided at **Appendix 1**.

6.12 **Communications Plan:** BCP Council, in collaboration with our Parent Carers Together (PCT) forum, has developed a new communications plan to strengthen transparency and engagement in relation to our sufficiency activity. This plan sets out a clear framework for sharing regular updates on the development of specialist places, capital investment, and strategic planning—ensuring families are informed, involved, and empowered throughout the process. It reflects our shared commitment to co-production and building trust with the SEND community.

7. Next Steps – Refreshed Approach SEND and Alternative Provision Sufficiency Strategy

7.1 The current strategy was established with a two-year horizon, focusing on immediate priorities for expanding provision, improving outcomes, and addressing rising demand for EHCPs. As we approach the end of this cycle, a refreshed strategic plan will be required to sustain progress and respond to evolving needs, particularly across the secondary phase, post-16 pathways and developing our alternative provision.

7.2 While growth and demand remain high, the council is in a stronger position to understand the gaps in the service and develop its longer term thinking necessary for the development of an updated SEND and Alternative Provision Sufficiency Strategy.

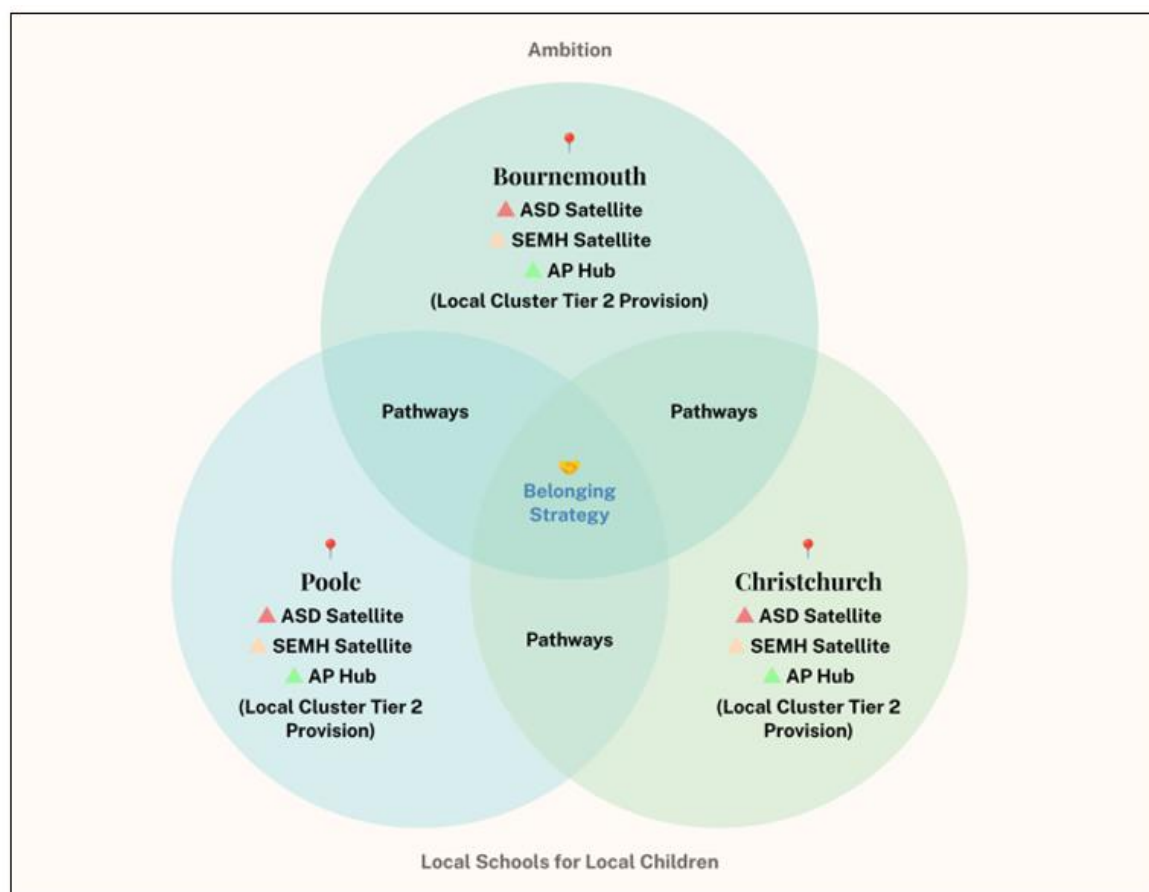
7.3 The focus of the updated strategy will further help to create the right conditions for the creation of specialist and alternative provision places by pursuing system wide changes that bring together the activity across the service to:

- **Alternative Provision:** Encourage inclusive practice in mainstream schools as part of our work across the service with The Difference who are delivering Inclusion training to school leaders and co-leading a multi-disciplinary working group of partners and stakeholders to develop a three-tiered model of alternative provision as part of the Council's Belonging Strategy and SEND and Alternative Provision Improvement Plan (details are contained in **Appendix 3**). This work should include a focus on developing options for primary schools to support a range of needs and help keep children in mainstream schools.
- **Secondary Phase Approach:** To address sufficiency challenges in alternative provision across secondary schools, the Council is adopting a joined-up approach that spans SEND, Inclusion, and wider Children's and partnership services. The strategy involves co-designing solutions that draw on shared expertise and actively apply the three-tier model of alternative provision to resolve sufficiency issues. The goal is to create mainstream pathways that are responsive, inclusive, and sustainable.
- This renewed strategic focus has prompted the development of a refreshed secondary strategy. Work is already underway to engage secondary school headteachers, with a strong emphasis on developing internal alternative provision models. These models aim to offer short-term placements for children and young people with additional needs, providing tailored and inclusive interventions like the flexible, personalised support often found in

small group Resourced Provisions. The provision will help learners re-engage with education and reduce the risk of exclusion.

- Current thinking is at the development stage and is best illustrated in the concept shown in Figure 7: Local Schools for Local Children. This model outlines a geographically distributed cluster approach, featuring alternative provision hubs, specialist satellite provision across Bournemouth, Christchurch, and Poole, and Tier 2 cluster-based provision aligned with the Belonging Strategy. The intersecting pathways across the conurbation are designed to deliver impact and quality, supported by access to a broad curriculum and qualification routes, robust systems, and a sustainable finance model. This approach also complements efforts to deliver a sustainable travel and transport service.

Figure 7: Local Schools for Local Children



- **Developing Our Post-14 and Post-16 Offer:** While the Council has been coordinating efforts across teams involved in commissioning post-16 provision, the development of a cohesive offer with flexible pathways remains at an early stage. Continued collaboration is essential to align services, identify gaps, and shape a more integrated and responsive offer that meets the diverse needs of young people. The emerging strategy will aim to:
 - **Expand access to supported training routes**, including internships and employment opportunities, for children and young people with special educational needs who do not have an EHCP or associated funding. Work is underway to explore the post 16 offer with our special schools incorporating creative options to develop our 'learning pathways' potentially across multiple sites and commissioning routes to employment through supported internships and pre-internships. An options analysis will help shape this work further.
 - **Strengthen early identification** of pupils at high risk of becoming NEET, with tailored transition support for those with SEND.
 - **Improve course planning** by gathering and sharing clear data on post-16 needs with mainstream providers, enabling the Council to broker a broader and demand-led curriculum offer. Current gaps include areas such as Sport and Animal Care, and there is a need to build parental and learner confidence in accessing Foundation Offers

within Further Education Colleges. Work is underway with Bournemouth and Poole College to develop a post 14 Curriculum offer as part of a pilot programme.

- **Enhance transition planning** through robust annual review processes from Year 9 onwards, incorporating Careers, Advice and Guidance to support Preparation for Adulthood.
- **Home to School Transport:** As part of a review of home to school transport, there is an opportunity to provide support for children and young people to develop their independence skills and prepare for adulthood through a proposed independent travel training offer.
- **Post-19 Next Steps:** Further work is required to forecast and plan for the evolving needs of young people in the post-19 sector. This will include:
 - **Identifying learners who will require continued educational provision beyond age 19**, and developing progression pathways tailored to individual needs with a strong focus on Preparation for Adulthood.
 - **Planning for EHCP cessation** (or, more positively named 'graduation') in a structured and supportive way to ensure young people are prepared for adulthood and receive appropriate support.
 - **Building confidence among parents and young people** to access employment and navigate available support systems.
 - **Mapping and communicating employment pathways** clearly to young people and their families.
 - **Strengthening joint working with health and social care** to ensure timely and appropriate transitions out of education into adult services.
 - **Anticipating national reform**, including the forthcoming White Paper on SEND, Alternative Provision, and Inclusion expected in Autumn 2025, and preparing for the systematic challenges and opportunities it may bring.
 - **Embedding Preparation for Adulthood outcomes** across all pathways to ensure young people are supported to achieve independence, employment, good health, and community participation.
 - **Commissioning** supported internships and employment-focused programmes to reduce reliance on costly out-of-area provision.

- 7.4 **Turnkey opportunities – Place Creation:** The council will continue to progress its efforts to deliver several turnkey opportunities. These refer to the total number of places offered by sites that deliver a significant number of places. The council is also working with the DfE to progress one of the two bids received for the development of specialist places at the former Parkfield School site. Turnkey opportunities are broken down in Figure 8 as follows:

Figure 8: Additional Turn-Key Place Opportunities

	Places
Parkfield	180
Site locations under review	120-300
AP	100
Total Places (Range)	400-580

- 7.5 The council will continue to develop a meaningful strategy through a collaborative and consultative process, drawing on data and evidence to achieve rapid change needed to deliver improvements in the short to medium term. Details of our approach will be presented to the SEND Programme Board in the first instance and will feature as a key part in the updated SEND Sufficiency Strategy in May 2026.

8. Risks and Mitigations

- 8.1 Delivering a sustainable and responsive SEND and Alternative Provision Sufficiency Strategy requires careful navigation of a range of operational, strategic, and systemic risks. Key risks and proposed mitigations are contained in Appendix 2.

9. Legal Implications

9.1 The delivery of a robust SEND Sufficiency Strategy is underpinned by a complex legal framework that governs the rights of children and young people, the duties of local authorities, and the expectations of multi-agency collaboration. As the strategy evolves, it is essential to remain mindful of the legal implications associated with planning, commissioning, and delivering provision. These include statutory responsibilities under education and equality legislation, procedural requirements for consultation and decision-making, and the potential for legal challenge where duties are not met or processes are not followed. The following outlines the key legal considerations that must inform the development and implementation of the strategy.

- **Statutory Duties Under the Children and Families Act 2014:** Local authorities have a legal duty to identify and meet the special educational needs of children and young people in their area. This includes ensuring sufficient and appropriate provision is available, both in mainstream and specialist settings. Failure to meet these duties could result in legal challenge via judicial review or tribunal proceedings.
- **Duty to Secure Education Health and Care (EHC) Plans:** The council must ensure timely and lawful assessment and issuance of EHC plans under the SEND Code of Practice. Delays or inadequacies in provision linked to sufficiency gaps may breach statutory timelines and obligations.
- **Equality Act 2010:** The strategy must ensure non-discrimination and reasonable adjustments for children and young people with disabilities. Any changes to provision must be assessed for potential disproportionate impact on protected groups, supported by a robust Equality Impact Assessment (EIA).
- **Human Rights Act 1998:** Children have a right to education under Article 2 of Protocol 1. Inadequate or inaccessible provision could be challenged as a breach of this right, particularly if it affects access to suitable education.
- **Public Law Principles:** The council must act reasonably, transparently, and fairly in its decision-making. This includes meaningful consultation with stakeholders, especially parents and carers, and clear communication around changes to provision.
- **Procurement and Capital Investment:** Any new provision or expansion must comply with public procurement regulations and statutory processes for school alterations, including planning and consultation requirements. Delays or missteps in these processes could result in legal or financial risk.
- **Cross-Border and Market Management Considerations:** The council must navigate legal complexities around placements made by other local authorities and its limited control over independent providers. Strategic commissioning must align with legal frameworks governing school admissions, funding, and inter-authority collaboration.

10. Financial Implications

10.1 Delivering a sustainable SEND Sufficiency Strategy carries significant financial considerations, both in terms of immediate investment and long-term cost management. Key implications are set out as follows:

- **Capital Investment Requirements:** Expanding and adapting the local school estate to meet rising demand requires capital funding. Projects involve adaptations, refurbishment and a mix of major and minor capital works in schools. The council recently submitted details of capital investment to the DfE as part of its annual high needs capital assurance return.
- **Revenue Pressures:** Increased demand for specialist placements and support services places pressure on the High Needs Block of the Dedicated Schools Grant (DSG). Without sufficient local provision, reliance on costly independent and out-of-area placements may continue, exacerbating budgetary strain.
- **Cost Avoidance Opportunities:** Investing in early intervention, inclusive mainstream provision, and local specialist capacity can reduce long-term reliance on expensive external placements. Improved sufficiency may also reduce transport costs and associated logistical pressures.

- **Joint Funding Dependencies:** Effective delivery depends on securing appropriate contributions from Health and Social Care partners, particularly for children with complex needs. Lack of alignment or delays in joint commissioning may result in unfunded pressures on education budgets.
- **Market Development and Incentives:** Encouraging schools and academies to expand provision may require financial incentives or support packages. The council may need to underwrite certain risks or offer transitional funding to stimulate development.
- **Banding and Funding Model Reform:** A revised banding model, co-produced with stakeholders, will have financial implications for how funding is distributed across settings. Ensuring the model is equitable, transparent, and sustainable is critical to managing expectations and avoiding unintended cost shifts.

Background Papers

- Children and Young People's Partnership Plan 2024/25
- SEND Improvement Plan 2024/25
- SEND and Alternative Provision Improvement Plan 2025/27 [1.3 02 - SEND and AP Improvement Plan.docx](#)
- Belonging Strategy 2024 [1.3 04 - Belonging Strategy Final.pdf](#)
- SEND Sufficiency Strategy 2024 – 2026 [1.3 05 - SEND Sufficiency Strategy.pdf](#)

Appendices

Appendix 1: SEND Admissions Re-Design Implementation Overview

Appendix 2: SEND Sufficiency Risks and Mitigations

Admissions Re-design - Implementation Overview

Phase 1

Preparation and Alignment (Oct–Dec 2025)

- Confirm governance and Terms of Reference.
- Cleanse and analyse UDF data to identify gaps.
- Launch internal communications and training to shift culture and language around “unplaced” pupils.
- Establish interim processes for placement decisions.
- Create and run Extraordinary Panels to review cases.

System Design (Nov 2025–Feb 2026)

- Build/adapt data systems for tracking placements.
- Design panel frameworks and supporting tools.
- Draft QA and KPI frameworks.
- Develop Special Admissions Policy.

Refinement and Readiness (March 2026)

- Consult with schools, parents, and CYP.
- Finalise documentation and tools.
- Deliver training and establish operational plans.

Summer Term Implementation (Apr–Jul 2026)

- Operate live panels using the new system.
- Monitor QA and gather feedback.
- Refine tools

Phase 2

Review and Continuous Improvement (Sep 2026–August 2027)

- Monitor KPIs and present findings.
- Update policies and publish an annual review

Sufficiency Risks and Mitigations

Pace and Scale of Local Provision Development

- **Risk:** Difficulty in expanding provision quickly enough to meet growing and diverse needs.
- **Mitigation:** Prioritise strategic partnerships with schools and academies to co-develop phased expansion plans; explore interim solutions such as satellite provision and resource bases.

Complexity of Needs

- **Risk:** Increasing complexity of children and young people's needs may outpace available expertise and infrastructure.
- **Mitigation:** Invest in workforce development and specialist training; strengthen multi-agency collaboration to support holistic planning and delivery.

Rising Demand and Timeliness of EHCPs

- **Risk:** Improved timeliness and volume of EHCPs may accelerate demand beyond current capacity.
- **Mitigation:** Use dynamic forecasting models and real-time data to inform commissioning cycles; embed flexibility in provision planning.

Parental Confidence in Local Provision

- **Risk:** Low confidence in local maintained settings may drive demand for out-of-area placements.
- **Mitigation:** Enhance transparency and engagement with families; invest in quality improvement and inclusive practice across mainstream and specialist settings.

Key Phase Transitions

- **Risk:** Planning for transitions (e.g., primary to secondary) may be constrained by scale and complexity.
- **Mitigation:** Develop transition protocols and early planning frameworks; ensure cross-phase coordination and tailored support.

In-Year Identification of Needs

- **Risk:** Late identification makes it difficult to forecast and allocate places accurately.
- **Mitigation:** Strengthen early identification pathways and flexible commissioning options; maintain contingency capacity.

Demographic Shifts

- **Risk:** Population changes, including inward migration, may disrupt demand forecasts.
- **Mitigation:** Regularly update demographic modelling; maintain adaptable provision planning and reserve capacity.

Cross-Border Placements

- **Risk:** Other local authorities placing children in BCP schools may impact sufficiency planning.
- **Mitigation:** Monitor cross-border activity and engage in regional planning forums to coordinate demand and capacity.

Joint Funding Challenges

- **Risk:** Difficulty securing timely and appropriate contributions from Health and Social Care.
- **Mitigation:** Strengthen governance and joint commissioning arrangements; embed shared outcomes and accountability.

Market Management Limitations

- **Risk:** Limited control over independent and academy-led provision development.

- **Mitigation:** Use influence and incentives to encourage local expansion; align capital investment with strategic priorities.

Capital Investment Approval Delays

- **Risk:** Lengthy local processes may delay critical infrastructure projects.
- **Mitigation:** Streamline internal approvals and maintain clear project pipelines; engage early with planning and procurement teams.

Statutory Process Delays

- **Risk:** Prescribed alterations, free school presumptions, and planning timelines may delay delivery.
- **Mitigation:** Build realistic timelines into project planning; maintain oversight of statutory milestones and dependencies.

Banding Model Review

Risk: Delay or lack of consensus in co-producing a revised banding model may affect equity and funding clarity.

- **Mitigation:** Maintain inclusive stakeholder engagement; ensure the model is transparent, needs-led, and adaptable to future pressures.

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CHILDREN'S SERVICES OVERVIEW AND SCRUTINY COMMITTEE



Report subject	Children's Services Key Performance Indicators Q1 2025-26
Meeting date	Paper circulation by email
Status	Public Report
Executive summary	This report provides a performance update for the period April – June 2025 (Quarter 1 2025-26) for the key performance indicators relating to Children's Services as detailed in the Corporate Performance Scorecard. It should be noted that these are our amended KPIs and targets for the new financial year. They are based on our previous KPIs and therefore the focus, alignment to corporate priorities and ambitions have not changed. However, minor changes have been made to improve accuracy, clarity and to align with our internal reporting (which is also reviewed annually and set against national comparators whenever possible).
Recommendations	It is RECOMMENDED that: The performance update is noted by members of the board.
Reason for recommendations	For noting

Portfolio Holder(s):	Cllr Richard Burton, Portfolio Holder for Children and Young People
Corporate Director	Cathi Hadley, Director of Children's Services
Report Authors	Stefanie Gehrig Clark, Interim Head of Performance Rachel Gravett, Director of Quality, Performance Improvement, Governance and Commissioning Juliette Blake, Director of Children's Social Care Lisa Linscott, Director of Education and Skills
Wards	Council-wide
Classification	For Information

Background

1. This report provides a performance update for the period April - June 2025 (Quarter 1 2025-26) for the key performance indicators (KPI) relating to Children's Services as detailed in the Corporate Performance Scorecard ([A shared vision for Bournemouth, Christchurch and Poole | BCP](#)).
2. The key performance indicators are reported under the following 2 directorates in Children's Services: Children's Social Care and Education & Skills.

Children's Social Care

3. **Decrease the percentage of Children and Young People returning to Early Help (targeted support) within 12 months.** This measure shows that Early Help (targeted support) is having a positive impact on the lives of children. The data is based on Level 3 Targeted Intervention which is part of the Early help system. During Q1, we remained on target, with a continued low volume of re-referrals into the service. This trend reflects a positive trajectory, suggesting that the interventions delivered through BCP Early Help and Targeted Intervention service, and the broader EH partnership are effectively addressing the needs of children and families at the earliest opportunity. Notably, the reduction in repeat interventions highlights the impact and sustainability of our current approach. The introduction of clear pathways across the wider EH partnership is progressing well. These developments are strengthening multi-agency collaboration and enhancing the consistency of support offered.
4. **Ensure that the timeliness of assessments to determine the child's needs is conducive with offering the right service at the right time to children, young people and their families.** This measure shows that child and family's needs are assessed in a timely fashion. Plans and services are implemented without delay. The percentage of assessments completed by Social Care that were completed within timeframe remains high for the 5th quarter in a row. Performance outstrips our statistical neighbours and other Good LAs by at least 5 percentage points. We are consistently high performers in this area.

Education and Skills

5. **Reduce the attainment gap and improve learning outcomes for children and young people in receipt of free school meals.** This measure shows that pupils are achieving better results at Key stage 4. Results will be available at the end of August for BCP and will be uploaded at the end of Q2. Comparison data will be available in November and uploaded at the end of Q3.
6. **Reduce the percentage of primary school aged children permanently excluded from school.** This measure shows the percentage of children who were permanently excluded in primary schools during the Spring term. Children who experience a permanent exclusion from school, miss vital time from their educational learning. For some children this disruption can be significant and have a profound impact on their progress and future outcomes. The Inclusion Service have liaised closely with school leaders to ensure supportive plans are in place for children who potentially could be excluded from a school. We are working collaboratively with children, young people and their families, as well as school leaders and other partners to develop a Belonging Plan to ensure that the priorities set out in our Belonging Strategy are delivered and impactful. We have also secured funding to commission 'The Difference' (an educational charity) to develop whole-school inclusion and support with the development of a three-tier Alternative Provision model. We will also utilise grant funding to collaboratively develop high-quality ordinarily available provision across the conurbation. The rate of primary age permanent exclusions remains below national comparators but in line with regional comparators.
7. **Reduce the percentage of secondary school aged children permanently excluded from school.** This measure shows the percentage of children who were permanently excluded in secondary schools during the Spring term. We are working collaboratively with children, young people and their families, as well as school leaders and other partners to develop a Belonging Plan to ensure that the priorities set out in our Belonging Strategy are delivered and impactful. We have also secured funding to commission 'The Difference' (an educational charity) to develop whole-school inclusion and support with the development of a three-tier Alternative Provision model. We will also utilise grant funding to collaboratively develop high-quality ordinarily available provision across the conurbation.
8. **Increase the percentage of Education Health Care Plans issued within 20 weeks.** This measure shows of all EHCPs issued in the quarter the percentage of those that were issued within timescale. Performance has dropped since the last quarter due to the previously anticipated effects of delays to Educational Psychology Advice being completed as a result of service capacity limitations. However, this figure still remains above national average at 46.4%. A capacity management plan is in place to manage the backlog and ensure timeliness matches at least national average while still addressing older assessments.

Options Appraisal

9. None

Summary of financial implications

10. Local authorities have a statutory duty arrange education for children who are permanently excluded. If children cannot be placed in a mainstream school, they will be in alternative provision. An alternative provision place will cost between

£20,000 and £50,000 per year. Places are funded from the High Needs Block funding, which is currently in deficit.

Summary of legal implications

11. None

Summary of human resources implications

12. None

Summary of sustainability impact

13. None

Summary of public health implications

14. It has been evidenced that children who have been permanently excluded achieve less well against a wide range of health and wellbeing outcomes, both through childhood and in later life.

Summary of equality implications

- 15. Children and young people who are disadvantaged, vulnerable, have additional needs and have minority ethnic heritage could be disproportionately affected by permanent exclusion.
- 16. Some groups of children are more likely than others to be referred to social care services. For example, disabled children have been found to be at greater risk of abuse and neglect, and recognition and assessment can be delayed for this group, as signs of neglect and abuse may be confused with the underlying disability or condition. Disabled parents, and parents with a learning disability, may require additional support to engage with children's services.
- 17. Unaccompanied asylum-seeking children are without parental protection and may face language barriers (NICE Social Care Guideline Equality Impact Assessment).

Summary of risk assessment

18. None

Background papers

None

Appendices

None

OVERVIEW AND SCRUTINY BOARD AND COMMITTEES



Report subject	Overview and Scrutiny Annual Report
Meeting date	To be provided to the following Overview and Scrutiny meetings: Overview and Scrutiny Board – 17 November 2025 Environment & Place O&S Committee – 19 November 2025 Children's Services O&S Committee – 25 November 2025 Health & Adult Social Care O&S Committee – 1 December 2025
Status	Public Report
Executive summary	This is the annual report of the Statutory Scrutiny Officer on Overview and Scrutiny (O&S) activity within BCP Council. There is a requirement to report on the work of O&S to the O&S Board and Committees and then to Council. This promotes visibility of the O&S function and Council ownership of activity and any improvements required. The annual report contains a summary and analysis of O&S activity during 2024-25, reflections on working practices and identified improvements to strengthen the O&S function. This report version is for consideration by the O&S Board and O&S committees, providing opportunity for comment prior to the supply of the final report to Council. The Council will be the decision maker on any recommendations for change within the report. The final report to Council will be updated to incorporate the views of the O&S Board and Committees on these recommendations.
Recommendations	It is RECOMMENDED that: 1. The Board/ Committee consider and comment on the annual report. 2. The Board/ Committee comment on the proposed recommendation to Council that the Overview and Scrutiny committee structure as outlined in figure one be agreed. 3. The Board/ Committee comment on the proposed recommendations to Council aimed at maximising the resource available for O&S work: i) for pieces of in-depth work, the constitution be

	updated to allow one scrutiny topic to be undertaken at a time across the whole O&S function, with one further topic being scoped during the same period. ii) the O&S Chairs and Vice Chairs group role be strengthened to include a responsibility to agree the priority of all work topics across the full O&S committee structure. iii) the O&S Chairs and Vice Chairs group strengthen scoping for all O&S topics by reviewing key lines of enquiry for topics on an ongoing basis to provide peer test and challenge. iv) the Monitoring Officer be delegated to make the associated updates to the Constitution.
Reason for recommendations	The Constitution requires the Statutory Scrutiny Officer to report to Council on an annual basis on the work of Overview and Scrutiny, including recommendations for any changes that may be required to ensure the function remains fit for purpose. The report must be informed by consultation with the Chairs and Vice-Chairs of the O&S Committees and referred to the four O&S Committees for comment. Consideration and comment on the annual report by the O&S Committees and Council upholds principle b) of good scrutiny, as outlined in the Constitution, that O&S shall 'be a Councillor led and owned function that seeks to continuously improve through self-reflection and development'.
Portfolio Holder(s):	Not applicable – Overview and Scrutiny is a non-executive function.
Corporate Director	Aidan Dunn - Chief Executive
Report Authors	Lindsay Marshall – Overview and Scrutiny Specialist
Wards	Council-wide
Classification	For Decision

Background

The Overview and Scrutiny Annual Report

1. [‘Overview and Scrutiny: statutory guidance for councils and combined authorities’](#) by the Ministry of Housing, Communities and Local Government (MHCLG) and the Department for Levelling Up, Housing & Communities (DLUHC), recommends that councils report annually on their Overview & Scrutiny (O&S) function and activity. The purpose of the report is to outline the activity and output of the O&S function

over the previous year and to identify improvements for the function to ensure it remains fit for purpose. This report is based on the municipal year of May 2024 - April 2025.

2. The report will be received by all O&S Committees and at a meeting of Council but is aimed at all stakeholders of O&S – this includes those within the Council, external partners, and the public and communities served by the council.
3. This is the report of the council's Statutory Scrutiny Officer, who is responsible for supporting and promoting O&S activity. Contribution has been made by other officers who provide support to O&S, and Chairs and Vice Chairs of O&S committees. Comments made by Chairs and Vice Chairs through consultation are reflected within the body of this report.

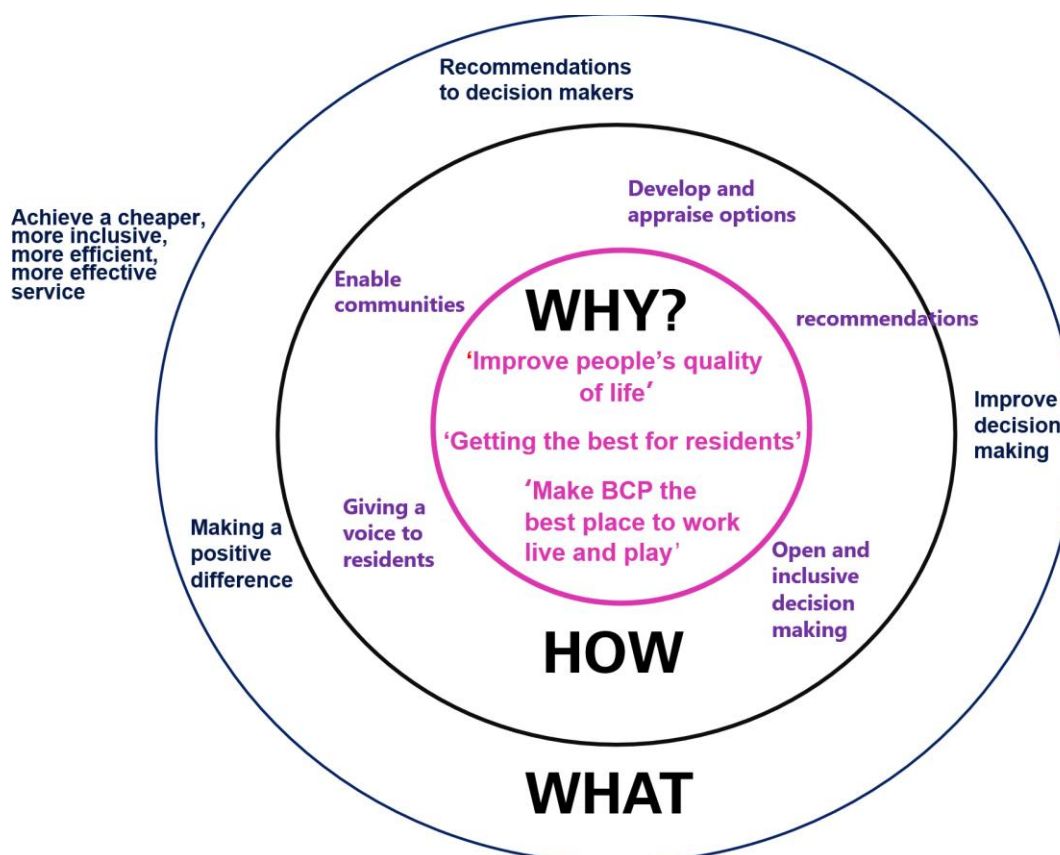
What is Overview and Scrutiny?

4. The purpose and principles of overview and scrutiny and its role in supporting the ambitions and values of the council is set out in Appendix 1.

What does good scrutiny look like?

5. There is not one definition of good scrutiny. In development workshops in 2025, stakeholders of O&S worked together to articulate their view on what good scrutiny looks like in BCP council. This is illustrated below as a 'What/How/ Why' of good scrutiny, and an outline of good scrutiny ways of working:

Good scrutiny – what/ how / why – defined by BCP O&S members, Cabinet and senior officers:



Good scrutiny – ways of working – defined by BCP O&S members, Cabinet and senior officers:

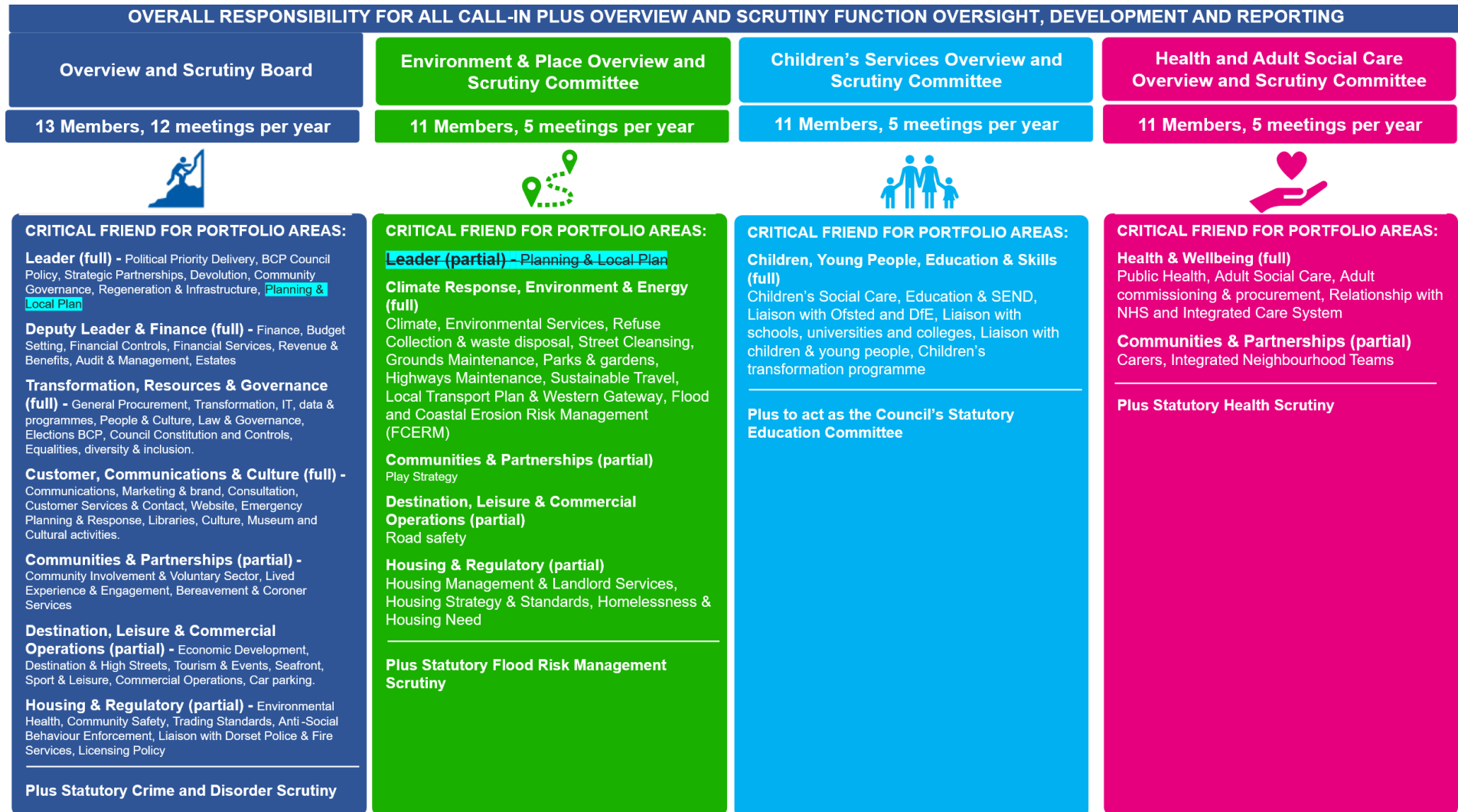
Approaches	Ask sensible questions
	Critical friend
	Sharing information
	Exploring information and data
	Wider input from members and community
Accountability	Accountability, defending decisions
	Holding systems, officers and outside bodies to account
	Asking questions of officials and portfolio holders
Policy development	A check on policy
	Adding value to the position, policy on output
	Opportunity to refine decisions and ensure views are considered
Overview and direction setting	More overview – forward looking
	Venue for fresh ideas

6. Understanding what good scrutiny looks like in BCP is important as this helps stakeholders of O&S work towards a common aim and to reflect on how well the organisation is meeting this aim. This annual report forms a key part of the reflection process and allows councillors the opportunity to refresh their understanding of the aims and purpose of scrutiny.

The Overview & Scrutiny Committee structure

7. The current Overview and Scrutiny Committee structure is illustrated in figure one below. The Council's Constitution makes provision for any changes required to the structure to be reported to Council as part of this annual report, to ensure committees remain fit for purpose. Councillors will note that 'Planning and the Local Plan' is highlighted and listed under the responsibilities of the O&S Board and removed from the responsibilities of the Environment & Place O&S Committee. This change was agreed by the Monitoring Officer in 2025 in consultation with O&S Chairs under constitution rules relating to joint working, to allow for more flexible interaction with the developing local plan through the higher frequency of O&S Board meetings. It is suggested that this now be agreed by Council as a permanent change to ensure clear lines of reporting.

Figure One – Overview and Scrutiny Committee structure



Overview & Scrutiny Activity 2024/25

8. A full outline of Overview and Scrutiny activity during this reporting year is attached at Appendix 2. This includes a summary of scrutiny topics and outcomes by committee, improvements and successes, and future aims.

Overview & Scrutiny Action Plan

9. An O&S Action Plan was agreed by Council in September 2023, to identify strategic actions to improve O&S activity in BCP Council and bring working practices in line with statutory guidance. Actions were originally planned for completion within one year but have slowed as a result of resource pressures with core service activity prioritised over action plan progression. The plan now is now at over 75% completion. More detail is set out in Appendix 2 and the full O&S Action Plan is appended to this report.

Recommendations from Council to Overview & Scrutiny

10. During 2024/25 there was a marked increase in recommendations from Council to Overview and Scrutiny committees to undertake work (detailed further in Appendix 2). This increase shows a greater council-wide understanding of the role that O&S can play in developing policy and providing critical friend test and challenge to issues of importance to councillors and residents.
11. When receiving a request for work, including requests from Council, O&S committees are required to weigh up the likely added value of any work suggestion and the resources available to it to proceed with the request. Many suggestions from Council to scrutiny have been agreed by O&S committees but not yet progressed owing to lack of work programme capacity. O&S Chairs and Vice Chairs have asked that, through this report, councillors be reminded that whilst Council can ask Overview and Scrutiny to undertake work, it is in the gift of the relevant O&S committee to determine whether to agree to this request and when to timetable work, taking account of other work programme priorities.
12. Many recommendations from Council to O&S result from motions raised by councillors. To make this process more effective, it is recommended that Councillors wishing to raise a Council motion for O&S work seek prior consultation with the relevant O&S Chair. This will enable them to gain an understanding of available O&S resources, the alignment of their motion with existing work programme priorities and so the likelihood of their work suggestion being agreed / progressing in a timely way through O&S.

Resourcing Overview & Scrutiny

Background and Challenges

13. Resources available to support Overview and Scrutiny are stretched and have been well documented in previous annual reports which are available to view as background papers. The most significant pressures relate to previous cumulative Council decisions to increase the number of O&S committees and meeting numbers over time, not matched by officer resource to support these. Accompanied by an increase in other committees also resourced by the same team (Democratic Services) the overall resource available to support Overview and Scrutiny work has reduced whilst the level of O&S and other committee activity has increased. This is illustrated in figure two below which shows the total meeting numbers resourced by the Democratic Services team.

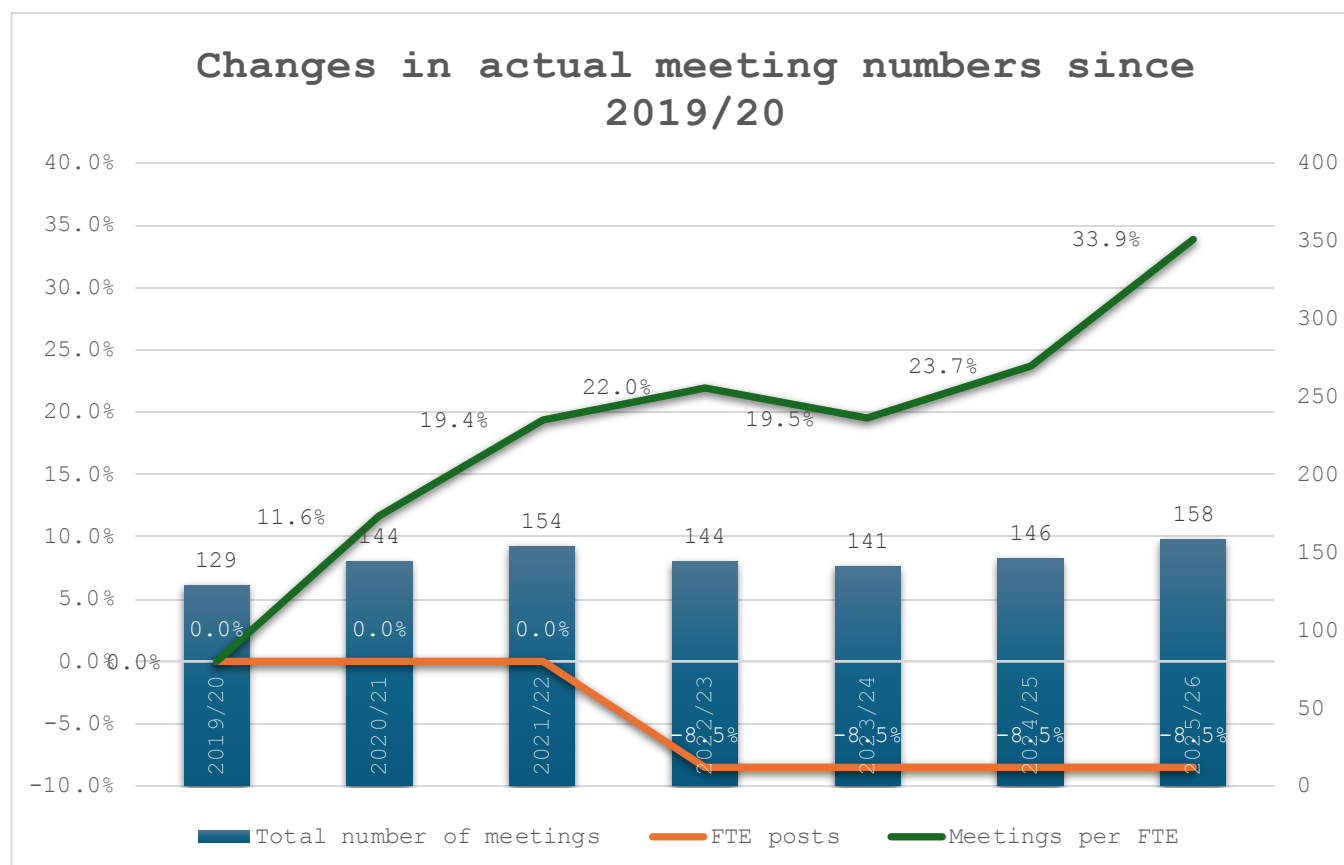


Figure Two – BCP meeting numbers in relation to Democratic Services Team resource.

14. More recently resource has been further strained by a high number of working groups and other in-depth scrutiny work (such as committee based proactive inquiries) scheduled to take place concurrently, as permitted under the constitution. An increase in work programme suggestions being received from councillors and other council bodies has also been seen, and day to day advice and guidance to councillors and officers on O&S has also increased in line with this. Whilst this reflects a healthy engagement with the O&S function and a wider understanding of the ability of O&S to undertake work which contributes to the priorities of the Council, this has added additional pressure to resources.
15. The impact of highly stretched resource has been a slow rate of progression for planned work, delays to strategic O&S work (such as annual work programme activity), limited resource available to respond to arising issues throughout the year and the likelihood that O&S outcomes have been limited in value as planned work has not benefitted from effective levels of officer support.
16. Scoping support: analysis of scrutiny outcomes in 2024/25 indicates that the current level of activity in O&S could benefit from strengthened scoping to plan for valuable outcomes. In 2024/25 an average of 25% agenda items across all O&S committee meetings led to recommendations. Whilst not all scrutiny work will lead to recommendations, this figure indicates that there is room for more targeted selection

of scrutiny topics and stronger scoping of the topics selected to ensure that O&S activity has impact.

Addressing resource challenges

Levels of concurrent work

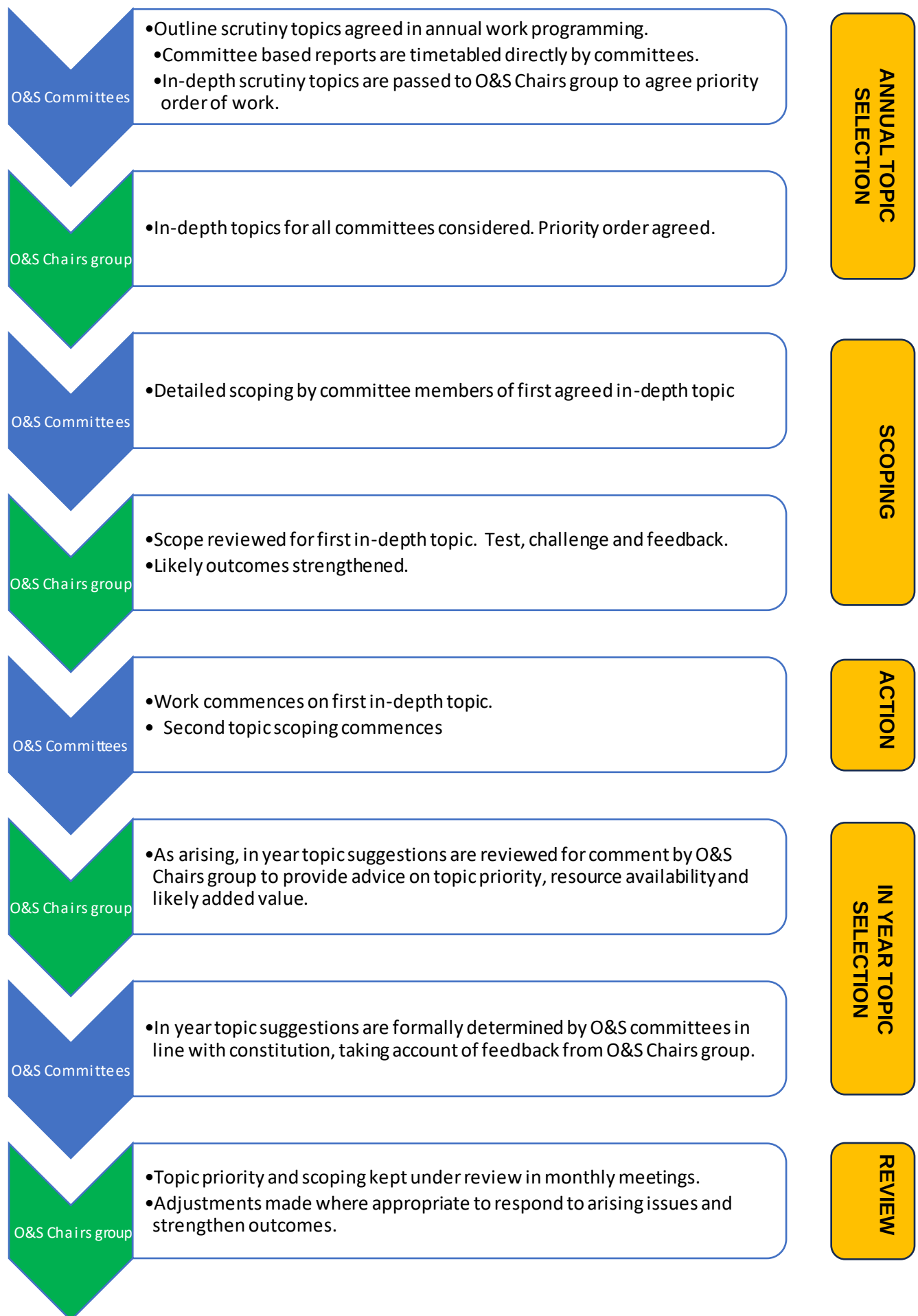
17. Under current Constitution rules, up to four committees are able to undertake one piece of in-depth work concurrently with no limit on scoping activity. This high level of concurrent activity across all O&S committees dilutes the level of officer support that is available for this purpose and risks a quantity over quality approach. To make better use of existing resources it is recommended that greater controls be placed around the use of resource for work that requires significant planning and resource to undertake (eg. working groups/ in-depth committee inquiries). **For pieces of in-depth work, it is recommended that the constitution be updated to allow one topic to be scrutinised at a time across the whole O&S function, with one further topic being scoped during the same period (Option A).** This will enable greater and more timely focus and support to selected topics in train.

Topic prioritisation

18. To agree the priority of in-depth topics, **it is recommended that the O&S Chairs and Vice Chairs group role be strengthened to include a responsibility to agree the priority of all work topics across the full O&S committee structure.** Currently, all O&S committees are able to decide their own work priorities. It is not proposed that this be changed but adding a level of O&S leadership sign off to the implementation of in-depth work will provide tighter grip to the use of resource and test and challenge to the selection of topics before work commences.

Topic scoping

19. To plan for valuable O&S outcomes, **it is recommended that the O&S Chairs and Vice Chairs group strengthen scoping for all O&S topics by reviewing key lines of enquiry for topics on an ongoing basis.** This group of O&S lead members have received a higher level of training in achieving effective O&S outcomes and are well placed to provide peer challenge.
20. Figure three below illustrates the proposed oversight to be provided by the O&S Chairs and Vice Chairs group. It is intended that this will provide opportunity for an ongoing dialogue with committees to give views on topic suggestions, resource availability and likely added value of the topics suggested. It is suggested that this be kept under continuous review to ensure that arrangements are fit for purpose.



Maximising Resource – Rapporteurs

21. Along with effective topic prioritisation, O&S resource can be maximised by a member-led approach to scrutiny that capitalises on the strengths and interests of individual committee members. An effective way to do this is through the use of rapporteurs. O&S committees have appointed more rapporteurs in 2024/25, and O&S Chairs intend to embed the use of these further in future. Rapporteurs are councillor champions appointed by an O&S committee to work independently towards an agreed remit and report back to committee. The model is suited to the progression of light touch scrutiny topics and research, such as gathering background information on a topic through conversations with officers and portfolio holders. By establishing rapporteurs O&S committees can spread workload across members with relevant skills and interests and progress issues in a timely way.
22. As a working method, rapporteurs rely on officers and portfolio holders working with them in a flexible and transparent way to share information, as they would if a committee report were requested by an O&S committee. O&S Chairs and Vice Chairs have asked that awareness of rapporteurs be raised through this annual report. Further information on rapporteurs and other working methods that will maximise resource is contained within Appendix 2.

Options Appraisal

23. Option A (Recommended option) -

- i) for pieces of in-depth work, the constitution be updated to allow one topic to be undertaken at a time across the whole O&S function, with one further topic being scoped during the same period.
- ii) the O&S Chairs and Vice Chairs group role be strengthened to include a responsibility to agree the priority of all work topics across the full O&S committee structure.
- iii) the O&S Chairs and Vice Chairs group strengthen scoping for all O&S topics by reviewing key lines of enquiry for topics on an ongoing basis to provide peer test and challenge.
- iv) the Monitoring Officer be delegated to make the associated updates to the Constitution.

More detail on this option is outlined in the paragraphs above. This option is preferred because it will allow work to progress in a more focussed and timely way and will release capacity for greater scoping support for agreed priorities. The option does not require any significant change to the current O&S committee structure or committee numbers and has no financial implications.

24. **Option B** – Arrangements for in-depth work levels remain the same but resource is released to support this work through a review of the O&S committee structure to reduce committee numbers and thereby reduce meeting numbers.

A review of the O&S committee structure will be required if this is the preferred option, including stakeholder consultation. This will divert officer resource from ongoing O&S work priorities and so has not been provided in detail with this report.

If this option is preferred, the detail of this option will require further consideration and reporting.

- 25. Option C** – Arrangements for in-depth work levels remain the same but resource is released to support this work through a reduction in the overall number of meetings across all O&S committees.

A review of O&S committee numbers will be required if this is the preferred option, including stakeholder consultation. This will divert officer resource from ongoing O&S work priorities and so has not been provided in detail with this report. If this option is preferred, the detail of this option will require further consideration and reporting.

- 26. Option D** – Arrangements for in-depth work levels remain the same but resource to the Democratic Services team is increased to provide greater support to O&S work.

To advance this option, a bid will need to be prepared to set out the required resource. This will divert officer resource from ongoing O&S work priorities and so has not been provided in detail with this report. If this option is preferred, the detail of this option will require further consideration and reporting.

- 27. Option E** – Arrangements for in-depth work levels remain the same but in-depth work is outsourced to an external body such as the Centre for Governance and Scrutiny, to undertake work on behalf of the council.

(Note – this option was considered unfavourable by the O&S Chairs' group in early consultation due to likely prohibitive costs and reduction in council ownership of work. If this option is preferred it will require further consideration and reporting to identify financial implications).

- 28. Option F** – No change.

If no change is made resources will be used to support statutory work as a priority (eg. scheduled meetings and associated activity). Non-statutory O&S activity may be delayed or not delivered. This includes a delay to the progression of working groups and in-depth O&S work and limitations on scoping support which will affect the outcomes of work. Additional O&S activity such as annual work programming may not be supported and committees will instead plan work on a rolling basis. Proactive budget scrutiny, over and above committee meeting-based scrutiny, may not be fulfilled.

Summary of financial implications

29. There are no direct financial implications related with the production of this annual report. The report explores the implications of resourcing O&S in paragraphs 13 to 22 above. Should options D-E above be supported it is recommended that a further report be brought forward to set out the detail of financial implications associated with pursuing these options.

Summary of legal implications

30. Overview and Scrutiny is a statutory function of all councils operating an executive model of decision making. Improvements to the function, outlined in the report, will ensure that the work of O&S Committees in BCP Council complies with relevant legislation and upholds statutory guidance.

Summary of human resources implications

31. There are no human resources implications arising from this report.

Summary of sustainability impact

32. There are no sustainability implications arising from this report.

Summary of public health implications

33. There are no public health implications arising from this report.

Summary of equality implications

34. Equality impact screening has been undertaken in relation to the preferred option in the report and the EIA is attached at Appendix 4. This has indicated that there are no equality implications relating to the proposals within this report and so no mitigations are required. Should other options within the report be preferred these will be the subject of a further report and associated EIA as appropriate.

Summary of risk assessment

35. The improvements identified for O&S, as set out in Appendix 2 and recommended above, will promote the upholding of statutory guidance and valuable O&S outcomes. There is a risk that the guidance will not be properly upheld by the Council if actions identified within this report, particularly those to address resources, are not taken; although this risk is low as it is for each local authority to implement their own scrutiny arrangements in response to the statutory guidance.

Background papers

Published works:

- [‘Statutory Guidance on Overview and Scrutiny in Local and Combined Authorities’](#) the Ministry of Housing, Communities and Local Government (MHCLG) and the Department for Levelling Up, Housing & Communities (DLUHC)
- [Overview and Scrutiny Annual Report 2023/24](#)
- [Overview and Scrutiny Annual Report 2019-23](#)

Appendices

Appendix 1– Overview and Scrutiny statutory powers and BCP context

Appendix 2 – Overview & Scrutiny 2024/25 Activity

Appendix 3 – Overview and Scrutiny Action Plan

Appendix 4 – Equality Impact Assessment (EIA) Screening Tool

BOURNEMOUTH, CHRISTCHURCH AND POOLE COUNCIL

OVERVIEW AND SCRUTINY STATUTORY POWERS AND BCP CONTEXT

WHAT IS OVERVIEW AND SCRUTINY?

1. Overview and Scrutiny (O&S) is an integral part of the Council's governance structure and is a statutory requirement for BCP Council. All councils operating executive arrangements must have at least one O&S committee. In BCP Council, O&S activity is carried out by four O&S committees formed of councillors and co-opted members. These are:
 - The Overview and Scrutiny Board
 - Environment and Place Overview and Scrutiny Committee
 - Children's Services Overview and Scrutiny Committee
 - Health and Adult Social Care Overview and Scrutiny Committee
2. The role of the Overview and Scrutiny Board and Committees is to help develop policy, to carry out reviews of Council and other local services, and to hold decision makers to account.
3. O&S committees are not decision-making bodies but can influence decisions through powers to obtain information, require attendance from council officers and members and to make recommendations. Under the [Local Government Act 2000](#), O&S committees have the right to scrutinise '*any matter affecting the local authority area or the inhabitants of the area.*'
4. Additional powers to scrutinise NHS services and review the work of the local community safety partnership mean that O&S committees have an important role in acting as a 'check and balance' to decisions made both within the council and in external organisations.
5. The overall aim of O&S activity is to impact in a tangible way on the council and the residents it serves. The Ministerial foreword of '[Overview and Scrutiny: statutory guidance for councils and combined authorities](#)' by the Ministry of Housing, Communities and Local Government (MHCLG) and the Department for Levelling Up, Housing & Communities (DLUHC) states:

"The role that overview and scrutiny can play in holding an authority's decision-makers to account makes it fundamentally important to the successful functioning of local democracy.

Effective scrutiny helps secure the efficient delivery of public services and drives improvements within the authority itself. Conversely, poor scrutiny can be indicative of wider governance, leadership, and service failure."

PRINCIPLES OF GOOD SCRUTINY

6. The majority of councils base their O&S arrangements on commonly held principles of good scrutiny. These are set out in the [BCP Constitution](#), which states that the O&S committees shall:
- a) contribute to sound decision making in a timely way by holding decision makers to account as a 'critical friend';
 - b) be a Councillor led and owned function that seeks to continuously improve through self-reflection and development;
 - c) enable the voice and concerns of the public to be heard and reflected in the Council's decision-making process;
 - d) engage in decision making and policy development at an appropriate time to be able to have influence;
 - e) contribute to and reflect the vision and priorities of the Council; and
 - f) be agile and be able to respond to changing and emerging priorities at the right time with flexible working methods.

Through their work, O&S councillors should seek to uphold these principles.

SUPPORTING THE AMBITIONS AND VALUES OF THE COUNCIL

7. O&S can support the high level aims of the council by aligning its work to the priorities identified within the council's corporate plan entitled '[A Shared Vision for Bournemouth Christchurch and Poole, 2024-28](#)'. The plan was refreshed in May 2024. With the remit of O&S committees spanning all service areas of the council, O&S activity has the potential to support the following vision and priorities identified within the corporate plan:

Our vision:

- Where people, nature, coast and towns come together in sustainable, safe and healthy communities.

Our priorities:

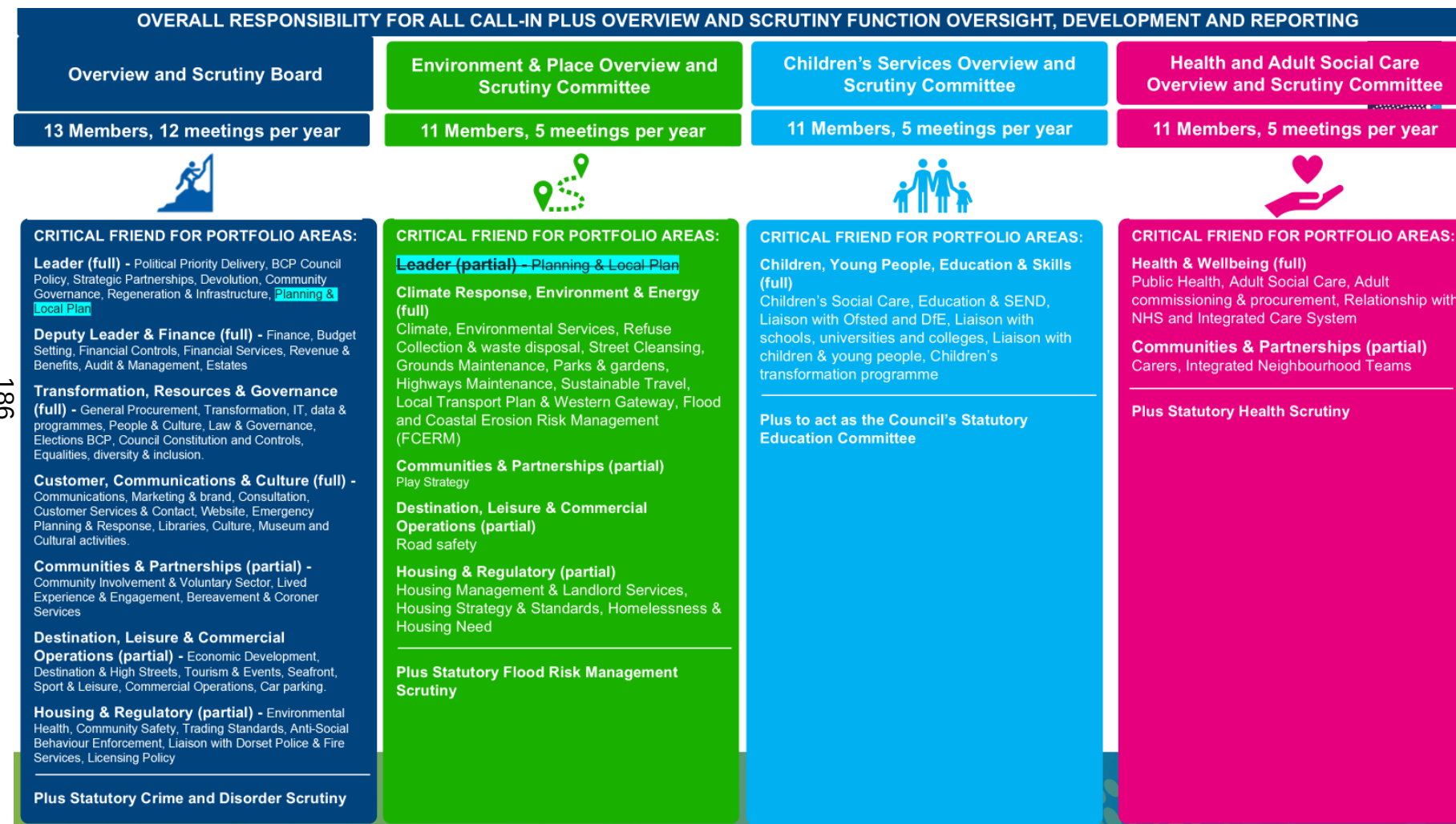
- Our place and environment: Vibrant places, where people and nature flourish, with a thriving economy in a healthy, natural environment.
- Our people and communities: Everyone leads a fulfilled life, maximising opportunity for all.

This could be achieved through alignment of O&S work plans to policy areas earmarked for development within the corporate plan. O&S can also provide benefit by monitoring the progress of the council against the ambitions set out in the corporate plan, through engagement with the relevant aspects of performance dashboards.

Overview & Scrutiny

2024/25 Activity

BCP Overview & Scrutiny Committee structure



The structure consists of one Board and three committees, with remits aligned to Portfolio Holder responsibilities.

The Board has additional responsibilities, but each O&S body is distinctly separate and has powers to set its own programme of work.

Recent changes to the structure are identified in highlighted text.

Overview & Scrutiny Board



187



**CHAIR –
COUNCILLOR
STEPHEN
BARTLETT**



**VICE CHAIR –
COUNCILLOR
SUE
AITKENHEAD**



**MEETINGS: 10
ORDINARY, 2
SPECIAL
MEETINGS**



**MEMBERSHIP: 13
COUNCILLORS**

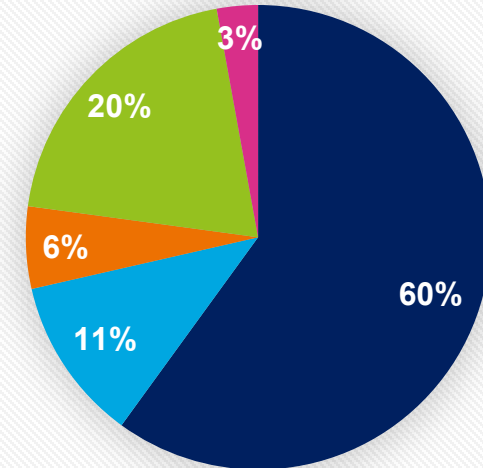


**AVERAGE
NUMBER OF
AGENDA ITEMS –
2.9**



**WORKING
GROUPS - 2**

O&S Board Agenda Item Categories

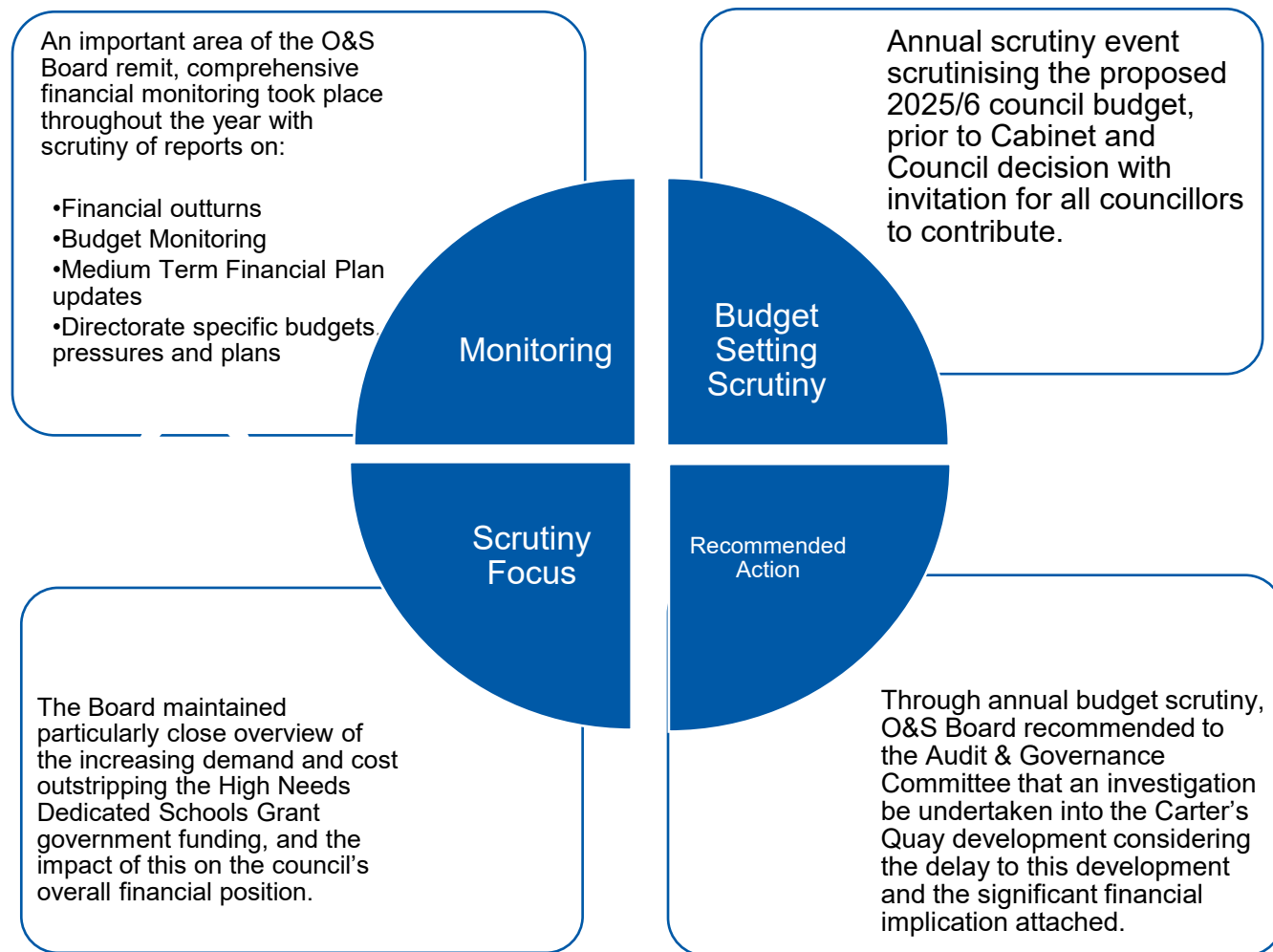


- Pre-decision scrutiny
- Reactive scrutiny
- Call-In
- Proactive scrutiny
- Update/ monitoring reports

Overview & Scrutiny Board - Scrutinising the Council's Finances



Ongoing in year monitoring of finance related Cabinet reports:



Scrutiny of the developing 2025/26 budget:

Budget Working Group

Deep dive scrutiny into budgets associated with **car parking** and the proposed **Resident's Card**.

Working group provided test, challenge and ideas to strengthen the areas selected. Working group recommendations to Cabinet included:

Car Parking

- Inflationary increases across all car parks endorsed;
- Proposal for use of surplus car parking income to accelerate the car park charging machine replacement programme;
- Exploration of options to reduce costs for the Council and make the process easier for the public to pay for car parking, in particular an option to be able to pay in advance on Council website.

Resident's Card

- Proposed small financial contribution for the Resident's Card, to make it a financially sustainable offer to residents; concessions to the charge to be considered for disadvantaged groups.

Overview & Scrutiny Board



Scrutinising Corporate Activity

- The Board scrutinised key areas of council activity:
- The Council's **Transformation Programme**
 - **Regeneration updates**, including scrutiny of activity of the **Bournemouth Development Company**
 - **Seafront Strategy**
 - Strategic use of the **Community Infrastructure Levy**
 - **Pay & Reward**
included multiple update reports and one call-in meeting.
The Board determined that no scrutiny advice was required to be given to Cabinet following the call-in.
 - Monitoring the impact and effectiveness of the whole O&S function through scrutiny of the **O&S Annual Report**.

Developing Policy

- Open discussion items to test, challenge & contribute views to emerging policies including:
 - **The Library Strategy**
 - **Centralised complaints policy**
 - **Community Governance Review**
 - **Devolution**
 - Discussion items in committee to consider the council's position on joining with other local authorities to form a strategic authority across a wider area.
 - O&S recommended, and Cabinet agreed, that an emergency Council meeting was required to include all councillors in this important decision.

Performance Monitoring

- Contribution to the refreshed **Corporate Plan**
- **Corporate Performance Dashboard** demo and scrutiny
- **Best Value Notice**- monitoring this improvement activity until conclusion with the lifting of the Best Value Notice.
- **Quarterly performance 'for information' reports** – regular monitoring of these reports allows scrutiny members to identify red flags and issues which may benefit from scrutiny.
- Reports circulated outside of meetings to reserve committee time for impactful scrutiny.

Overview & Scrutiny Board

Monitoring Impact



Blue Badge Service

- Monitoring reports of improvement actions following scrutiny of the service in 2023.
- Original scrutiny requested triggered by councillor and community concerns about lengthy waiting times for badge renewals and the negative impact on residents who may be left without a badge whilst waiting for a renewal.
- Update reports showed that changes in operational activities were being implemented with streamlined assessments, renewals being prioritised and good practice from other authorities being adopted in BCP.
- A final report in May 2025 highlighted that waiting times had significantly reduced.

Working Groups



Small groups of members meeting to deep dive into a specific topic:

BCP Consultation approaches

- Working group commissioned to provide test and challenge to a refreshed Consultation Framework, as it develops.

Budget working group

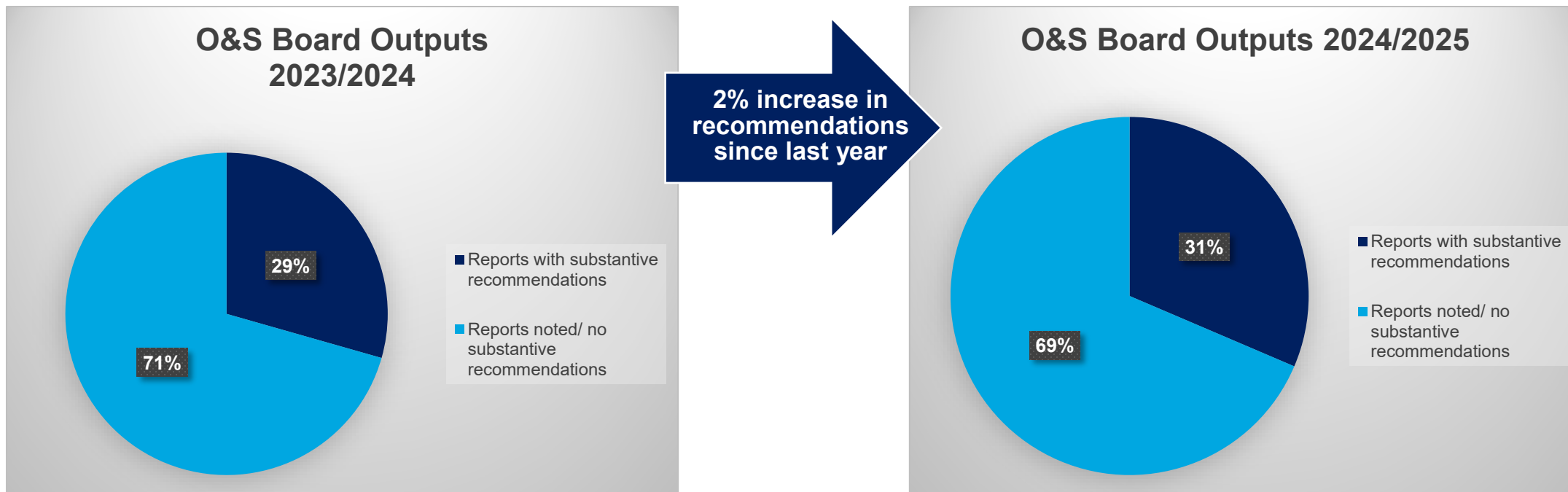
- Deep dive into the budgets associated with car parking and residents card, providing opportunity to test and challenge and influence the related 2025/26 budget as it develops.

Statutory Scrutiny



Scrutiny of the **Community Safety Partnership** – fulfilling the requirement for councils to undertake crime and disorder scrutiny annually.

Overview & Scrutiny Board



Environment & Place Overview & Scrutiny Committee



192



**CHAIR –
COUNCILLOR
CHRIS RIGBY**



**VICE CHAIR –
COUNCILLOR
DAVID D'ORTON-
GIBSON**



MEETINGS: 5
ORDINARY, 0
SPECIAL
MEETINGS



MEMBERSHIP: 11
COUNCILLORS



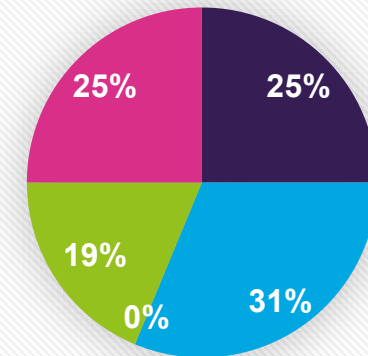
AVERAGE
NUMBER OF
AGENDA ITEMS –
3.2



WORKING
GROUPS - 2



Environment & Place O&S Agenda Item Categories



- Pre-decision scrutiny
- Proactive scrutiny
- Reactive scrutiny
- Update/ monitoring reports
- Referrals from Cabinet/ Council

Environment & Place Overview & Scrutiny Committee



Listening to Residents

Prompted by high levels of public interest, the committee held a scrutiny session dedicated to hearing views on the **trial closure to vehicles of an entrance to Poole Park**. The committee assessed a range **of views and evidence, including:**

- Over 30 public questions and statements, for and against the closure.
- The outcome of a four- week public consultation
- The impact of the trial closure on the elderly and disabled through a report by DOTS disability.
- Portfolio Holder and ward councillor views.
- An officer report outlining the purpose of the trial closure and anticipated benefits to the environment of Poole Park.

The committee recommended to Cabinet that a full Council debate and decision should be held on the topic in light of the significant public interest. This was not upheld by Cabinet and the closure was confirmed as permanent.

Climate & Nature Scrutiny

A central part of the committee's remit, the committee scrutinised a range of areas relating to climate & nature:

- Monitoring work relating to **Nutrient Neutrality** in respect of Phosphates in the River Avon.
- **Heathland Mitigation** - monitoring work that mitigates the impact of housing on Dorset's lowland heaths.
- Scrutiny of progress across the council towards reaching climate action goals through the **Climate Action Annual Report**.
- Review of the Council's new **BCP Greenhouse Gas Emissions Dashboard**, with scrutiny recommendations to strengthen targets for carbon emission reduction.
- Through the budget working group, the committee recommended that Cabinet **strengthen the corporate approach to financing the council's climate action goals**, to enable the council to meet its net zero targets by 2030.

Environment & Place Overview & Scrutiny Committee



Monitoring Improvements



- Scrutinising the performance of the **Planning Service** to monitor improvements including the reduction of the planning application backlog and stabilisation of the workforce.

Adding value through rapporteurs



The committee increased its capacity to undertake work through member-led rapporteur scrutiny.

Rapporteurs work towards an agreed remit on behalf of the committee, liaising with officers to progress issues outside of meeting and reporting activity back to the full committee

This year, Councillor Felicity Rice worked with officers to progress a Play Streets policy, which sets out how residents can close streets to make them safe for children to play and socialise. The work led to the drafting of a policy in readiness for launch.

Further rapporteurs were established in 2025 and their work will be reported in the 2025/26 annual report.

Housing Scrutiny



- **Housing Strategy review** – scrutiny of the refreshed housing strategy with recommendations made regarding the governance and monitoring of the strategy.
- **Safe Accommodation Strategy** – the committee established a working group to test, challenge and contribute to the developing strategy which outlines how the council will support residents in need of housing due to domestic abuse.

Working Groups

- Small groups of members meeting to deep dive into a specific topic:
- **Budget Working Group** – topics covered: climate & ecological emergency budget; housing temporary accommodation budget.
- Recommendations included requesting a gap analysis of the estimated total amount of spend required to reach net zero targets and including the costs within the MTFP
- **Safe Accommodation Strategy Working Group**
- Recommendations included an awareness campaign to inform residents escaping domestic abuse about the financial and housing support available to them; suggestions to strengthen the strategy itself and councillor awareness of it; suggestions for KPIs to be introduced to monitor the effectiveness of the new safe accommodation model.

Council Driven Scrutiny

The Committee saw an uplift in suggested topics for scrutiny, generated by debate at full Council meetings or portfolio holder suggestions. Topics submitted included:

Safe Accommodation Strategy

Van Life

Climate & Nature scrutiny

Cliff and Coastal erosion

Redhill paddling pool

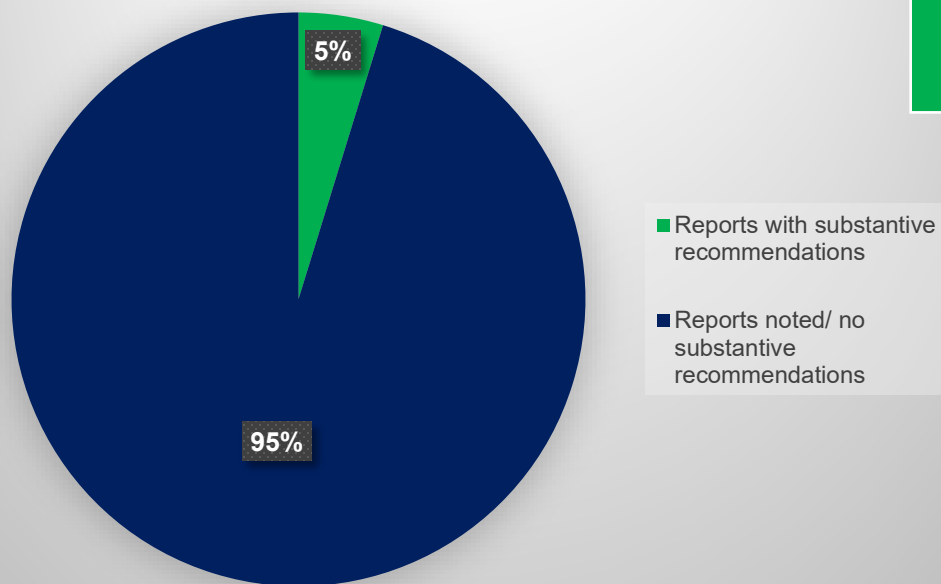
Strengthening building standards through local authority control.

A Safe Accommodation working group was established in response (see above), and other topics were added to the committee's work programme for later work.

Environment & Place Overview & Scrutiny Committee

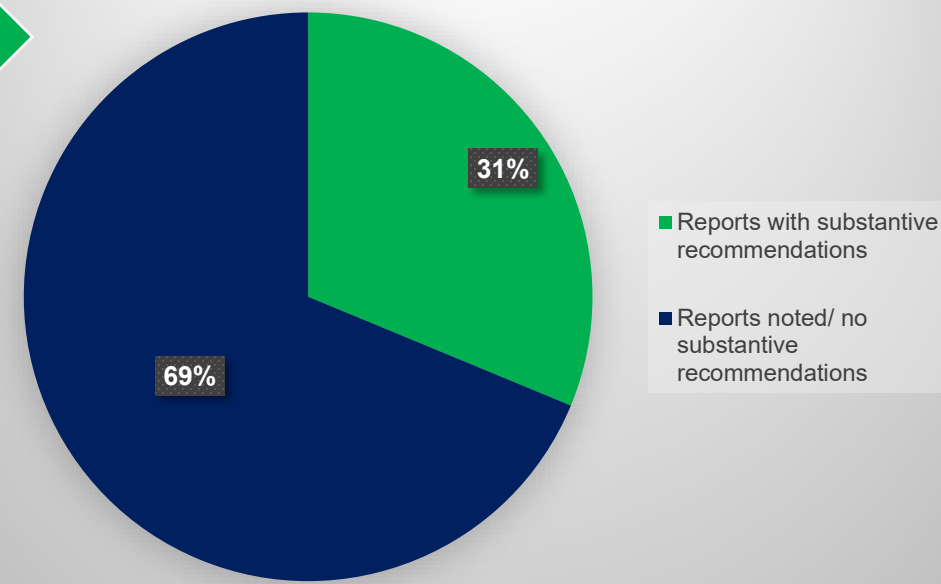


Environment & Place O&S Outputs
2023/2024



26% increase in
recommendations
since last year

Environment & Place O&S Outputs
2024/2025



Children's Services Overview & Scrutiny Committee



196



**CHAIR –
COUNCILLOR
SHARON CARR-
BROWN**



**VICE CHAIR –
COUNCILLOR
SIMON BULL**



MEETINGS: 5
ORDINARY, 0
SPECIAL
MEETINGS



MEMBERSHIP: 11
COUNCILLORS



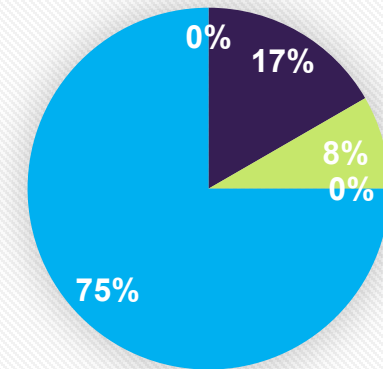
AVERAGE
NUMBER OF
AGENDA ITEMS –
4.8



WORKING
GROUPS - 2



Children's Services O&S Agenda Item Categories



- Pre-decision scrutiny
- Proactive scrutiny
- Reactive scrutiny
- Update/ monitoring reports
- Referrals from Cabinet/ Council

Children's Services Overview & Scrutiny Committee



Scrutinising new activity

The committee scrutinised new decisions and strategies prior to adoption, applying test and challenge to strengthen outcomes:

- **Linwood Special School** – the committee scrutinised the Cabinet paper prior to decision and recommended that expansion of the school go ahead.
- **Children in care and care experienced young people sufficiency strategy** – setting out how BCP will provide sufficient, safe, secure and sustainable homes for children in care and care experienced young people between 2024-2028.
- **Children & Young People's Partnership Plan 2025-2030**- a high-level strategic plan that outlines how to support children and young people living in Bournemouth, Christchurch and Poole with the aim to improve outcomes for all children and young people.
- **Childcare Sufficiency Assessment 2024-2025** – an evaluation of childcare places to ensure that there are enough to meet the needs of the BCP area.

Monitoring progress

In its role as a critical friend, the Committee monitored key areas of activity within children's services:

- **SEND progress updates** including discussions and continued public interest in the Safety Valve Programme.
- **Children's social care improvement journey**- in keeping with previous years' work, the committee supported this critical area of improvement in the council and closely monitored activity along the way. In 2025 the council moved from an 'inadequate' to a 'good' Ofsted rating.
- **Independent Reviewing Officer annual report.**
- **Speech and language therapy update**

Holding decision makers to account

- The committee received updates on activity from the Portfolio Holder for Children, Young People, Education & Skills at every meeting, providing opportunity for questions and idea sharing.

Children's Services Overview & Scrutiny Committee



Scrutinising the Council's Finances

The committee considered a range of financial reports to monitor budget and pressures within children's services, and the impact on children and families. This included:

- **An update on the full children's services budget**
- **Alternative Provision** – an update on the services provided to support mainstream inclusion and action being taken to positively impact the trajectory of high needs expenditure.
- **The High Needs Schools Grant Expenditure Forecast**
- **Children's Services Capital Strategy** – setting out the capital funding available to the service and improvement priorities aligned.
- The committee also recommended that Cabinet **assess the impact on children, young people and families of any potential budget overspend in the SEND service budget**, which Cabinet agreed to through a dedicated report.

Gaining insight

In addition to councillors bringing insight from their own work with residents and schools, the committee heard from:

- **Youth Parliament representatives** – a regular meeting slot to provide updates on Youth Parliament priorities and gain the views of young people on scrutiny topics.
- **NHS Dorset representative** – the introduction of a standing invitation to the Chief Nursing Officer to provide a link between children's services and health related matters and gain the insight of health professionals on topics scrutinised.

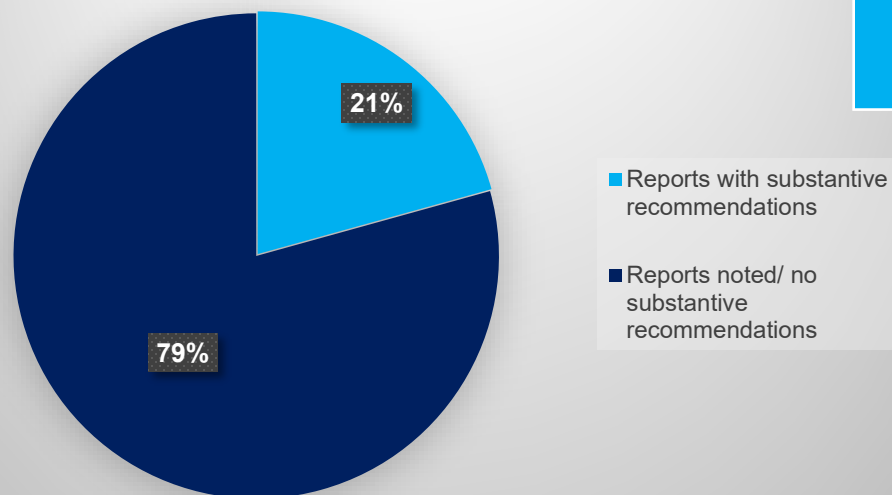
Working Groups

Small groups of members meeting to deep dive into a specific topic:

- Final report of the **Child Exploitation Working Group** (activity took place in previous municipal years). Recommendations included earlier age-appropriate education in schools regarding the risks associated with exploitation, drugs and the dangers of carrying weapons.
- **Family Hubs Working Group** – included a visit to see Family Hubs in action. Further work in progress.
- **Budget Working Group** - priority topics selected by councillors for deep dive scrutiny - **School Transport Costs** and **Care Growth Forecast**.
- Recommendations included advocacy for:
 - the protection of non-statutory services (such as Early Help) – councillors highlighted that it is vitally important to support these services to avoid additional financial impact on statutory services.
 - the inclusion of pupils with SEND in mainstream, local schools, to reduce the need for school transport provision and associated costs.

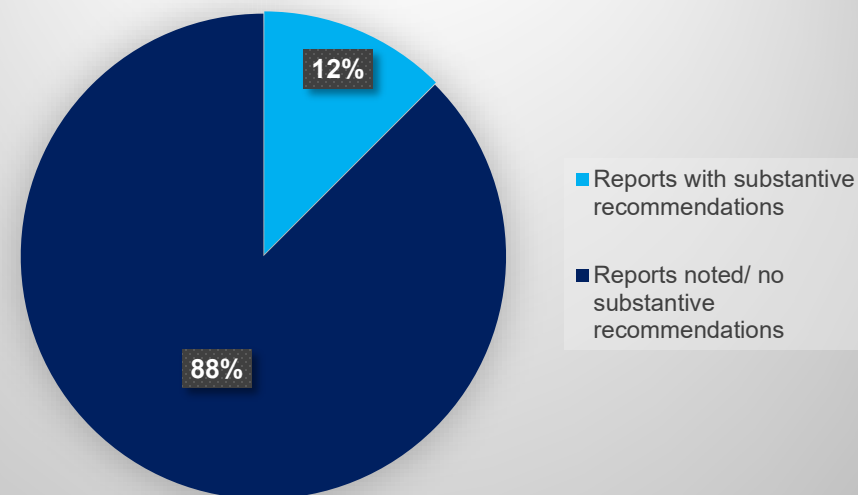
Children's Services Overview & Scrutiny Committee

Children's Services O&S Outputs
2023/2024



9% decrease in
recommendations
since last year

Children's Services O&S Outputs
2024/2025



Health & Adult Social Care Overview & Scrutiny Committee



200



**CHAIR –
COUNCILLOR
PATRICK CANAVAN**



**VICE CHAIR –
COUNCILLOR
LESLEY DEDMAN**



**MEETINGS: 5
ORDINARY, 0
SPECIAL MEETINGS**



**MEMBERSHIP: 11
COUNCILLORS**

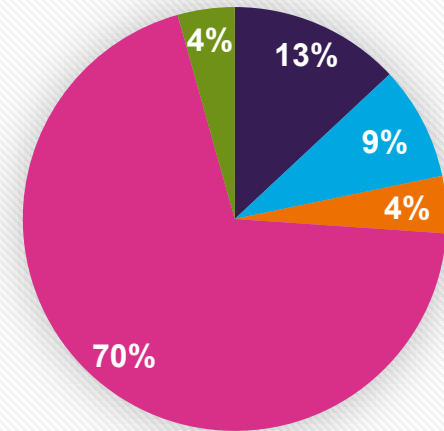


**AVERAGE NUMBER
OF AGENDA ITEMS –
4.6**



**WORKING GROUPS
- 2**

Health & Adult Social Care O&S Agenda Item Categories



- Pre-decision scrutiny
- Proactive scrutiny
- Reactive scrutiny
- Update/ monitoring reports
- Referrals from Cabinet/ Council

Health & Adult Social Care O&S Committee



Holding decision makers to account

The committee received updates on activity from the Portfolio Holder for Health & Wellbeing at every meeting, providing opportunity for questions and idea sharing.

Scrutinising new activity

The committee scrutinised new decisions and strategies prior to adoption, applying test and challenge to strengthen outcomes:

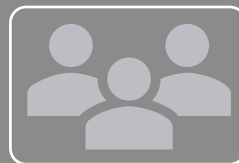
- **Adult Social Care Strategy 2025-28**– the committee made recommendations that the strategy be strengthened by the inclusion of clear targets.
- **Reconfiguration of the Public Health function for BCP**– the committee contributed views on new arrangements and received updates on progress throughout the year.
- **Transforming Urgent and Emergency Care Services** – the committee scrutinised plans for a system-wide programme to transform and improve urgent and emergency care services for Dorset residents.
- **‘Fulfilled Lives’** – the committee scrutinised the establishment of a new transformation programme for adult social care services and supported activity throughout the year through a series of briefings and update reports on specific themes within the programme.

Monitoring Progress

In its role as a critical friend, the Committee monitored key areas of activity by health providers and within adult social care:

- **Home First Development across Dorset** update report.
- **Integrated Neighbourhood Teams** update report.
- **NHS Dentistry** – update report from Healthwatch.
- **Tricuro Business Plan**
- **Safeguarding Adults Board Annual Report**
- **Adult Social Care Compliments, Complaints & Learning Annual Report**
- **Adult Social Care Waiting Times** update report

Health & Adult Social Care O&S Committee



Working with Health Partners

- The committee maintained overview of key issues relating to health service provision, including:
- **Transformation of UHD hospitals**
- **UHD Maternity Services**
- **Gender Identity Disorder Services**

Gaining Insight

- In addition to councillors bringing insight from their own work with residents the committee heard from a representative of **Healthwatch Dorset** at every meeting. Healthwatch champions residents' voices in relation to their experience of health and social care services and brings this service user insight to scrutiny debates.

Working Groups

- Small groups of members meeting to deep dive into a specific topic:
- **Data Working Group** - this working group developed a Data Toolkit to enable members to more easily access data and information sources, with a view to achieving more evidence driven scrutiny. The group recommended roll-out of a similar toolkit to all O&S committees.
- **Budget Working Group**

Proactive Scrutiny

- Prompted by a publication of Healthwatch Dorset, looking at **health inequality for people experiencing homelessness**, the committee asked NHS Dorset and council officers to outline how existing services address inequalities.
- Through recommendations, the committee highlighted the issues to Cabinet and asked them to discuss the matter further, in particular funding and partnership collaboration, to ensure a robust system is in place to support the most vulnerable.

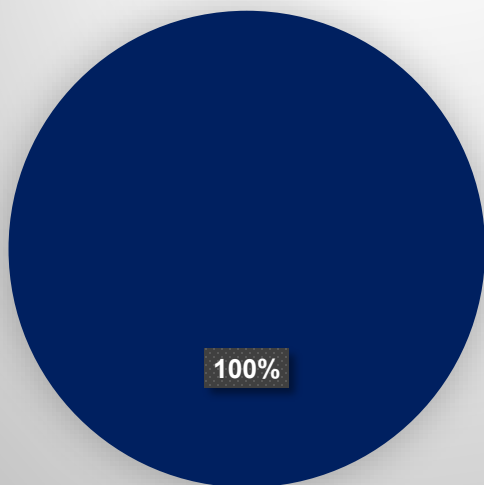
Scrutinising the Council's Finances

- The committee received an update on adult social care and public health budgets and commissioned a **Budget Working Group** to take a deep dive into financial planning for **demand management**.
- The working group made a recommendation to Cabinet that block booked-beds for long-term care provision be increased, to achieve more value for money in this budget area.

Health & Adult Social Care O&S Committee



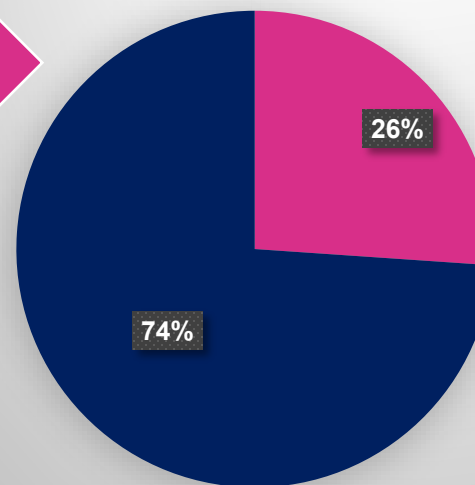
Health & Adult Social Care O&S
Outputs 2023/2024



- Reports with substantive recommendations
- Reports noted/ no substantive recommendations

26% increase in
recommendations
since last year

Health & Adult Social Care O&S
Outputs 2024/2025



- Reports with substantive recommendations
- Reports noted/ no substantive recommendations

Improvements & Successes

Strategic improvements
made across all O&S
Committees in 2024/25



Improvements & Successes- Training & Development

O&S Culture Development workshops

- Facilitated by the Centre for Governance and Scrutiny, three workshops were held with officers, Cabinet and O&S councillors to focus on the roles of each in underpinning a culture that enables successful scrutiny. Output – an O&S / Cabinet protocol is in development to capture agreements and good practices.

Leadership training for O&S Chairs

- All O&S Chairs have been provided LGA scrutiny leadership training, refreshed with any changes in chairing positions to ensure continuity of scrutiny expertise.

Targeted training for Children's Services O&S

- Facilitated by the LGA, a comprehensive package of support and mentoring was provided throughout 2024/25 to strengthen councillors' approach to child-centred, successful scrutiny. Councillors' knowledge of the children's services landscape was improved and focussed sessions on work planning and scoping work will enable the committee to better support and scrutinise the important services provided to support young people in the BCP area.

Regular briefings

- All committees established a series of regular briefing slots to enable them to stay informed and explore issues related to their remit. These informal slots free up committee time for value-added scrutiny topics. With standard invitations to all councillors, these regular briefings also provide opportunity for other councillors to stay informed of important issues.

*“The prevailing **organisational culture, behaviours and attitudes** of an authority will largely determine whether its scrutiny function succeeds or fails. While everyone in an authority can play a role in creating an environment conducive to effective scrutiny, **it is important that this is led and owned by members**, given their role in setting and maintaining the culture of an authority.” **

* Overview and Scrutiny: statutory guidance for councils, combined authorities and combined county authorities

Improvements & Successes - Topics and scoping

The key to effective O&S outputs lies in the selection and scoping of topics. Improvements in 2024/25 included:

Closer working with Council	Maintaining a balance of scrutiny work	Key lines of enquiry	A lens for scrutiny
2025 saw a marked increase in recommendations from Council to O&S committees, particularly within the remit of the Environment & Place O&S Committee. This increase shows a greater council-wide understanding of the role that O&S can play in developing policy and providing critical friend test and challenge to burning issues raised at Council. Many of these topics have been raised by residents attending Council meetings, or through councillors bringing forward insight on matters of concern from their wards.	In the 2023 Best Value review, the Council was encouraged to reduce its focus on pre-decision scrutiny and increase the O&S policy development role. The imbalance of pre-decision scrutiny was successfully addressed in 2023/24 with pre decision scrutiny accounting for 21% of all scrutiny across all committees in the function. There was a small increase to 29% across the function in 2024/25. Pre-decision levels represent a higher proportion of O&S Board work as this committee aligns to the calendar of Cabinet meetings with the specific purpose of enabling pre-decision scrutiny where required.	Key lines of enquiry documents have been embedded as standard across all committees for use when scoping work topics. These encourage focus on lines of enquiry that will lead to valuable outcomes and ensure that O&S councillors' enquiries are clearly captured and officers have clarity on the ask of scrutiny.	Statutory guidance encourages the establishment of a clear and communicable role for scrutiny, over and above statutory rights and the role of holding decision makers to account. Three out of four O&S committees have now established lenses for their committees to more clearly identify their role and to help with topic choices and scrutiny enquiry lines.

*“Authorities should take steps to ensure scrutiny has a clear role and focus within the organisation, i.e. a niche within which it can clearly demonstrate it adds value. Therefore, prioritisation is necessary to ensure the scrutiny function concentrates on delivering work that is of genuine value and relevance to the work of the wider authority – this is one of the most challenging parts of scrutiny, and a critical element to get right if it is to be recognised as a strategic function of the authority” **

* Overview and Scrutiny: statutory guidance for councils, combined authorities and combined county authorities

Improvements & Successes - Governance & Leadership

Call-In levels remain stable

- O&S call-in should be used as a last resort where there is a concern that a decision has not been made in keeping with budget and policy framework of the council or the principles of decision making. There was one call-in item considered during 2024/25, in keeping with an average of one call in per year during the 2019-24 period. The level of call-in items in BCP indicates that call-in is not used as a party-political tool. Low call-in levels may be an indication that governance arrangements in the council offer appropriate alternative opportunities to test and challenge decision making, such as a suitable level of pre-decision scrutiny opportunities and flexibility for all non-Cabinet members to ask question in O&S meetings and Cabinet meetings.

Regular O&S Chairs meetings

- O&S Chairs and Vice Chairs meet regularly to oversee the function, discussing cross-cutting topics, resource, training and development needs, successes and challenges.

Strengthened links to Audit

- The Chair and Vice Chair of Audit & Governance Committee have now been made standing invitees to O&S Chairs meetings to strengthen the links between O&S & Audit providing opportunity for alignment of work programmes to ensure the council's governance arrangements in this respect are robust.

Greater member- led approach

- Scrutiny councillors have taken a more active role in leading O&S enquiries. Rapporteurs have been established on specific topics, to undertake detailed enquiries independently, and report back to committee, successfully encouraging action on topics selected. Coupled with strong committee leadership from Chairs and Vice Chairs this is in keeping with one of the founding principles of O&S that scrutiny should be councillor led. A proactive member-led approach is also a vital tool for O&S members to share the workload across committee members and progress issues of importance to them despite resource constraints.

*“Scrutiny committees do have the power to ‘call in’ decisions, i.e. ask the executive to reconsider them before they are implemented, but should not view it as a substitute for early involvement in the decision-making process or as a party-political tool.” **

* Overview and Scrutiny: statutory guidance for councils, combined authorities and combined county authorities

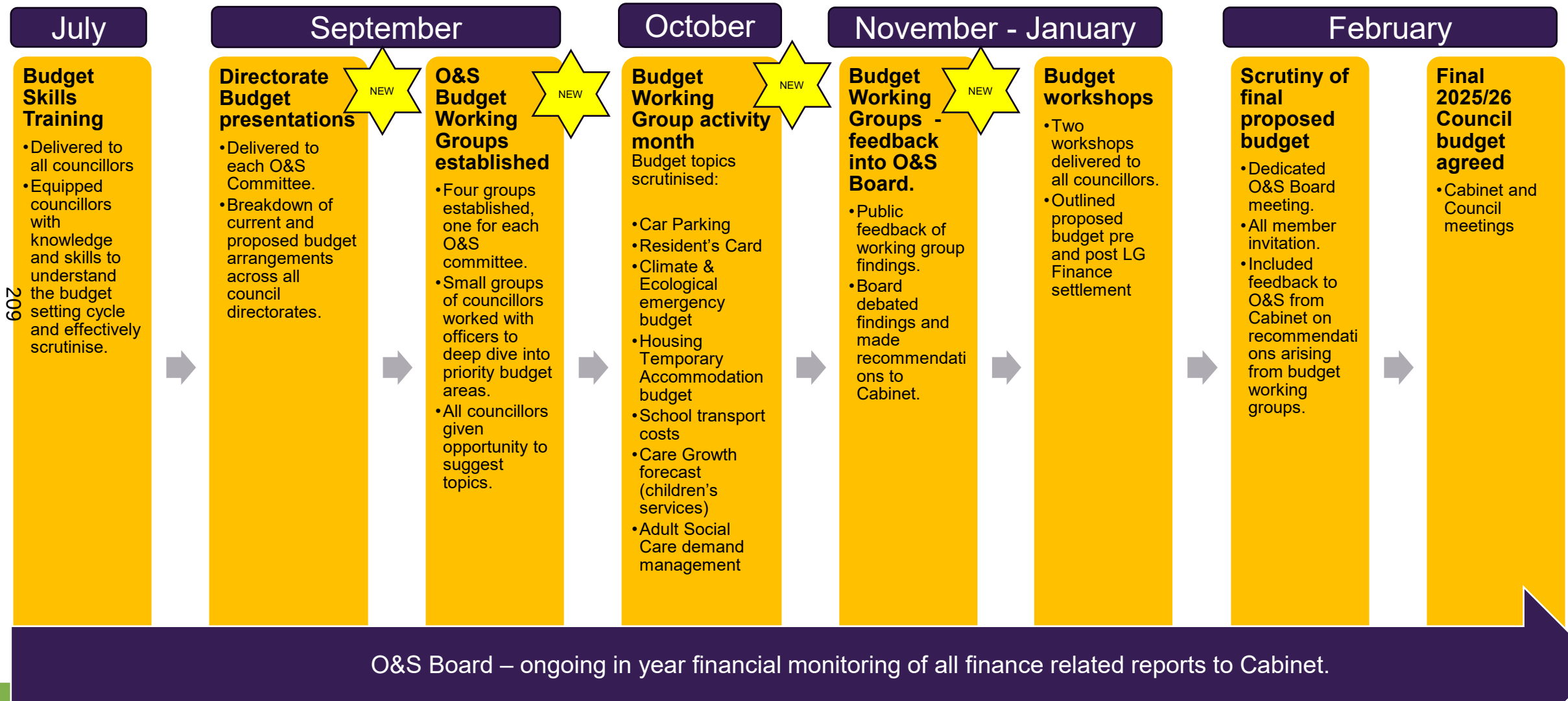
Improvements & Successes –

Proactive Budget Scrutiny

- Budget scrutiny opportunities were increased in 24/25. Scrutiny councillors provided test, challenge and ideas on the developing budget for the following year.
- Proactive scrutiny was timed to give councillors the chance to input during development stages of the budget – not at the end when proposals are fully developed and impact is limited.
- The enhanced model was recognised by the Centre for Governance and Scrutiny as an example of excellence in proactive budget scrutiny.



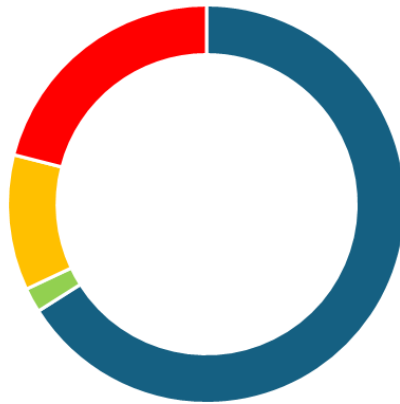
Improvements & Successes - Proactive Budget Scrutiny ctd.



Improvements & Successes – O&S Action Plan

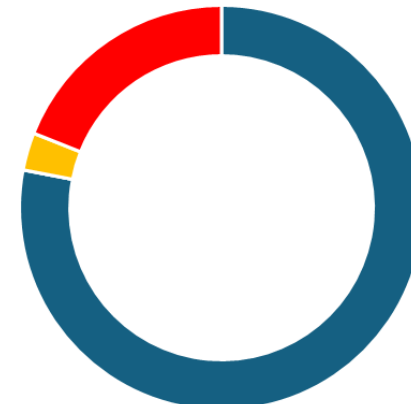
- The O&S Action Plan was agreed by Council in 2023 and contains strategic actions to improve O&S activity and bring it into line with statutory guidance.
- Progress made against the O&S Action Plan in 2024/25 took it to over 75% complete.
- Notable actions completed this year related to officer and member training to improve the culture needed to support effective scrutiny and targeted support to the Children's Services O&S Committee.
- The Action Plan has been progressed as resources allow, and after core O&S activity is resourced. It will continue to be progressed on this basis and reported annually to Council with this report. O&S lead members also monitor the Action Plan on a regular basis.

23/24 Progress against Action Plan



■ Completed ■ On track ■ Some delay ■ Significant delay

24/25 Progress against Action Plan



■ Completed ■ On track ■ Some delay ■ Significant delay

Future Aims



Planned improvements to strengthen the practices and value of scrutiny

These are focussed on two clear aims:

- **Maximising Resource**
- **Value added scrutiny**

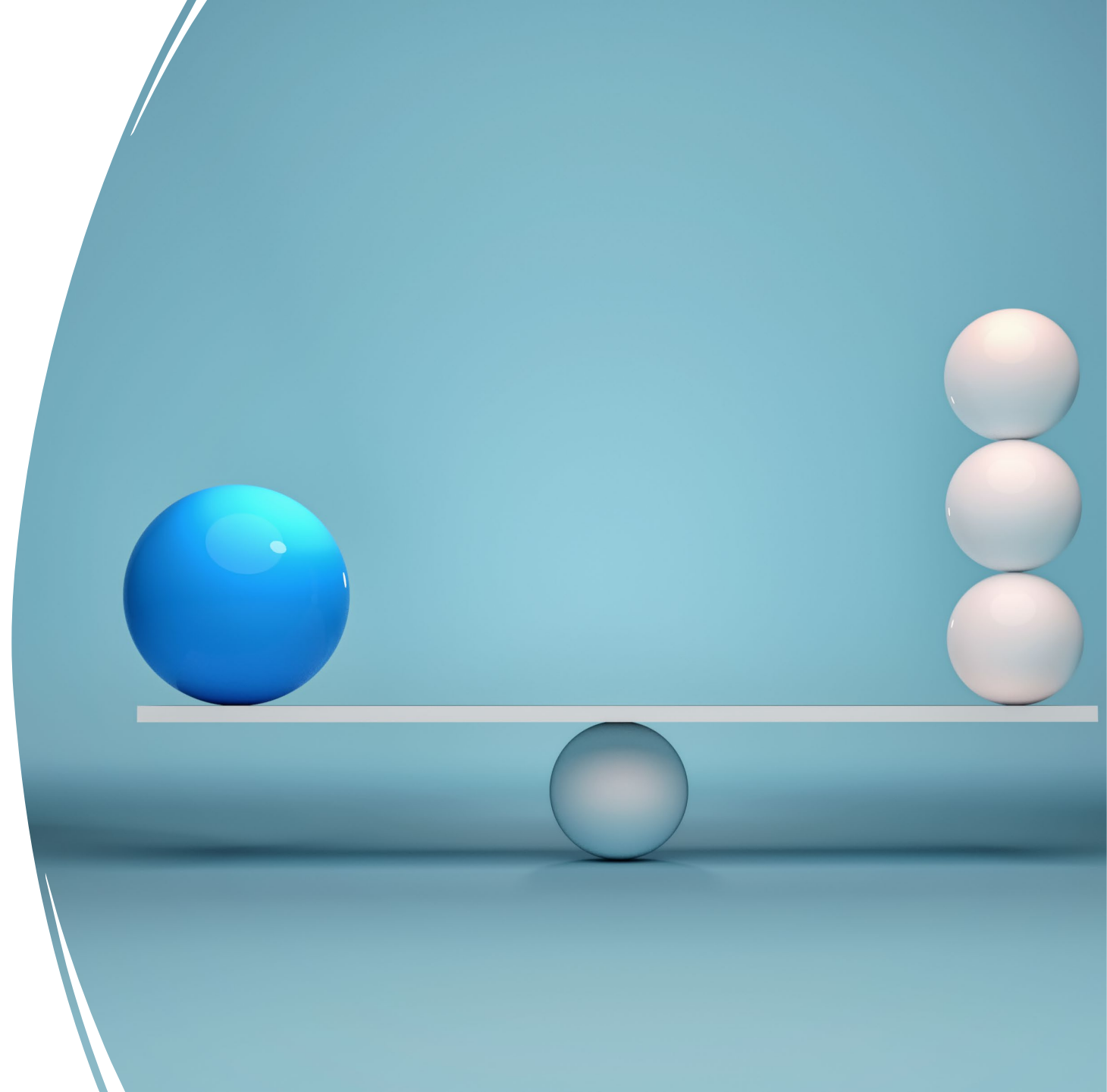
Future Aims – Maximising Resource

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“The resource an authority allocates to the scrutiny function plays a pivotal role in determining how successful that function is and therefore the value it can add to the work of the authority.

*Ultimately it is up to each authority to decide on the resource it provides, but every authority should recognise that creating and sustaining an effective scrutiny function requires them to allocate resources to it.” **

* Overview and Scrutiny: statutory guidance for councils, combined authorities and combined county authorities



Future Aims – Maximising Resource

The biggest challenge to overview and scrutiny is how to use its resources for maximum impact. Resource to support Overview and Scrutiny work is limited and to have the most influence, must be used innovatively and targeted towards the topics that will have the most likelihood of tangible change and improvements for residents. **Measures suggested to maximise resource in 2025/26 include:**

Streamlining working groups

- It is recommended that the council move to a quality over quantity approach, with one O&S working group taking place at a time (previously up to 4 concurrently). This will encourage a focus on progressing the highest importance working groups and enable the work to progress in a timely way, before moving on to the next topic. O&S Chairs and Vice Chairs will play a role in determining the priority order of working groups.

More test and challenge of topic suggestions and scopes

- As O&S leads, the O&S Chairs and Vice Chairs group are well placed to provide peer test and challenge to the topics and scopes suggested for scrutiny across all committees with the aim of ensuring that those selected are likely to lead to meaningful outcomes. Chairs and Vice Chairs meet regularly throughout the year and will add this to their oversight role.

Scoping champions

- In addition to added challenge from Chairs and Vice Chairs, it is recommended that any topic agreed for scoping will be assigned a committee member to liaise with other councillors and officers to ensure scopes will add value. Member championing will ensure that the issues of highest interest to committees are driven forward at pace by passionate members keen to explore issues of interest.

Matrix for prioritising topics

- In consultation with O&S Chairs, a topic prioritisation matrix will be introduced to assist committees in their work programming choices. A scored matrix will provide a more evidence-based method for councillors to assess and prioritise topics with the greatest likelihood of impact.

“Scrutiny members should accept that shortlisting can be difficult; scrutiny committees have finite resources and deciding how these are best allocated is tough. They should understand that, if work programming is robust and effective, there might well be issues that they want to look at that nonetheless are not selected.” * Overview and Scrutiny: statutory guidance for councils, combined authorities and combined county authorities

Future Aims – Maximising Resource ctd.

Other measures that will maximise O&S resource:

Rapporteurs –

Embedding the use of rapporteurs across all committees will enable individual members to champion issues of interest, monitor, progress and report back on issues to the full committee, freeing up committee time. This model has already been used successfully in some committees.

Self-serve councillor access to data –

Following the implementation of a Data Toolkit to assist Health & Adult Social Care O&S Committee members navigate the complex health data landscape, a similar toolkit has been developed for Children's Services O&S members. Corporate performance data and will also be shared with all O&S committees on a regular basis. This will enable O&S members to horizon scan data on a self-serve basis, raising red flags into committee and using data to inform scrutiny topics choices.

Keeping agenda items low –

Attempting to scrutinise too many items in committee meetings can dilute the benefit of scrutiny and limit meaningful outcomes. Maintaining a focus on a maximum of 3 items per committee agenda and reducing from the levels seen in 2024/25 will ensure that each topic can be explored in sufficient depth to lead to valuable recommendations. Using other scrutiny mechanisms to receive information items and selecting only the topics where the committee can have the most influence will be essential to making the most of O&S resource.

Future Aims – Value added scrutiny

Scrutiny topics should impact positively on the work of the Council and, through this, BCP residents. Understanding and demonstrating this impact is an identified action within the O&S action plan. Planned measures to strengthen this include:

☐ **Introducing recommendation trackers**

- to enable O&S committees to track the recommendations made and ask for updates on implementation, ultimately assisting committees in understanding the impact that recommendations have had and how recommendations could be strengthened to maximise impact.

☐ **Annual surveys to gather insight on added value and impact**

- gathering feedback from councillors and officers on their perception of impact to help inform future work planning choices.

☐ **Regular monitoring of impact**

- reflecting on the value and success of scrutiny topics and methods through Chairs and Vice Chairs meetings.

Listening to Residents

☐ **Topic suggestion form**

- an improved user-friendly form will be provided on the council website for residents to make scrutiny topic suggestions.

☐ **Increase resident driven scrutiny topics**

- scrutiny committees can become overwhelmed by internal focussed reports such as budget and performance reports. By making space on agendas for topics that either respond to burning issues for residents, are generated by resident suggestions or include listening opportunities to hear from the public, scrutiny will ensure that it is aligning to and serving the needs of residents. Listening sessions are already planned in 2025/26 for topics such as 'Van Life', to understand the needs of those who live in vehicles in BCP through choice or necessity.

Introduction

This action plan outlines improvement activity for BCP Council's Overview and Scrutiny function. This activity has been identified as appropriate to bring O&S practices to the level outlined in the Government's [Statutory Guidance on Overview and Scrutiny in Local and Combined Authorities](#)

The actions also address recommendations arising from the Department for Levelling Up, Housing & Communities' (DLUHC) [external assurance review](#) and [Best Value Notice](#), issued on the 3 August 2023 as well as the Chief Executive's own [internal assurance review](#) conducted in Spring and updated in Summer 2023. The resulting [Assurance Review Action Plan](#) was established by the Council to respond to these recommendations.

Guidance Note

This action plan follows the themes of the statutory guidance which are categorised as follows:

- Culture • Resourcing • Selecting Committee Members • Power to Access Information • Planning Work • Evidence Sessions

All relevant paragraphs of the guidance have been included within the action plan, to aid reader's understanding of why actions have been identified. Please note that where actions are similar (eg. reflecting different aspects of councillor training required) they remain split into separate actions to demonstrate how these will uphold the statutory guidance. It should be noted that for this reason the action plan is highly detailed and serves as an operational tool to progress actions as well as for reporting on progress.

Actions are grouped and action leads identified as per the coding set out in the key below. Where actions are duplicated, the update is provided against the first arising action. A RAG rating is used to show progress against actions along with a commentary, with the latest updates provided in blue text.

Key			
Code	Description	Action Lead	Code
	Member Training – induction and refresher	Democratic Services Team	MT1
	Member Training – Chairs		MT2
	Member Training – ongoing programme of training		MT3
	Officer Training		OT1
	Role Descriptions for O&S leads		RD1
	Chairs’ Meetings		CM1
	Work Selection and Scoping		WS1
	Community Insight		CI1
	Web Presence		WP1
	Working Methods		WM1
	Terms of Reference for O&S Committees		TOR1
	Constitution Review		CR1
	Library of O&S Resources		L1
	Protocol and Tool Development		P1
	Annual Reporting on O&S		AR1
	Resourcing		R1
	Communications		COM1
	Corporate Management Team Action		Corporate Management Team
	Cabinet Action	Cabinet	C1
	Chief Executive/ Leader Action	Chief Executive/ Leader	CL1
	Supporting Children’s Services O&S	Democratic Services Team	CS1
RAG Rating			
Significant delay likely to affect action completion			
Some delay likely to affect action completion			
Action on track to complete as planned			
Action completed			

Overview and Scrutiny Action Plan 2023-24

Relevant Extract from: Statutory Guidance on O&S (ID 1-53) Chief Executive's Assurance Review (ID 54-58) DLUHC Assurance Review (ID 59 – 64)	ID	Action for BCP Council with updates (Latest updates December 2023 in blue text)	RAG and timescales	Code
Culture				
Scrutiny is Member Led				
<i>The prevailing organisational culture, behaviours and attitudes of an authority will largely determine whether its scrutiny function succeeds or fails. While everyone in an authority can play a role in creating an environment conducive to effective scrutiny, it is important that this is led and owned by members, given their role in setting and maintaining the culture of an authority.</i>	1a	New Councillor and refresher training to be provided to include – O&S in BCP is Member led	Complete. Monitor the need for refresher training.	MT1
	1b	Role descriptions to be developed for Councillors in leading O&S roles to clarify expectations for this role <i>Action delayed and will be rescheduled for development in lead up to next council term.</i>	Autumn 2023	RD1
	1c	Establish calendar of meeting dates for O&S chairs for collective leadership and oversight of the effectiveness of the O&S function.	Complete	CM1
Scrutiny is understood and recognised across the organisation				
<i>Recognising scrutiny's legal and democratic legitimacy – all members and officers should recognise and appreciate the importance and legitimacy the scrutiny function is afforded by the law. It was created to act as a check and balance on the executive and is a statutory requirement for all authorities operating executive arrangements and for combined authorities.</i>	2a	New Councillor and refresher training to be provided to include – Background and statutory powers of O&S, to raise the profile and importance of the scrutiny function within the organisation.	Complete. Monitor the need for refresher training.	MT1
	2b	Officer refresher training to be provided to include – Background and statutory powers of O&S, to raise the profile and importance of the scrutiny function within the organisation <i>Provided to senior officers in Winter 2024/ Spring 2025. Training included a CfGS led workshop with scrutiny and executive members and had a focus on embedding a clear understanding of scrutiny fundamentals and developing a positive scrutiny culture with all stakeholders across the organisation.</i>	Complete. Monitor the need for refresher training.	OT1

Overview and Scrutiny Action Plan 2023-24

Relevant Extract from:	ID	Action for BCP Council with updates (Latest updates December 2023 in blue text)	RAG and timescales	Code
Statutory Guidance on O&S (ID 1-53) Chief Executive's Assurance Review (ID 54-58) DLUHC Assurance Review (ID 59 – 64)				
Scrutiny draws on community insight and selects topics of community relevance				
<i>Councillors have a unique legitimacy derived from their being democratically elected. The insights that they can bring by having this close connection to local people are part of what gives scrutiny its value.</i>	3a	New Councillor and refresher training to be provided to include – Councillors bring community insight to their scrutiny work	Complete. Monitor the need for refresher training.	MT1
	3b	Strengthen O&S work selection criteria, as set out in the constitution, to include consideration of the impact and value to the public when selecting work programme topics. Review for use in annual work programming for O&S Committees. O&S scrutiny request forms ask councillors to outline the value to be added by a proposed scrutiny topic. Use of this form is now embedded across the function and O&S work programmes now include more work balanced towards the impact on BCP residents. O&S Board has selected resident impact as a lens by which to plan and approach its work and committee discussions regularly include resident impact as a scrutiny enquiry line. Officers will continue to encourage selection of O&S topics that have tangible benefit to residents.	Complete, monitor long-term.	WS1
	3c	Use is made of community insight through the selection of work topics that are driven by community need, evidence sessions, use of subject experts and data providing the view of residents and community groups. Councillors regularly suggest scrutiny topics based on their community insight and there has been an increase in topics with a public focus, with some topics being generated through matters raised to Council through public representations.	Complete, monitor long-term and revisit in annual work programming for all committees.	CI1

Overview and Scrutiny Action Plan 2023-24

Relevant Extract from:	ID	Action for BCP Council with updates (Latest updates December 2023 in blue text)	RAG and timescales	Code
Statutory Guidance on O&S (ID 1-53) Chief Executive's Assurance Review (ID 54-58) DLUHC Assurance Review (ID 59 – 64)		Officers will continue to maintain focus on community insight and evidence based scrutiny when assisting councillors in work planning and scoping.		
	3d	Develop O&S web pages to clarify public role in O&S, ways to engage and improve ease of access for topic suggestion. Action delayed and will be advanced as resources allow.	Autumn 2024	WP1
Scrutiny has a clear role and focus				
<i>Identifying a clear role and focus – authorities should take steps to ensure scrutiny has a clear role and focus within the organisation, i.e. a niche within which it can clearly demonstrate it adds value. Therefore, prioritisation is necessary to ensure the scrutiny function concentrates on delivering work that is of genuine value and relevance to the work of the wider authority – this is one of the most challenging parts of scrutiny, and a critical element to get right if it is to be recognised as a strategic function of the authority</i>	4a	Scrutiny committees agree a clear communicable role or focus for the year when planning their work programme in order to assist in topic selection and in ensuring that stakeholders can anticipate which topics are likely to be of interest to scrutiny, and plan accordingly for engagement. This may be in the form of a 'lens' (eg. risk) through which to scrutinise topics, or a key priority or set of priorities for a committee (eg. 'budget' or 'ofsted improvement plan') Three out of four O&S committees have agreed a lens for their topic selection and scrutiny approach. The Children's O&S Committee chose not to agree a lens. This will be revisited in future work planning activity to ensure the lenses remain fit for purpose.	Complete, monitor long-term.	WS1
	4b	Committees carefully consider the type and balance of work undertaken to ensure that work aims can be met within the meeting capacity available. This will require a determined focus to undertake work in diverse ways eg. - receiving information based reports outside of meetings, - establishing O&S rapporteurs (topic champions) to maintain oversight of an issue and report back to committee on exceptions - reducing the level of Cabinet decision scrutiny to free up capacity for more overview work. Working methods have been diversified to make better use of meeting resource. Information based reporting is regularly	Complete, monitor long-term.	WM1

Overview and Scrutiny Action Plan 2023-24

Relevant Extract from:	ID	Action for BCP Council with updates (Latest updates December 2023 in blue text)	RAG and timescales	Code
Statutory Guidance on O&S (ID 1-53) Chief Executive's Assurance Review (ID 54-58) DLUHC Assurance Review (ID 59 – 64)		received outside of meetings of through a series of regular informal briefings, now established for each committee. Pre-decision scrutiny levels fell in 2023/4 and have remained stable in 2024/25. There has been an increase in the use of rapporteurs and the approach will be further embedded in 2025/26. There were 2 additional meetings held in 2024/25 which demonstrates that committee based work is mainly keeping to meeting capacity. In 2024/25 meeting duration was long in some cases, resulting in loss of members and less effective scrutiny for some items of business. All committees would benefit from a continued consistent focus on prioritisation to keep to a maximum of 3 items per agenda.		
	4c	Develop user friendly terms of reference documents for each O&S committee based on split of responsibility set out in constitution. Updated terms of reference are now circulated with the forward plan paper for each O&S Committee.	Complete	TOR1
<i>There is a clear distinction between scrutiny and audit</i>				
<i>Authorities should ensure a clear division of responsibilities between the scrutiny function and the audit function. While it is appropriate for scrutiny to pay due regard to the authority's financial position, this will need to happen in the context of the formal audit role. The authority's section 151 officer should advise scrutiny on how to manage this dynamic</i>	5a	Division of responsibility already established within the Articles of the Constitution.	Complete	CR1
	5b	A&G chair invitation to be scheduled into annual programme of O&S Chairs meetings A&G Chair & Vice Chair are now invited to O&S Chairs meetings as standard.	Complete	CM1
<i>While scrutiny has no role in the investigation or oversight of the authority's whistleblowing arrangements, the findings of independent whistleblowing investigations might be of interest to scrutiny committees as they consider their wider implications.</i>	6	Develop a library of O&S oversight information, provided in an online format for Councillors to access independently, to include – The findings of independent whistleblowing investigations HASC O&S Committee has developed a data toolkit, which gathers data and policy information in a digestible format for	Spring/ Summer 2024	L1

Overview and Scrutiny Action Plan 2023-24

Relevant Extract from:	ID	Action for BCP Council with updates (Latest updates December 2023 in blue text)	RAG and timescales	Code
Statutory Guidance on O&S (ID 1-53) Chief Executive's Assurance Review (ID 54-58) DLUHC Assurance Review (ID 59 – 64)		O&S members. This to be rolled out to all committees to include whistleblowing information. Action nearing completion for Children's Svs O&S Committee and is delayed for other committees. Will be progressed according to resource availability.		
The relationship between scrutiny and the executive is effective				
<i>Ensuring early and regular engagement between the executive and scrutiny – authorities should ensure early and regular discussion takes place between scrutiny and the executive, especially regarding the latter's future work programme.</i>	7a	Portfolio Holders attend O&S meetings when requested, or send deputies Attendance of Portfolio Holders at O&S when requested is now well established and will continue to be encouraged.	Complete, monitor long-term.	C1
	7b	The Cabinet Forward Plan is regularly updated with sufficient notice of forthcoming priorities to enable O&S to engage effectively at an early stage in policy shaping. This request remains in place as the Cabinet Forward Plan population could be strengthened. This relies on officers registering planned decisions early. This would give O&S members sufficient time to seek further information on forthcoming issues and plan scrutiny more effectively.	Immediate and ongoing request to Cabinet	C1
	7c	The Constitution sets out that it is good practice for there to be regular, informal dialogue between O&S leads and Portfolio Holders in order that O&S can understand developing Cabinet priorities, discuss and assess the value that Overview and Scrutiny can provide and contribute in a timely way to policy development (O&S Procedure Rule 8.3). Officers regularly encourage this action and some Chairs now have regular meetings in place for this purpose.	Complete, monitor long-term.	CR1
	7d	Role descriptions to be developed for Councillors in leading O&S roles to clarify expectation that scrutiny chairs establish informal working arrangements with relevant Portfolio Holders.	Autumn 2023	RD1

Overview and Scrutiny Action Plan 2023-24

Relevant Extract from:	ID	Action for BCP Council with updates (Latest updates December 2023 in blue text)	RAG and timescales	Code
Statutory Guidance on O&S (ID 1-53) Chief Executive's Assurance Review (ID 54-58) DLUHC Assurance Review (ID 59 – 64)		Role description development has been delayed and will be rescheduled for completion in lead up to next council term, however lead O&S members are regularly encouraged to develop informal working arrangements with relevant Portfolio Holders and some now have regular meetings in place for this purpose.		
	7e	Lines of accountability between scrutiny committees and Portfolio Holders were agreed by Council in April 2022- review after election when any change to Cabinet portfolios are known and document these in a more granular way than is captured within the constitution to aid transparency. Lines of accountability are identified between each area of responsibility under a Portfolio Holder and the relevant O&S committee. This document is circulated with each O&S agenda.	Complete	TOR1
	7f	Maintain a review of the Portfolio/ O&S Committee alignment to ensure that it is fit for purpose, with amendments to be suggested via O&S annual report to Council, as required. Changes are reported annually as standard in the O&S annual report where required.	Complete, monitor annually through annual report process.	AR1
<i>The executive should not try to exercise control over the work of the scrutiny committee. This could be direct, e.g. by purporting to 'order' scrutiny to look at, or not look at, certain issues, or indirect, e.g. through the use of the whip or as a tool of political patronage, and the committee itself should remember its statutory purpose when carrying out its work. All members and officers should consider the role the scrutiny committee plays to be that of a 'critical friend' not a de facto 'opposition'. Scrutiny chairs have a particular role to play in establishing the profile and nature of their committee</i>	8a	O&S considers work requested by Cabinet or Council using the criteria written into the constitution - Criteria already exists in constitution and is used to assess requests. A notable increase in requests from Cabinet and Council have been seen during 2024/25, demonstrating greater council-wide understanding of the role O&S can play in supporting the objectives of the council.	Complete, monitor long-term.	WS1
	8b	New Councillor and refresher training to be provided to include – All Political Groups be reminded of the incompatibility of the whip with O&S, and the forms that this may take.	Complete. Monitor the need for	MT1

Overview and Scrutiny Action Plan 2023-24

Relevant Extract from:	ID	Action for BCP Council with updates (Latest updates December 2023 in blue text)	RAG and timescales	Code
Statutory Guidance on O&S (ID 1-53) Chief Executive's Assurance Review (ID 54-58) DLUHC Assurance Review (ID 59 – 64)		The message was reinforced in training and the CEx had written confirmation from every Group Leader in 2024 that the party whip, or similar, will not be applied around the Overview and Scrutiny functions.	refresher training.	
	8c	O&S chairs to be opposition members, where practicable, to reduce risk of executive control being exercised over O&S – referral to Constitution Review Working Group for consideration of any appropriate Constitution changes to set out this good practice - prior to May 2024 O&S Chairs elections. Since May 2023 all O&S Committees have appointed a Chair, and in most cases, a Vice-Chair, from outside of the Administration. O&S Board has confirmed a wish to include this advice within the constitution. Package of work to review constitution to strengthen areas around O&S has not yet started and will be progressed as resources allow.	Spring 2024	CR1
	8d	Role descriptions to be developed for Councillors in leading roles to clarify expectation that scrutiny chairs establish informal committee pre-meetings, to assist the committee in working towards its aims and taking a cross-party approach to scrutiny. Role description development has been delayed and will be rescheduled for completion in lead up to next council term, however some O&S Chairs have established pre-meetings successfully to develop a scrutiny 'team' mindset and move away from political party lines, and officers continue to encourage these.	Autumn 2023	RD1
	8e	O&S Chairing skills training to be delivered to include the benefit of pre-meetings, and management of political dynamics in scrutiny to avoid a de facto opposition approach. Chairing skills training provided in Summer 2023 induction. Higher level of training through LGA leadership courses has	Complete, monitor long-term.	MT2

Overview and Scrutiny Action Plan 2023-24

Relevant Extract from:	ID	Action for BCP Council with updates (Latest updates December 2023 in blue text)	RAG and timescales	Code
Statutory Guidance on O&S (ID 1-53) Chief Executive's Assurance Review (ID 54-58) DLUHC Assurance Review (ID 59 – 64)				
		been offered to all O&S chairs, including following chairmanship changes to ensure continuity of expertise.		
<i>The chair of the scrutiny committee should determine the nature and extent of an executive member's participation in a scrutiny committee meeting, and in any informal scrutiny task group meeting</i>	9a	Clarity of O&S powers in determining attendees and participation already written into constitution at O&S Procedure Rule 9.1	Complete	CR1
	9b	New Councillor and refresher training to be provided to include – Clarity of scrutiny's powers in determining attendees and participation in O&S.	Complete. Monitor the need for refresher training.	MT1
	9c	Scrutiny committees to be asked to consider appropriate invitees when scoping a piece of work and to consider where more value may be added by an officer/ scrutiny session as opposed to a Cabinet member scrutiny Appropriate invitees are considered in the planning stage for all O&S work. Since May 2023 there has been a noticeable shift in emphasis within the Council, with officers and external witnesses being invited to contribute on specific issues at scrutiny as appropriate. The range of inquiry from councillors to both portfolio holders and officers is now more diverse and this will continue to be encouraged.	Complete, monitor long-term.	WS1
Managing disagreement				
<i>Effective scrutiny involves looking at issues that can be politically contentious. It is therefore inevitable that, at times, an executive will disagree with the findings or recommendations of a scrutiny committee. It is the job of both the executive and scrutiny to work together to reduce the risk of this happening, and authorities should take steps to predict, identify and act on disagreement. One way in which this can be done is via an 'executive-scrutiny protocol' which can help define the relationship between the two and mitigate any differences of opinion before they manifest</i>	10	Executive members and O&S Chairs group to consider the value for BCP in preparing an executive – scrutiny protocol. Executive – scrutiny protocol in development following development session held with CfGS in 2025. Executive members and officers are now also invited into a series of meetings with O&S leads to give opportunity to discuss common aims and barriers to effective scrutiny.	Winter 2023	C1/ CM1

Overview and Scrutiny Action Plan 2023-24

Relevant Extract from:	ID	Action for BCP Council with updates (Latest updates December 2023 in blue text)	RAG and timescales	Code
Statutory Guidance on O&S (ID 1-53) Chief Executive's Assurance Review (ID 54-58) DLUHC Assurance Review (ID 59 – 64)				
<i>themselves in unhelpful and unproductive ways. The benefit of this approach is that it provides a framework for disagreement and debate, and a way to manage it when it happens. Often, the value of such a protocol lies in the dialogue that underpins its preparation. It is important that these protocols are reviewed on a regular basis.</i>				
<i>Scrutiny committees do have the power to 'call in' decisions, i.e. ask the executive to reconsider them before they are implemented, but should not view it as a substitute for early involvement in the decision-making process or as a party-political tool.</i>	11	Use of call-in be monitored and reflected within annual report to Council. Call-in frequency is now reflected in the O&S annual report as standard as a measure of governance health.	Complete, monitor annually through annual report process.	AR1
Ensuring impartial advice from officers				
<i>Authorities, particularly senior officers, should ensure all officers are free to provide impartial advice to scrutiny committees. This is fundamental to effective scrutiny. Of particular importance is the role played by 'statutory officers' – the monitoring officer, the section 151 officer and the head of paid service, and where relevant the statutory scrutiny officer. These individuals have a particular role in ensuring that timely, relevant and high-quality advice is provided to scrutiny.</i>	12	Officer refresher training to be provided to include – The importance of impartial advice to O&S Provided to senior officers in Winter 2024/ Spring 2025. Training included a CfGS led workshop with scrutiny and executive members and had a focus on embedding a clear understanding of scrutiny fundamentals and developing a positive scrutiny culture with all stakeholders across the organisation.	Complete. Monitor the need for refresher training.	OT1
Communicating scrutiny's role and purpose to the wider authority				
<i>The scrutiny function can often lack support and recognition within an authority because there is a lack of awareness among both members and officers about the specific role it plays, which individuals are involved and its relevance to the authority's wider work. Authorities should, therefore, take steps to ensure all members and officers are made aware of the role the scrutiny committee plays in the organisation, its value and the outcomes it can deliver, the powers it has, its membership and, if appropriate, the identity of those providing officer support.</i>	13	Officer refresher training to be provided to include – The identity of those providing officer support to O&S. Provided to senior officers in Winter 2024/ Spring 2025. Training included a CfGS led workshop with scrutiny and executive members and had a focus on embedding a clear understanding of scrutiny fundamentals and developing a positive scrutiny culture with all stakeholders across the organisation.	Complete. Monitor the need for refresher training.	OT1

Overview and Scrutiny Action Plan 2023-24

Relevant Extract from:	ID	Action for BCP Council with updates (Latest updates December 2023 in blue text)	RAG and timescales	Code
Statutory Guidance on O&S (ID 1-53) Chief Executive's Assurance Review (ID 54-58) DLUHC Assurance Review (ID 59 – 64)				
Maintaining the interest of full Council in the work of the scrutiny committee				
<i>Part of communicating scrutiny's role and purpose to the wider authority should happen through the formal, public role of full Council – particularly given that scrutiny will undertake valuable work to highlight challenging issues that an authority will be facing and subjects that will be a focus of full Council's work. Authorities should therefore take steps to ensure full Council is informed of the work the scrutiny committee is doing.</i>	14a	Report annually to Council on the work of scrutiny, and progress on actions to improve scrutiny. <i>Annual report is received by Council annually as standard. 2025 report has been delayed on account of resource availability and will report during winter 2025.</i>	Complete, repeat annually.	AR1
<i>One way in which this can be done is by reports and recommendations being submitted to full Council rather than solely to the executive. Scrutiny should decide when it would be appropriate to submit reports for wider debate in this way, taking into account the relevance of reports to full Council business, as well as full Council's capacity to consider and respond in a timely manner. Such reports would supplement the annual report to full Council on scrutiny's activities and raise awareness of ongoing work.</i>	14b	New Councillor and refresher training to be provided to include – The appropriate route for recommendations to full Council or Cabinet	Complete. Monitor the need for refresher training.	MT1
	14c	Consideration be given to any amendments required to constitution to clarify reporting routes from O&S - referral to Constitution Review Working Group for consideration. <i>Package of work to review constitution to strengthen areas around O&S has not yet started and will be progressed as resources allow.</i>	Spring 2024	CR1
Communicating scrutiny's role to the public				
<i>Authorities should ensure scrutiny has a profile in the wider community. Consideration should be given to how and when to engage the authority's communications officers, and any other relevant channels, to understand how to get that message across. This will usually require engagement early on in the work programming process</i>	15a	Consideration be given to the promotion of outcomes via Communications Team at the scoping stage of O&S work. <i>Some O&S activity relating to high profile decisions is already promoted by the Communications Team. Greater use could be made of promotion opportunities to raise the profile of O&S work. Resources have not been available for a comprehensive approach to this through annual work programming. Consideration of this will instead be encouraged on an ongoing basis at the scoping stage for all O&S work, as resources allow.</i>	In annual work programming for O&S Committees – Autumn 2023	COM1

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Statutory Guidance on O&S (ID 1-53) Chief Executive's Assurance Review (ID 54-58) DLUHC Assurance Review (ID 59 – 64)				
	15b	O&S webpage development - See action 3d above.	See relevant action above.	See relevant action above.
Ensuring scrutiny members are supported in having an independent mindset				
<i>Formal committee meetings provide a vital opportunity for scrutiny members to question the executive and officers. Inevitably, some committee members will come from the same political party as a member they are scrutinising and might well have a long-standing personal, or familial, relationship with them.</i>	16a	New Councillor and refresher training to be provided to include – The importance of an independent mind-set to O&S	Complete. Monitor the need for refresher training.	MT1
<i>Scrutiny members should bear in mind, however, that adopting an independent mind-set is fundamental to carrying out their work effectively. In practice, this is likely to require scrutiny chairs working proactively to identify any potentially contentious issues and plan how to manage them.</i>	16b	O&S Chairs are supported by Officers to identify and plan for contentious issues through Chairs briefings. Chairs are well supported by officers in regular briefings to scope and plan the level of interest anticipated in O&S work and any necessary meeting adjustments. Contentious issues such as Poole Park and CGR scrutiny - which included significant councillor and external interest - have been well managed by Chairs resulting in orderly meetings with good opportunity for additional input from interested parties.	Complete, monitor long-term	WS1
	16c	Establish calendar of meeting dates for O&S chairs to include-monitoring the independence of O&S Calendar of meetings planned for 2025/26.	Complete	CM1
Resourcing scrutiny				
<i>The resource an authority allocates to the scrutiny function plays a pivotal role in determining how successful that function is and therefore the value it can add to the work of the authority.</i> <i>Ultimately it is up to each authority to decide on the resource it provides, but every authority should recognise that creating and</i>	17	Consideration be given to the level of officer resource available to support scrutiny and that this is appropriate to ensure effective outputs that add value to the organisation – discussion with O&S chairs group, with views to be passed to Corporate Management Team. Resources available to support Overview and Scrutiny are stretched and the level of O&S activity against officer	Resource monitoring completed in 23/24 and 2024/25, but requires careful	R1/ CMT1

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Statutory Guidance on O&S (ID 1-53) Chief Executive's Assurance Review (ID 54-58) DLUHC Assurance Review (ID 59 – 64) <i>sustaining an effective scrutiny function requires them to allocate resources to it.</i> <i>When deciding on the level of resource to allocate to the scrutiny function, the factors an authority should consider include: • Scrutiny's legal powers and responsibilities; • The particular role and remit scrutiny will play in the authority; • The training requirements of scrutiny members and support officers, particularly the support needed to ask effective questions of the executive and other key partners, and make effective recommendations; • The need for ad hoc external support where expertise does not exist in the council; • Effectively-resourced scrutiny has been shown to add value to the work of authorities, improving their ability to meet the needs of local people; and • Effectively-resourced scrutiny can help policy formulation and so minimise the need for call-in of executive decisions</i>		resource is significantly higher in BCP Council than some other comparative councils. This has been well documented in O&S annual reports to Council and CMB to raise awareness. The most significant pressures relate to previous and cumulative Council decisions to increase the number of O&S committees and meeting numbers over time, not matched by officer resource to support these. Accompanied by an increase in other committees also resourced by the same team (Democratic Services) the overall resource available to support Overview and Scrutiny work has reduced whilst the level of O&S activity has increased. The impact of this has been a slow rate of progression for planned work, delays to strategic O&S work (such as annual work programme activity), limited resource available to respond to arising issues throughout the year and the likelihood that O&S outcomes have been limited in value as planned work has not benefitted from effective levels of officer support. Proposals have been made to Council in the 2025 annual report to reduce concurrent working group numbers and promote a 'quality of quantity' approach to O&S work. The outcome and impact of any changes agreed will be monitored by the O&S Chairs group and through future annual reports to Council.	ongoing monitoring	
<i>Authorities should also recognise that support for scrutiny committees, task groups and other activities is not solely about budgets and provision of officer time, although these are clearly extremely important elements. Effective support is also about the</i>	18a	New Councillor and refresher training to be provided to include – Use of resource, and effective wider authority engagement in O&S	Complete. Monitor the need for refresher training.	MT1

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<i>ways in which the wider authority engages with those who carry out the scrutiny function (both members and officers).</i>	18b	Officer refresher training to be provided to include – Use of resource, and effective wider authority engagement in O&S <i>Provided to senior officers in Winter 2024/ Spring 2025. Training included a CfGS led workshop with scrutiny and executive members and had a focus on embedding a clear understanding of scrutiny fundamentals and developing a positive scrutiny culture with all stakeholders across the organisation.</i>	Complete. Monitor the need for refresher training.	OT1
	18c	As required by the constitution, all requests for O&S committees to undertake work are considered by Committees against the current resource levels available to support the request <i>All committees are asked to take account of resources when considering requests for work, especially commissioned work such as working groups and additional meetings. Officer resource to support O&S work has been limited and has resulted in delays to topic progression. To address this, proposals have been made to Council in the 2025 annual report to reduce concurrent working group numbers and promote a 'quality of quantity' approach to O&S work. The outcome and impact of any changes agreed will be monitored by the O&S Chairs group and through future annual reports to Council.</i>	Complete in 23/24 – continue to monitor resource long-term.	R1
	18d	Establish calendar of meeting dates for O&S chairs to include-monitoring the total level of resource available across the O&S function <i>Calendar of meetings planned for 2025/26.</i>	Complete	CM1
Statutory scrutiny officers				
<i>Combined authorities, upper and single tier authorities are required to designate a statutory scrutiny officer, someone whose role is to:</i> <i>• promote the role of the authority's scrutiny committee;</i> <i>• provide support to the scrutiny committee and its members; and</i>	19a	Statutory scrutiny officer is appointed and sits within the Democratic Services Team.	Complete	R1

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Statutory Guidance on O&S (ID 1-53) Chief Executive's Assurance Review (ID 54-58) DLUHC Assurance Review (ID 59 – 64) <i>• provide support and guidance to members and officers relating to the functions of the scrutiny committee.</i>	19b	The Statutory Scrutiny Officer role is set out in the constitution to aid authority wide understanding - referral to Constitution Review Working Group for consideration. <i>Package of work to review constitution to strengthen areas around O&S has not yet started and will be progressed as resources allow.</i>	Winter 2023	CR1
	19c	New Councillor and refresher training to be provided to include – The role of the statutory scrutiny officer, to increase visibility	Complete. Monitor the need for refresher training.	MT1
	19d	Officer refresher training to be provided to include – The role of the statutory scrutiny officer, to increase visibility. <i>Provided to senior officers in Winter 2024/ Spring 2025. Training included a CfGS led workshop with scrutiny and executive members and had a focus on embedding a clear understanding of scrutiny fundamentals and developing a positive scrutiny culture with all stakeholders across the organisation.</i>	Complete. Monitor the need for refresher training.	OT1
	19e	Consider the interface of the statutory scrutiny officer role with Corporate Management Team to ensure that planning for engagement with scrutiny can be considered for significant forthcoming decisions. <i>O&S Specialist attends CMB as required to discuss key issues. Council Leader, Chief Executive, Sec 151 Officer and Monitoring Officer now invited into regular meetings with O&S Chairs to assist in identifying key issues to O&S.</i>	Complete	CMT1

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Statutory Guidance on O&S (ID 1-53) Chief Executive's Assurance Review (ID 54-58) DLUHC Assurance Review (ID 59 – 64)				
Officer resource models <i>Authorities should ensure that, whatever model they employ, officers tasked with providing scrutiny support are able to provide impartial advice. This might require consideration of the need to build safeguards into the way that support is provided. The nature of these safeguards will differ according to the specific role scrutiny plays in the organisation.</i>	20	Officer refresher training to be provided to include – The importance of impartial advice to O&S. <i>Provided to senior officers in Winter 2024/ Spring 2025. Training included a CfGS led workshop with scrutiny and executive members and had a focus on embedding a clear understanding of scrutiny fundamentals and developing a positive scrutiny culture with all stakeholders across the organisation.</i>	Complete. Monitor the need for refresher training.	OT1
Selecting Committee Members				
<i>Selecting the right members to serve on scrutiny committees is essential if those committees are to function effectively. Where a committee is made up of members who have the necessary skills and commitment, it is far more likely to be taken seriously by the wider authority.</i>	21a	New Councillor and refresher training to be provided to include – Appropriate selection of committee members, in order that this can be taken account of by political groups when establishing their committee representation.	Complete. Monitor the need for refresher training.	MT1

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Statutory Guidance on O&S (ID 1-53) Chief Executive's Assurance Review (ID 54-58) DLUHC Assurance Review (ID 59 – 64)				
<i>When selecting individual members to serve on scrutiny committees, an authority should consider a member's experience, expertise, interests, ability to act impartially, ability to work as part of a group, and capacity to serve.</i> <i>Authorities should not take into account a member's perceived level of support for or opposition to a particular political party (notwithstanding the wider legal requirement for proportionality)</i> <i>Members invariably have different skill-sets. What an authority must consider when forming a committee is that, as a group, it possesses the requisite expertise, commitment and ability to act impartially to fulfil its functions.</i>	21b	A programme of ongoing scrutiny skills training to be developed for delivery to O&S Councillors throughout municipal year 2023/24. Following induction training, a range of development opportunities have been provided to councillors through the LGA, the South West Scrutiny Network and the Centre for Governance and Scrutiny. This has included bespoke in-house training to develop work programming and a collective understanding of a positive scrutiny culture. Online training opportunities are regularly promoted and taken up by councillors and O&S Chairs meetings have training as a standard item on agendas to review arising needs.	Complete, monitor long-term	MT3
<i>Authorities are reminded that members of the executive cannot be members of a scrutiny committee. Authorities should take care to ensure that, as a minimum, members holding less formal executive positions, e.g. as Cabinet assistants, do not sit on scrutinising committees looking at portfolios to which those roles relate.</i> <i>Authorities should articulate in their constitutions how conflicts of interest, including familial links between executive and scrutiny responsibilities should be managed, including where members stand down from the executive and move to a scrutiny role, and vice-versa.</i>	22a	Review Constitution rules for clarity on the principle of Executive lead members sitting on O&S referral to Constitution Review Working Group for consideration. Constitution identifies that Executive lead members cannot sit on O&S.	Complete	CR1
	22b	Review constitution to consider providing further clarity on how to manage conflicts of interest, including when Councillors move between roles - referral to Constitution Review Working Group for consideration. Package of work to review constitution to strengthen areas around O&S has not yet started and will be progressed as resources allow.	Winter 2023	CR1

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Statutory Guidance on O&S (ID 1-53) Chief Executive's Assurance Review (ID 54-58) DLUHC Assurance Review (ID 59 – 64)				
Selecting a chair				
<i>The Chair plays a leadership role on a scrutiny committee as they are largely responsible for establishing its profile, influence and ways of working.</i>	23a	New Councillor and refresher training to be provided to include – Appropriate selection of committee chairs, in order that this can be taken account of by political groups when establishing their proposed chair nominees	Complete. Monitor the need for refresher training.	MT1
<i>The attributes authorities should and should not take into account when selecting individual committee members also apply to the selection of the Chair, but the Chair should also possess the ability to lead and build a sense of teamwork and consensus among committee members.</i>	23b	O&S Chairing skills training to be delivered to include - leadership skills. Chairing skills training provided in Summer 2023 induction. Higher level of training through LGA leadership courses has been offered to all O&S chairs, including following chairmanship changes to ensure continuity of expertise.	Complete, monitor long-term	MT2
<i>Given their pre-eminent role on the scrutiny committee, it is strongly recommended that the Chair not preside over scrutiny of their relatives</i>	24	Review constitution to consider providing further clarity on the Chair not presiding over scrutiny of relatives- referral to Constitution Review Working Group for consideration. Package of work to review constitution to strengthen areas around O&S has not yet started and will be progressed as resources allow.	Winter 2023	CR1
<i>The method for selecting a Chair is for each authority to decide for itself, however every authority should consider taking a vote by secret ballot.</i>	25a	Secret ballot method vote for Chair and Vice Chair is already in place within constitution at Meeting Procedure Rule 19.	Complete	CR1
	25b	See 8c above 'opposition chairs'	See relevant action above.	CR1
The role of the chair				
<i>Chairs should pay special attention to the need to guard the committee's independence. Importantly, however, they should take care to avoid the committee being, and being viewed as, a de facto opposition to the executive.</i>	26	O&S Chairing skills training to be delivered to include – independence of O&S, and the need to avoid de facto opposition role. Chairing skills training provided in Summer 2023 induction. Higher level of training through LGA leadership courses has been offered to all O&S chairs, including following chairmanship changes to ensure continuity of expertise.	Complete, monitor long-term	MT2

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Statutory Guidance on O&S (ID 1-53) Chief Executive's Assurance Review (ID 54-58) DLUHC Assurance Review (ID 59 – 64)				
Training for committee members <i>Authorities should ensure committee members are offered induction when they take up their role and ongoing training so they can carry out their responsibilities effectively. Authorities should pay attention to the need to ensure committee members are aware of their legal powers, and how to prepare for and ask relevant questions at scrutiny sessions.</i> <i>When deciding on training requirements for committee members, authorities should consider taking advantage of opportunities offered by external providers in the sector.</i>				
	27a	See action 2a above - new Councillor and refresher training on statutory powers of O&S	See relevant action above.	MT1
	27b	A programme of ongoing scrutiny skills training to be developed for delivery to O&S Councillors throughout municipal year 2023/24, to include – questioning skills training. <i>Questioning skills training was incorporated into O&S induction training and refreshed through scrutiny culture development sessions and LGA training targeted at Children's O&S members.</i> <i>O&S Chairs keep training needs under review and additional training of this nature can be planned according to need and budget availability.</i>	Complete, monitor long-term	MT3
	27c	Training to be delivered by external facilitators as appropriate and according to budget available. <i>A mix of in-house support and external facilitators have been used in training and development to date to provide additional O&S expertise and insight to specific training areas as appropriate. This approach will continue to be used according to need and budget availability.</i>	Complete, monitor long-term.	MT3
<i>While members and their support officers will often have significant local insight and an understanding of local people and their needs, the provision of outside expertise can be invaluable. There are two principal ways to procure this:</i> <i>• Co-option – formal co-option is provided for in legislation.</i> <i>Authorities must establish a co-option scheme to determine how individuals will be co-opted onto committees; and</i> <i>• Technical advisers – depending on the subject matter, independent local experts might exist who can provide advice and assistance in evaluating evidence</i>	28a	Facility to use external experts by O&S is already set out in constitution at Article 6, Rule 6.6.	Complete	CR1
	28b	Consideration be given to the appropriate use of external experts at the scoping stage of O&S work. <i>Greater use of subject experts and community insight have been included in O&S since May 2023.</i> <i>Examples include a subject expert on the Safety Valve programme, developer input to Local Plan discussions, regular</i>	Complete, monitor long-term.	WS1

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Statutory Guidance on O&S (ID 1-53) Chief Executive's Assurance Review (ID 54-58) DLUHC Assurance Review (ID 59 – 64)				
		Healthwatch contributions at HASC O&S Committee, Chief Nurse input to Children's Svs O&S and expert insight from independent bodies on parish councils and charter trustees to CGR. The terms of reference of the Environment & Place O&S Committee were amended by Council in September 2023, to allow the inclusion of additional insight on sustainability matters in the form of two non-voting member independent members but this has not yet been taken up by the committee. Renewal of statutory Children's Services co-optees is in process. Use of community insight and evidence will continue to encourage at the scoping stage of forthcoming work.		
Powers to Access Information				
<i>A scrutiny committee needs access to relevant information the authority holds, and to receive it in good time, if it is to do its job effectively.</i> <i>This need is recognised in law, with members of scrutiny committees enjoying powers to access information. In particular, regulations give enhanced powers to a scrutiny member to access exempt or confidential information. This is in addition to existing rights for councillors to have access to information to perform their duties, including common law rights to request information and rights to request information under the Freedom of Information Act 2000 and the Environmental Information Regulations 2004.</i> <i>When considering what information scrutiny needs in order to carry out its work, scrutiny members and the executive should consider scrutiny's role and the legal rights that committees and their individual members have, as well as their need to receive timely and accurate information to carry out their duties effectively.</i>	29a	Enhanced rights of O&S in relation to access to information are already set out in Constitution at Access to Information Procedure Rule 24.	Complete	CR1
	29b	New Councillor and refresher training to be provided to include – enhanced rights of O&S in relation to access to information	Complete. Monitor the need for refresher training.	MT1

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Statutory Guidance on O&S (ID 1-53) Chief Executive's Assurance Review (ID 54-58) DLUHC Assurance Review (ID 59 – 64)				
<i>Scrutiny members should have access to a regularly available source of key information about the management of the authority – particularly on performance, management and risk. Where this information exists, and scrutiny members are given support to understand it, the potential for what officers might consider unfocused and unproductive requests is reduced as members will be able to frame their requests from a more informed position.</i>	30a	Develop a library of O&S oversight information, provided in an online format for Councillors to access independently, to include - Performance, Management, Finance, Risk, Complaints, Business Cases and Ombudsman information. This will assist in 'horizon scanning' to enhance the effectiveness of O&S work planning. Action to develop online library of resources not yet actioned and will progress as resources allow. Progress has been made towards sharing some of this information with O&S councillors regularly, such as through a HASC O&S data toolkit document that gathers much of the above data in one place, and through regular reporting of corporate performance information into O&S committees. Development of the online library will provide consistency of approach when completed.	Spring/ Summer 24	L1
	30b	A programme of ongoing scrutiny skills training to be developed for delivery to O&S Councillors throughout municipal year 2023/24, to include – Interpretation of performance, management and risk information, and its application to O&S work programming. LGA training opportunities in February and March 2024 on 'Data and Managing Council Performance' was promoted to all councillors. O&S Chairs keep training needs under review and additional training of this nature can be planned according to need and budget availability.	Complete, monitor long-term	MT3
<i>Officers should speak to scrutiny members to ensure they understand the reasons why information is needed, thereby making the authority better able to provide information that is relevant and timely, as well as ensuring that the authority complies with legal requirements.</i>	31	Support scrutiny committees to be clear in identifying information needs and to scope larger pieces of work effectively so that information expectations can be met by officers and executive members.	Complete – monitor long-term	WS1

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Statutory Guidance on O&S (ID 1-53) Chief Executive's Assurance Review (ID 54-58) DLUHC Assurance Review (ID 59 – 64)				
<i>Regulations already stipulate a timeframe for executives to comply with requests from a scrutiny member. When agreeing to such requests, authorities should:</i> • <i>consider whether seeking clarification from the information requester could help better target the request; and</i> • <i>Ensure the information is supplied in a format appropriate to the recipient's needs.</i>		– In annual work programming for O&S Committees and ongoing, during work programming discussions at each meeting. Key Lines of Enquiry documents were introduced in 2023/24 and are now embedded across all committees. These capture key questions and data requests from committees for scrutiny topics, providing a clearer audit trail of the ask of scrutiny for both committees and information providers. In 2024, HASC O&S completed a working group on data and produced a Data Toolkit to capture its findings. This includes clear guidance on a standard data request for HASC O&S committee reports - a process that can be mirrored by the other committees. The Children's O&S has developed a similar toolkit throughout 2025 and will launch this soon.		
<i>While each request for information should be judged on its individual merits, authorities should adopt a default position of sharing the information they hold, on request, with scrutiny committee members.</i>	32	Officer refresher training to be provided to include – Default position of sharing information with O&S Provided to senior officers in Winter 2024/ Spring 2025. Training included a CfGS led workshop with scrutiny and executive members and had a focus on embedding a clear understanding of scrutiny fundamentals and developing a positive scrutiny culture with all stakeholders across the organisation.	Complete. Monitor the need for refresher training.	OT1
<i>The law recognises that there might be instances where it is legitimate for an authority to withhold information and places a requirement on the executive to provide the scrutiny committee with a written statement setting out its reasons for that decision. However, members of the executive and senior officers should take particular care to avoid refusing requests, or limiting the information they provide, for reasons of party political or reputational expediency. Before an authority takes a decision not</i>	33a	Situations where information may be withheld from O&S, and actions to communicate this, are already set out in the Constitution at Access to Information Procedure Rule 24.	Complete	CR1
	33b	New Councillor and refresher training to be provided to include – Default position of sharing information with O&S, and situations where information may be withheld.	Complete. Monitor the need for refresher training.	MT1

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<i>to share information it holds, it should give serious consideration to whether that information could be shared in closed session</i>	33c	Officer refresher training to be provided to include – Default position of sharing information with O&S, and situations where information may be withheld. <i>Provided to senior officers in Winter 2024/ Spring 2025. Training included a CfGS led workshop with scrutiny and executive members and had a focus on embedding a clear understanding of scrutiny fundamentals and developing a positive scrutiny culture with all stakeholders across the organisation.</i>	Complete. Monitor the need for refresher training.	OT1
<i>Committees should be aware of their legal power to require members of the executive and officers to attend before them to answer questions. It is the duty of members and officers to comply with such requests.</i>	34a	Requirement for Cabinet members and officers to attend O&S when requested is already set out in constitution at O&S Procedure Rule 9.	Complete	CR1
	34b	Identification of attendees and formal requests to Cabinet and officers to attend is required by the constitution and an embedded practice.	Complete, monitor long-term.	WS1
	34c	Portfolio Holders attend O&S meetings in response to requests, or send deputies. <i>Attendance of Portfolio Holders at O&S when requested is now well established and will continue to be encouraged.</i>	Complete, monitor long-term.	C1
	34d	New Councillor and refresher training to be provided to include – Requirement of Cabinet members and officers to attend scrutiny when requested	Complete. Monitor the need for refresher training.	MT1
	34e	Officer refresher training to be provided to include – Requirement of Cabinet members and officers to attend scrutiny when requested. <i>Provided to senior officers in Winter 2024/ Spring 2025. Training included a CfGS led workshop with scrutiny and executive members and had a focus on embedding a clear</i>	Complete. Monitor the need for refresher training.	OT1

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		understanding of scrutiny fundamentals and developing a positive scrutiny culture with all stakeholders across the organisation.		
Seeking information from external organisations				
<i>Scrutiny members should also consider the need to supplement any authority-held information they receive with information and intelligence that might be available from other sources, and should note in particular their statutory powers to access information from certain external organisations</i>	35	Develop a library of O&S oversight information, provided in an online format for Councillors to access independently, to include - Information from external organisations, as appropriate, to support individual work items and annual work programming Action to develop online library of resources not yet actioned and will progress as resources allow. Progress has been made towards sharing some of this information with O&S councillors regularly, such as through a HASC O&S data toolkit document that gathers much of the above data in one place, and through regular reporting of corporate performance information into O&S committees. Development of the online library will provide consistency of approach when completed.	Spring/ Summer 24	L1
<i>When asking an external organisation to provide documentation or appear before it, and where that organisation is not legally obliged to do either, scrutiny committees should consider the following:</i>	36a	Guidelines for scrutinising external organisations is already included within the Council's Constitution at O&S Procedure Rule 10.	Complete	CR1
<i>a) The need to explain the purpose of scrutiny – the organisation being approached might have little or no awareness of the committee's work, or of an authority's scrutiny function more generally, and so might be reluctant to comply with any request;</i> <i>b) The benefits of an informal approach – individuals from external organisations can have fixed perceptions of what an evidence session entails and may be unwilling to subject themselves to detailed public scrutiny if they believe it could reflect badly on them or their employer. Making an informal approach can help reassure</i>	36b	Develop a user-friendly protocol to assist committees with approaching, preparing for and scrutinising external organisations. Not started. To be progressed as resources allow.	Summer 2024	P1

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Statutory Guidance on O&S (ID 1-53) Chief Executive's Assurance Review (ID 54-58) DLUHC Assurance Review (ID 59 – 64)				
<i>an organisation of the aims of the committee, the type of information being sought and the manner in which the evidence session would be conducted;</i> <i>c) How to encourage compliance with the request – scrutiny committees will want to frame their approach on a case by case basis. For contentious issues, committees might want to emphasise the opportunity their request gives the organisation to 'set the record straight' in a public setting; and</i> <i>d) Who to approach – a committee might instinctively want to ask the Chief Executive or Managing Director of an organisation to appear at an evidence session, however it could be more beneficial to engage front-line staff when seeking operational-level detail rather than senior executives who might only be able to talk in more general terms. When making a request to a specific individual, the committee should consider the type of information it is seeking, the nature of the organisation in question and the authority's pre-existing relationship with it.</i>				
Following 'the Council Pound'				
<i>Scrutiny committees will often have a keen interest in 'following the council pound', i.e. scrutinising organisations that receive public funding to deliver goods and services.</i> <i>Authorities should recognise the legitimacy of this interest and, where relevant, consider the need to provide assistance to scrutiny members and their support staff to obtain information from organisations the council has contracted to deliver services. In particular, when agreeing contracts with these bodies, authorities should consider whether it would be appropriate to include a requirement for them to supply information to or appear before scrutiny committees</i>	37	Officer refresher training to be provided to include – Support to scrutiny committees in respect of scrutinising organisations that receive public funding to deliver goods and services <i>Provided to senior officers in Winter 2024/ Spring 2025. Training included a CfGS led workshop with scrutiny and executive members and had a focus on embedding a clear understanding of scrutiny fundamentals and developing a positive scrutiny culture with all stakeholders across the organisation.</i>	Complete. Monitor the need for refresher training.	OT1

Overview and Scrutiny Action Plan 2023-24

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Statutory Guidance on O&S (ID 1-53) Chief Executive's Assurance Review (ID 54-58) DLUHC Assurance Review (ID 59 – 64)				
Planning Work				
<i>Effective scrutiny should have a defined impact on the ground, with the committee making recommendations that will make a tangible difference to the work of the authority. To have this kind of impact, scrutiny committees need to plan their work programme, i.e. draw up a long-term agenda and consider making it flexible enough to accommodate any urgent, short-term issues that might arise during the year.</i>	38a	O&S committees agree a work programme annually drawing ideas from relevant sources, that enables reports to be prepared and brought to the committee in a timely way. All O&S committees completed annual work programming in 2023/24, basing suggestions on a variety of relevant sources. Work programming in 2025 has been delayed. Whilst annual programming is good practice, committees are able to plan on a rolling basis in the absence of an annual approach and will continue to do so until resources can be released to support this.	Completed in 2023/24, delayed in 2025.	WS1
	38b	Work programmes are based on realistic assessment of resources available to O&S, also retaining capacity for some arising issues to be accommodated. All committees are asked to take account of resources when considering requests for work, especially commissioned work such as working groups and additional meetings. Officer resource to support O&S work has been limited and has resulted in delays to topic progression. To address this, proposals have been made to Council in the 2025 annual report to reduce concurrent working group numbers and promote a 'quality of quantity' approach to O&S work. The outcome and impact of any changes agreed will be monitored by the O&S Chairs group and through future annual reports to Council. All committees would benefit from retaining clear capacity within their annual work programmes to ensure space exists to respond to arising issues throughout the year without exceeding resource.	Monitor resource availability and impact of Council decision on work programme numbers.	R1
	38c	New Councillor and refresher training to be provided to include – Effective O&S Work programming and best use of resources	Complete. Monitor the need for	MT1

Overview and Scrutiny Action Plan 2023-24

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Statutory Guidance on O&S (ID 1-53) Chief Executive's Assurance Review (ID 54-58) DLUHC Assurance Review (ID 59 – 64)			refresher training.	
	38d	Feedback is gathered on O&S outputs and a tool developed to measure the success of O&S. <i>Not started. This is identified as a key aim in the 2025 O&S annual report and will be progressed as resources allow.</i>	Summer 2024	P1
<i>Authorities with multiple scrutiny committees sometimes have a separate work programme for each committee. Where this happens, consideration should be given to how to co-ordinate the various committees' work to make best use of the total resources available.</i>	39a	Each O&S committee may establish separate work plans, with responsibility for monitoring use of resource across all work plans sitting with O&S Board, supported by O&S Chairs. This is set out in the Constitution. <i>Proposals have been made in the 2025 O&S annual report that controls on the use of O&S resource be strengthened via the O&S Chairs group. If agreed, changes will be made to the constitution to reflect that. these members will agree the priority order of in-depth work across all committees to more effectively manage resource.</i>	Complete	CR1
	39b	Establish calendar of meeting dates for O&S chairs to include collective leadership monitoring of O&S resource <i>Calendar of meetings planned for 2025/26.</i>	Autumn 2023	CM1
Being clear about scrutiny's role				
<i>Scrutiny works best when it has a clear role and function. This provides focus and direction. While scrutiny has the power to look at anything which affects 'the area, or the area's inhabitants', authorities will often find it difficult to support a scrutiny function that carries out generalised oversight across the wide range of issues experienced by local people, particularly in the context of partnership working. Prioritisation is necessary, which means that there might be things that, despite being important, scrutiny will not be able to look at.</i>	40	See actions 4a, b and c above – O&S 'focus', working methods and terms of reference.	See relevant actions above	WS1/ WM1/ TOR1

Overview and Scrutiny Action Plan 2023-24

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Statutory Guidance on O&S (ID 1-53) Chief Executive's Assurance Review (ID 54-58) DLUHC Assurance Review (ID 59 – 64)				
<i>Different overall roles could include having a focus on risk, the authority's finances, or on the way the authority works with its partners.</i> <i>Applying this focus does not mean that certain subjects are 'off limits'. It is more about looking at topics and deciding whether their relative importance justifies the positive impact scrutiny's further involvement could bring.</i>				
<i>When thinking about scrutiny's focus, members should be supported by key senior officers. The statutory scrutiny officer, if an authority has one, will need to take a leading role in supporting members to clarify the role and function of scrutiny, and championing that role once agreed.</i>	41a	Senior officers and the statutory scrutiny officer support committees in selecting priorities that are of relevance and can add value to the organisation. – In annual work programming for O&S Committees and ongoing, during work programming discussions at each meeting. Senior officers provide good support to O&S in planning work. In 2025, the Chief Executive, Section 151 Officer and Monitoring Officer have all proactively suggested topics and approaches for scrutiny. All senior officers are asked to provide topic suggestions as part of standard annual work programming methodology. The O&S Specialist and Democratic Services team provide support on scrutiny priorities on an ongoing basis. This support is balanced against other service priorities and so is limited by resource availability. Scrutiny outcomes could be strengthened if direct officer support could be provided to greater depth and more consistently provided, and will remain resource dependent. All committees would benefit from regularly assessing the value that has been added by their work, to inform future work planning.	Complete, monitor long-term	WS1

Overview and Scrutiny Action Plan 2023-24

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Statutory Guidance on O&S (ID 1-53) Chief Executive's Assurance Review (ID 54-58) DLUHC Assurance Review (ID 59 – 64)				
	41b	Statutory scrutiny officer to ensure that scrutiny priorities are promoted to Executive members and the wider officer corps via Corporate Management Board and information sharing with Cabinet members. All annual work programmes have been developed and are shared with each O&S committee agenda. Mechanisms are in place for promoting scrutiny priorities within the organisation: CMB has agreed to receive all O&S work programmes on a quarterly basis. The Leader and senior council officers are now invited into regular meetings with all O&S chairs to promote effective information sharing between O&S and executive. O&S lead members are regularly encouraged to form effective informal relationships with cabinet members for information sharing purposes.	Complete, monitor long-term.	WS1
Who to speak to				
<i>Evidence will need to be gathered to inform the work programming process. This will ensure that it looks at the right topics, in the right way and at the right time. Gathering evidence requires conversations with:</i> <i>The public -</i> <i>It is likely that formal 'consultation' with the public on the scrutiny work programme will be ineffective. Asking individual scrutiny members to have conversations with individuals and groups in their own local areas can work better. Insights gained from the public through individual pieces of scrutiny work can be fed back into the work programming process. Listening to and participating in conversations in places where local people come together, including in online forums, can help authorities engage people on their own terms and yield more positive results</i>	42a	New Councillor and refresher training to be provided to include – Sources of input to annual work programming, to include community insight to their scrutiny work, partner information and Cabinet forthcoming priorities	Complete. Monitor the need for refresher training.	MT1
	42b	See 3C above – use of community insight in O&S work	See relevant action above.	CI1
	42c	Statutory scrutiny officer to work with communications team to establish how scrutiny can promote its work priorities and gather public insight. To include proactive work with communications team in Spring 2024 to gather public insight to inform future annual work programming in Summer 2024. Not started, to be progressed as resources allow.	Spring 2024	COM1

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Statutory Guidance on O&S (ID 1-53) Chief Executive's Assurance Review (ID 54-58) DLUHC Assurance Review (ID 59 – 64)				
<i>Authorities should consider how their communications officers can help scrutiny engage with the public, and how wider internal expertise and local knowledge from both members and officers might make a contribution.</i> <i>The authority's partners –</i> <i>relationships with other partners should not be limited to evidence-gathering to support individual reviews or agenda items. A range of partners are likely to have insights that will prove useful:</i> <i>o Public sector partners (like the NHS and community safety partners, over which scrutiny has specific legal powers);</i> <i>o Voluntary sector partners;</i> <i>o Contractors and commissioning partners (including partners in joint ventures and authority-owned companies);</i> <i>o In parished areas, town, community and parish councils;</i> <i>o Neighbouring principal councils (both in two-tier and unitary areas);</i> <i>o Cross-authority bodies and organisations, such as Local Enterprise Partnerships; and</i> <i>o Others with a stake and interest in the local area – large local employers, for example.</i> <i>The executive –</i> <i>a principal partner in discussions on the work programme should be the executive (and senior officers). The executive should not direct scrutiny's work, but conversations will help scrutiny members better understand how their work can be designed to align with</i>	42d	See 35 above: Develop a library of O&S oversight information, provided in an online format for Councillors to access independently, to include - Information from external organisations, as appropriate, to support individual work items and annual work programming	See relevant action above.	L1
	42e	Cabinet is asked to provide input to annual O&S work programming to indicate forthcoming areas of work where O&S can add value. <i>Cabinet are asked to provide ideas for annual work programming as standard, and have also contributed in-year ideas for scrutiny in 2024/25.</i>	Complete.	C1
	42f	See 7b above: The Cabinet Forward Plan is regularly updated with sufficient notice of forthcoming priorities to enable O&S to engage effectively at an early stage in policy shaping	See relevant action above.	C1
	42g	See 7d above: Role descriptions to be developed for Councillors in leading O&S roles to clarify expectation that scrutiny chairs establish informal working arrangements with relevant Portfolio Holders to ensure scrutiny can be informed of Cabinet priorities in a timely way.	See relevant action above.	RD1

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<i>the best opportunities to influence the authority's wider work.</i>				
Information sources				
Scrutiny will need access to relevant information to inform its work programme. The type of information will depend on the specific role and function scrutiny plays within the authority, but might include: • Performance information from across the authority and its partners; • Finance and risk information from across the authority and its partners; • Corporate complaints information, and aggregated information from political groups about the subject matter of members' surgeries; • Business cases and options appraisals (and other planning information) for forthcoming major decisions. This information will be of particular use for pre -decision scrutiny; and • Reports and recommendations issued by relevant ombudsmen, especially the Local Government and Social Care Ombudsman. As committees can meet in closed session, commercial confidentiality should not preclude the sharing of information. Authorities should note, however, that the default for meetings should be that they are held in public	43a	See 30a above: Develop a library of O&S oversight information, provided in an online format for Councillors to access independently, to include - Performance, Management, Finance, Risk, Complaints, Business Cases and Ombudsman information. This will assist in 'horizon scanning' to enhance the effectiveness of O&S work planning.	See relevant action above.	L1
	43b	Presumption is made that library of information for O&S Councillors is public, with non- public information shared in appropriate alternative environment to ensure Councillors can remain informed. <i>The presumption for information shared with O&S to be public is already an embedded practice, with appropriate consideration given on an arising basis to O&S requests for non-public information.</i>	Complete, monitor long-term.	L1
Scrutiny members should consider keeping this information under regular review. It is likely to be easier to do this outside committee, rather than bringing such information to committee 'to note', or to provide an update, as a matter of course.	44	Support committees to work in more diverse ways to maintain oversight of key information, including circulating information outside of meetings and the use of rapporteurs or champions for particular topics. This will free up committee resource for value added scrutiny. <i>Working methods have now been diversified to make better use of meeting resource. Information based reporting is regularly received outside of meetings of through a series of regular informal briefings, now established for each committee. There</i>	In annual work programming for O&S Committees – Autumn 2023	WM1

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Statutory Guidance on O&S (ID 1-53) Chief Executive's Assurance Review (ID 54-58) DLUHC Assurance Review (ID 59 – 64)		has been an increase in the use of rapporteurs and the approach will be further embedded in 2025/26. This action has not been marked as completed, as, although working methods have diversified, analysis of 24/25 work outputs across all committees show an overbalance of monitoring/update reports in HASC and Children's Services O&S. This is taking up time that could be used for other value-added scrutiny. These committees would benefit from an ongoing rigorous approach to committee agenda planning, to ensure monitoring work does not over balance agendas and committee time can be used to reach valuable outcomes. Officers will continue to support this approach.		
Shortlisting topics				
<i>Approaches to shortlisting topics should reflect scrutiny's overall role in the authority. This will require the development of bespoke, local solutions, however when considering whether an item should be included in the work programme, the kind of questions a scrutiny committee should consider might include:</i> • Do we understand the benefits scrutiny would bring to this issue? • How could we best carry out work on this subject? • What would be the best outcome of this work? • How would this work engage with the activity of the executive and other decision-makers, including partners?	45a	Extend the use of the 'scrutiny request form' already in place for commissioned items, to encourage consideration of the value to be added by all reports, such as scrutiny's consideration of Cabinet pre-decision items and officer proposed items. – In annual work programming for O&S Committees and ongoing, during work programming discussions at each meeting. The use of the 'scrutiny request form' is embedded for councillor requests. It is not currently used for requests to consider other items such as Cabinet items or officer proposed items. O&S Chairs have confirmed that they do not feel a documented process for officer or cabinet requests is necessary. Careful consideration of the likely benefits of all intended work prior to commencement, regardless of origin, will continue to be encouraged by officers that support O&S.	Complete, monitor long-term.	WS1

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Statutory Guidance on O&S (ID 1-53) Chief Executive's Assurance Review (ID 54-58) DLUHC Assurance Review (ID 59 – 64)				
<i>Some authorities use scoring systems to evaluate and rank work programme proposals. If these are used to provoke discussion and debate, based on evidence, about what priorities should be, they can be a useful tool. Others take a looser approach. Whichever method is adopted, a committee should be able to justify how and why a decision has been taken to include certain issues and not others.</i> <i>Scrutiny members should accept that shortlisting can be difficult; scrutiny committees have finite resources and deciding how these are best allocated is tough. They should understand that, if work programming is robust and effective, there might well be issues that they want to look at that nonetheless are not selected.</i>	45b	Review 'scrutiny request form' and update as appropriate to incorporate all suggested areas referenced in O&S guidance. <i>Not started. To be progressed as resources allow.</i>	Autumn 2023	P1
	45c	See 18c above: As required by the constitution, all requests for O&S work are considered by Committees against the current resource levels available to support the request	See relevant action above.	R1
Carrying out work				
Selected topics can be scrutinised in several ways, including: a) As a single item on a committee agenda – this often presents a limited opportunity for effective scrutiny, but may be appropriate for some issues or where the committee wants to maintain a formal watching brief over a given issue; b) At a single meeting – which could be a committee meeting or something less formal. This can provide an opportunity to have a single public meeting about a given subject, or to have a meeting at which evidence is taken from a number of witnesses; c) At a task and finish review of two or three meetings – short, sharp scrutiny review are likely to be most effective even for complex topics. Properly focused, they ensure members can swiftly reach conclusions and make recommendations, perhaps over the course of a couple of months or less;	46a	Methods of carrying out O&S work are set out within the Constitution at Article 6, Rule 6.9.	Complete	CR1
	46b	Support committees to actively consider diverse ways of working other than committee reports to secure most effective outputs. <i>O&S working methods have diversified and now regularly include committee reporting, outside of committee briefings, rapporteurs and working groups. Diverse working methods will continue to be encouraged.</i>	Complete, monitor long-term	WM1
	46c	Review and develop task and finish/ working group scoping document, protocol and joint working group protocol <i>Not started. To be progressed as resources allow.</i>	Summer 2024	P1

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d) Via a longer-term task and finish review – the 'traditional' task and finish model – with perhaps six or seven meetings spread over a number of months – is still appropriate when scrutiny needs to dig into a complex topic in significant detail. However, the resource implications of such work, and its length, can make it unattractive for all but the most complex matters; and e) By establishing a 'standing panel' – this falls short of establishing a whole new committee but may reflect a necessity to keep a watching brief over a critical local issue, especially where members feel they need to convene regularly to carry out that oversight. Again, the resource implications of this approach means that it will be rarely used.				
Evidence sessions				
Evidence sessions are a key way in which scrutiny committees inform their work. They might happen at formal committee, in less formal 'task and finish' groups or at standalone sessions. Good preparation is a vital part of conducting effective evidence sessions. Members should have a clear idea of what the committee hopes to get out of each session and appreciate that success will depend on their ability to work together on the day.	47	Consider the appropriateness of conducting evidence sessions to scrutinise particular topics when planning annual work programmes. These will need proactive planning to ensure that sufficient resource can be made available to support effective sessions. An evidence based approach is encouraged on an ongoing basis and there has been a small increase in the inclusion of external invitees during meetings to bring insight. A larger scale evidence gathering topic on Van Life is planned for 2025/26. Planning and conducting evidence sessions is valuable but resource intensive. The approach will therefore continue to be promoted as an effective form of scrutiny to be taken up as resources allow.	Action will progress as resources allow.	WM1

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How to plan <i>Effective planning does not necessarily involve a large number of pre-meetings, the development of complex scopes or the drafting of questioning plans. It is more often about setting overall objectives and then considering what type of questions (and the way in which they are asked) can best elicit the information the committee is seeking. This applies as much to individual agenda items as it does for longer evidence sessions – there should always be consideration in advance of what scrutiny is trying to get out of a particular evidence session.</i>	48	New Councillor and refresher training to be provided to include – Evidence led approach to O&S, and how to conduct an effective evidence session	Complete. Monitor the need for refresher training.	MT1
<i>Chairs play a vital role in leading discussions on objective-setting and ensuring all members are aware of the specific role each will play during the evidence session.</i> <i>As far as possible there should be consensus among scrutiny members about the objective of an evidence session before it starts. It is important to recognise that members have different perspectives on certain issues, and so might not share the objectives for a session that are ultimately adopted. Where this happens, the Chair will need to be aware of this divergence of views and bear it in mind when planning the evidence session.</i>	49	O&S Chairing skills training to be delivered to include how to plan for and lead evidence sessions, establish aims and manage different objectives from committee members Chairing skills training provided in Summer 2023 induction. Higher level of training through LGA leadership courses has been offered to all O&S chairs, including following chairmanship changes to ensure continuity of expertise.	Complete, monitor long-term.	MT2
<i>Effective planning should mean that at the end of a session it is relatively straightforward for the chair to draw together themes and highlight the key findings. It is unlikely that the committee will be able to develop and agree recommendations immediately, but, unless the session is part of a wider inquiry, enough evidence should have been gathered to allow the chair to set a clear direction.</i> <i>After an evidence session, the committee might wish to hold a short 'wash-up' meeting to review whether their objectives were met and lessons could be learned for future sessions</i>	50	O&S Chairing skills training to be delivered to include how to draw together themes and highlight key findings at the end of evidence sessions – this approach to be extended to all O&S work items to ensure Chairs can provide transparent summary of discussions. Chairing skills training provided in Summer 2023 induction. Higher level of training through LGA leadership courses has been offered to all O&S chairs, including following chairmanship changes to ensure continuity of expertise.	Complete, monitor long-term	MT2

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Developing recommendations <i>The development and agreement of recommendations is often an iterative process. It will usually be appropriate for this to be done only by members, assisted by co-optees where relevant. When deciding on recommendations, however, members should have due regard to advice received from officers, particularly the Monitoring Officer.</i> <i>The drafting of reports is usually, but not always, carried out by officers, directed by members.</i>				
	51a	Officer refresher training to be provided to include – Officers to provide timely, transparent advice to committees in all areas of O&S work, as appropriate. <i>Provided to senior officers in Winter 2024/ Spring 2025. Training included a CfGS led workshop with scrutiny and executive members and had a focus on embedding a clear understanding of scrutiny fundamentals and developing a positive scrutiny culture with all stakeholders across the organisation.</i>	Complete. Monitor the need for refresher training.	OT1
	51b	For longer pieces of O&S work, a lead officer to be identified at the scoping stage who will support report drafting - include this within relevant protocols listed at 46c above. <i>This is included as standard within scoping documents for O&S working groups.</i> <i>Wider piece of work to review protocols (46c) not yet started. To be progressed as resources allow.</i>	Immediate, as arising (WS1/R1) Protocol review Summer 2024 (P1)	WS1/R1/P1
<i>Authorities draft reports and recommendations in a number of ways, but there are normally three stages:</i> <i>i. the development of a 'heads of report' – a document setting out general findings that members can then discuss as they consider the overall structure and focus of the report and its recommendations;</i> <i>ii. The development of those findings, which will set out some areas on which recommendations might be made; and</i> <i>iii. the drafting of the full report.</i> <i>Recommendations should be evidence-based and SMART, i.e. specific, measurable, achievable, relevant and timed. Where</i>	52	New Councillor and refresher training to be provided to include – Consideration of appropriate recommendations and reporting route for O&S work, to include consideration of what SMART recommendations may look like. Consideration of this to take place at the scoping stage of O&S work, to ensure scope is clear enough and to provide an indication of the value that is likely to be added by the work undertaken.	Complete. Monitor the need for refresher training.	MT1

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<i>appropriate, committees may wish to consider sharing them in draft with interested parties.</i> <i>Committees should bear in mind that often six to eight recommendations are sufficient to enable the authority to focus its response, although there may be specific circumstances in which more might be appropriate.</i>				
<i>Sharing draft recommendations with executive members should not provide an opportunity for them to revise or block recommendations before they are made. It should, however, provide an opportunity for errors to be identified and corrected, and for a more general sense-check</i>	53	New Councillor and refresher training to be provided to include – The role of executive member consultation during draft reporting stages.	Complete. Monitor the need for refresher training.	MT1
Chief Executive's Assurance Review, June 2023 – recommendations and comments relating to O&S				
<i>In a No Overall Control council it is useful to ensure there is an opportunity to elect a Chair from outside of the administration to each Overview and Scrutiny Committee, to ensure appropriate scrutiny and holding the Executive to account.</i>	54a	Since May 2023 all O&S Committees have appointed a Chair, and in most cases, a Vice-Chair from outside of the Administration.	Complete – monitor long term.	CL1
<i>Opposition councillors have recently been given a majority of positions on the principal Overview and Scrutiny committees as a result of changes in the political balance calculations. Opposition councillors appear to be content to keep Conservative councillors as Chairs for the Committees where they are already in place, for the remainder of this Council term.</i>	54b	Action relating to potential constitutional changes to clarify the good practice of opposition chairs outlined at 8c above.	See relevant action above.	CR1
<i>Overview and scrutiny committees are to be encouraged to take evidence and contributions from officers as well as portfolio holders, to ensure a more informed basis to O&S recommendations.</i>	55	Multiple actions relating to O&S powers to question, skills training, and planning of evidence sessions are outlined above. These will all assist with encouraging evidence and contributions from officers as well as portfolio holders, to increase the effectiveness of scrutiny sessions. See 9a, 9b, 9c, 27b and 48 above.	See relevant actions above	See relevant actions above

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<i>There is still a marked reluctance amongst the broader overview and scrutiny committees to ask questions directly of officers and there are regular comments that leading councillors do not give clear answers to questions, but other councillors do not seek that clarity from officers, which they could.</i> <i>Since June there has been a noticeable shift in emphasis within the Council, with officers being invited to contribute on specific issues in Cabinet and this need needs to be extended to O&S committees</i> <i>Continue to encourage full participation and clarity of answers in all meetings, and incorporate into training for Overview and Scrutiny committee members.</i>				
<i>Overview and scrutiny committees should continue to increase their focus on policy development and engagement rather than pre-Cabinet scrutiny.</i>	56a	Since May 2023 significant effort has gone into reducing pre-Cabinet scrutiny levels to achieve a more even balance with other types of scrutiny. Actions to encourage this included training and development, CMB engagement to identify early policy discussion items and ongoing officer support to assist in weighing up the benefits of scrutiny topics. In 2023/4 pre-decision levels of scrutiny across all committees reduced to 21% and remained stable in 2024/25 at 29%. There was greater emphasis on earlier policy discussion with items such as debates on Devolution in 2024 being an example of this. With ten political groups making up the Council, the organic drive for pre- Cabinet scrutiny is likely to remain and diverse scrutiny topics will continue to be encouraged by support officers to avoid overbalance.	Complete, monitor long-term.	WS1

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Relevant Extract from: Statutory Guidance on O&S (ID 1-53) Chief Executive's Assurance Review (ID 54-58) DLUHC Assurance Review (ID 59 – 64)	ID	Action for BCP Council with updates (Latest updates December 2023 in blue text)	RAG and timescales	Code
	56b	Ongoing support to promote a balance of O&S work is identified through multiple actions above. Encouraging an effective balance of scrutiny work involves many factors including effective engagement with Cabinet and senior officers to ensure O&S understanding of forthcoming priorities; training; work planning actions and monitoring and reporting on scrutiny outputs to ensure Council ownership of the balance of O&S work. These actions will embed a practice of selecting topics which generate meaningful outcomes and balance policy engagement with pre-Cabinet scrutiny. See actions 1c, 4b,7b,7c,7d, 14a, 38c, 38d, 41, 42e, 43a, 45a above.	See relevant actions above	See relevant actions above
<i>Overview and scrutiny committees should consider putting more focus into corporate performance reporting, challenging the executive to ensure that improvement plans are having an effect and improving the services that are missing their targets.</i> <i>There is an opportunity to strengthen the focus of O&S on performance management, through the overview and scrutiny committees.</i> <i>Incorporate into training for Overview and Scrutiny committee members and monitor agendas, encouraging Overview and Scrutiny Committees to focus on performance management information.</i>	57	See 30a and 30b above relating to the provision of performance management information and associated training.	See relevant actions above	See relevant actions above
<i>Need to ensure the party whip is not applied to O&S functions. This message needs to be reinforced and the situation monitored.</i>	58	Actions relating to training, chairing and monitoring the independence of O&S are set out above. See 8b, 8d,8e, 16a and 16c and 26 above.	See relevant actions above	See relevant actions above

Overview and Scrutiny Action Plan 2023-24

Relevant Extract from:	ID	Action for BCP Council with updates (Latest updates December 2023 in blue text)	RAG and timescales	Code
Statutory Guidance on O&S (ID 1-53) Chief Executive's Assurance Review (ID 54-58) DLUHC Assurance Review (ID 59 – 64)				
<i>There has been no recent evidence of the party whip being applied to O&S functions, but this needs to be monitored. A positive statement will be sought from Group Leaders.</i>				
DLUHC External Assurance Review of BCP Council, August 2023 – recommendations and comments relating to O&S				
<i>The Council reviews the Transformation programme and agrees a realistic and deliverable programme by October 2023. The Council sets up effective mechanisms for Member oversight and monitoring of the delivery of the programme by June 2023</i>	59	O&S to consider and establish its role in this member oversight and monitoring. The O&S Board Chair and Vice Chair were members of the cross-party councillor working group to monitor the Transformation Programme, prior to its completion. This provided a mechanism for O&S to maintain oversight of and raise red flags to committee by exception. Cabinet reports were also selected for scrutiny to maintain oversight of key stages.	Complete, programme now concluded,	WS1
<i>The Council establishes a sound budget setting process and begins preparations for the 2024/25 budget as soon as possible after the local government elections and has proposals drafted for a sustainable MTFP and three-year budget by the end of September 2023</i>	60	O&S to consider and establish its role in the budget setting process A comprehensive package of budget scrutiny has been established since 2023. The O&S Board leads budget monitoring and final budget setting debate and includes other O&S Chairs in this, whilst individual committees have requested their own areas of deep dive scrutiny on specific budget areas. Training has been provided to councillors to support them in this role. Additionally, to better influence the budget during development stage, budget working groups were established by scrutiny in 2024. This approach has been adapted to a 'Budget Conversation' day for 2025 and BCP Council has been recognised by the Centre for Governance and Scrutiny as a council leader for this approach. Executive members have also welcomed and encouraged this approach which is a demonstration of a healthy working relationship between O&S and Cabinet. This proactive budget work is resource intensive	In annual work programming for O&S Committees – Autumn 2023	WS1

Overview and Scrutiny Action Plan 2023-24

Relevant Extract from:	ID	Action for BCP Council with updates (Latest updates December 2023 in blue text)	RAG and timescales	Code
Statutory Guidance on O&S (ID 1-53) Chief Executive's Assurance Review (ID 54-58) DLUHC Assurance Review (ID 59 – 64)				
		for officers across the council and those that support O&S directly, and the approach requires careful evaluation to assess the benefit vs resource input. Similar approaches will continue to be encouraged in the future, balanced against resources.		
<i>The Council, with the active leadership of the respective group leaders, uses the opportunity of a new Council to reset the Member / Member and Member / officer culture and relationships. The new Council must use the support offered by the LGA and set up a comprehensive programme of Member induction and an on-going programme of Member training. The induction programme should be in place by June 2023 and the ongoing programme by July 2023</i>	61a	New Councillor and refresher training to be provided. Complete. See all actions coded MT1 above.	See relevant actions above.	MT1
	61b	See 21b above - A programme of ongoing scrutiny skills training to be developed for delivery to O&S Councillors throughout municipal year 2023/24.	See relevant action above.	MT3
	61c	See 23b above – O&S Chairing and leadership skills support to be provided.	See relevant action above.	MT2
	61d	LGA training opportunities to be taken up. The LGA has been widely engaged to provide support to O&S since May 2023. This includes Leadership Academy training for chairs, in-house delivery of support for O&S work programming, targeted children's services training for the Children's Svs O&S Committee, and promotion of LGA online training courses to councillors as arising.	Complete. Continue to take up opportunities on an ongoing basis.	WS1
<i>The Council puts in place a regular annual cycle for the business plans, mid-year reviews and year end reviews of all its companies to be reported to the appropriate scrutiny and decision-making bodies. This should be in place by June 2023 to begin the 2024/25 process</i>	62	O&S to consider and establish its role in this review process. Business plans are usually selected for scrutiny as standard, when available as Cabinet reports.	In annual work programming for O&S Committees – Autumn 2023	WS1
<i>The Council has four scrutiny committees – Corporate and Community; Children's Services; Health and Adult Social Care, and Place. Scrutiny has focused rather heavily on pre scrutiny of</i>	63	See 56a and 56b above.	See relevant actions above	See relevant

Overview and Scrutiny Action Plan 2023-24

Relevant Extract from: Statutory Guidance on O&S (ID 1-53) Chief Executive's Assurance Review (ID 54-58) DLUHC Assurance Review (ID 59 – 64)	ID	Action for BCP Council with updates (Latest updates December 2023 in blue text)	RAG and timescales	Code
<i>Cabinet decisions rather than having a broader focus or looking at policy development. I was told by a range of people that politics has got in the way of effective scrutiny. When scrutiny has looked at wider issues the feedback has been more positive – I was told of a good example of scrutiny inviting the Police and Crime Commissioner and neighbourhood watch representatives to a scrutiny committee. The Centre for Governance and Scrutiny summarise scrutiny's role as providing a space to bring critical friend challenge and support to decision making; providing a way of challenging and supporting partner organisations; bringing issues that matter to local people and the local community into decision making; and surface issues that the Council should be engaging with but which are not yet part of formal decision making.</i> <i>From what I have seen there is an opportunity at BCP – as there is with many other councils – to develop the scrutiny role along the lines above rather than simply to focus on pre-cabinet scrutiny. There is an opportunity with a new Council to ensure that Councillors have training and support to enable them to develop their role in overview and scrutiny. This should be built into the Member induction and ongoing training programme.</i>				actions above
<i>The DfE Advisor has commented that the Scrutiny Committee [Children's Services O&S] and particularly its Chair (prior to the elections) have been engaged in a proper and appropriate way. The Chair of scrutiny prior to the elections has now been appointed as the Cabinet Member and therefore the Statutory Lead Member for Children's Services. Given the position of children's services the change in both the Cabinet Member and Scrutiny Chair roles will need careful management and both Members will need focussed support to discharge these key roles.</i>	64a	Work programming support provided summer 2023. Further support to be provided to complete annual work programming. <i>Annual work programming delayed in 2025 but provided on a rolling meeting basis instead.</i>	Complete in 23/24, delayed in 2025.	CS1
	64b	Focussed support provided by service area lead to identify and provide relevant performance information to support the committee in its role. <i>Service area lead officer support provided to Children's O&S Chair and committee. This is well established and provided on an ongoing basis. Includes designated lead officer and meetings with the Executive Director and Portfolio Holder.</i>	Complete, monitor on ongoing basis.	CS1

Overview and Scrutiny Action Plan 2023-24

Relevant Extract from:	ID	Action for BCP Council with updates (Latest updates December 2023 in blue text)	RAG and timescales	Code
Statutory Guidance on O&S (ID 1-53) Chief Executive's Assurance Review (ID 54-58) DLUHC Assurance Review (ID 59 – 64)		Children's Services have offered to expand this to include quarterly meetings with all lead directors in Children's Services to provide a comprehensive update to the Chair of scrutiny, with these meetings to be implemented in late 2025.		
	64c	Ongoing training plan for the Committee in development. The LGA provided a targeted skills and knowledge training programme to Children's Svs O&S Committee members in 2024/25. A programme of briefing slots is now established for the committee to provide information needed for the committee to undertake their role but which doesn't require active scrutiny. This accompanies other scrutiny network training opportunities available to councillors on an arising basis.	Complete, monitor skills training needs on an ongoing basis and particularly when there is significant membership change.	CS1
	64d	Establish links with O&S Chairs in other authorities that have experience of similar improvement journey. Mentoring links now established through LGA training programme.	Complete, monitor take-up of opportunities ongoing.	CS1
	64e	LGA development opportunities promoted to Chair. The LGA provided a targeted skills and knowledge training programme to Children's Svs O&S Committee members in 2024/25. Mentoring links for Chair now established through LGA training programme. LGA Leadership Academy delivered to previous Chair in 2023 and planned for current Chair on next available course.	Complete. Development opportunities will continue to be promoted and take-up monitored on ongoing basis.	CS1

Equality Impact Assessment: Conversation Screening Tool

The Council is legally required by the Equality Act 2010 to evidence how it has considered its equality duties in its decision-making process.

The Council must have due regard to the need to -

- (a) eliminate discrimination, harassment, victimisation and any other conduct that is prohibited by or under this Act;
- (b) advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it;
- (c) foster good relations between persons who share a relevant protected characteristic and persons who do not share it.

Having due regard to the need to advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it involves having due regard, in particular, to the need to -

- (a) remove or minimise disadvantages suffered by persons who share a relevant protected characteristic that are connected to that characteristic;
- (b) take steps to meet the needs of persons who share a relevant protected characteristic that are different from the needs of persons who do not share it;
- (c) encourage persons who share a relevant protected characteristic to participate in public life or in any other activity in which participation by such persons is disproportionately low.

A link to the full text of [s149 of the Equality Act 2010](#) which must be considered when making decisions.

1	What is being reviewed?	The level of concurrent Overview and Scrutiny topic inquiries
2	What changes are being made?	Potential reduction of topics from one per Overview and Scrutiny (O&S) committee concurrently (across four committees) to one at a time across all committees. Topic priority order to be determined by O&S Chairs rather than O&S committees. Greater scoping controls to be applied by Overview and Scrutiny chairs.
3	Service Unit:	Democratic Services
4	Participants in the conversation:	Lindsay Marshall, Overview and Scrutiny Specialist Richard Jones, Head of Democratic Services
5	Conversation date/s:	September 2025
6	Do you know your current or potential client base? Who are the key stakeholders?	Anyone submitting a topic for overview and scrutiny work, primarily councillors but also including officers, other council bodies (eg. Cabinet/ Council), and residents.
7	Do different groups have different needs or experiences? age (young/old), disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex, sexual orientation, members of the armed forces community, any other factors/groups e.g. socio-economic status, carers, human rights.	The impact on all protected groups is neutral and there is no difference in needs or experiences for any protected group. Under the BCP Constitution all councillors and residents have the right to submit a topic for scrutiny work and this will not change.
8	Will this change affect any service users?	No - There will be no impact on any protected group as a result of the proposed changes to O&S topic prioritisation.

9	Not applicable	
10	What are the benefits or positive equality impacts of the change on current or potential users?	The proposed changes to topic prioritisation may positively benefit the council and residents as prioritisation will by necessity become more robust and those topics of the highest importance and tangible impact to residents may be more likely to be selected for scrutiny. The impact on all protected groups will be equal.
11	What are the negative impacts of the change on current or potential users?	As a result of more robust topic prioritisation some topics may not be selected for scrutiny which may otherwise have been progressed. This may include topics suggested by residents. However it is likely that topics that are less impactful are not progressed and this is in line with existing arrangements in place to guide O&S councillors when making judgements on scrutiny topic selection. The impact of this on all protected groups will be equal.
12	Will the change affect employees?	No.
13	Will the change affect the wider community?	No further than is outlined in the paragraphs above.
14	What mitigating actions are planned or already in place for those negatively affected by this change?	There are no significant negative impacts of proposed changes to O&S topic prioritisation and so no mitigating actions are planned.
15	Summary of Equality Implications:	There are no direct equality implications arising from proposed changes to O&S topic prioritisation. Benefits to communities may be seen in the selection of topics that have a greater positive impact on communities but this will not affect any protected group more than others. Overall, the outcome of proposals will have a neutral impact on equality.

Foreword - Achieving Data Driven Scrutiny



Councillor Sharon Carr-Brown

Chair, Children's Services Overview and Scrutiny Committee

The Children's Services O&S Committee plays a crucial role in enhancing the decisions made on behalf of BCP residents through scrutinising policy and decisions and making recommendations for change.

Children's Services O&S councillors are mindful that there is a wealth of data available to support us in our role as effective scrutineers. This data tells a story of the needs and experiences of residents using our services as well as the performance of services, the costs associated, and the judgements formed by the council and other responsible bodies on service direction.

Following the creation of a similar toolkit by the Health and Adult Social Care O&S Committee, it became clear that a toolkit would also strengthen scrutiny for Children's Services. This toolkit will help councillors to better understand the various data sources and how these can provide a wider evidence base for the work of scrutiny.

As our data and analytical tools become more advanced, the potential for the council and its partners to leverage this information to shape and target services and interventions is immense. As our data tools continue to evolve, this toolkit will be updated and reviewed annually.

Above all else, it is acknowledged that scrutiny councillors are not expected to be data analysts or experts in the field. The strength of scrutiny lies in the ability of councillors to listen to residents and shine a light on issues of public importance, to ask the right questions of those designing and delivering services, and to draw upon the relevant evidence in response to those questions. The toolkit has been developed with this in mind and with the aim of being a resource for current and new councillors in their understanding of the data landscape.

1. Purpose

The purpose of this toolkit is to provide councillors with:

- an understanding of the purpose and benefits of data use by Children's Services (CS) O&S Committee
- access to a range of data tools that will support a proactive approach to incorporating data into scrutiny work

2. How to use this toolkit

This toolkit is focused on the data sources that will support work within the remit of the CS O&S Committee. Other O&S committees will find alternative data sets more relevant to their work.

Sections 3 – 7 provide guidance on the definitions of data, the value of data for scrutiny work, and guidance on how to request and use data.

Table 1 provides detail of the various data sources.

Data, research, reports and analysis sources have been provided in this toolkit. All may serve a purpose for scrutiny for different reasons. Sources include a brief description, advisory notes on how to use them and have been categorised in the following ways:

- **Accessibility**
- **Local/national relevance**
- **The type of scrutiny work that the source will support (deep dive/horizon scanning)**

Many data sources are public, with links provided for easy access. Some tools provide data with a supporting narrative, whilst others may require an account to access, or present raw data in a way that will benefit from the assistance of officers to interpret. Taking account of this, sources are categorised as '**self-serve**' or '**supported access**'.

Councillors can also use the sources' available information through this toolkit to support their own **background research** for O&S work and develop a wider understanding of children's services' issues to better inform their scrutiny enquiries and work programming judgements.

3. What is data?

Data or intelligence is the quantitative and qualitative information we gather from systems and people. It is used by the council and other service providers to understand outcomes for people and ensure the services delivered are the right ones.

Quantitative data is data represented numerically, including anything that can be counted, measured, or given a numerical value.

Qualitative data is data that cannot be represented numerically and is instead based on an observation of described lived experiences and patterns of behaviours.

Quantitative data may be more **structured** (e.g. numbers of children and young people in our care system) whereas qualitative data is **unstructured** (e.g. feedback on a service gathered through a focus group). Both types of data represent a person using the services provided by the council and its partners and are of equal importance.

To be meaningful, the use of data and intelligence needs to be **timely and measurable**. Some data is available in **real time**. Other data has been gathered, cleansed and included within overarching reports, such as quarterly or annual reports. There will be a **lag in the data** provided in these types of reports. Both forms of data will be useful to O&S, but judgements should be made regarding the timeliness of data that is required to inform O&S work.

4. Why is data important for overview and scrutiny?

The role of O&S is to **test and challenge** the assumptions and decisions of the council and its health partners, to strengthen the decisions that are made. It provides this test and challenge on behalf of the public and has a wide range of powers to scrutinise anything that affects the local area or its residents. This is a significant responsibility and the work undertaken by O&S should be **based on evidence**.

O&S work is selected by councillors and supported by officers and partners of the council (e.g. NHS) who are experts in their field. Reports to scrutiny are provided by officers and partners who can provide information and narrative on issues selected for scrutiny. By incorporating data and additional insight into their work (e.g. evidence sessions with relevant stakeholders, site visits, surveys), O&S councillors can form a broader understanding of an issue and **triangulate** information to test that what is being provided to them in reports is supported by relevant data. Through this, O&S findings become **evidence based** and scrutiny can better support the governance of the council and its partners as an effective '**critical friend**'.

There is no one person who holds all the data and answers about the performance of services in the local area. A unique **power of scrutiny** is the ability to **bring together** a range of **partners and information** to gain a picture of how well services are meeting the needs of residents, and to help find solutions where improvements are needed. Data is part of the clue package that can be drawn upon to build this picture.

Lessons can be learned from other areas of the country where data has not been used effectively by scrutiny, or councillors have not heeded the stories being told by the data provided. Where scrutiny has not been evidence led, it has been found to be a contributing factor to major service failure that has had a significant impact on the lives of residents.

5. Deep dive and Horizon scanning

Scrutiny work can be broadly divided into two categories of 'deep dive' and 'horizon scanning'. These are defined as:

Deep dive

- Detailed work focused on policy development and exploring options for the future.
- Often in the form of a working group or a series of committee-based evidence sessions.
- Framed as a series of questions or key lines of enquiry (KLOE) to which O&S seeks answers through detailed enquiry. Answers are found through the gathering of evidence, with a view to informing future policy.
- Specific and potentially more granular-level data may form part of the evidence base in answer to KLOE.
- O&S may also gather insight by talking directly to partners, officers and residents, to build a fuller picture around the data gathered.

Horizon scanning

- Regular monitoring of a range of higher-level data, outside of a committee setting.
- Data selected should assist in giving the committee high-level narratives that tell the story of need or set the context for strategies.
- Using this data the committee can build an understanding of context and trends around performance and resident experience and identify any emerging 'red flags'.
- Red flags may be elevated to committee for a report or a working group deep dive, following background enquiries.
- Horizon scanning data sources should be reviewed collectively on an annual basis to inform onward work planning.

An example of the types of data sources that support deep dive and horizon scanning work is set out in **Figure 1** below.

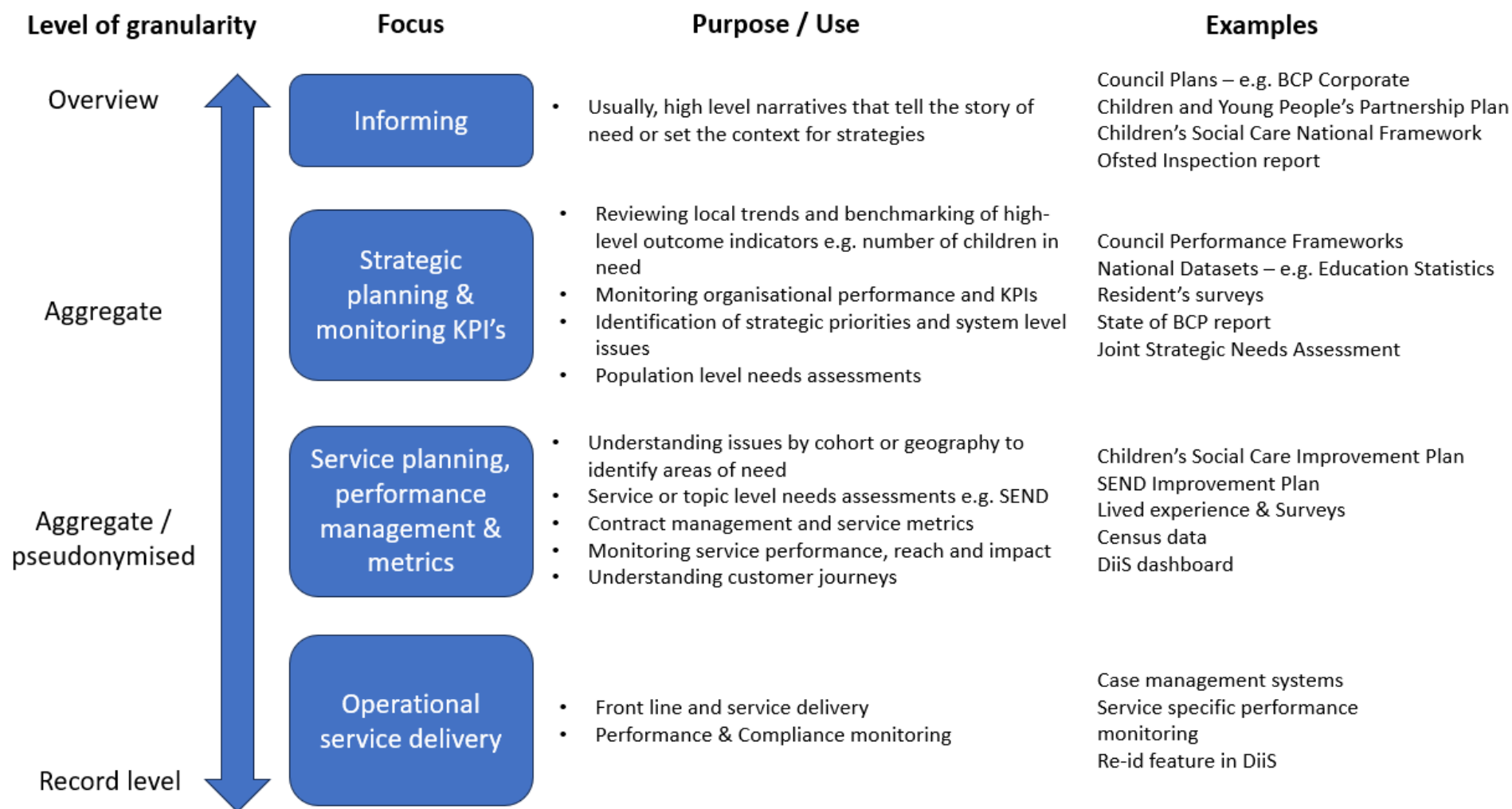


Figure 1 – Examples of data sources to support deep dive and horizon scanning (from the Adult's O&S tool kit originally provided by Public Health). Please note all data sources mentioned in the image are in the Table 1 below.

6. Accessing data – a methodology for O&S councillors

Rights to information

Councillors, and scrutiny councillors in particular, have elevated rights of access to information held by the council and its partners. O&S committees have **statutory powers to request information** but with this right is a responsibility to **clearly set out what these requests are**, and to do so **in a reasonable timeframe** for requests to be provided. This will help to ensure that requests by O&S can be met effectively, and that relationships with officers and partners are built on mutual trust with a shared common aim of improving services and outcomes through scrutiny.

Using the following guidelines for data and information requests will assist with this. These should be followed in conjunction with the requirements of procedure rules within the BCP Council Constitution.

Key Lines of Enquiry

O&S outcomes are often most effective when work is targeted, rather than taking a broad ‘oversight’ approach. A good practice to achieving targeted scrutiny is the establishment of a set of key lines of enquiry (KLOE). This applies to one-off committee reports as well as more in-depth, deep dive reviews. By seeking answers to these KLOE, findings and recommendations will be evidence based and are more likely to be SMART (Specific, Measurable, Achievable, Relevant, and Time-Bound), with a tangible benefit to residents.

Committees are encouraged to outline a set of KLOE for all items on their work programme, **at least one meeting cycle (2/3 months) in advance, and ideally on an annual basis when the following year’s work programme is set**. This will allow opportunity for respondents to gather and provide the requested information and to meet the council’s consultation and sign off requirements for public reports. KLOE should include any specific data requests to support the subject matter under scrutiny. Committees can collaborate on KLOE informally and formalise these requests at committee.

A link to a standard proforma for Key Lines of Enquiry can be found [here](#).

Standard data inclusions for Children's Overview and Scrutiny reports -

The O&S tool kit outlines a **standard set of data inclusions** that, where available, should accompany all reports to committee to enhance the evidence base provided to scrutiny. These are as follows:

- ✓ Historical trends
- ✓ Regional and national comparisons
- ✓ Demographic comparisons
- ✓ Costings and budget
- ✓ An outline of any limitations in the data that should be taken into account by the committee

Officers will be able to provide tailored advice and support in analysing the data as appropriate for individual reports.

Additional requests for data and information

Reports to committee are published five clear working days in advance of committee meetings. After reading reports, committee members may have additional questions, over and above KLOE and standard data inclusions, that require technical detail to respond. Wherever possible, councillors should provide these questions in advance of the committee meeting to report authors, to give opportunity for supply of information into committee.

Where additional details, or further analysis of data is requested, it may be necessary to provide that information post-meeting or at the next committee. Committees are therefore encouraged to invest time in scoping scrutiny items to ensure that data requests can be identified at an early stage.

Horizon scanning and work planning

There are a variety of data sources that will support the horizon scanning role of the Children's Services O&S Committee. These are identified in the table below, with many identified as '**self-serve**' resources that councillors can easily access and research independently.

O&S is one of many bodies that maintain a close oversight of data. Some of the resources provided are in the form of strategies produced by other bodies (such as the Joint Strategic Needs Assessment) where data has already been assessed to give a picture of the needs and service

aspirations for the area. Sources from the policy and strategy landscape will provide a shortcut to the committee in terms of understanding where their work programme may be most valuably directed.

Of the resources considered, a set of primary sources have been identified as most useful for the group in its work. Primary sources have been identified within Table 1 and are also set out below.

Sources for O&S horizon scanning

- ✓ A Shared Vision for Bournemouth, Christchurch and Poole 2024-28
- ✓ State of BCP Report (2023)
- ✓ Children and Young People's Partnership Plan 2025-30 (launch April 2025 - replacing CYPP 2021-24)
- ✓ BCP Children and Young People's Joint Needs Assessment (CYP JSNA)

Primary sources for deep dive O&S work

- ✓ Children's Social Care Dashboard
- ✓ Explore education statistics - GOV.UK
- ✓ BCP hosted statistics, data and census

These sources listed in Table 1 below and will be kept under review and updated as appropriate.

O&S committees and councillors have limited resources to undertake their work. Independent, regular review of horizon scanning resources by councillors will ensure that committee time is reserved for value added scrutiny. To share the load, the committee may wish to agree **rapporteurs** who will take responsibility for monitoring and researching specific agreed areas and reporting back to the wider committee. This may be achieved by undertaking a skills and interests audit of committee members to match areas of interests with appropriate members.

O&S work planning will be strengthened by a collective annual review of horizon scanning resources. With support from senior officers to provide further background information on services and any areas of strategic change, this will provide an evidence base for work programme

decisions for the year ahead. Planning an annual programme of scrutiny work will provide sufficient notice for report authors to meet the data requests identified for each scrutiny item.

7. How to be an intelligent user of data tools

Where data is used to make judgements, it is essential that this is approached with some caution. Wherever possible, data should be **triangulated** across a range of sources, and **red flags in data should always be followed up with further enquiries** to understand a fuller picture - one that may not be evident from the data alone. For example, data changes may be a result of service change or a difference in the way that data is collected.

The following **'top tips'** may be useful for councillors when approaching data independently:

- Always treat high level data with some caution – consider who has produced the data or look for official statistics-type markings.
- Look at historical information and trends as well as the current data point.
- Consider the size of the data set – changes in smaller data sets will appear more significant than in larger data sets.
- Look at the description of how data has been calculated. Differences in collection and calculation of data in different councils will affect how the data compares.
- Data doesn't explain the context. Ask questions around service change or how data has been calculated to understand further what the data may mean.
- Be aware of the timeliness of data. Consider when real time data is required compared to quarterly/ annual reports, which will reflect a data lag.
- Data quality can vary, and the output is only as good as the input. Care may need to be taken if the data beneath is of poor quality. Ask questions around data cleansing to understand the quality of the data provided.
- Seek assistance from council performance and intelligence teams where a more analytical approach is required.

The council and its partners (e.g. Charities, Police, Fire and Rescue, Education, Public Health, NHS) have experts who regularly work with the data sources outlined in **Table 1**. Accessing the support of data analysts for deep dive scrutiny work will assist councillors and strengthen scrutiny outcomes. Support required can be identified at the scoping stage of a piece of scrutiny work.

Table 1 – Data Sources for use by the Children’s Services O&S Committee

General Strategies & Reports (not Children Services specific)					
Accessibility	Data Source	Description	Remit	Application	Notes
1 Self-serve	Primary Source A Shared Vision for Bournemouth, Christchurch and Poole 2024-28 Corporate Performance information : Scroll down to bottom of page, click view dashboard	The Council’s vision for 2024-28, setting out key priorities and ambitions for the BCP area as well as a high-level delivery plan. Click here for a high level summary . Corporate performance is updated quarterly and shows how BCP Council is working towards achieving the objectives in the Corporate Strategy. Includes updates on actions and key performance indicators	Local	Horizon scanning	Overarching Council Strategy and performance information, which includes people, health and care aims. These three sources accessed together will give a full picture of council aims and performance on working towards these. Corporate performance information is updated quarterly.
2 Self-serve	BCP Budget and Annual Accounts	Overarching BCP Council finance information	Local	Horizon scanning	See also medium-term Financial Plan reports, published throughout the year to Cabinet.
3 Self-serve	BCP Council Residents’ Survey 2021	Survey of residents in BCP area asking questions about what it’s like living in the local area. The results of this survey provide baseline information which is used to measure satisfaction and perceptions over time.	Local	Horizon scanning	Due for a refresh – new survey conducted in October 2024. Includes satisfaction in services & support for older people/ young people; carer satisfaction with BCP services; levels of social contact and isolation across a range of indicators
4 Self-serve	Primary Source State of BCP Report, 2023	‘Key facts’ document providing information on the BCP area and resident characteristics. Updated annually.	Local	Horizon scanning	Includes a range of information on wellbeing indicators (e.g. obesity, mental health, injury) as well as linked indicators such as deprivation, housing and economic factors.

Children Services specific Strategies & Reports

Accessibility	Data Source	Description	Remit	Application	Notes
5 Self-serve	Primary Source BCP Children and Young People's Joint Needs Assessment	The Joint Strategic Needs Assessment is a report provided by Public Health and is an assessment of current and future health and wellbeing issues for the local population. In January 2025 a Children and Young People specific deep dive was published which provides an evidence base, pulling from both qualitative and quantitative data, of health and wellbeing needs of Children and Young People to support planning and commissioning and preparation of bids and business cases.	Local	Horizon scanning	Report production is based on an assessment of raw data sources also listed in this document, along with liaison with local stakeholders on issues for the area. This is used to present an assessment of current needs of the BCP area. The JSNA therefore provides a shortcut to committee in terms of horizon scanning vs. accessing the data independently.
6 Self-serve	Primary Source Children and Young People's Partnership Plan	The Children and Young People's Partnership Plan is a high-level strategy that outlines how services will work together to help and support children and young people to improve outcomes across BCP.	Local	Horizon Scanning	This plan was launched in May 2025 and covers 2025-2030. This plan highlights to members of O&S priorities and focus across BCP for children and young people across the partnership.
7 Self-serve	SEND Improvement Plan How we are improving SEND services	These plans are part of the improvement journey of BCP's SEND provision. It highlights areas of improvement on a monthly basis, including partnership additions, action updates and progress made. Progress is monitored via the SEND Improvement board scorecard which is published on the local offer SEND Improvement Board key performance indicator	Local – SEND focus	Horizon Scanning	The Improvement Plans are updated on a monthly basis in advance of the SEND Improvement Boards.

8 Self-serve	Pan Dorset Safeguarding Children Partnership report BCP Safeguarding Children Partnership Multi-agency Safeguarding Arrangements and Priorities	Statutory annual report informing readers about how the Safeguarding has carried out its responsibilities to prevent abuse, harm and neglect of children and young people with care and support needs during the reporting period. The latest published report is for pan-Dorset. The partnerships are now separated, and the next report will be for BCP area specific.	Local	Horizon scanning	It is a statutory requirement for the Safeguarding Children Partnership to publish an Annual Report each year and to present that report to the Council's Health & Wellbeing Board. Many Councils also request that the report is presented to Scrutiny as the report enables a discussion on the work of the Safeguarding Children Partnership.
9 Self-serve	Children's Services Complaints and Compliments 2023-24	The Children's Services Compliments and Complaints Annual Report 2023-2024 provides an overview of the feedback received by BCP Council regarding Children's Services. It details the types and numbers of complaints and compliments, the handling processes, and outcomes. The report also highlights service improvements made based on the feedback, ensuring transparency and continuous improvement in service delivery.	Local – Children's services focus	Horizon scanning	Annual review of the report by the committee will assist the committee to identify any areas of concern that would benefit from scrutiny.

Data Portals

Accessibility	Data Source	Description	Remit	Application	Notes
10 Self-serve	Primary Source Children's Social Care Dashboard	This is a tool that will bring together various indicators and data points to track progress towards the outcomes outlined in the National Framework. The initial indicators will be developed from existing data, and the dashboard will evolve over time to address data gaps and improve understanding of outcomes.	National (but can be filtered to region and LA) Children's Social Care Focus	Deep dive	To inform the framework's principles, enablers, and outcomes, ensuring that the guidance is based on current and comprehensive data. Supports a deep dive review of performance in various aspects of children's social care.

11 Self-serve	Primary Source Find statistics and data - Explore education statistics - GOV.UK	Explore Education Statistics website allows users to search and browse a wide range of statistical summaries and associated data related to education in England including: • School and Pupil Characteristics including age, gender, free school meals eligibility • Local Authority and School Expenditure. • Pupil Attendance • GCSE and A-Level Results • Teacher Training and Workforce: Statistics on new entrants to Initial Teacher Training and characteristics of the school workforce. • SEND: data on children and young people with an education, health and care (EHC) plan in England and, historically, for those with a statement of special educational needs (SEN).	National	Horizon Scanning	Search within Themes to aid scrutiny
12 Self-serve	Statistics: looked-after children - GOV.UK	Provides comprehensive data on children under local authority care in England • This includes information on the number, placement, and legal status of looked-after children, as well as outcomes for looked after children, such as educational attainment and health	Horizon Scanning	National	National picture on Looked after children. Access to annual statistical releases, guidance documents, and historical data, helping users understand trends and patterns in the care and outcomes of looked-after children.

13 Self-serve	Statistics: children in need and child protection - GOV.UK	This page provides comprehensive data on children in need and child protection in England. It includes statistics on: • Children in Need: Information on the number and characteristics of children referred to and assessed by children's social services. • Referrals and Assessments: Data on the number of referrals to children's social care services and the outcomes of these assessments. • Child Protection Plans: Statistics on children who were the subject of a child protection plan. • Outcomes for Children in Need: Data on the educational attainment, health, and other outcomes for children in need, including those looked after by local authorities.	Horizon Scanning	National	Specific to Children in Need and Child Protection statistics The page offers access to annual statistical releases, historical data, and guidance documents, helping users understand trends and patterns in the support and outcomes for children in need
14 Self-serve	Local Government & Social Care Ombudsman	Searchable database of the decisions made on complaints relating to BCP Council Services.	Local – all categories of council services children's social care	Horizon scanning	Maintaining a review of the database will provide an opportunity for the committee to monitor any trends in the levels and types of complaints relating to Children's social care. This will assist in work programming by helping to identify any areas of concern that would benefit from scrutiny.
15 Supported Access	Primary Source BCP hosted statistics, data and census	Portal to a range of public data hosted by BCP Council.	General local data portal, surveys and key facts	Both	For deep dive - Information contained on the portal may give further background to an issue under review – e.g. deprivation and poverty indices in BCP.

16 Requires registration to access	LG Inform – Children's social care reports	Series of ready-made reports on a range of topics to provide an easy way to access a deeper level of information and intelligence about the local area or community.	Local	Deep dive	Automated reports which pull together data sets to give a picture of the key headlines for the local area, including some benchmarking. Councillors may welcome this resource for their own background research prior to scrutiny in committee, to provide some wider context to the data provided by officers within reports.
17 Requires officer/ DiiS support as use of DiiS is restricted to account holders. Technical support from specialised officers essential to also understand any limitations in the data.	Dorset Intelligence & Insight Service (DiiS)	DiiS links data from health and social care across Dorset. Highly granular anonymised data about those using services in the Dorset area. Valuable local tool as data is supplied by a wide range of clinicians and analysts including BCP Children's social care.	Local	Deep dive - reviewing selected data in response to key lines of enquiry	Wide range of health-related information including Children's social care and SEND data that can be sliced in different ways according to specific enquiries. Potential to get lost in the vast range of data available – therefore best suited as a response to clear and specific query from committee. Value of the data is only as good as the initial data that has been provided into the system. Note of caution in approaching the data, and a reason to be guided by an analyst in use of this data. Currently not possible to benchmark BCP against other local authority areas through DiiS.
18 Publicly available, best accessed via public health officers supporting the committee to help navigate the breadth of information available.	Fingertips Public Health Data from Office for Health Improvement and Disparities (OHID) Within the profiles available, Public health outcomes framework and local authority health profiles recommended by Public Health officers as particularly useful datasets for scrutiny	National profiles on a wide range of public health data e.g. Dental services, inequality tools, physical activity Provides a wider overview to operational performance in the BCP area. – e.g. by providing national context, benchmarking against other LA areas, monitoring trends over time for key performance indicators (KPIs)	National – health focus	Supports horizon scanning with ability to review our performance against other areas across a range of indicators. Red flags may give clues about areas that could benefit from deeper scrutiny investigation.	Provides a wider overview to operational performance in the BCP area. – e.g. by providing national context, benchmarking against other LA areas, monitoring trends over time for key performance indicators (KPIs). Some data may breakdown to lower levels, by ward or geographical hospital trust areas. Complements the granular local data available through DiiS to provide an evidence base for deep dive scrutiny.

19 Publicly available, best accessed via officers/ public health officers supporting the committee to help navigate the breadth of information available.	LG Inform (Upon opening the link, it will highlight Children and Families)	National profiles on a wide range of specific KPIs e.g. proportion of 5-year-old children free from dental decay, suicide rates, Juvenile first-time entrants.	National – health focus	Deep dive - reviewing selected data in response to key lines of enquiry Also supports horizon scanning with ability to review BCP performance against other areas across a range of indicators. Red flags may give clues about areas that could benefit from deeper scrutiny investigation.	Provides a wider overview to operational performance in the BCP area – e.g. by providing national context, benchmarking against other LA areas, monitoring trends over time for key performance indicators (KPIs). Some data may breakdown to lower levels, by ward or geographical hospital trust areas. Complements the granular local data available through DiIS to provide an evidence base for deep dive scrutiny
20 Available to relevant senior officers	BCP Internal Officer Data (quantitative data)	A core data set relating to Children's Social Care provides senior managers with visibility of activity, performance and risk. Provided through an interactive Power Bi Dashboard. Monitored and reported by exception into the Executive Board.	Local – children's social care focus	Deep dive	Relevant data will be incorporated into reports to O&S committee according to the subject matter (e.g. workforce recruitment and retention data). O&S committee may request specific data from officers to support deep dive investigations. This is best established through a clear set of key lines of enquiry, agreed in advance by the committee.

21 Available to relevant senior officers	BCP Internal Officer Data (qualitative data)	Data gathered and held by senior officers from a range of mechanisms such as: • Feedback from all stakeholders and staff through a number of different Quality Assurance mechanisms • Audits and Practice Learning reviews • Compliments, Stories of Difference and Our Journeys • Bespoke team level surveys • Safeguarding and serious incident reviews •	Local – Children's social care focus	Deep dive	Relevant data will be incorporated into reports to O&S committee according to the subject matter. O&S committee may request specific data from officers to support deep dive investigations. This is best established through a clear set of key lines of enquiry, agreed in advance by the committee.
22 Available to relevant senior officers	BCP Finance Data (held on Finance and Operations 'F&O' software)	Children's Social Care finance data gathered and held by senior officers	Local – children's social care focus	Both	For horizon scanning - finance related data, when paired with performance data, will provide a fuller picture around the performance of services and the impact of potential savings/ investment proposals. The committee may wish to request a regular update on an agreed set of key finance and performance measures within the adult social care area for horizon scanning purposes and consult annually when work planning. For deep dive – relevant finance data will be incorporated into reports to O&S committee according to the subject matter.

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CHILDREN'S SERVICES OVERVIEW AND SCRUTINY COMMITTEE



Report subject	Work Plan
Meeting date	25 November 2025
Status	Public Report
Executive summary	The Overview and Scrutiny (O&S) Committee is asked to consider and identify work priorities for publication in a Work Plan.
Recommendations	It is RECOMMENDED that: the Overview and Scrutiny Committee review, update and confirm the Work Plan.
Reason for recommendations	The Council's Constitution requires all Overview and Scrutiny Committees to set out proposed work in a Work Plan which will be published with each agenda.
Portfolio Holder(s):	N/A – Overview and Scrutiny is a non-executive function
Corporate Director	Aidan Dunn, Chief Executive
Report Authors	Lindsay Marshall, Overview and Scrutiny Specialist
Wards	Council-wide
Classification	For Decision

Work Plan updates

1. This report provides the latest version of the Committee's Work Plan at Appendix A and guidance on how to populate and review the Work Plan in line with the Council's Constitution. For the purposes of this report, all references to Overview and Scrutiny Committees shall also apply to the Overview and Scrutiny Board unless otherwise stated.
2. Items added to the Work Plan since the last publication are highlighted as **NEW**. Councillors are asked to consider and confirm the latest Work Plan.
3. The most recent [Cabinet Forward Plan](#) can be viewed on the council's website. This link is included in each O&S Work Plan report for councillors to view and refer to when considering whether any items of pre-decision scrutiny will join the O&S Committee Work Plan.

Resources to support O&S Work

4. The Constitution requires that O&S committees take account of the resources available to support proposals for O&S work. Advice on maximising the resource available to O&S Committees is set out in the O&S Work Planning Guidance document referenced below.

Work programming guidance and tools

5. The [Overview and Scrutiny Committees Terms of Reference](#) document provides detail on the principles of scrutiny at BCP Council, the membership, functions and remit of each O&S committee and the variety of working methods available.
6. [The O&S Work Planning Guidance](#) document provides detail on all aspects of work planning including how to determine requests for scrutiny in line with the Council's constitution.
7. The [O&S Framework for scrutiny topic selection](#) was drawn up by O&S councillors in conjunction with the Centre for Governance and Scrutiny. The framework provides detail on the criteria for proactive, reactive and pre-decision scrutiny topics, and guidance on how these can be selected to contribute to value-added scrutiny outcomes.
8. The '[Request for consideration of an issue by Overview and Scrutiny](#)' form is an example form to be used by councillors and residents when making a new suggestion for a scrutiny topic. Word copies of the form are available from Democratic Services upon request by using the contact details on this agenda.
9. Performance information: progress against the council's Corporate Strategy can be viewed on the council's [Performance Dashboard](#). The dashboard includes ratings to show where the council is on target, areas for monitoring or where action is required, and explanations. The dashboard includes measures relevant to all O&S committees and is provided to assist committees in their horizon scanning and work selection process.

Options Appraisal

10. The O&S Committee is asked to review, update and confirm its Work Plan, taking account of the supporting documents provided and including the determination of any new requests for scrutiny. This will ensure member ownership of the Work Plan and that reports can be prepared in a timely way.
11. If updates to the Work Plan are not confirmed there may be an impact on timeliness of reports and other scrutiny activity.

Summary of financial implications

12. There are no financial implications arising from this report.

Summary of legal implications

13. There are no legal implications arising from this report. The Council's Constitution requires that all O&S bodies set out proposed work in a Work Plan which will be published with each agenda. The recommendation proposed in this report will fulfil this requirement.

Summary of human resources implications

14. There are no human resources implications arising from this report.

Summary of sustainability impact

15. There are no sustainability resources implications arising from this report.

Summary of public health implications

16. There are no public health implications arising from this report.

Summary of equality implications

17. There are no equality implications arising from this report. Any councillor and any member of the public may make suggestions for overview and scrutiny work. Further detail on this process is included within O&S Procedure Rules at Part 4 of the Council's Constitution.

Summary of risk assessment

18. There is a risk of challenge to the Council if the Constitutional requirement to establish and publish a Work Plan is not met.

Background papers

- [Overview and Scrutiny Committees Terms of Reference](#)
- [O&S Work Planning Guidance document](#)
- [O&S Framework for scrutiny topic selection](#)
- [‘Request for consideration of an issue by Overview and Scrutiny’](#)

Further detail on these background papers is contained within the body of this report.

Appendices

Appendix A - Current O&S Work Plan

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BCP Council Children's Services Overview and Scrutiny Committee – Work Plan. Updated 01.10.25

Guidance notes:

- 2/3 items per committee meeting is the recommended maximum for effective scrutiny.
- The Children's Services O&S Committee will approach work through a lens of **TBC**
- Items requiring further scoping are identified and should be scoped using the Key Lines of Enquiry tool.

	Subject and background	How will the scrutiny be done?	Lead Officer/Portfolio Holder	Report Information
Meeting Date: 25 November 2025				
1.	Verbal update from John Coughlan on SEND improvement Journey	Verbal Report		
2.	BUDGET SCRUTINY – Inclusion/ SEND Benchmarking	Committee Report	Lisa Linscott Nicola Webb	Was agreed to come as Committee report in March 2025 meeting
3.	Permanent Exclusions & Suspensions	Committee Report	Tanya Smith	
4.	Home to School Transport	Committee Report		Going to 26 November Cabinet
	SEND Sufficiency Strategy	Information only		Going to 26 November Cabinet
	Q1 Corporate KPI's	Information only		Circulated via email to Committee members

Key: Pre-Decision Scrutiny Pro-active Scrutiny

				ahead of 1 October 2025 Cabinet
	O&S Annual Report	Information only	Lindsay Marshall	
	CS O&S Data Toolkit	Information only		
Meeting Date: 27 January 2026				
1.	Youth Service Motion	Committee Report		
2.	Housing for Care Experienced Young People Update	Committee Report	Kelly Dean Ben Tomlin	Was agreed to come as Committee report in June 2025 meeting
3.	BUDGET SCRUTINY HOLD	Committee Report	TBC	
	Family Hubs Working Group – Potential update		TBC	
Meeting Date: 9 March 2026				
1.	Reserved for pre-decision or reactive scrutiny decision or reactive scrutiny consult Cabinet Forward Plan			
2.	BUDGET SCRUTINY HOLD	Committee Report		
3.	Item to be selected from Pro-Active Scrutiny topic list			
Items with Dates to be allocated				

Key: Pre-Decision Scrutiny Pro-active Scrutiny

	Annual report from Corporate Parenting Board to include information on Children in Care To include details of any protected characteristics detailed within the Equalities Act	Committee Report		Enable the Committee to maintain oversight of this issue and target scrutiny as required.
	Children's Services Data Toolkit	TBC	November	To enable the Committee to have a toolkit to consider data relating to CS
	Strengthening Families, Supporting Communities Update (New Service Delivery Model)	TBC	TBC	Was suggested by Officers but was not chosen as a priority by the Committee
	Post 16 Provision	TBC	TBC	Was suggested by Officers but was not chosen as a priority by the Committee
	CS Budget Updates	TBC	Potential focus for budget work 2026	Was suggested by Officers but was not chosen as a priority by the Committee
Working Groups				
	Family Hubs across BCP	Proposed outline of working group included in scrutiny request	TBC	Requires full scoping Appendix E - Request for consideration of an issue by OS Family Hubs - Cllr Brown 003.pdf (bcpcouncil.gov.uk)

	Transition of mental health services from children to adults			CS O&S CAMHS.docx Was chosen by the Committee as their top priority after conclusion of Family Hubs working group
	The increased use of and funding for TAs in schools to support SEND and increase inclusion			Scrutiny request form TAs.docx Was chosen as second priority
	Child Exploitation inc knife crime – To consider and track Cabinet's response to the recommendations and how they could potentially be furthered by the Committee and whether this topic should be revisited by a working group			Discussed at the meeting of 24 July 2024. Was chosen as third priority
	Parent / Carer Forums and wider family engagement channels used by BCP Children's Services and health colleagues			Scrutiny request form Was chosen as fourth priority
	Review of the quality of food served to children at our schools			Scrutiny request form School meals.docx Was chosen as fifth priority
Item Suggestions for Briefing Sessions				
	POTENTIAL BRIEFING SESSIONS	TBC	TBC	TBC

Key:  Pre-Decision Scrutiny  Pro-active Scrutiny

Update Items The following items of information have been requested as updates to the Committee. The Committee may wish to receive these in an alternative to format to Committee updates (e.g. by emailed briefing note outside of the Committee) to reserve capacity in Committee meetings for items of value-added scrutiny.				
	Key Performance Indicators (KPIs) To receive KPIs to include updates on CMOEs and NEETs	Committee Report	Head of Performance for Children and Young People Portfolio Holder for Children and Young People	Consideration being given to include in data tool kit
Annual Report				
•	Virtual School Head Annual Report	Committee Report	Headteacher of Virtual School and College Portfolio Holder for Children and Young People	To be received annually in January as an annual update.
•	School Admissions Arrangements for community and maintained schools	Committee Report	Director of Education	To be received annually in September/November as an annual update.
•	Youth Offending Service Annual Youth Justice Plan	Committee Report	Service Manager, Dorset YJS	To be received annually in June as an annual update.
•	Annual Report from CPB to include info on CIC	Committee Report	TBC	TBC
•	Annual Report – Complaints and Compliments	Committee Report		To note the information only report – in March

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