

Agenda

Dorset County Council



Meeting: Cabinet

Time: 10.00 am

Date: 6 September 2017

Venue: Committee Room 1, County Hall, Colliton Park, Dorchester, Dorset, DT1 1XJ

Rebecca Knox (Chairman)
Tony Ferrari

Steve Butler
Jill Haynes

Deborah Croney
Daryl Turner

Notes:

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- **Public Participation**

Guidance on public participation at County Council meetings is available on request or at <http://www.dorsetforyou.com/374629>.

Public Speaking

Members of the public can ask questions and make statements at the meeting. The closing date for us to receive questions is 10.00am on 1 September 2017, and statements by midday the day before the meeting.

Debbie Ward
Chief Executive

Contact: Lee Gallagher
County Hall, Dorchester, DT1 1XJ
l.d.gallagher@dorsetcc.gov.uk - 01305 224191

Date of Publication:
Tuesday, 29 August 2017

1. **Apologies for Absence**

To receive any apologies for absence.

2. **Code of Conduct**

Councillors are required to comply with the requirements of the Localism Act 2011 regarding disclosable pecuniary interests.

- Check if there is an item of business on this agenda in which the member or other relevant person has a disclosable pecuniary interest.
- Check that the interest has been notified to the Monitoring Officer (in writing) and entered in the Register (if not this must be done on the form available from the clerk within 28 days).
- Disclose the interest at the meeting (in accordance with the County Council's Code of Conduct) and in the absence of a dispensation to speak and/or vote, withdraw from any consideration of the item.

The Register of Interests is available on Dorsetforyou.com and the list of disclosable pecuniary interests is set out on the reverse of the form.

3. **Minutes**

5 - 12

To confirm and sign the minutes of the meeting held on 19 July 2017.

4. **Public Participation**

5. **Cabinet Forward Plan**

13 - 20

To receive the Cabinet Forward Plan.

6. **Panels and Boards**

To receive the minutes of the following meeting:

a) Tricuro Executive Shareholder Group - 27 June 2017

21 - 28

7. **Further approval for procurements over £500k**

29 - 34

To consider a report by the Cabinet Member for Community and Resources.

8. **Special Educational Needs and Disability - Written Statement of Action**

35 - 90

To consider a report by the Cabinet Member for Economy, Education, Learning and Skills.

9. **Quarterly Asset Management Report**

91 - 118

To consider a joint report by the Cabinet Member for Natural and Built Environment and the Cabinet Member for Communities and Resources.

10. **Recommendations from Committees**

To consider the following recommendation:

a) **Approval of the Youth Justice Plan 2017-18**

119 - 148

To consider a recommendation from the Safeguarding Overview and Scrutiny Committee on 6 July 2017.

11. Questions from County Councillors

To answer any questions received in writing by the Chief Executive by not later than 10.00am on 1 September 2017.

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Cabinet

Minutes of a meeting held at County Hall, Colliton Park, Dorchester,
Dorset, DT1 1XJ on Wednesday, 19 July 2017.

Present:

Rebecca Knox	Leader of the Council
Jill Haynes	Deputy Leader and Cabinet Member for Health and Care
Steve Butler	Cabinet Member for Safeguarding
Deborah Croney	Cabinet Member for Economy, Education, Learning and Skills
Toni Ferrari	Cabinet Member for Community and Resources
Daryl Turner	Cabinet Member for Natural and Built Environment

Members Attending:

David Harris, County Councillor for Westham
Byron Quayle, County Councillor for Blandford Forum

Officers Attending:

Debbie Ward (Chief Executive), Richard Bates (Chief Financial Officer), Mike Harries (Corporate Director for Environment and Economy), Jonathan Mair (Head of Organisational Development - Monitoring Officer), Sara Tough (Corporate Director for Children's, Adults and Community Services) and Lee Gallagher (Democratic Services Manager).

For certain items, as appropriate:

Karen Andrews (Head of Business Improvement), Michael Carhart-Harris (Senior Communications Officer), Marc Eyre (Senior Assurance Manager (Governance, Risk and Special Projects)), Darran Gunter (Programme Director LGR), Paul Leivers (Assistant Director - Early Help and Community Services), Ben Print (Programme and Project Manager), Peter Scarlett (Estate and Assets Manager), Roger Sewill (Strategic Estate Management Team Manager) and Mark Taylor (Group Manager - Governance and Assurance).

(Notes:(1) In accordance with Rule 16(b) of the Overview and Scrutiny Procedure Rules the decisions set out in these minutes will come into force and may then be implemented on the expiry of five working days after the publication date.
Publication Date: **Tuesday, 25 July 2017.**

(2) These minutes have been prepared by officers as a record of the meeting and of any decisions reached. They are to be considered and confirmed at the next meeting of the Cabinet to be held on **Wednesday, 6 September 2017.**)

Apologies for Absence

85 No apologies for absence were received.

Code of Conduct

86 There were no declarations by members of disclosable pecuniary interests under the Code of Conduct.

Minutes

87 The minutes of the meeting held on 28 June 2017 were confirmed and signed.

Public Participation

88 Public Speaking

There were no public questions received at the meeting in accordance with Standing Order 21(1).

There were no public statements received at the meeting in accordance with Standing Order 21(2).

Petitions

There were no petitions received at the meeting in accordance with the County Council's Petition Scheme.

Cabinet Forward Plan

89 The Cabinet considered the draft Forward Plan, which identified key decisions to be taken by the Cabinet on or after the next meeting.

The extent to which the Forward Plan was used by overview and scrutiny committees to help form their own work programmes was questioned. In response it was confirmed that the Forward Plan was reported to the Chairmen of the committees on a regular basis through the Overview and Scrutiny Management Board. The time horizon of the Plan was also questioned as it did not contain a long period of notice for items and did not therefore inform the committees sufficiently far in advance about forthcoming items of business, where the Cabinet would benefit from the input of the overview and scrutiny committees.

It was suggested that items should be forward planned with up to 12-18 months' notice in order to provide committees with the opportunity to develop policy and contribute towards proposals for the Cabinet to consider. Similar discussions had been held at the last two Cabinet meetings and a meeting would now be arranged between the Cabinet and Chairmen of the committees to discuss forward planning arrangements. Cllr David Harris, as the Chairman of the Audit and Governance Committee and the Overview and Scrutiny Management Board, welcomed the opportunity to meet with the Cabinet.

It was noted that two items on the Plan which referred to Special Educational Needs had been amended prior to the meeting to reflect Cllr Deborah Croney, as the responsible Cabinet Member.

On discussing the Plan, no further items were identified at the meeting.

Resolved

That a meeting be arranged between the Cabinet and Chairmen of the Overview and Scrutiny committees to discuss forward planning arrangements.

Panels and Boards

90 The Cabinet received the following minutes and recommendations from Panels and Boards:

Dorset Health and Wellbeing Board - 21 June 2017

90a Cllr Rebecca Knox highlighted and welcomed the newly introduced informal second part of the Board's meetings. On this occasion it was an extremely interactive session about Prevention at Scale and the formation of locally based Health and Wellbeing Boards, and included contributions from partners outside of the Board. It was noted that the record of the informal part of the meetings would be made more comprehensive in future minutes.

Noted

Executive Advisory Panel on Pathways to Independence - 23 June 2017

90b The Cabinet considered the following recommendations from the meeting:

Recommendation 14 – Progress on ‘Making Charges Fairer’

It was recognised that the proposals would enable the Council to become more Care Act compliant. However it was noted that wording on letters was being changed to make it very clear that the default position regarding payment by direct debit. Cllr Haynes was content that the work to amend the wording was underway and would be applied shortly.

It was also confirmed that although the new Mosaic ICT system had a standard configuration, this was exactly what was needed to make a big difference to the way the service worked, and in respect of the culture of the service, it was not anticipated that there would be any issues with the introduction as the new system was very much needed and welcomed.

Resolved

That the minutes of the meeting be received and the following recommendations be approved:

Recommendation 9 – Appointment of Vice-Chairman

That Cllr Mary Penfold be appointed as an additional member to the Panel.

Recommendation 14 – Progress on ‘Making Charges Fairer’

That the Cabinet be asked to accept the significant progress towards prompt billing offered by the implementation of the standard configuration of Mosaic, and resume work towards the objective of billing two weeks in advance and two weeks in arrears in the autumn.

Reason for Recommendation

To help secure a sustainable approach to the County Council’s Corporate Plan aims that people in Dorset be safe, healthy, independent and prosperous.

Joint Public Health Board - 28 June 2017

90c Cllr Tony Ferrari highlighted the pleasing financial position of the Public Health Service and highlighted the continued good service provided across all areas of responsibility.

Noted**Dorset Police and Crime Panel - 29 June 2017**

90d The Chief Executive drew attention to the appointment of Mike Short as the new independent Chairman of the Dorset Police and Crime Panel, and acknowledged the four years that Cllr John Adams had undertaken the role and the valuable contribution he had made to the Panel.

Noted**Risk Management and Governance**

91 The Cabinet considered a joint report by the Leader of the Council and Cabinet Member for Community and Resources in relation to the Council’s risk management arrangements.

Cllr Rebecca Knox introduced the item and explained that the item had been requested by the Cabinet to ensure oversight of the Council’s risk management arrangements, and in particular the quality and use of data in areas of risk, performance and finance. The Group Manager (Assurance and Governance) and the Senior Assurance Manager (Governance, Risk and Special Projects) provided a summary presentation to outline the Council’s risk management arrangements, including how risk was aligned to the Council’s corporate aims or the key parts of the Council’s healthy organisation model. It was highlighted that risk should never be a

barrier to change, or seen as a negative process, and should be harnessed as a tool to take advantage of opportunities and challenges. The presentation also provided insight into how risk was managed through the Forward Together Programme, the Council's risk appetite, and how plans were actively managed to mitigate risks.

The Cabinet was grateful for the presentation which had provided the assurance that had been requested, and as such the Annual Governance Statement was signed by Cllr Rebecca Knox in her capacity as Leader of the Council. In addition to the arrangements outlined in the presentation, it was suggested that Cabinet members be made aware of risks as they were raised, and received regular updates in order to proactively address and manage their areas of responsibility.

Resolved

1. That the presentation on the most significant risks, and how they are reviewed, challenged and monitored in contributing to an outcomes focussed approach be noted.
2. That Cllr Tony Ferrari, as the Cabinet Member for Community and Resources, be allocated the role of member risk champion.
3. That the reporting mechanism to keep Cabinet members apprised of new and worsening significant risks and the effectiveness of existing and proposed mitigation be supported, with the addition of increased briefing of risks for Cabinet members.

Reason for Decisions

To ensure that decision making was made on a risk informed basis to support delivery of improved outcomes for the residents of Dorset, based on an approved risk appetite.

Request for approval to re-procure and award a contract for the provision of self service (RFID) technology in libraries

92 The Cabinet considered a report by the Cabinet Member for Economy, Education, Learning and Skills regarding the contract arrangements in relation to self-service technology through kiosks in the Council's, and community managed, libraries to enable users to check books in and out, pay charges and check their account without the need for staff intervention.

Cllr Deborah Croney summarised the report and confirmed that the kiosks provided an important service to enable staff to undertake other duties and increase capacity for community activities. It was confirmed that the new arrangements would see the reduction of kiosks from 53 to 43 and to also introduce card payment facilities that warranted a card payment facility. The procurement process would look to consider an award the contract at an appropriate financial level, as outlined in the report, and if the amount was more than intended the matter would be reconsidered by the Cabinet. It was also requested that the cost of maintenance be monitored closely as part of the contract arrangements.

Resolved

1. That the contract for the re-provision of self service equipment and the subsequent support and maintenance arrangements be tendered.
2. That delegated authority be granted to the Corporate Director for Children's, Adults and Community Services, after consultation with the Cabinet Member for Economy , Education, Learning and Skills, following the tendering process, subject to it being within the budget figure in the report, to consider and award a contract that represents best value to the Council over the life of the contract arrangement to the preferred supplier identified through the tender evaluation process for the replacement self-service equipment and support and maintenance.
3. That the cost of maintenance be monitored closely as part of the contract arrangements.

Reasons for Decisions

1. To ensure that the County Council was operating legally.
2. To ensure compliance with Dorset County Council's Constitution and Contract Procedure Rules.
3. To provide innovative and value for money services by delivering a cost efficient and effective service for the management and delivery of the self-service kiosks.

Questions from County Councillors

93 No questions from County Councillors were received.

Exempt Business

94 **Resolved**

That in accordance with Section 100 A (4) of the Local Government Act 1972 to exclude the public from the meeting in relation to the business specified in minutes 95-97 as it was likely that if members of the public were present, there would be disclosure to them of exempt information as defined in paragraphs 1, 3, 4, 6a and 6b of Part 1 of Schedule 12A to the Act and the public interest in withholding the information outweighs the public interest in disclosing the information to the public.

B3073 Junction with A338, Blackwater Interchange, Christchurch - Compulsory Purchase Order and Side Roads Order

95 The Cabinet considered an exempt report by the Cabinet Member for Natural and Built Environment to seek authority in principle to use a Compulsory Purchase Order (CPO), if required, under the Highways Act 1980 and Acquisition of Land Act 1981, to acquire the land and rights needed for the Blackwater Interchange B3073 Christchurch Road, junction with A338 Bournemouth Spur Road in the parish of Hurn, Christchurch.

Resolved

1. That the Cabinet authorises in principle the making of a compulsory purchase order for A338/B3073 Blackwater Interchange, if negotiations are not successful, under the Highways Act 1980 and Acquisition of Land Act 1981 in respect of the land shown coloured pink on the drawing at Appendix 2 of the Cabinet Member's report – Blackwater Interchange Indicative Land Acquisition Plan.
2. That Cabinet authorises in principle the making of a Side Roads Order (SRO) under Sections 14 and 125 of the Highways Act 1980 for the Blackwater Junction scheme, as required.

Reasons for Decisions

1. The reason for seeking agreement in principle to make a CPO. If it was necessary to make a CPO officers would report to Cabinet with specific detail on the land to be included in such an order.
2. The acquisition of the land was necessary to construct the proposed improvement to the highway network at the A338/B3073 Blackwater Interchange in Christchurch.
3. The Side Roads Order (SRO) at Blackwater Junction may be required to establish the changes and diversion of the existing highway network away from the current line as required in the proposed scheme.
4. The proposed scheme formed an integral part of the Bournemouth International Growth (BIG) schemes which contributed towards delivering a network for the future to boost economic growth in the Bournemouth Airport area which meets the needs of the Dorset Local Enterprise Partnership (DLEP) objectives and was included in the Local Transport Plan (LTP3) 2011-2026 and the Christchurch and East Dorset Local Plan Part 1 – Core Strategy.

The Community Offer for Living and Learning

96 The Cabinet considered a joint exempt report by the Leader of the Council, the Cabinet Member for Economy, Education, Learning and Skills, and the Cabinet Member for Community and Resources on the Community Offer for Living and

Learning, including progress made to date, budget position, and proposed activity within the pilot areas.

Cllr Deborah Croney provided an extensive summary of Living and Learning and the development of the offer so far which included the need to prioritise against the financial benefits (revenue and capital), asset realisation and to refine the services that could be delivered in areas, noting that each area would have different issues and circumstances. It was highlighted that extensive input and information from communities was needed in order to assess what could be delivered in the timeframes available. Cllr Croney also asked that Option 2 be amended to reword paragraph 7.3 to say "Investigate further strategic opportunities" rather than "Drive forward the strategic opportunities" as these were not yet fully defined.

The Cabinet recognised the dependency on external influences to maximise what could be developed as an offer in each area. It was felt that progressing with the pilot areas outlined in the report was appropriate, and that a Living and Learning Steering Group be formed with invitations to the relevant Cabinet members to participate.

Cllr David Harris addressed the Cabinet as the local member for Westham to highlight that although engagement was good in Weymouth this would only deliver smaller savings and there was a need to concentrate on the bigger strategic savings, with public sector partners. He highlighted a number of teams that would be difficult to relocate and free up accommodation.

Cllr Byron Quayle also highlighted similar issues as a local member for Blandford Forum and felt that there were so many areas to consider to make sure people did not lose out, such as possible relocation of some services in Blandford.

It was explained that the outcome of the Clinical Commissioning Group's Clinical Services Review would be known by 20 September 2017 and could provide a better understanding of health reconfiguration of buildings, which could benefit the development of localised Living and Learning offers.

The importance of delivery timescales was highlighted as any delay would have a negative impact on the possible savings that could be achieved. It was also suggested that the progress made so far in engaging communities needed to be kept and not to lose any momentum if possible. Cllr Croney explained the importance of the prioritisation of each opportunity through a 'desktop exercise' approach, and for this information to be included in the report to the Cabinet in September 2017.

Confirmation was given that information on public sector assets provided as part of the One Public Estate was shared with other public sector bodies across Dorset and all were informed of the asset management position across Dorset. However it was acknowledged that not all stakeholders were aware of the information and that the Steering Group should develop communications messages for key stakeholders, particularly to districts and boroughs, to better clarify what the programme was aiming to achieve, and what was happening in each area.

In addition, it was confirmed that Living and Learning remained part of the Council's Way we Work Programme, and the Corporate Director for Children, Adults and Community Services would continue to act as its strategic champion. The Cabinet felt that following the desktop prioritisation any 'quick wins' and uncontentious decisions should be able to be made at the earliest opportunity to realise savings, including local member involvement. It was agreed that delegated authority (to the Assistant Director (Early Help and Community Services) and Programme Director (Local Government Reorganisation), following consultation with the Cabinet Member for Economy, Education, Learning and Skills) would be used to determine which opportunities required consideration by Cabinet prior to formal public consultation on

a case by case basis, which needed full business cases, and which could be progressed without Cabinet approval.

Resolved

1. That the progress made to date be noted.
2. That the Living and Learning programme continues to be driven as part of the Forward Together programme.
3. That option 2 (as amended in the minute above) to proceed with a targeted phased countywide rollout of the community offer for Living and Learning be supported.
4. That the prioritisation criteria (appendix 1 of the report) be approved with a view to these being applied to other local areas.
5. That the previous Cabinet approvals in 2016 for delegated authorities be amended to reflect the new Cabinet portfolios and senior officer structures.
6. That delegated authority be granted to the Assistant Director (Early Help and Community Services) and Programme Director (Local Government Reorganisation), after consultation with the Cabinet Member for Economy, Education, Learning and Skills to determine which opportunities require consideration by Cabinet prior to formal public consultation on a case by case basis, which needed full business cases, and which can be progressed without Cabinet approval.
8. That a further report to be provided to the Cabinet with recommendations on priorities, potential savings and timescales in September 2017.
9. That a Living and Learning Steering Group be formed with invitations to the relevant Cabinet members to participate.

Reasons for Decisions

To reflect some of Cabinet's key objectives:

1. To lead the community planning process, both within the region and locally, and the search for best value.
2. To be the focus for forming partnerships with other public, private, voluntary and community sector organisations to address local needs.

Integrated Prevention and Support Service

- 97 The Cabinet considered a report by the Cabinet Member for Health and Care on the development of an Integrated Prevention and Support (IPS) Service, including a review of existing contracts. A review of the Partnership of Older People Programme (POPPs) was currently underway and would inform the development of the IPS service. It was also noted that the proposal would form a significant saving in 2018-19 whilst providing a more targeted service.

Resolved

1. That the proposal for the development of the Integrated Prevention and Support Service be approved.
2. That further work on the alignment of POPPs to support the service be approved.
3. That inclusion of mental health recovery services, subject to business case approval, be agreed.

Reasons for Decisions

The development of the service would:

1. Release £782k pa cashable savings.
2. Introduce targeted support to older people regardless of tenure.
3. Increase opportunities to maximise benefits.
4. Provide evidenced based support for people with challenging behaviour to gain and maintain settled accommodation.
5. Reduce the number of people having to re-enter crisis services.
6. Improve joint agency working to support people with complex needs.

Meeting Duration: 10.00 am - 11.50 am

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**Cabinet Forward Plan
(Cabinet Meeting Date – 27 September 2017)**

Explanatory note: This work plan contains future items to be considered by the Cabinet. It will be published 28 days before the next meeting of the Cabinet.

This plan includes matters which the Leader has reason to believe will be the subject of a key decision to be taken by the Cabinet and items that are planned to be considered in a private part of the meeting. The plan shows the following details for key decisions:-

- (1) date on which decision will be made
- (2) matter for decision, whether in public or private (if private see the extract from the Local Government Act on the last page of this plan)
- (3) decision maker
- (4) consultees
- (5) means of consultation carried out
- (6) documents relied upon in making the decision

Any additional items added to the Forward Plan following publication of the Plan in accordance with section 5 of Part 2, 10 of Part 3, and Section 11 of Part 3 of The Local Authorities (Executive Arrangements) (Meetings and Access to information) (England) Regulations 2012 are detailed at the end of this document.

Definition of Key Decisions

Key decisions are defined in the County Council's Constitution as decisions of the Cabinet which are likely to -

- "(a) result in the County Council incurring expenditure which is, or the making of savings which are, significant having regard to the County Council's budget for the service or function to which the decision relates namely where the sum involved would exceed £500,000; or
- (b) to be significant in terms of its effects on communities living or working in an area comprising two or more electoral divisions in Dorset."

Membership of the Cabinet

Rebecca Knox	Leader of the Council
Jill Haynes	Deputy Leader of the Council and Cabinet Member for Health and Care
Steve Butler	Cabinet Member for Safeguarding
Deborah Croney	Cabinet Member for Economy, Education, Learning and Skills
Tony Ferrari	Cabinet Member for Community and Resources
Daryl Turner	Cabinet Member for Natural and Built Environment

How to request access to details of documents, or make representations regarding a particular item

If you would like to request access to details of documents or to make representations about any matter in respect of which a decision is to be made, please contact the Democratic Services Manager, Corporate Resources Directorate, County Hall, Colliton Park, Dorchester, DT1 1XJ (Tel: (01305) 224191 or email: l.d.gallagher@dorsetcc.gov.uk).

Date of meeting (1)	Matter for Decision/ Consideration (2)	Decision Maker (3)	Consultees (4)	Means of Consultation (5)	Documents (6)	Lead Officer
27/09/17 Page 14	Key Decision - Yes Part exempt Community Offer for Living and Learning - Update on the programme and consideration of further roll out.	Cabinet Cabinet Member for Economy, Education, Learning and Skills (Deborah Croney)	Debbie Ward – Chief Executive Sara Tough – Corporate Director for Children’s, Adults and Community Services Richard Bates – Head of Financial Services Jonathan Mair – Head of Organisational Development (Monitoring Officer) Living and Learning Members Steering Group	Consultees provided draft copy of Cabinet paper	16 June 2016 - People and Communities Overview and Scrutiny Committee & 29 June 2016 - Cabinet 11 October 2016 People and Communities Overview and Scrutiny Committee & 26th October 2016 – Cabinet. 1 February 2017 Cabinet. Asset Management Capital Priorities 19 July 2017. Cabinet.	Paul Leivers, Assistant Director - Early Help and Community Services
27/09/17	Key Decision - Yes Open Fostering Business Improve and Support Programme	Cabinet Cabinet Member for Safeguarding (Steve Butler)			None	Vanessa Glenn, Assistant Director for Care and Protection

18/10/17	<p>Key Decision - Yes Open The County Council's Budget and precept for 2018/19; Medium Term Financial Strategy 2018/19 to 2020/21; and Capital Programme 2018/19 to 2020/21</p>	<p>Cabinet Leader of the Council (Rebecca Knox)</p>	<p>Members and officers, representatives, Citizens' Panel and general public.</p>	<p>Seminars and briefings for members and officers, Audit and Governance Committee meetings, information on dorsetforyou.com and questionnaires for business community and the public.</p>	None	Richard Bates, Chief Financial Officer
18/10/17	<p>Key Decision - Yes Open To agree publication of pre-submission draft Mineral Sites Plan and subsequent submission of plan</p>	<p>Cabinet Cabinet Member for Natural and Built Environment (Daryl Turner)</p>	<p>Bournemouth Borough Council; Borough of Poole</p>	<p>Officer contact; emails; presenting plans to Bournemouth and Poole Cabinets; previously flagged up work at Bournemouth, Dorset and Poole Minerals and Waste (Policy) Joint Advisory Committee. Public consultation to follow Cabinet.</p>	Pre-submission Draft Mineral Sites Plan	Mike Garrity, County Planning, Minerals and Waste Team Leader

18/10/17	Key Decision - Yes Open To agree publication of pre-submission draft Waste Plan and subsequent submission of plan	Cabinet Cabinet Member for Natural and Built Environment (Daryl Turner)	Bournemouth Borough Council; Borough of Poole.	Officer contact; emails; presenting plans to Bournemouth and Poole Cabinets; previously flagged up work at Bournemouth, Dorset and Poole Minerals and Waste (Policy) Joint Advisory Committee. Public consultation to follow Cabinet.	Bournemouth Borough Council; Borough of Poole	Mike Garrity, County Planning, Minerals and Waste Team Leader
18/10/17 Page 16	Key Decision - Yes Fully exempt Special Educational Needs and Disability (SEND): Growth Bid Funding	Cabinet Cabinet Member for Economy, Education, Learning and Skills (Deborah Croney)	-	-	SEND Local Area Inspection Letter	Sara Tough, Corporate Director for Children's, Adults and Community Services
18/10/17	Key Decision - No Open Corporate Performance Monitoring Report To consider and comment on performance against the budget and corporate plan.	Cabinet Cabinet Member for Community and Resources (Tony Ferrari)	-	-	None	John Alexander, Senior Assurance Manager - Performance
15/11/17	Key Decision - Yes Open Direction of Travel and Programme for Care and Protection	Cabinet Cabinet Member for Safeguarding (Steve Butler)	-	-	None	Vanessa Glenn, Assistant Director for Care and Protection

6/12/17	Key Decision - Yes Open The County Council's Budget and precept for 2018/19; Medium Term Financial Strategy 2018/19 to 2020/21; and Capital Programme 2018/19 to 2020/21	Cabinet Leader of the Council (Rebecca Knox)	Members and officers, representatives, Citizens' Panel and general public.	Seminars and briefings for members and officers, Audit and Governance Committee meetings, information on dorsetforyou.com and questionnaires for business community and the public.	None	Richard Bates, Chief Financial Officer
6/12/17	Key Decision - Yes Open Quarterly Asset Management Plan Various decisions regarding property performance, property transactions, project variations and project commit to invest	Cabinet Cabinet Member for Community and Resources (Tony Ferrari)	Environment Directorate / Children's Services / Adult & Community Services / Corporate Resources	All consultees submit contributions to the report	'Quarterly Asset Management Report'	Peter Scarlett, Estate and Assets Manager
6/12/17	Key Decision - Yes Open Dorset County Council School Admission Arrangements 2018-19 and School Transport 2017-18	Cabinet	All schools, neighbouring local authorities, all town and parish councils, all Members and parents and carers.	Consultation Tracker E-mail to all district, town and parishes E-mails to Members E-mails to all schools (requesting they highlight in newsletters and on school website) DCC Admissions Website	None	Ed Denham, Schools Sufficiency Manager

To be determined	Key Decision - Yes Open Health and Wellbeing Board Update	Cabinet Leader of the Council (Rebecca Knox)	-	-	None	David Phillips, Director of Public Health, Dorset, Bournemouth and Poole
To be determined	Key Decision - Yes Open Tendering of the operational management of Children's Centres Clusters in East Dorset and Weymouth and Portland	Cabinet Cabinet Member for Economy, Education, Learning and Skills (Deborah Croney)	Children's Services leadership team.	Briefing paper and discussion at Children's Services Leadership Team on 1st September 2015.	Dorset Children and Young	Tom Smith, Contracts and Marketing Development Manager
To be determined	Key Decision - Yes Open Children's Services expenditure on housing related support for young people following the tendering exercise led by Adult Services	Cabinet Cabinet Member for Safeguarding (Steve Butler)	Children's Services leadership team.	Briefing paper and discussion at Children's Services Leadership Team on 1st September 2015.	Dorset Children and Young	Tom Smith, Contracts and Marketing Development Manager

Private Meetings

The following paragraphs define the reasons why the public may be excluded from meetings whenever it is likely in view of the nature of the business to be transacted or the nature of the proceedings that exempt information would be disclosed and the public interest in withholding the information outweighs the public interest in disclosing the information to the public. Each item in the plan above marked as 'private' will refer to one of the following paragraphs.

1. Information relating to any individual.
2. Information which is likely to reveal the identity of an individual.
3. Information relating to the financial or business affairs of any particular person (including the authority holding that information).
4. Information relating to any consultations or negotiations, or contemplated consultations or negotiations, in connection with any labour relations matter arising between the authority or a Minister of the Crown and employees of, or office holders under, the authority.
5. Information in respect of which a claim to legal professional privilege could be maintained in legal proceedings.
6. Information which reveals that the authority proposes:-
 - (a) to give under any enactment a notice under or by virtue of which requirements are imposed on a person; or
 - (b) to make an order or direction under any enactment.
7. Information relating to any action taken or to be taken in connection with the prevention, investigation or prosecution of crime.

Dorset County Council

Business not included in the Cabinet Forward Plan

Is this item a Key Decision	Date of meeting of the Cabinet	Matter for Decision/Consideration	Agreement to Exception, Urgency or Private Item	Reason(s) why the item was not included
		NONE		

The above notice provides information required by The Local Authorities (Executive Arrangements) (Meetings and Access to information) (England) Regulations 2012 in respect of matters considered by the Cabinet which were not included in the published Forward Plan.

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improving lives, building independence

Tricuro Executive Shareholder Group held at Beech House, Poole on
27 June 2017

PRESENT - Karen Rampton (Chairman), Pauline Batstone, Blair Crawford, Tony Ferrari, Mike Greene, Jill Haynes, Mohan Iyengar, Ros Kayes and David Walsh.

OFFICERS PRESENT:

Sue Ross (Director, Adults and Children, Bournemouth Borough Council)
Jan Thurgood (Strategic Director - People Theme - Borough of Poole)
Helen Coombes (Adults and Community Services Director, Dorset County Council)
Alison Waller (Managing Director - Tricuro)
Phil Rook (Finance Director - Tricuro)
Colin Dennis (Chairman - Tricuro)

The meeting started at 10.00 am and finished at 11.10 am

1. APOLOGIES AND MEMBERSHIP OF THE GROUP

The Group welcomed new Members to their first meeting following the Dorset County Council Elections in May 2017.

The Group was advised that apologies were received from Nicola Greene (Bournemouth Borough Council) and Steve Butler (Dorset County Council). The Group was advised that Pauline Batstone (Dorset County Council) attended as a reserve Member for Steve Butler. The Group was advised that apologies had been received from Councillors Jane Kelly and Lawrence Williams (who was now Mayor of Bournemouth) and therefore there was no reserve Member for Councillor Nicola Greene.

2. ELECTION OF CHAIRMAN FOR 2017/18

DECISION MADE:

That Councillor Karen Rampton, Borough of Poole, be elected Chairman for 2017/18.

3. CODE OF CONDUCT

There were no declarations of interest made at this meeting.

4. MINUTES

DECISION MADE:

That the minutes of the Executive Shareholder Group meeting held on 14 March 2017 were confirmed.

5. MANAGING DIRECTOR UPDATE

The Managing Director reported that arrangements had been made for an informal discussion with the company's barrister following the meeting. She presented her update report explaining that as the Company concluded its 2nd year of trading it was evident that there had been significant progress in transforming its services, achieving efficiencies across services and improving services which were responsive to local community need. The Group was informed that there had been considerable activity across the Company which had focussed on the delivery of the in-year efficiency savings: a focus on the quality of services and transforming some services as the company increased its trading position in line with the business case.

The Group was advised that more detail on performance would be included in the report from the Finance Director. The Managing Director commented on the outcome of recent inspections by the CQC all of which had returned "Good" outcomes with the exception of Sidney Gale House in Bridport which received a "requires improvement" notice. The Managing Director reported that the Quality and Assurance Committee would focus on this outcome and ensure there are lessons learnt from Sidney Gale which would inform wider learning across the company. A Member commented on the future development of Sidney Gale House and it was noted that a pre-application process would be happening shortly.

The Group was advised of the establishment of the Rewards and Recognition Committee in recognising and developing staff. The Managing Director highlighted the work undertaken on marketing and communications. She commented on the trading for day care and care home provision. A Member asked if the rebranding and marketing campaign was being delayed until after any employment tribunal. It was confirmed that this was not the case.

The Managing Director reported on service developments and the work with Dorset County Council on the development of a programme to ensure that efficiencies were realised of up to £2.5m in 2018-19. She indicated that the work would include the financial modelling of what the efficiencies would mean for the Company and investment in services. The Group was informed that more clarity would be provided at the next meeting of the Group in September 2017. Helen Coombes, Director, Dorset County Council reported that in benchmarking with comparatives, costs were high whilst acknowledging the level of independence and choices which could be provided.

Jan Thurgood, Strategic Director, Borough of Poole reported that each of the Councils, in view of the financial challenges they faced, needed to have discussions with Tricuro on the nature of the services provided. She referred to the potential need for the reconfiguration of services. A Member commented on the stability of the Company and the need for a broader conversation on strengthening its growth and development. This approach was supported by other Members and in particular that discussions should be shared with Tricuro. The Director, Dorset County Council reported that to operate in the market the Company needs to be competitive acknowledging that some business may not be attractive in the market place. She explained that part of this process would be to use the Company for independence and complex care and to benchmark these areas. The Strategic Director, Borough of Poole highlighted the dialogue with Shareholders, working together and sharing plans with the view of reporting to the next meeting of the Group in September on a strategic approach.

The Managing Director reported on in year service reductions which had been achieved through vacancy management. Tricuro was not providing all of the “contracted hours” in reablement due to vacant reablement posts. Therefore, the reduction in funding for the reablement service has been achieved through vacancy management and has not required actual hours delivered to be reduced or resulted in loss of any workforce.

The Group was advised of the relocation of clients from Broadwaters to the new Coastal Lodge with an increase in beds to 40. A Member commented on the refurbishment at Coastal Lodge. The Managing Director highlighted the transitional changes which would enable staff to receive training and support as a new model of care and support would be implemented. The Group was advised of the development of the community hub, Bridport Connect, which was on plan to commence building in January 2018.

The Managing Director reported that the Company had tendered for the development of a new build 80 bedded care home in Poole. She explained that this will be a test of the Company’s ability to operate competitively in the market place. The tender has been submitted with Dorset Healthcare as a partner to offer the added value that partnership working will bring to the care and support of clients in the home and staff.

The Group was updated on the work of Tricuro on nutritional care and a recent article for Older People. The Managing Director reported on the approach taken by the Company in successfully generating evidence and outcome measures around the importance of good nutritional care for older people as well as potential cost saving data. The Group was also advised of the development in the transformation of Day Services including the provision of activities. The Managing Director highlighted the Leadership Development Programme which would further enhance the leadership capabilities of executive directors, service directors and middle managers across the Company.



The Managing Director reported on the recent Open Day to coincide with the National Care Home Open Day which had been well supported by the Company's partners, the local communities and gave staff an opportunity to visit other services.

Sue Ross, Director, Bournemouth Borough Council referred to the tendering process for the Poole Care home emphasising that commissioning required a considerable amount of time regardless of the outcome. She referred to the capacity of the Company and asked to what extent Tricuro could service that activity. The Managing Director reported that the tender process was a straight forward process which would provide a platform on what can be delivered. She explained that 86% of controllable costs in Tricuro are its staffing and therefore a focus on remodelling the staffing structure within the home and optimising the input from Dorset Healthcare was essential to deliver a financially competitive tender. A Member referred to the financial impact and the need to consider how the market was responding. The Chairman of the Company commented on the tendering process and the impact on the Company. In response to a question the Managing Director reported that the Company was working with Grant Thornton to identify where competitively the company sits in the market place - an essential piece of work to understand opportunities for future growth and development.

DECISION MADE:

That as requested the Group commented on the progress made and key issues currently faced by Tricuro as detailed above.

6. FINANCE AND PERFORMANCE UPDATE

The Group considered a report from the Finance Director which provided an update on the financial position of Tricuro, the forecast for 2017/18 and detailed the outturn for 2016/17 including a copy of the audited group financial statements for the Company.

The Finance Director reported that the financial statements have been audited by KPMG, Tricuro's external auditors. KPMG will issue an unmodified audit report. The Finance Director reported that 2016/17 was a difficult year with significant savings targets to be delivered, on-going pressures and delays in implementation of revised terms and conditions which were implemented on 10 March 2017. Officers explained that much has been done by services across the whole of Tricuro to halt non-essential spend, hold vacancies, re-prioritise spend and to challenge planned expenditure and increase external income. This has resulted in the one-off surplus in 2016/17 of £314k which represents 0.75% of turnover. Tricuro have continued to provide high quality services with recent CQC inspection reports highlighting good outcomes across regulated services. This will be reported at the Annual General Meeting on 8 August.



The Group was informed that the latest forecast for 2017/18 was an underspend of £137k based on data to the end of May 2017 with the alignment of performance and the financial position of the Company. The Finance Director reported on staff turnover for the 12 months to the end of April which remained significantly below the average for this sector. He explained that 6 staff left due to the changes made in March 2017. The Group was advised that currently sickness rates were 9.37 pro rata days lost per FTE compared to the target of 8. The Finance Director reported on the current income levels which were £420k compared to the target of £395K.

A Member asked what arrangements would be put in place after 30 June for support services. The Finance Director explained that the support services contract was currently being reviewed. Members asked what would happen after 2018. The Director, Dorset County Council reported that the current contract was being looked at and consideration given to identifying what Tricuro need over the next three years. A Member referred to fees and changes and the opportunity to grow this part of the business. The Chairman of Tricuro commented on the expectations in respect of income generation, the constraints on the Company which was set up as a commercial trading company and the approach of shareholders in investing in the Company. The Member indicated that if there was any strategic change in direction of the Company then this needed to be reported back to the relevant committees of the authorities. She explained that the Company needed resources to grow and to see how it could develop. The Chairman of the Company commented on taking a five to ten-year view with a clear direction from the shareholders. A Member commented on the current model and potential options available. The Group discussed the options available for the Company which included the potential to be competitive in the open market and controlling costs. The Director, Dorset County Council reported that by September there would be an opportunity to feedback to the Group on these issues understanding the financial position of each of the Local Authorities. A Member suggested that it would be useful to see a timetable in exploring opportunities and potential which was the initial vision. The Managing Director reported that when trading targets were set the Company was looking innovatively at technology which potentially provided a better service delivery mode. Members commented on the impact of the accountable care system and LGR on the Company acknowledging the need for continual dialogue in respect of the reshaping of services in the contract as well as the trading capacity.

DECISION MADE:

1. That the outturn position for 2016/17 be noted.
2. That the 2017/18 forecast position as at end of May 2017 be noted.



7. MEMORANDUM OF UNDERSTANDING

DECISION MADE:

That there were no changes to the Terms of Reference as circulated with the agenda.

8. DATES FOR NEXT MEETING OF THE GROUP

DECISION MADE:

That Members of the Group be consulted on options for the date of the next meeting in September 2017.





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Cabinet

Dorset County Council



Date of Meeting	6 th Sept 2017
<u>Cabinet Member</u> Tony Ferrari – Community & Resources <u>Lead Officer</u> Richard Bates – Chief Financial Officer	
Subject of Report	Further approval for procurements over £500k
Executive Summary	<p>The County Council defines key decisions as those with a financial consequence of £500k or more.</p> <p>A report giving details of planned procurements during 2017/18 was submitted to cabinet in March. There are now further projects with a potential value of over £500K which need approval during the current financial year and which were unknown at the March Cabinet date.</p> <p>Details of contracts that are known/likely to hit the £500k threshold are set out in Appendix 1 for Cabinet’s consideration and approval.</p>
Impact Assessment:	<p>Equalities Impact Assessment: Assessments are carried out as part of the business case and rationale for each of the procurements when triggered by the assessment screening process.</p>
	<p>Use of Evidence: This schedule relies on information on current contracts and input from services regarding procurements that are likely to require approval by Cabinet.</p>
	<p>Budget: Service budgets will need to incorporate funding required for the procurements set out in this paper.</p>
	<p>Risk Assessment: Individual risk assessment and management processes are undertaken before and during the procurement processes, as set out in the procurement toolkit.</p>
	<p>Other Implications:</p>
Recommendation	<p>The Cabinet is asked to consider the contents of this report and give approval for the procurements and awards of contracts set out in Appendix 1.</p>

	In giving this approval, Members are approving further procurements set for implementation during 2017 (or as specifically noted otherwise) on terms to be agreed by the delegated officer, Lead Director or Portfolio Holder for each arrangement.
Reason for Recommendation	Cabinet is required to approve all key decisions with financial consequences of £500k or more. It is also good governance to provide Cabinet with a summary of all proposed procurements prior to them formally commencing. Planning procurements effectively ensures effective stakeholder engagement, efficient sourcing, compliance with regulations and contract procedure rules and best value for money.
Appendices	1. Further procurements planned for 2017/18 where the value is expected to exceed £500k.
Background Papers	Procurement toolkit
Officer Contact	Name: Roger Allen, Senior Procurement Officer Tel: 01305 221279 Email: r.allen@dorsetcc.gov.uk

1. Key decisions

- 1.1 Key decisions are those which are required to be taken by Cabinet as they are likely to:
- result in the County Council incurring expenditure which is significant in terms of the Authority's budget and specifically where they are likely to exceed £500k
 - be significant in terms of the effect communities living or working in an area comprising two or more electoral divisions in the county.
- 1.2 This report is coming to Cabinet because since the original schedule of over £500k procurements was approved in March 2017, several other arrangements have emerged which need approval before further progress can be made.

2. Summary of contracts

Dorset families matter

- 2.1 Dorset Families Matter is a broad partnership that is committed to delivering the national Troubled Families initiative, locally. As the lead partner Dorset County Council is seeking a range of suitably qualified and experienced service providers to provide:
- a service,
 - an intervention and/or
 - an activity
- that can be termed a Family Support Package and can deliver positive outcomes in line with those set out in the Dorset Families Matter Outcomes Plan.
- 2.2 The national programme is currently set to run until 31 March 2020 and the focus is now on local authorities and their public sector partners to transform the way services that support families with multiple and complex needs are delivered. To meet this challenge the approach and principles of Dorset Families Matter have been embedded through the newly established Family Partnership Zones. These zones will deliver early help to identified children, young people and families where provision of appropriate help can improve outcomes and sustain change. In the long term this will reduce dependence on public sector organisations and associated costs.

Framework for collection and disposal of waste and recycling

- 2.3 This framework will be set up for use by Schools, academies and Tricuro. It will ensure that schools and academies can access arrangements where waste is disposed of lawfully. By setting up a single, supplier framework (rather than using a national framework) local suppliers are able to tender for this opportunity. DCC will receive an annual income from this arrangement via rebates.

Framework for Primary School Meals

- 2.4 Consultation has taken place with schools, many of which stated that they would like access to a local framework in order to give them a choice of suppliers and ensure that arrangements are compliant. Supplier engagement has taken place with a number of local providers. The framework will be split into nine geographical lots – meals must be produced in Dorset.
- 2.5 The framework will be awarded in January 2018 and schools will then need to carry out further competition (supported by Dorset Procurement) ready for a contracts to start on of 1st August 2018. Indications are that there will be approximately 30 schools using the framework from 2018, with more joining in following years when

their current contract arrangements come to an end. DCC will receive an annual income from this arrangement via rebates.

Provision of catering services

- 2.6 Twynham Learning Academy: This contract will ensure compliant arrangements (in both terms of procurement and National Food Standards) are in place for all six schools within the Academy. Two of the schools are secondary and so not able to access the primary school meal framework mentioned earlier. The Academy will pay DCC to carry out this procurement.
- 2.7 Woodroffe School: This contract for on-site catering will ensure compliant arrangements (in both terms of procurement and National Food Standards) are in place for Woodroffe School. Woodroffe School will pay DCC to carry out this procurement.
- 2.8 Purbeck School: This contract for on-site catering will ensure compliant arrangements (in both terms of procurement and National Food standards) are in place for Woodroffe School. Purbeck School will pay DCC to carry out this procurement.

Richard Bates
Chief Financial Officer
August 2017

Appendix A - Contracts 2017/2018 where the contract value is expected to exceed £500,000

Contract Description	Portfolio Lead	Head of Service	Contract Term	DCC Total Spend over Contract Term £K	Sourcing Strategy (Public Services (Social Value) Act 2012)	Fit with Council Priorities and Vision	Risk Category
A framework of Family Support Packages for the Dorset Families Matter Project	Children's Services: Steve Butler	Patrick Myers	1+1 framework	Possibly in excess of 500	Call off Framework/ Open Tender	Promoting Health, Developing Independence, Keeping Young People and Families Safe	Low
Framework for Collection and Disposal of Waste and Recycling (Tricuro & Schools and Academies)	Children's Services Deborah Croney Community & Resources - Tony Ferarri	Jay Mercer	4 year Framework Agreement	DCC £0 (others £1.2m)	Call off Framework/ Open Tender	Enabling Economic Growth	Medium
Framework for Primary School Meals - a framework with multiple suppliers , schools will have the option of accessing this framework when their current contract ends.	Children's Services Deborah Croney Community & Resources - Tony Ferarri	Jay Mercer	4 year Framework Agreement	DCC £0 (possible value for schools £12m)	Call off Framework/ Open Tender	Promoting Health, Wellbeing and Safeguarding, Enabling Economic Growth	Medium
Provision of Catering Services Twynham Learning - School meal service for Twynham, The Grange, Twynham Primary, Christchurch Junior, Stourfield infants and Stourfield Junior School.	Children's Services Deborah Croney Community & Resources - Tony Ferarri	Jay Mercer	6 years	DCC £0 (Twynham Learning £3.4m)	Open Tender	Promoting Health, Wellbeing and Safeguarding, Enabling Economic Growth	Medium
Provision of Catering Services Woodroffe School - School meal service at Woodroffe School.	Children's Services Deborah Croney Community & Resources - Tony Ferarri	Jay Mercer	6 years	DCC £0 (Woodroffe School £1.2m)	Open Tender	Promoting Health, Wellbeing and Safeguarding, Enabling Economic Growth	Low
Provision of Catering Services Purbeck School - School meal service at Purbeck school.	Children's Services Deborah Croney Community & Resources - Tony Ferarri	Jay Mercer	6 years	DCC £0 (Purbeck School £1.6m)	Open Tender	Promoting Health, Wellbeing and Safeguarding, Enabling Economic Growth	Low

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Cabinet

Dorset County Council



Date of Meeting	6 September 2017
Officer	<p><u>Lead Member</u> Cllr Deborah Croney, Cabinet Member for Economy, Education, Learning and Skills</p> <p><u>Director</u> Sara Tough, Corporate Director for Children, Adults and Communities</p>
Subject of Report	Special Educational Needs and Disability – Written Statement of Action
Executive Summary	<p>Children’s Services and their partners were subject to a joint inspection by Ofsted and the Care Quality Commission (CQC) of support for children and young people SEND in the Dorset local area between 23 and 27 January 2017. This looked at how well all partners in Dorset were putting the government’s 2014 SEND reforms into practice. Inspectors spoke with children and young people, parents and carers, and staff from the council and NHS. They also visited schools and looked at a wide range of information, including what we said about ourselves.</p> <p>What did Ofsted say? On 16 March 2017, the lead inspector informed partners their findings. There were a large number of strengths recorded in the report but the inspectors highlighted four main areas where they felt Dorset needs to improve:</p> <ol style="list-style-type: none"> 1. Strategic planning across education, health and social care including checks to make sure leaders are held to account. 2. Delays in turning statements of special educational needs into Education, Health and Care Plans (EHCPs) and completing new EHCPs. 3. Parents experiencing a lack of support, communication and involvement. 4. Monitoring and quality assurance to challenge and support services and improve outcomes for children and young people. <p>As a result the partners were required to produce a joint Written Statement of Action (WSOA) setting out how we will tackle these areas. The attached document is the final written statement of action that has been accepted as fit for purpose by Ofsted and the CQC. This very clearly sets out our priorities and the actions that will be undertaken by partners to make the experience of children and young people with SEND and their families a good one in relation to the services we provide.</p>

Special Educational Needs and Disability – Written Statement of Action

Budget	Capacity and volume have been cited in the WSOA as impacting on our ability to fulfil some of the timescales that are resulting in parental dissatisfaction. Some activity is already underway to address at least some of these issues for 2017-18, SEND reform grant is being used to fund the additional cost but a residual net cost of £45k is anticipated. There are financial implications of meeting the requirements of the WSOA beyond 2017-18 and these will be brought back to Cabinet in another paper in October once these have been fully assessed.
Impact Assessment: <i>Please refer to the protocol for writing reports.</i>	Equalities Impact Assessment: The work to which the WSOA refers is directed towards Children with SEN and or a disability. It is part of our overall work that supports the education, care and wellbeing which is detailed in other EQIA's
	Use of Evidence: Ofsted and the CQC used a range of evidence to make their judgements and we have responded to those statements with a range of activities that are evidence based. We have a good knowledge of needs of Children and Young People with SEND and this has been applied in the context of the work set out in the WSOA
	Implications for Health and Wellbeing: Through the WSOA we will with partners improve children and young people's experience of services, including health.
	Risk Assessment: Having considered the risks associated with this decision using the County Council's approved risk management methodology, the level of risk has been identified as: Current Risk: Medium Residual Risk: Medium Mitigated through monitoring of the action plan by the SEND Improvement Delivery Group and regular feedback to Department for Education representative.
Recommendation	That Cabinet note the contents of the WSOA and request updates on progress towards the outcomes detailed in the statement.
Reason for Recommendation	It is important that Cabinet due to the financial and reputational impacts of this area of work remains informed on progress and achievement against the Written Statement of Action.
Appendices	A. Ofsted acceptance of final WSOA B. Written Statement of Action
Background Papers	None
Officer Contact	Name: Patrick Myers, Assistant Director, Design and Development Tel: 01305 224648 Email. P.myers@dorsetcc.gov.uk

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3 August 2017

Ms Sara Tough
Director of Children's Services
Dorset County Council
Colliton Park
Dorchester
DT1 1XJ

Dear Ms Tough

This letter is written in accordance with The Children Act 2004 (Joint Area Reviews) Regulations 2015¹ to inform the principal authority of Dorset that Ofsted and the Care Quality Commission have jointly evaluated the written statement of action submitted to Ofsted on 1 August 2017.

The statement of action is deemed to be fit for purpose in setting out how the local area will tackle the significant areas of weakness identified in the published report letter.

I note and appreciate your acknowledgement and swift response to strengthen your statement of action to tackle the four key weaknesses identified at the inspection in January 2017. Your revised action plan confirms your collaborative approach, working with the area's clinical commissioning group and a range of partners and stakeholders including schools, health services and social care. You have also included arrangements to include representation from parents, carers, children and young people in the delivery of your strategy.

Your written statement of action records the considerable progress you have made to tackle the identified weaknesses since the inspection. You have included appropriate success criteria and milestones for completion of actions with designated leaders set against each action. This will enable leaders across the local area to evaluate the impact your actions are having on improving services for children and young people who have special educational needs and/or disabilities. It is reassuring to note your drive and commitment to ensure that 100% of statements will be converted to education, health and care plans in time to meet statutory timescales.

¹ The Children Act 2004 (Joint Area Reviews) Regulations 2015
www.legislation.gov.uk/ukSI/2015/1972/regulation/4/made.



The written statement of action must be published on local websites² so that parents, carers, children and young people can understand the actions you are taking to improve the effectiveness of the local area in identifying and meeting needs, and improving outcomes for children and young people who have special educational needs and/or disabilities.

Yours sincerely,

A handwritten signature in black ink that reads 'Bradley Simmons'.

Bradley Simmons, HMI
Regional Director South West

² Regulation 4 (5); www.legislation.gov.uk/uksi/2015/1792/regulation/4/made



Dorset Local Area Written Statement of Action for Special Educational Needs and Disabilities (SEND) 23 June 2017

Purpose of this statement

Between 23 January and 27 January 2017, Ofsted and the Care Quality Commission (CQC) conducted a joint inspection of the Dorset local area to judge its effectiveness in implementing the special educational needs and disability (SEND) reforms set out in the Children and Families Act 2014. As a result of the findings of the inspection, Her Majesty's Chief Inspector (HMCI) determined that a Written Statement of Action is required to address four areas of significant weakness in the local area's practice. Dorset County Council (DCC) and the NHS Dorset Clinical Commissioning Group (CCG) are jointly responsible for submitting the written statement.

Since the inspection, the county council's Corporate Director of Children, Adults and Community Services and the CCG's Director of Service Delivery have been working with services and stakeholders to understand the actions we need to take to make improvements. These include: parent/carer representatives; employees of DCC and Dorset CCG; schools and colleges; Schools Forum; Public Health Dorset; Dorset HealthCare University Foundation Trust and other health care providers; and voluntary and community sector organisations.

This is our statement of action. It sets out:

1. Our vision for improvement and the values that will drive culture change;
2. The arrangements for working together to oversee this work;
3. A summary of the outcomes we are seeking to achieve to address the weaknesses identified and the improvements we will make;
4. The high priority actions we will take to address the weaknesses identified by inspectors.

In addition, we include:

5. A summary of the additional areas for development and the improvements we will make to address these;
6. The actions we will take to address the areas for development identified by the inspectors;
7. The framework we will use to measure our performance.

A glossary in [Appendix 1](#) explains some of the terms we use throughout the document.

1. Our vision and values

Our vision is to have a well-planned system that works across education, health and social care to improve outcomes for children, young people with SEND and their families.

This will make sure we:

- provide help early
- complete assessments and plans on time, and;
- involve and listen to children with SEND and their families.

We will work together to give children and young people with SEND in Dorset the best chance to succeed in life. We want them to enjoy family life and to go to school as near to their home as possible.

To do this we will work to understand how:

- families can be best supported to care for children through early action;
- universal services can be more inclusive;
- we can use data to inform future provision of specialist bases and special schools;
- we can deliver a seamless pathway to adulthood and independence;
- services can be integrated where it can improve outcomes, and;
- Education Health and Care assessments are completed within statutory timescales.

Together we will support children and young people with SEND to maximise their potential at home, at school and at college and to prepare well for adulthood. Our young people will have opportunities to work, live independently, participate fully in their community and live full, healthy lives.

Our work will be shaped by a number of core values to make sure everything we do is in keeping with our vision, the SEND reforms and the Care Act. These values will be shared by all involved in our work and will drive our improvement programme. We will:

- make it easy for you to get the support you need and make sure you get it at the right time
- be person-centred and celebrate your individuality
- be outcomes-focussed and make sure we make a difference work with you, rather than do things to or for you.

2. The way we will work together

We will make sure the right people are involved in this improvement plan and in development of our joint strategy. This will include councillors, senior leaders, partners, schools, colleges, staff, parents and carers, and young people. Improvement work will be delivered through a set of work-streams overseen by a joint SEND Improvement Delivery Group. This group will be jointly accountable to the Dorset Strategic Alliance, a sub-group of the [Dorset Health and Wellbeing Board](#), which is leading integration and partnership work between the county council, public health and NHS bodies and the Dorset Schools Forum which has responsibility for the High Needs Block of the Dedicated Schools Grant. The work of the SEND Delivery Group will also be reported to the CCG's Audit and Quality Group and the County Council's Transformation Programme Board.

The structure in [Appendix 2](#) shows how communication, delivery and accountability will work.

1. Key Outcomes to achieve the vision

We have identified a set of outcomes linked directly to the areas of weakness identified by inspectors. These are provided in the table below along with a summary of the key improvements that we will make to have the greatest impact.

Outcome 1: A single system working together across education, health and social care for joint outcomes	
What Ofsted and CQC said	Outcome we are seeking to achieve
<p><i>“... weaknesses in strategic planning, integrated with health and social care, which include clear monitoring and evaluation arrangements to ensure that leaders are held to account for improving children and young people’s outcomes”</i></p>	<p>Improvements in the quality, timeliness, accessibility and reliability of services mean that children and young people with SEND, and their families, can trust and have confidence that services are working together. This leads to improvement in their child’s outcomes and enables effective preparation for adulthood.</p>
What we are doing about it	
<p>We will have a joint strategy between education, health and care ensuring that:</p> <ul style="list-style-type: none"> • All relevant professionals will contribute to planning to meet the needs of children and young people with SEND including appropriate preparation for adulthood • There is more consistent early identification, assessment of need and offer of early help • Attainment of children and young people with SEND improves • Professionals working with children and young people with SEND and their families have the skills and knowledge they need to ensure that they work together effectively 	
Outcome 2: Getting it right first time: appropriate, effective and timely joint assessment, planning and review of need that is personalised to the child or young person with SEND	
What Ofsted and CQC Said	Outcome we are seeking to achieve
<p><i>“... low conversion rates from statements of special educational needs to education, health and care plans and a lack of timely completions of new EHC plans with appropriate and personalised outcomes”</i></p>	<p>Children and young people, and their families, are easily able to access advice, information and support. Where specialist assessment is necessary, this takes place in a timely way and leads to effective and personalised plans. These plans are reviewed so that they remain relevant to the changing needs of children and their families, leading to improved life chances. All SEN Statements are converted to EHC Plans by the end of March 2018</p>

Special Educational Needs and Disability – Written Statement of Action

What we are doing about it

We will work together to ensure that:

- Assessments, conversions and reviews are completed within the statutory timescale of 20 weeks
- There is timely transfer of statements to EHCPs by end of March 2018
- Plans are outcomes focused and personalised
- Professionals have the skills and knowledge they need to ensure they contribute effectively to SEND assessment, planning and review processes

Outcome 3: Talking to, listening to and involving children, young people and parents and carers

What Ofsted and CQC said

“... a significant proportion of parents describe their concerns at the extent of the delays, the lack of support and lack of communication, transparency and involvement at strategic and individual level”

Outcome we are seeking to achieve

Children and young people, and their families, are listened to, and their views and wishes are acted on and respected.

What we are doing about it

We will work together to make sure that:

- Children, young people, parents and carers have greater involvement in service planning, development and evaluation
- Children, young people, parents and carers have access to better information about help, support and provision
- We improve the customer experience of all SEND processes
- Professionals working with children, families and young people with SEND have the skills and knowledge to communicate and engage effectively with them and work in a person-centred, outcome-focused way.

Outcome 4: Use effective monitoring and quality assurance procedures to challenge, support and develop provision

What Ofsted and CQC said

“... weaknesses in the monitoring and quality assurance procedures to challenge and support provision and improve outcomes for children and young people.”

Outcome we are seeking to achieve

A culture of accountability ensures that all parts of the system focus on making life better for children and their families. Business intelligence is used to identify emerging need and plan excellent services and settings that support children and young people to meet their aspirations. We produce high quality Education, Health and Care Plans

What we are doing about it

Special Educational Needs and Disability – Written Statement of Action

We will make sure there is shared accountability across the system by:

- Ensuring all organisations monitor performance
- Using business intelligence to plan services and provision
- Sharing data and information to provide better support
- Always seeking to improve, particularly the quality of Education, Health and Care Plans

2. Action plan to address the areas of weakness identified during the inspection

This section shows the **high priority actions** we will take to address the areas of significant weakness identified during the inspection.

1. The development of an education, health and care joint strategy for SEND						
	Action	Timescale	Measures of success	Lead	Progress and Milestones	Status
1.1 Page 43	Engage with stakeholders	May to June 2017	Engagement by stakeholders from education, health and social care at relevant workshops and meetings.	Corporate Director of Children, Adults and Community Services SRO for Dorset CCG, Director of Nursing and Quality, CCG and Head of Partnerships (Children's Services) Dorset CCG	Engagement with schools, health services, voluntary and community sector, parents and carers to identify priorities (Jun 17)	Complete
	Establish governance arrangements to deliver improvements	July 2017	There are clear lines of accountability for monitoring progress and delivering improvements.	Assistant Director Strategy, Design and Development, DCC	SEND Improvement Board established and met three times (Jul 17) Review of existing groups and governance arrangements (Jul 17)	Complete Complete

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			Regular attendance of appropriate professionals at relevant groups There is appropriate partner representation (including parents and carers) on working groups to deliver the strategy.		SEND Health Forum re-established and meeting bi-monthly (Jun 17)	Complete
					Long term governance arrangements agreed (Jul 17)	Complete
					SEND Delivery Group established (Jul 17)	Complete
1.3	Publish Strategy	Dec 2017	Draft strategy published for consultation.	Assistant Director	Review of best practice (Jul 17)	Complete

1. The development of an education, health and care joint strategy for SEND

Page 44	Action	Timescale	Measures of success	Lead	Progress and Milestones	Status
			Feedback received from all relevant stakeholders from education, health and social care and from children, young people and parents and carers Strategy agreed by relevant governance groups Joint strategy is known and referred to as the key driver for SEND Strategic Planning and review across the local area	Strategy, Design and Development, DCC Head of Partnerships (Children's Services) Dorset CCG	Joint strategy working group established (Jul 17)	Complete
					Analysis of areas for development (Aug)	On target
					Draft strategy agreed by SEND Delivery Group (Sep 17)	On target
					Public consultation on draft strategy (Oct to Dec 17)	On target
					Consultation with and ratification of strategy with Strategic Alliance, Schools Forum and CCG Audit and Quality (Oct to Dec 17)	On target
					Final Strategy published (Dec 17)	On target

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					Identification of areas for development (Sep17)	On target
1.4	Design and agree a Performance Management Framework	Dec 2017	We will understand our current performance, identify where we need to focus attention and put an action plan in place to make improvements.	Senior Manager – Business Intelligence, DCC	Baseline assessment of performance (Aug 17)	On target
			This will enable a suite of performance measures to be put in place.	Assistant Director Strategy, Design and Development DCC Head of Partnerships (Children’s	Identification of areas for improvement (Sep 17)	On target
			An outcomes based accountability (OBA) performance management framework is in place with measures from across the system. A whole system approach is taken to understand whether joint priorities		Suite of performance measures and targets agreed by SEND Delivery Group (Sep 17)	On target

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The development of an education, health and care joint strategy for SEND

Action	Timescale	Measures of success	Lead	Progress and Milestones	Status
		are being met across education, social care and health	Services) Dorset CCG		
		Action is taken to address areas of poor performance Learning is shared across the system Reporting at the Strategic Alliance enables leaders from across the system to take responsibility, action and learning from the agreed performance management framework.	Corporate Director of Children, Adults and Community Services, DCC Director of Nursing and Quality, CCG	Performance reporting on agreed measures at Strategic Alliance commences (Dec 17)	On target

2. Ensuring assessments, conversions and reviews of children and young people’s education, health and care needs assessments and plans (EHCPs) are completed within the statutory timescale of 20 weeks

	Action	Timescale	Measures of success	Lead	Progress and milestones	Status
Page 46	2.1 Increase capacity in SEND team: <ul style="list-style-type: none"> • 1FTE Manager • 1FTE Team leader • 1FTE data administrator • 3.8 FTE Business support • 3 FTE Planning coordinators • 2 FTE Contacts assistants 	June 2017	Staff in post Due to an increase in capacity the % of new EHCPs completed within statutory timescales of 20 weeks increases by 10% each month to reach 100% by March 31 st . 100% conversions of statements to EHCPs by deadline of 31 st March 2018	Manager SEN Team, DCC	Recruit additional staff in SEND Assessment and Review Team (Jun 17)	Complete
					Extend contracts for Planning and Review Officers to April 2018 (Jun 17)	Complete
					100% conversions completed (Mar 18)	On target
					100% EHC Plans completed within statutory timescales	On target
2.2	Commission an external provider to increase capacity for transfer processes	June 2017	100% conversions of statements to EHCPs by deadline of 31 st March 2018	SEN Commissioner, DCC	Pilot contract awarded (Jun 17)	Complete
					Quality assurance test (Jul 17)	Complete
					Providers appointed (Jul 17)	On target
					100 conversions completed per month (June – Mar 18)	On target
					100% conversions completed (Mar 18)	On target

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2.3	Introduce targets for SEND case workers to help us understand and measure performance	Aug 2017	% of new EHCPs completed within statutory timescales of 20 weeks increases by 10% each month to reach 100% by March 31 st	Manager SEN Team, DCC	Targets introduced and individual performance is being reviewed monthly by team managers (Jun 17)	Complete
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2. Ensuring assessments, conversions and reviews of children and young people’s education, health and care needs assessments and plans (EHCPs) are completed within the statutory timescale of 20 weeks

	Action	Timescale	Measures of success	Lead	Progress and milestones	Status
Page 47			Parent/carer and child/young people’s satisfaction surveys indicate reduced levels of stress and greater levels of confidence in the system		Weekly reporting to Senior Leadership Team commences (Jul 17)	Complete
				Senior Manager – SEND, DCC	Team performance monitoring of trajectory improvement plan at monthly leadership team meetings (50% Oct 17; 100% Mar 18)	On target
2.4	Set targets for and monitor EHC plan timeliness to ensure compliance with statutory timescales	Mar 2018	% of new EHCPs completed within statutory timescales of 20 weeks increases by 10% each month to reach 100% by March 31 st % Decision to assess within 6 weeks increases to 100% % Decision to issue final plan within 16 increases to 100%	Children’s Services Leadership Team, DCC	Monthly monitoring at leadership team meetings commences (Jun 17) <ul style="list-style-type: none"> % decisions to assess within 6 weeks % decisions to issue plan within 16 weeks % final plan issues at 20 weeks 	Complete
					All late statements issued (Aug 17)	On target
					50% EHCP issued within 20 weeks (Oct 17)	On target

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					100% EHC Plans issued within 20 weeks (Mar 17)	On target
2.5	Increase Education Psychology contribution to statutory processes	Sept 2017	Quarterly monitoring shows appropriate contribution by Education Psychology Services	Principal Educational Psychologist, DCC	Define the core role of the Educational Psychology Service (Jun 17)	Complete
					Allocate Educational Psychology time (Jul 17)	Complete
					Quarterly monitoring of contribution commences (Sep 17)	On target

2.6 Ensuring assessments, conversions and reviews of children and young people's education, health and care needs assessments and plans (EHCPs) are completed within the statutory timescale of 20 weeks

48	Action	Timescale	Measures of success	Lead	Progress and milestones	Status
2.6	Audit timeliness of contributions from health and social care to EHCPs	Oct 2017	Quarterly monitoring shows that contributions to EHCP are timely, transparent and appropriate. Where there are areas of poor performance the issues are appropriately escalated, and acted upon.	Manager SEN Team, DCC Designated Medical Officer	Develop a process for monitoring contributions and attendance through our IT systems ((May 17)	Complete
					Test process (Jul 17)	On target
					Stronger links between DMO and SEN team established (Jul 17)	On target
					Quarterly monitoring of contribution commences (Sep 17)	On target
2.7	Produce a Toolkit regarding Annual	Dec 2017	Improvements in quality of annual reviews including a true person	Manager SEN Team, DCC	Review of current guidance on 'Schoolsnet' (Aug 2017)	On target

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	Reviews for schools/settings practitioners and families		centred approach across all schools, settings and services. Measured through regular audits of reviews by the SEN Assessment Team.		New revised toolkit produced (Nov 17)	On target
					Toolkit available on Dorset Nexus website (Dec 17)	On target
Page 49	Jointly review pathways and information flows for EHCP processes to identify and address delays in the process including reviewing the paperwork we use to make it as easy as possible for everyone to contribute	Dec 2017	Pathway reviewed and areas for improvement identified SEND team are judged to have efficient processes (SW Audit) Processes are proportionate and flexible to meet individual need	Manager SEN Team, DCC	Map current processes (Jun 17)	Complete
				Head of Partnerships (Children's Services) Dorset CCG	Joint meeting between health and DCC to map information flows (Jun 17)	Complete
				Business Analyst, DCC	Identify appropriate electronic case recording system (Dec 17)	On target
				Designated Medical Officer	Revise health medical report into standard form (Sep 17)	On target
				Manager SEN Team, DCC	Review all forms and paperwork (Dec 17)	On target
				Programme Manager (DCC)	Introduction of Dorset Care Record (electronic system for sharing	On target

2. Ensuring assessments, conversions and reviews of children and young people's education, health and care needs assessments and plans (EHCPs) are completed within the statutory timescale of 20 weeks

	Action	Timescale	Measures of success	Lead	Progress and milestones	Status
					information between health and social care (Sept 18)	
2.9	We will make sure that there is attendance at	Jan 18	Attendance at reviews	Director of Children, Adults and Community Services/	Attendance at all transfer reviews by DCC officers (Jul 17)	Complete

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Page 50	reviews by appropriate education, health, and social care practitioners. Priority will be given to: All Transfer Reviews Y9 Transition Reviews Complex cases requiring multiagency attendance		QA process of reviews is designed and in place to ensure quality and identify opportunities improvement	Head of Partnerships (Children’s Services) Dorset CCG Manager SEN Team, DCC	Finalise operational agreement between CCG and health providers clarifying expectations (Oct17)	On target
					Attendance at all Year 9 Transfer Reviews (Dec 17)	On target
					Attendance by all professionals at all complex cases (Dec 17)	On target
					Ratification of agreement (Jan 18)	On target
					Implementation of agreement (Oct 18)	On target
					Identify and implement a process for overseeing the reviews of (Mar 18)	On target
250	Monitor provider performance to ensure that statutory requirements are met and put an improvement programme in place to ensure they comply with statutory requirements	Sept 18	Ratified Joint Agreement will form part of systematic monitoring arrangements within contractual arrangements. Reporting to Audit and Quality in the CCG Quarterly monitoring of timeliness demonstrates improved performance	Director of Service Delivery, Dorset CCG.	Agree monitoring requirements with providers (Jan 18)	On target
					Systematic Performance Monitoring in place (Sep 18)	On target

3. Involving children, young people and their families in developing our provision and services

	Action	Timescale	Measures of success	Lead	Progress and milestones	Status
Page 51	3.1 Write a joint communication plan that shares the improvement work we are doing for use by all partner agencies.	Sept 2017	Children, young people and their families know the issues we are trying to address and what we are doing about them Professionals working with children, young people know the issues we are trying to address and what we are doing about them	Chair – SEND Delivery Group in collaboration with communication leads from partner organisations	Director letter to parents/carers (April 17)	Complete
					Parent Carer Council release statement (May 17)	Complete
					Review Dorset Parent Carer Survey Results survey results and young researcher's surveys to inform communication (Jul 17)	Complete
					Stakeholder Engagement (Jun 17)	Complete
					Agree a set of key messages to be used by all partners across the SEND system (Sept 17)	On target
3.2	Ensure appropriate parent/carer and/or child/young person representation at key decision making groups and forums including (but not limited to): <ul style="list-style-type: none"> SEND Delivery Group SEND Health Forum Person Centred Approaches 	June 2017	Participants report feeling listened to and that action is taken to meet their needs	Chair – SEND Delivery Group	Invite Dorset Parent Carer Council to SEND Improvement Board (Apr 17)	Complete
					Invite the Dorset Parent Carer Council to SEND Delivery Group (Jun 17)	Complete
				Head of Partnerships	Invite Parent/Carer representation to Health Forum (Jun 17)	Complete

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<ul style="list-style-type: none"> Local Offer Steering Group Integrated Children’s Community Health Services Programme 			(Children’s Services) Dorset CCG	Parents and Carers fully involved in Integrated Children’s Community Health Services Programme (Jun 17)	Complete
			Chair – SEND Delivery Group	Review Terms of Reference of decision making groups and identify appropriate parent/carer representation (Sep 17)	On target

3. Involving children, young people and their families in developing our provision and services

	Action	Timescale	Measures of success	Lead	Progress and milestones	Status
Page 58				SEND, Participation and Engagement Lead, DCC	Consult with children and young people on how best to ensure representation and the support required (Oct 17)	On target
	3.4	Collect feedback on service satisfaction and customer experience	Sept 2017	Satisfaction with process/support and services understood and areas for development identified	Partnership and Workforce Manager, DCC	Establish feedback mechanism on front of the local offer to collect feedback (Jun 17)
					Publish ‘You said, we did’ on local offer	Complete
				Senior Manager – Business Intelligence, DCC	Undertake a survey of parents and carers (Sept 17)	On target
3.4	Facilitate an annual conference for children and young people with SEND and professionals across the SEND system to work together on service planning and evaluation	Feb 2018	Attendance and satisfaction survey of events	Chair – SEND Delivery Group	Planning commences (Sep 17)	On target
					Conference held (Feb 18)	On target

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3.5	Work with children, young people and families to review our local offer to ensure that it appropriate, easy to understand and improve accessibility and search function on web hosted information	March 2018	SEND children and young people and their families/carers actively participate in the further development of Dorset's local offer and other communication channels as measured by LO feedback All providers have reviewed their local offer record within timescales	Chair – Local Offer Steering Group	Appoint an administrator to oversee and coordinate contributions to the local offer and website reviews (Sep 17)	On target
				Partnerships and Workforce Manager, DCC		
				DCC Corporate Communications Lead	Review branding of Local Offer (Aug 17)	On target
				Partnerships and Workforce Manager, DCC	Write a marketing plan to ensure local offer reaches those that need to know about it (Jun 17)	Complete

3. Involving children, young people and their families in developing our provision and services

Page 53	Action	Timescale	Measures of success	Lead	Progress and milestones	Status
				Head of Partnerships (Children's Services) Dorset CCG	Review of health section of the Local Offer by CCG and parents and carers (Sep 17)	On target
				Partnerships and Workforce Manager, DCC	Relaunch Local Offer with marketing plan (Jan 18)	On target
					Streamline publication of individual Local Offers for schools, childcare, Further Education and health services on our directory (Mar 18)	On target
			Migrate Local Offer to new website as part of DCC website replacement (Mar 18)		On target	

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3.6	Undertake further engagement with children, young people, parents and carers in relation to SEND as part of the clinical services review (CSR) transformation programme to coproduce new service delivery models that will meet required needs. Review the plan for CSR and the Equality Impact Assessment to ensure that the needs of children and young people with SEND and their families are fully considered.	Dec 2017	Communication plan for CSR fully considers children and young people with SEND Children, young people and families have confidence they have been part of the process and understand the need for transformation Any new service model(s) meets required needs and are coproduced.	Head of Partnerships (Children’s Services) Dorset CCG	Update Equality Impact Assessment (May 17)	Complete
					Independent analysis of consultation findings published (Jun 17)	Complete
					Establish work streams and develop plans and timescales following CCG Governing Body decision (Sep 17)	On target
3.7	Write the Dorset SEND Participation and Engagement	March 2018	SEND children and young people and their		Appoint Participation and Engagement Officer (Sep 17)	On target

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3. Involving children, young people and their families in developing our provision and services

	Action	Timescale	Measures of success	Lead	Progress and milestones	Status
	Strategy in co-production with parents, young people and stakeholders		families/carers actively participate in service design and planning	SEND Participation and Engagement Officer, DCC	Engagement and co-production activities (Sep to Dec 17)	On target
					Draft strategy published (Jan 18)	On target
					Final Strategy and implementation plan agreed (Mar 18)	On target
3.8	Improve the customer experience of the EHCP process	Mar 2018	Reduction in number and associated costs of complaints and tribunals and	Manager SEND Team, DCC	Ensure single point of contact regarding assessment and plan and add direct contact details to all correspondence with families (Jun 17)	Complete

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subsequent request for formal mediation

Parental survey shows there is a high level of communication, honesty and transparency; they feel informed and included; any delays and reasons have been communicated, with expected completion date

DCC Customer Service Standards are met

Professionals have the information they need to support children with SEND effectively

Chair SEND Delivery Group	Workshop on identifying professionals that can take on key worker role and development of plan to take this forward (Sept 17)	On target
Manager SEND Team, DCC	Publish clear and detailed information on EHCP process for on Dorset Local Offer (Sep 17)	On target
	Publish information on the roles and responsibilities of key professionals on the Dorset Local Offer (Sep 17)	On target
	Update printed literature (Sep 17)	On target
	Co-produce information guides with Dorset Parent Carer Council and SENDIASS (Sep 17)	On target
	Review all templates letters, forms and correspondence with parents and carers to ensure accessibility (Dec 17)	On target

3. Involving children, young people and their families in developing our provision and services

	Action	Timescale	Measures of success	Lead	Progress and milestones	Status
					Customer Care Training module for staff includes effective written communication (Jan 18)	On target
				Senior Manager – SEND, DCC	Co-production workshop with SENCos (Nov 17)	On target

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4. Improving the monitoring and quality assurance						
	Action	Timescale	Measures of success	Lead	Progress and milestones	Status
4.1	Develop regular management review of health SEND arrangements that will be reported to the Audit and Quality Group in Dorset CCG on a quarterly basis.	Oct 17	There are clear lines of accountability within organisations for the delivery of SEND improvement	Director of Service Delivery, Dorset CCG Head of Partnerships (Children's Services) Dorset CCG	Confirm Senior Responsible Owner and CCG Health Champion (Jul 18)	Complete
					Reporting to Quality and Group commences (Jun 18)	Complete
					Workshop on health outcomes (Sep 17)	On target
4.2	Implement regular management review of local authority SEND arrangements that will be reported to Children's Services Leadership Team within Dorset County Council, including the quality of EHC plans.	Sept 17	There are clear lines of accountability within organisations for the delivery of SEND improvement	DCC Children's Services Leadership Team	Develop new reports from IT system (Jul 17)	Complete
					Develop OBA reporting framework (Aug 17)	On target
4.3	Carry out SEN Reviews in all priority schools where our data shows us that the attainment gap for SEN groups is widest. Give recommendations and support for improvement. Use school self-evaluation frameworks to monitor effectiveness of schools/education settings	July 2018	Schools deliver the recommendations given and the SEN gap for these schools narrows. There are clear lines of accountability within organisations for the delivery of SEND improvement School improvement plans to demonstrate SEND/inclusion as a priority where whole school review has identified weaknesses in inclusive practice.	Principal Advisor Education Services Senior Manager for SEN, DCC	Shared a draft inclusion selfevaluation framework for inclusion with SENCos (Jun 17)	Complete
					SEN Reviews completed in KS2 Priority schools (Jul 17)	Complete
					Recommendations and offer of support (Jul 17)	Complete
					Follow up visits to monitor progress (Dec 17)	On target

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4.4	Introduce a multi-disciplinary case file auditing system that identifies themes for improvement:	March 2018	Improvements in the quality of our work results in reduction in complaints and appeals.	SEND Senior Leadership Team, DCC	Review multi-agency auditing process currently adopted by the Safeguarding Children’s Board (Sept 17)	On target
4. Improving the monitoring and quality assurance						
	Action	Timescale	Measures of success	Lead	Progress and milestones	Status
			Case monitoring shows robust record keeping and good customer service		Pilot case auditing process (Oct 17 – Jan 18)	On target
					Roll out process across the county (Jan to Mar 18)	On target
Page 57	Implement a system for collecting customer experience information and share this as well as learning from complaints across the SEND system	Dec 17	The workforce will report feeling valued and report greater confidence through annual survey Service user satisfaction will increase and the number of tribunals will reduce	Senior Manager SEND, DCC	Appoint a Complaints Officer for SEND in DCC to help coordinate and share learning (Jun 17)	Complete
					Design online feedback mechanism (Sept 17)	On target
				Senior Manager – Business Intelligence, DCC	Implement feedback mechanism (Oct 17)	On target
				Chair – SEND Delivery Group	Quarterly reporting on customer experience commences (Dec 17)	On target
4.6	Agree and use self- evaluation frameworks as tools for continuous improvement	July 2018	Self-evaluation frameworks are used and lead to improvement	Senior Manager SEND, DCC	Review current self-evaluation tools (Dec 17)	On target

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			plans resulting in improved outcomes		Consult on application across system (Jan 18)	On target
					Develop new self-evaluation tools (Mar 18)	On target
					Roll out across the county (Jul 18)	On target

3. Other areas for development

The next section focuses on the areas for development identified by inspectors along with a summary of the additional improvements we will make to address these.

	What Ofsted and CQC said	What we are doing about it
Page 58	<i>“...Until recently, the local area did not meet the statutory timescales for the assessment of needs for children and young people who have special educational needs and/or disabilities. In addition, parents confirm that they continue to experience long delays with the completion of EHC plans. Leaders are determined to tackle this as a priority. Some recent signs of improvement are evident. Nonetheless, of the hundred or so parents who provided their views during the inspection, a significant proportion lack the confidence that the local area will provide timely assessments and effective support for their children.”</i>	We will put additional resources into the SEN assessment process to clear the backlog of transfers and bring new assessments into compliance with the timescale. In the short term, we will review all the processes associated with assessment and develop a plan to make these more streamlined, efficient and customer focused.
2.	<i>“...The educational psychology service has experienced a lack of capacity over a significant period, impacting on the work they do to identify needs quickly. This has contributed to the delays in completing assessments and EHC plans in a timely way.”</i>	We will ensure increased Educational Psychology contribution to statutory processes and develop a preventive model for the education psychology service which supports the graduated offer, and the timely completion of assessments

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3.	<p><i>“...Although health professionals are usually notified when an EHC plan is being considered and produced, the inspection found that the community nursing team, who work with children and young people with complex health needs and life-limiting conditions, were not always asked to contribute advice and information. Consequently, some EHC plans lack important input from health professionals. Many parents stated that they are unclear about what to expect in relation to the involvement of health professionals. They do not know who to approach to ensure that the plan is effective in meeting the health needs of their child and that it is kept up to date.”</i></p>	<p>We will develop a joint operational agreement for SEND between Dorset CCG and the range of health providers. This will fully outline health responsibilities and include a focus on children in care and those in out of area placements and we will make sure that local authorities, health service clinicians and parents /carers are clear about their role and who to contact. The Dorset Care Record will enable information to be shared digitally between professionals. Young people and parents should be able to use a portal function to see who is involved in their assessment and plan, track progress, and provide input.</p>
4.	<p><i>“...The local area’s ‘graduated pathway’ is known and implemented by schools, health and social care professionals. This approach ensures that professionals identify the needs of children and young people and plan appropriate targets with realistic outcomes. Where this works well, parents confirm that their children achieve and make good progress in their academic and personal development. However, inspectors found inconsistency in the implementation of this agreed approach. In particular, the inspection confirmed delays in early assessment of children’s needs and, at times, a lack of timely and appropriate support, impacting detrimentally on children and young people’s outcomes.”</i></p>	<p>We will build on the strengths in early years so that children and their parents can access support and early help. We will ensure that family partnership zones engage multi-agency professional groups to ensure that the graduated offer is supported by an effective and proactive early help offer</p>

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What Ofsted and CQC said	What we are doing about it
<p>5. <i>“... Parents confirm their dissatisfaction with the local area’s arrangements for assessment and planning to meet their child’s needs. In particular, the failure over time to meet statutory timescales for assessments and completion of EHC plans has resulted in continuing levels of registration of appeals to first-tier tribunal. Many appeals have been settled with parents in recognition of the delays which have occurred. However, leaders recognise the urgency of completing EHC plans on time. Since November 2016, improvements have been made.</i></p>	<p>We will put additional resources into the SEN assessment process to clear the backlog of transfers and bring new assessments into compliance with timescale. In the short term, we will review all the processes associated with assessment and develop a plan to make these more streamlined, efficient and customer focused. We will make sure that all services comply with statutory timescales so that children and young people have their needs identified and met in a timely way.</p>

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6.	<p><i>Leaders have prioritised the need to complete conversions from statements of special educational needs to EHC plans, particularly at the point of pupils' transfer to the next stage of their education, employment or training. Nonetheless, a considerable backlog of cases remains. In addition, there are inconsistencies across the area. Some statements of special educational needs have been converted to EHC plans in a timely way and are of a high quality. In other settings, children and young people were still waiting. In these cases, pupils did not know which school they were to attend next, adding to their concerns and those of their parents."</i></p>	<p>We will extend contracts for Planning Review Officers to April 2018 and contract with external providers to boost the transfer process to ensure that statements are converted to EHC plans in a timely manner so that young people have their needs met, and do not experience any delay or interruption in the provision of services.</p>
7.	<p><i>"... The local area places a higher proportion of Dorset pupils who have special educational needs and/or disabilities than seen nationally in out-of county provision. Leaders have prioritised the need to develop provision in Dorset, especially for pupils with complex communication needs and social, emotional and mental health difficulties. However, strategic plans to achieve these aims are not yet fully in place. Consequently, school leaders do not have clarity in how this strategic vision will be implemented, which is of concern to them."</i></p>	<p>We have initiated a project to ensure that Dorset County Council has sufficient provision (accommodation), and support services close to home, to meet the needs of the children of Dorset with Special Educational Needs and Disability (SEND), including support for children whose behaviour challenges.</p>
8.	<p><i>"... Assessments for autism and ADHD are taking too long and delays are increasing. These delays are having a significant impact on children and their families who wait to be seen, with many reporting uncertainty and stress as they wait for the final EHC plan to be agreed. Parents and schools also raised concerns about difficulties they have experienced in accessing CAMHS provision. Although waiting times have improved, parents are not clear about what they can expect from this service."</i></p>	<p>The Pathway for Development and Behaviour and child and adolescent mental health pathways will be fully implemented. This will be communicated to parents through the local offer, along with information about services which can support children and young people and their families who do not have a formal diagnosis.</p>
9.	<p><i>"... The timeliness and coverage of initial and review health assessments, dental checks and immunisations of children and young people who are looked after, fall below locally agreed improvement targets. The specialist</i></p>	<p>We will ensure that compliance with statutory requirements for IHAs and RHAs is routinely monitored via provider contract performance and monitoring meetings. The development of the Dorset Care Record and</p>

What Ofsted and CQC said	What we are doing about it
<p><i>health team has been recently strengthened. However, this team does not have a complete and up-to-date picture of children who are looked after who have special educational needs and/or disabilities. Consequently, their approach to the provision of comprehensive health care plans is not yet of a high quality."</i></p>	<p>Interoperability with MOSAIC, RIO, and Synergy will ensure that information and tasks are shared between professionals in real time by September 2018.</p>

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10.	<p><i>“... Children’s community nursing provision is currently available on weekdays. Consultation with families identifies the need to strengthen access out of hours. The children’s services review of paediatric services in the area recognises the need to build local capacity to reduce their reliance on hospital-based care. However, currently 33 children and young people (out of 59) are receiving a personal health budget which supports increased choice and control in meeting their needs.”</i></p>	<p>We will review and redesign the Children’s Community Nursing Service to provide greater accessibility and enhanced care for children and young people in the community.</p>
11.	<p><i>“... The proportion of pupils reaching the expected standard at the end of key stage 2 for all pupils in Dorset in reading, writing and mathematics is below the national average (45% in Dorset compared to 53% nationally). This picture is also reflected in outcomes for pupils who have special educational needs/and or disabilities receiving support and with EHC plans, particularly in writing but also in reading and mathematics. Pupils make insufficient progress by the end of Year 6, especially in writing.”</i></p>	<p>We will develop a more sophisticated attainment tracking tool for children receiving school support and with EHC plans which will enable us to support and challenge schools more effectively.</p>
12.	<p><i>“... Delays in the assessment of children and young people’s needs are preventing some pupils from making the progress of which they are capable. Larger schools with greater expertise and resources continue to support pupils while waiting for decisions to be made. However, this is not the case for all pupils. Parents voiced concerns about the quality of support some schools offer, and the impact this has on the progress their children make.”</i></p>	<p>We will build on the strengths in early years so that children and their parents can access support and early help. We will ensure that family partnership zones engage multi-agency professional groups to ensure that the graduated offer is supported by an effective and proactive early help offer</p>
13.	<p><i>“... Leaders have not sufficiently ensured that the work of professionals across the local area and the services provided are effective and of a high quality. Leaders in school confirm that they rarely get feedback about their work but are keen to know how to improve the work they do. This is not helping schools, settings and service providers improve their practice to deliver improved outcomes.”</i></p>	<p>We will implement a workforce development strategy ensure we have a confident and competent workforce that places the child/ young person at the heart of all they do and develop a culture which supports the values and vision for the system.</p> <p>We will ensure that there is effective support and challenge to schools, settings and service providers that contributes to continuous improvement.</p>

4. Additional areas of improvement from the inspection

The following section sets out the additional joint actions we are taking to address the areas for development identified by the inspectors

Outcome 1: A single system working together across education, health and social care for joint outcomes							
	Improvement	Action	Timescale	Measures of success	Lead	Progress/milestones	Status
Page 62	1.1 Professionals and parents/carers work together to meet the needs of children and young people with SEND including appropriate preparation for adulthood.	We will explore, using research and professional advice, different operational models of joint working for children with complex needs and implement one that works for Dorset.	Nov 18	A model of joint working is agreed and implemented. Positive feedback from children, young people and parents and carers on the quality of services	Corporate Director of Children’s, Adult’s and Community Services (DCC)	Stakeholder engagement workshop (Jun 17)	Complete
						Co-production activities (Sep to Dec 17)	On target
						Complete Needs Assessment (Dec 17)	On target
						Business Case and options appraisal (Feb 18)	On target
						Service Model Agreed (Mar 18)	On target
						Formal Consultation (Jun to Aug 18)	On target
						New model implemented (Nov 18)	On target
		We will review and redesign the Children’s Community Nursing Service to provide greater accessibility and	Timescale to be agreed	Community nursing services are enhanced to increase availability to meet need.	Head of Partnerships (Children’s), Dorset CCG	Present draft business case to Dorset Paediatric Acute Vanguard (Jun 17)	Complete

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		service delivery in the community. This		Positive feedback from children, young people and parents and carers on the quality of services		Workshop to further develop Business Case at the Sustainability and	Complete
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Outcome 1: A single system working together across education, health and social care for joint outcomes

	Improvement	Action	Timescale	Measures of success	Lead	Progress/milestones	Status
Page 63		will be linked to school health pathway				Transformation Network (Jul17)	
						Governance process for decision making agreed with final decision to be made at System Leadership Team meeting (Sept 17)	On target
		We will make sure that the roles and responsibilities of health professionals are clear by publishing an easy to understand formal statement on the Local Offer and the CCG website	August 2017	Feedback from children, young people and parents and carers shows increasing awareness	Head of Partnerships (Children's) Dorset CCG	Re-establish SEND Health Forum with local authority representation (Jun 17)	Complete
						Create mechanism on Local Offer to publish information (Jun 17)	Complete
						Publish information (Aug 17)	On target
		We will make sure that health providers understand their statutory responsibilities in relation to SEND and put in place a joint operational agreement for SEND between Dorset CCG and local health	October 2018	Outcomes within statutory plans are judged at Quality Assurance as SMART Surveys and feedback from health providers/professionals show increasing awareness	Head of Partnerships (Children's) Dorset CCG	A draft document was shared at the June meeting of SEND Health Forum.	Complete
						Finalise operational agreement between CCG and health providers clarifying expectations (Oct17)	Complete

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		providers that includes looked after children and out of area placements.				Ratification of agreement (Jan 18)	On target
						Implementation of agreement (Oct 18)	On target

Outcome 1: A single system working together across education, health and social care for joint outcomes

	Improvement	Action	Timescale	Measures of success	Lead	Progress/milestones	Status	
Page 64		<p>We will review our decision-making processes and commissioning panels to make sure that we are planning services together and are clear on the outcomes we are seeking to achieve.</p> <p>We will develop and implement a dispute resolution process across health and the local authority.</p>	Oct 2017	<p>Review of criteria, attendance and evidence submitted to joint commissioning panels shows that provision has been jointly planned and agreed</p> <p>Monitor through service, regular attendance at commissioning and decision making panel meetings</p> <p>Outcome tracking shows improved positive decision making and joint funding agreements in place across services</p>	<p>Assistant Director, Strategy, Design and Development, DCC</p> <p>Head of Partnerships (Children’s), Dorset CCG</p>	<p>Review arrangements at Joint Commissioning Operational Group (Jul 17)</p> <p>Review terms of reference for all panels (Sept 17)</p> <p>Review process for joint funding between health and local authority (Oct 17)</p>	<p>Complete</p> <p>On target</p> <p>On target</p>	
	1.2	All relevant professionals will contribute to planning to meet the needs	We will all make sure that there is attendance at multiagency planning meetings by all relevant professionals including	Oct 2018	Evidence of joint outcomes, joint planning and joint review with families and the children or young people themselves	Senior Manager – Business Intelligence, DCC	<p>Develop a process for monitoring contributions and attendance through our IT systems (May 17)</p> <p>Test process (Jul 17)</p>	<p>Complete</p> <p>On target</p>

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of children and young people with SEND including appropriate preparation for adulthood.	health, social care and adult services. Poor attendance at multi-agency planning meetings will be escalated to the SEND Improvement Board			Designated Medical Officer (DMO)	Stronger links between DMO and SEN team established (Jul 17)	On target
				Senior Manager SEND, DCC	Quarterly monitoring of contribution commences (Sep 17)	On target
				Manager SEN Team, DCC	New admin process in place for invitations to meetings (Oct 18)	On target

Outcome 1: A single system working together across education, health and social care for joint outcomes

	Improvement	Action	Timescale	Measures of success	Lead	Progress/milestones	Status
Page 65					Assistant Director Strategy, Design and Development (DCC)	Memorandum of Understanding signed by all agencies prioritising attendance at transition meetings particularly where there is a danger of placement breakdown (Mar 18)	On target
		We will all make sure that there is appropriate written information provided by all relevant professionals when required towards the EHC assessment process including health, social care and adult's services.	Oct 2018	Evidence of joint outcomes, joint planning and joint review with families and the children or young people themselves	Head of Partnerships (Children's) Dorset CCG	Audit tool developed to quality assure health contribution of assessments to EHC Plans (Dec 17)	On target
			December 2017		SEN Manager, DCC	Review assessment request systems between agencies (Nov 17)	On target
						Redesign of all paperwork and information flows (Dec 17)	On target

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						New admin process in place for request, receipt and confirmation of information and reports and follow up of missing information (Dec 17)	On target
1.3	More consistent early identification and	We will all make better use of data and information to identify those that might need support early through	June 2018	Data is shared using the Family Partnership Zone Business Intelligence tool to proactively identify children	Senior Manager, Business Intelligence, DCC	Redesign information sharing agreements to enable appropriate sharing of information to support early help (May 17)	Complete

Outcome 1: A single system working together across education, health and social care for joint outcomes

Page 66	Improvement	Action	Timescale	Measures of success	Lead	Progress/milestones	Status
Page 66	assessment of need.	Family Partnership Zones.		and families that may benefit from early help		Re-issue information sharing agreements (Sept 17)	On target
		We will use screening tools such as the Ages and Stages Questionnaire to identify children that might benefit from early action		Termly tracking of progress towards outcomes of identified children and families	Senior Manager – Early Action, DCC	Identify SEND Champion in each Family Partnership Zone (Sep 17)	On target
		We will track the progress towards outcomes of identified children			Senior Manager – Early Action, DCC	Business Intelligence Tool rolled out across all schools in Dorset (Oct 18)	On target
					Assistant Director (Children) Dorset Health Care University Foundation Trust	Regular sharing of information from Ages and Stages Questionnaire with relevant partners (Jan 18)	On target

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Page 67		We will provide support and guidance for universal services such as early year's settings, schools, colleges and post 16 providers to identify SEND and undertake assessments of need.	Dec 2017	Guidance is issued Schools and settings tell us they feel supported and are engaged	Principal Advisor Educational Services/ Senior Manager for SEND, DCC	Guidance issued to all settings (May 17)	Complete
		We will offer training to all universal settings		Take- up of training offer and evaluation Schools and settings tell us they feel supported and are engaged	Principal Advisor Educational Services/ Senior Manager for SEND, DCC	Training Offer reviewed (Jul 17)	Complete
						Training published on Dorset Nexus (Sep 17)	On target

Outcome 1: A single system working together across education, health and social care for joint outcomes

Page 67	Improvement	Action	Timescale	Measures of success	Lead	Progress/milestones	Status
1.4	More consistent offer of early help through 'graduated responses'.	We will provide support and challenge to educational settings across the local area to provide personalised planning, intervention and review for young people with SEND.	July 2018	SEND Decision making panels, pre-and post-16 show evidence in paperwork of graduated response to need Visits from advisory teams confirm from visit monitoring reports that there is greater evidence of a graduated response to need Schools and settings tell us they feel supported and engaged	Principal Advisor Education Services/Senior Manager for SEND, DCC	Guidance issued to all settings (May 17) Develop evidence based intervention training offer (May 17) Training offered to schools (Jun 17 – Jul 18)	Complete Complete On target

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Page 68	We will build on the good work we do in the early years to further develop our health pathway of support for children in the early years.	Dec 2017	Consistent and clear pathway developed Performance against timescale requirements are met Number of early years developmental checks completed and shared	Service Director, Dorset Healthcare University Foundation Trust (DHUFT) Head of Partnerships (Children's) Dorset CCG	Agree scope and timescales for delivery (May 17)	Complete
					Develop pathway of support (Oct 17)	On target
					Implement pathway (Dec 17)	On target
	We will work together to ensure that children, young people and families get help and support through our seven Family Partnership Zones .	March 2018	Quarterly reporting of early help interventions for children with SEND (activity and outcomes)	Senior Manager SEND, DCC Senior Manager for Early Action, DCC Chair, Strategic Alliance	Agree Strategic Alliance Terms of Reference outlining responsibility for this area of work (Jul 17)	Complete
					Identify SEND Champion in each Family Partnership Zone (Sep 17)	On target
					Develop reporting mechanism on SEND for	On target

Outcome 1: A single system working together across education, health and social care for joint outcomes

	Improvement	Action	Timescale	Measures of success	Lead	Progress/milestones	Status
						Strategic Alliance and Local Area Groups (Oct 18)	
1.5	We will work together to improve the experience of children, young people with SEND and their	We will provide accurate and up to date information with children, young people and their families to enable them to make choices for adulthood.	October 2018	Young people with SEND will tell us they feel prepared and informed regarding choices and that the information on the Dorset Local Offer is useful, helpful, and easy to navigate.	Service Manager Adult's Services, DCC Senior Manager SEND, DCC	Stakeholder engagement workshop – Transitions through social care (Jun 17) Review information provision on Local Offer (Sept 17)	Complete On target

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Page 69	families as they enter adulthood.	We will make sure that all Year 9 reviews (at the latest) and annual reviews thereafter are focused on preparation for adulthood.		Young people with SEND and their families will tell us through the felt supported and enabled at every stage and every aspect of the transition process.	Senior Manager SEND, DCC	Transition planning for out of county placements commences and is monitored by specialist services (Dec 17)	On target
				Case file auditing shows appropriate engagement of professionals	SEND Participation and Engagement Officer, DCC	Implement an engagement and review process to ensure information is regularly co-produced and updated (Jan 18)	On target
					Senior Manager SEND/Service Manager Adult's Services, DCC	Introduce named worker procedure in Children's and Adult's Services (Mar 18)	On target
						All children and families going through transition have a named worker (Oct 18)	
					Manager SEN Team, DCC	Identify and implement a process for overseeing the reviews of (Mar 18)	On target

Outcome 1: A single system working together across education, health and social care for joint outcomes

	Improvement	Action	Timescale	Measures of success	Lead	Progress/milestones	Status
		We will review transitions from child health services and identify areas for development which will	Oct 2018	Families and young people will feel better prepared and informed regarding choices about their future	Programme Lead Dorset CCG	Scoping review of current transition arrangements for child health providers (Jun 17)	Complete

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		be addressed by the Health Forum.		The health forum will oversee system change		Present review findings to Health Forum (Sep 17)	On target	
						Areas for development and action plan with timescales agreed (Oct 17)	On target	
Page 70	1.6	Improve educational attainment at Key Stage 2	We will implement our Key Stage 2 Improvement Plan, particularly focusing on vulnerable groups.	June 2018	KS2 results Gap Analysis reduces	Principal Advisor for Education Services, DCC	SEN Reviews completed in KS2 Priority schools (Jul 17)	Complete
						Virtual School Head, DCC	Targeted work specific groups of children including Looked After Children and Gypsy, Roma and Travellers (Jun 17)	Complete
						Principal Advisor for Education Services, DCC	Recommendations and offer of support (Jul 17)	Complete
							Analysis of KS2 results (Jul 17)	Complete
							Review Improvement Plan (Sep 17)	On target
							Follow up visits to monitor progress (Dec 17)	On target
						1.7	Professionals working with children and	We will write a workforce development plan for all
Development Plan agreed (Oct 17)	On target							

Outcome 1: A single system working together across education, health and social care for joint outcomes

	Improvement	Action	Timescale	Measures of success	Lead	Progress/milestones	Status
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Page 71	young people with SEND and their families have the skills and knowledge they need to ensure that they work together effectively.	Professionals working with children, young people and families in relation to SEND.		Support regarding SEND for all the workforce Workforce demonstrates confidence regarding broad knowledge of SEND legislative frameworks and guidance as evidenced in annual staff survey	Development, DCC	Training commences (Nov 17)	On target
		We will include mandatory training modules and update our induction processes for new members of staff in education, health and care that outlines their roles and responsibilities with regards to SEND. We will remind all professionals of their responsibilities for Continuous Professional Development (CPD) in SEND	Mar 2018	Quality Assurance of Education, Health and Care Plans will demonstrate how cultural changes have been implemented. Monitoring of the Online SEND module within DCC will show increased take up and completion by staff across the local authority.	Dorset CCG Designated Medical Officer (DMO) DCC Workforce Development Lead Senior Manager for SEND, DCC	School nursing teams/CAMHS nurses/Health Visitors attend SEND update training (Jul 17)	Complete
						SEND Foundation Module added to DCC online learning and development suite (Sep 17)	On target
						Internal communications to all professionals outlining responsibilities	On target
				Regional conferences attended by Health Workforce	On target		
We will provide multiagency training for professionals working with SEND on	Mar 2018	Attendance at events Quality Assurance of Education, Health and Care Plans will demonstrate how	DCC Workforce Development, DCC	Review current training opportunities (Oct 17)	On target		
Outcome 1: A single system working together across education, health and social care for joint outcomes							
	Improvement	Action	Timescale	Measures of success	Lead	Progress/milestones	Status

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Page 72	personalisation and working together that helps support the development of working relationships between professional groups and the development of a One Dorset Workforce		cultural changes have been implemented		Design and commission training opportunities (Dec 18)	On target	
					Publish training opportunities (Feb 18)	On target	
	We will promote the use of quality assured online training tools to professionals in education, health and care	Dec 17	Professional staff survey and feedback on quality of materials.	SEN Specialist Services Manager, DCC	Review national SEND elearning modules (Jun 17)	Complete	
					DCC Workforce Development Lead	Promote use of quality assured online training tools (Sep 17)	On target
					DCC Workforce Development Lead	Local e-learning module developed for all Dorset practitioners (Dec 17)	On target
	We will include training related to SEND as part of our Reinvigorating Social Work Programme that focuses on improving the quality of social work in Dorset	Sept 2019	Feedback on the quality of relationships between social workers and children, families and young people Feedback on the quality of relationships between social workers and other professionals	DCC Programme Lead for Reinvigorating Social Work	Appoint support team (Jun 17)	Complete	
					Review training needs of social workers (Jul 17)	On target	
					Design of programme completed (Sep 17)	On target	
					Roll out commences (Oct 17)	On target	
					All social workers complete programme (Sep 19)	On target	

Outcome 2: Getting it right first time: appropriate, effective and timely joint assessment, planning and review of need that is personalised to the child or young person with SEND							
	Improvement	Action	Timescale	Measures of success	Lead	Progress/Milestones	Status
Page 73	Plans are outcomes focused and personalised	We will audit the quality of social care and health contributions to EHCP and the plans themselves	Sept 2017	QA audit tool will demonstrate progress	SEN Team Manager, DCC	Audit completed (Aug 17)	On target
					Senior Manager, SEND, DCC	Share recommendations with CCG, health providers and social care and agree development plan (Sep 17)	On target
					Designated Medical Officer, Dorset CCG	Agree standardised approach to health medical input (Sept 17)	On target
	We will all involve children, young people and families in identifying outcomes and reviewing progress towards these in reviews	Sept 2017	Outcomes within statutory plans are judged at Quality Assurance as being SMART Training Audit and feedback tool will show increased take up by all partners and agencies Children, young people and parent carer are satisfied with services they receive (survey)	Chair, SEND Delivery Group	Review groups leading on person centred work (Jun 17)	Complete	
					Combine groups into Person Centred Approaches Group (Jul 17)	Complete	
					Agree work plan for this group (Sept 17)	On target	
					Offer person centred training to all educational settings (Sept 17)	On target	
					Expand person centred planning training to all partners and agencies (Jan 18)	On target	
Principal Educational Psychologist, DCC							

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					SEND Participation and Engagement Officer, DCC	Adopt common person- centred planning tools across children’s and adult’s services – education, health and care (Mar 18)	On target
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Outcome 2: Getting it right first time: appropriate, effective and timely joint assessment, planning and review of need that is personalised to the child or young person with SEND

	Improvement	Action	Timescale	Measures of success	Lead	Progress/Milestones	Status
Page 74		We will make sure that Personal Budgets are offered as part of education, health and care plans where appropriate.	Dec 2018	All families will be offered the option of a personal budget	SEN Team Manager, DCC	Update personal budget information on Dorset Local Offer (May 17)	Complete
						Guidance issued to all SEN Planning review coordinators (Sept 17)	On target
2.2	Professionals working with children and young people with SEND and their families have the skills and knowledge they need to ensure that they contribute effectively to SEND	We will appoint champions within education, health, and social care organisations to improve communication and awareness within their respective organisations	Jan 2018	Strategic health leads/champions within provider trusts will be key representatives on the Health Forum for SEND and will take responsibility for promoting good practice and key messages Feedback from settings reps shows impact of dissemination of practice	Senior Manager – SEND, DCC	Appoint SENCo champions in each partnership zone to support and develop SEND practice in schools	Complete
					Senior Manager – Early Action, DCC	Appoint SEND Champions in each Family Partnership Zone (Sep 17)	Complete
					Head of Partnerships (Children’s) Dorset	Appoint SEND champions from health provider trusts to sit on SEND Health Forum (Dec 17)	On target

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Assessment, Planning and Review process.				CCG	SEND Champions promote good practice and key messages (Jan 18)	On target
	We will ensure all SEN assessment, planning and reviewing officers complete training to	Mar 2018	Consistency in quality of assessments, plans, reviews	SEN Manager/Principal Education Psychologist, DCC	Develop training plan for SEN Assessment Team (Jun 17)	Complete
			Reduction in complaints		Outcomes training delivered (Jun 17)	Complete

Outcome 2: Getting it right first time: appropriate, effective and timely joint assessment, planning and review of need that is personalised to the child or young person with SEND

	Improvement	Action	Timescale	Measures of success	Lead	Progress/Milestones	Status
Page 75		ensure they can deliver their roles effectively and extend this training to the wider workforce following evaluation		Evidence of greater coproduction in the EHC process High quality outcome writing Greater awareness of Local Offer		SEND legislation/code of practice training delivered (Sep 17)	On target
						Customer Care training delivered (Nov 17)	On target
						Person centred approaches training delivered (Jan 18)	On target
						Co-production training delivered (Feb 18)	On target
						Signposting the Local Offer training delivered (Mar 18)	On target
	We will introduce regular monitoring of complaints and tribunals to identify key trends and themes that will be addressed	Ongoing – quarterly reports	Reductions in numbers and associated costs of tribunals, formal mediation and appeals Improved customer care, qualitative responses from users show increased satisfaction		Senior Manager – SEND, DCC	Appoint a Quality Assurance and Complaints Officer for SEND (Jun 17)	Complete
					Quality Assurance and Complaints Officer, DCC	Regular reporting commences (Sept 17)	On target

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		through team development			Manager SEN Team, DCC	SEND Team development plan reviewed and agreed (Dec 17)	On target
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Outcome 3: Talking, listening to and involving children, young people and parents and carers

	Improvement	Action	Timescale	Measures of success	Lead	Progress and milestones	Status
3.1 Page 76	We seek and use feedback from children and young people to inform service design and development	We will support children and young people with SEND to participate in youth/school forums	March 2018	There are inclusive strong pupil voice arrangements in place in mainstream and special schools	SEND Participation and Engagement Officer, DCC	Update Participation Strategy (Oct 17)	On target
		We will all systematically collect information and share the results of all our engagement work across the SEND system to inform service improvement and planning including:		Information is used to inform service delivery across the system	Senior Manager – Business Intelligence, DCC	Review and publish key messages from existing surveys (Dec 17)	On target
		<ul style="list-style-type: none"> • Young researchers • Young Inspectors • School level/pupil voice surveys • Patient experience 		We will agree a set of customer experience measures that we will collect across the system and use for service design	Chair – SEND Delivery Group	Identify a work stream lead to take this work forward (Sep 17)	On target
						Agree a work plan and timescales for this work stream (Sep 17)	On target

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3.2	Better information about help,	We will ensure that young people have access to advocacy	Dec 2017	Monitor the uptake and quality of service offer	Joint Commissioner, DCC	Implement changes (Mar 18)	On target
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Outcome 3: Talking, listening to and involving children, young people and parents and carers

	Improvement	Action	Timescale	Measures of success	Lead	Progress and milestones	Status
Page 77	support and provision is available for children, young people, parents and carers which is compliant with Accessible Information Standards	when having a transition assessment.				Review current spot purchasing arrangements (Apr 17)	Complete
						Develop business case for commissioning advocacy (Jun 17)	Complete
						Develop service specification (Jul 17)	Complete
						Tender service (Sept 17)	On target
						Award contract (Dec 17)	On target

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		We will clarify how short term breaks are supported through Continuing Health Care (CHC) processes and provide easy to understand information on the Local Offer.	Aug 2017	Families understand how short term breaks are provided through Continuing Health Care	Head of Continuing Healthcare, Dorset CCG	Publish as part of the CCGs Statement of Intent on the Local Offer (Aug 17)	On target
		We provide clear information on the services offer and pathways for	Nov 2017	Proportion of referrals leading to no further action	Service Director for Mental Health and Learning	Agree participation in national CAMHS Pilot on effectiveness of clinical pathways (May 17)	Complete

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Outcome 3: Talking, listening to and involving children, young people and parents and carers

78	Improvement	Action	Timescale	Measures of success	Lead	Progress and milestones	Status
		CAMHS as well as referral criteria.		Professionals understand service offer and referral criteria Children, young people, parents and carers understand how to get help Waiting times reduce	Disabilities, DHUFT	Review and rewrite referral criteria and clinical pathways (Jun 17)	Complete
						Consult on referral guidance and pathways (Jul 17)	Complete
						Introduce mechanism for quality assuring referrals to CAMHs (Oct 17)	On target
						Publish referral criteria and guidance on CAMHs website (Nov 17)	

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		We will ensure that all professionals working with children, young people with SEND and their families understand the local service offer and can signpost effectively to local support options.	November 2017	Workforce survey to understand awareness of local offer and local services and monitor changes as a result of our marketing strategy to increase awareness. The Local Offer Feedback Survey of parents/carers will be used to ascertain increased awareness by professionals.	Chair – Local Offer Steering Group	Share contents of Dorset Local Offer at SEND Network meetings (Oct 17)	On target
						Share contents of Dorset Local Offer at Health Forum meetings (Oct 17)	On target
							Print information on local offer provided to all practitioners working with children and families with SEND (Oct 17)
3.3 Page 76	Professionals working with children, families and young people with SEND	We will provide mandatory customer care training for all frontline SEND staff as part of our	Jan 2018	Monitor take up and impact of training Customer experience surveys	Chair – SEND Delivery Group	Scoping of workforce development plan completed (Jul 17)	Complete
						Development Plan agreed (Oct 17)	On target
Outcome 3: Talking, listening to and involving children, young people and parents and carers							
	Improvement	Action	Timescale	Measures of success	Lead	Progress and milestones	Status
	have the skills and knowledge to communicate and engage effectively with children, young people and families and work in a person	Workforce development plan				Training commences (Nov 17)	On target
		We will develop and agree a joint approach with health providers focusing on expected standards regarding strength based	Jan 2018	Positive feedback from children, families and young people is received through the annual parent/carer survey compiled by the Parent/Carer council	Head of Partnerships (Children’s), Dorset CCG Designated Medical Officer	Finalise operational agreement between CCG and health providers clarifying expectations (Oct 17)	On target
						Ratification of agreement (Jan 18)	On target

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Page 80	centred, outcome focused way.	assessments, personalisation, and life-long outcomes.				Implementation of agreement (Oct 18)	On target
		We will support educational settings across the system in understanding how to include the views of the child or young person, particularly focusing on those with complex learning and communication needs.	July 2018	Monitor the take up of training and support offered Case audit of assessments and plans to assess the voice of the child	Principal Educational Psychologist Chair – Person Centred Approaches Group	Record of attendance by schools complete (Jul 17)	Complete
						Training Offer reviewed (Jul 17)	Complete
						Record of attendance by Dorset schools reviewed (Jul 17)	
						New training offer published on Dorset Nexus (Sep 17)	On target
						Monitor take up of training commences (Sep 17)	On target

Outcome 4: Use effective monitoring and quality assurance to challenge, support and develop provision

	Improvement	Action	Timescale	Measures of success	Lead	Progress and milestones	Status
4.1	There is robust monitoring of performance	We will embed a culture of accountability through to frontline practice by spreading the use of outcomes focused case supervision models based on our approach to	July 2019	Quality assurance shows plans are outcomes focused and meet the needs of children, young people and families Supervision models are outcomes based and measurement of individual outcomes is clear and consistent which will be audited through case files Number of case audits completed	Programme Lead Reinvigorating Social Work, DCC	Develop outcomes based case supervision template for social care (Jun 17)	Complete
						Introduce a case file audit process to assessment if outcome based supervision is taken place (Sep 17)	On target
						Review effectiveness (Dec 17)	On target
						Develop rollout plan (Jan 18)	On target

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Page 84		Reinvigorating Social Work to help embed outcomes focused practice reviewed through auditing of EHC plan quality				Rollout completed (Jul 19)	On target
						Develop and introduce a case audit process	On target
					Manager SEND Team, DCC	Introduce a case file audit process for front-line SEND work (Jan 18)	On target
		We will review all our placements with independent providers to ensure they are value for money and delivering good outcomes for children and young people	Sept 2018	We are confident that all placements are contributing to improved outcomes for children and offering value for money	Senior Manager, Strategy, Design and Development, DCC	Increase capacity in Contracts Team (Jun 17)	Complete
						Multi-agency review of complex cases (Jul 17)	Complete
						Schedule of monitoring visits agreed (Jul 17)	Complete
						Monitoring visits to providers commence (Sep 17)	On target
	4	Business Intelligence is used to plan services and provision for	We will undertake structured needs assessments to help plan services across	Feb 2018	We will have a vibrant and diverse range of provision that meet local needs Children, young people and parents and carers tell us they	Senior Programme Lead, Dorset CCG	Needs Assessment Format agreed by Integrated Community Children’s Health Programme (Jun 17)

Outcome 4: Use effective monitoring and quality assurance to challenge, support and develop provision

	Improvement	Action	Timescale	Measures of success	Lead	Progress and milestones	Status
	children and young people with SEND and their families.	The system informed by data, information, customer experience, market mapping and		Can access the support they need There will be more places available for children with complex communication needs and social, emotional and mental health		Needs Assessment completed (Jan 18)	On target
					Senior Manager – Strategy, Design and Development, DCC	Share vision for SEND Provision with schools, early years settings and post 16 providers (Jul 17)	Complete

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Page 82		uptake of the local offer.		Schools and settings will be clear about the plan for implementation	Contracts and Market Development Manager, DCC	Market mapping completed (Feb 18)	On target
		We will improve our financial tracking systems to better understand spend across the system and identify opportunities for refocusing investment on early help or local provision and ensure value for money.	July 2019	We will understand the processes undertaken by schools, locator and values attached to these processes and the moderation for these, commitments for known expenditure for all children with an EHCP We will understand our collective spend and make decisions about investment opportunities We will provide assurance regarding the ability to deliver the service within the budget available.	Chair – SEND Delivery Group	Commission audit from South West Audit Partnership to explore (Jul 17)	Complete
	Senior Manager for Business Intelligence, DCC				Commission Business Intelligence Solution that draws together information from case management and financial systems (Jul 17)	Complete	
	South West Audit Partnership				Audit report with recommendations available (Oct 17)	On target	
	Senior Manager for Business Intelligence, DCC				Business Intelligence Tool available, Nov 17)	On target	
	We will support our local settings to increase capacity to meet the needs of	Sept 2019	We will monitor availability of placements and the number of children placed out of county	Senior Manager – Sufficiency, Commissioning and School Organisation, DCC	Multi-agency case review of children placed outside of Dorset to identify any that could be educated locally (Jun 17)	Complete	

Outcome 4: Use effective monitoring and quality assurance to challenge, support and develop provision							
	Improvement	Action	Timescale	Measures of success	Lead	Progress and milestones	Status
		more Dorset children with SEND		Reduced demand for special school places		Secure capital funding to make premises changes (Jul 17)	Complete

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Page 83				There will be more places available for children with moderate and severe learning difficulties; complex communication needs and social, emotional and mental health needs		Learning Centre transformation to host provision for Social, Emotional and Mental Health (SEMH) (Sep 17)	On target
						Increase the numbers of special school places for children with Moderate and Severe Learning Difficulties by (Jun 2018)	On target
						Identify additional mainstream hosts of resource based provision for SEMH across the county (Jul 18)	On target
						Work with an identified academy trust to provide local provision for 45 Dorset children with Autistic Spectrum Disorders (Sep 19)	On target
						Work with a Multi-Academy Trust to attract a new free school in Dorset for 49 approx.. 40 children with Social, Emotional and Mental Health difficulties (Sep 19)	On target

Outcome 4: Use effective monitoring and quality assurance to challenge, support and develop provision							
	Improvement	Action	Timescale	Measures of success	Lead	Progress and milestones	Status
		We will complete the work on the implementation of	March 2018	We will monitor wait times for assessment and undertake	Head of Partnerships (Children's), Dorset	Series of meeting to agree clinical pathway for assessment of needs (Jun17)	Complete

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		the pathway for Behaviour and Development (ASD/ADHD) by agreeing a new model and way of working between CAMHS and Paediatrics.		customer experience surveys to monitor parental satisfaction Holistic local specialist support is in place for the most complex needs that is personalised and appropriate to need	CCG	Complete options appraisal – agreement reached for a pan Dorset service (Jul 17)	Complete
						Preferred option agreed (Sep 17)	On target
						Implement new model (Apr 18)	On target
4.3	Data and information is shared appropriately to enable effective provision of support to individuals	We will ensure that electronic systems are used to support health information sharing	Sept 18	Effective data systems and monitoring processes are in place to streamline processes and predict future demand	Manager SEND Team, DCC	Appoint data systems administrator (Jun 17)	Complete
			Dec 17	Effective data systems and monitoring processes are in place to inform financial commitments and predict future demand, ensuring that value for money is achieved	Head of Partnerships (Children’s Services) Dorset CCG	Joint meeting between health and DCC to map information flows (Jun 17)	Complete
						Agree plan for improving information flows (Oct 17)	On target
						Business Analyst, DCC	Identify appropriate electronic case recording systems (Dec 17)
Programme Manager (DCC)	Introduction of Dorset Care Record (electronic system for sharing information between health and social care (Sept 18)	On target					

Outcome 4: Use effective monitoring and quality assurance to challenge, support and develop provision

	Improvement	Action	Timescale	Measures of success	Lead	Progress and milestones	Status
4.4	We will embed a culture of continuous learning and improvement	We will share and celebrate good practice across the system	July 2018	The workforce will report feeling valued and report greater confidence through annual survey	Senior Manager – SEND/Head of Partnerships (Children’s) Dorset CCG	Share good practice at SENCo meetings and Health Forum (Jul 17)	Complete

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Page 85	across the SEND network				Senior Manager SEND, DCC	Share draft self-evaluation framework with SENCoS (Jun 17)	Complete
					Senior Manager – SEND	Commence SENCo Award Training (Sep 17)	On target
					Chair – Local Offer Steering Group	Staff newsletters identify and share good practice (Nov 17)	On target
					Chair – SEND Delivery Group	Scope feasibility of local inclusion award (Dec 17)	On target
	We will track progress of children with SEND throughout the year to identify opportunities for intervention that would improve performance	July 2018	Educational attainment will be improved for children and young people with SEND	Senior Manager – Early Action	Business Intelligence tool to monitor progress of children receiving SEN support developed (May 17)	Complete	
						BI Tool roll out across all Family Partnership Zones (Sep 17)	On target
				Head teacher Virtual School, DCC	Targeted support provided to vulnerable groups	On target	

5. Proposed performance management framework

How much did we do?		How well did we do it?	
Page 86	<ul style="list-style-type: none"> • Number of Education Health and Care Plan Assessment Requests • Number of Education Health and Care Plan Assessments • Number of requests for information from health, education and social care professionals • Number of case audits completed • Number of conversions from statements to EHCP • Number of referrals to specialist services • Number of professionals completing training (by type) • Number of Early Years Developmental Checks completed • Number of children placed out of county • Number of places available in SEN Resource Provision • Number of places available in Dorset Special Schools for children with complex SEND • Attendance at commissioning and decision making meetings • Number of joint funding agreements in place • Number of early help interventions/graduated response offers • Attendance at Year 9 Reviews • Number of inclusion self-evaluation frameworks completed 		<ul style="list-style-type: none"> • % of EHCP assessments completed within 6 weeks • % of decisions to issue plans completed with 16 weeks • % of new EHCP completed within statutory timescales • % of requests for information received within agreed timescales • Quality of assessments and plans (case audits report) <ul style="list-style-type: none"> ○ Outcomes focused ○ Personalised ○ Voice of child • Quality of reviews <ul style="list-style-type: none"> ○ Preparation for adulthood • Customer experience survey <ul style="list-style-type: none"> ○ Satisfaction with process/support/services ○ Awareness and quality of Local Offer • Number of complaints/tribunals/PALs contacts • Waiting times for specialist services • Training evaluation • Value for money of services • Satisfaction of educational settings on quality of support offered
Is anyone better off as a result?			
	<ul style="list-style-type: none"> • % children and young people meeting goal based outcomes (measured at review) • Key Stage 2 attainment • Educational progress of vulnerable groups • Pupil absence rates of children with SEND • Pupil exclusion rates • Change in attitude/skills/confidence of workforce 		

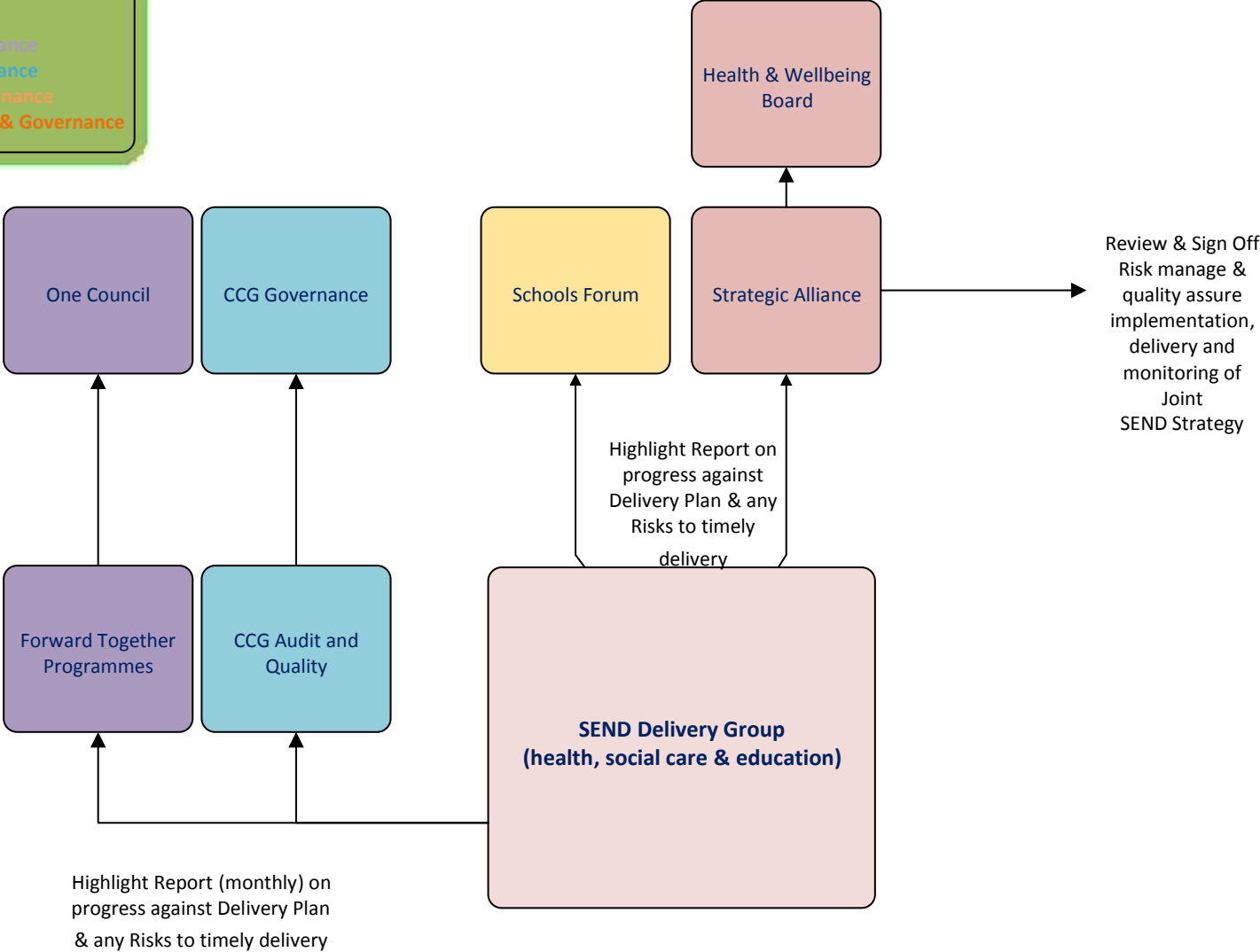
Appendix 1: Glossary

Term	Explanation
Acute Paediatric Vanguard	This is the work that paediatricians from all the hospitals in Dorset are changing how they work to ensure the services they offer meet national standards.
Audit	This is a way of looking at the quality of work of professionals. An independent person reviews paperwork and decisions and makes recommendations for improvement.
Designated Medical Officer (DMO)	The Designated Medical Officer is employed by the CCG and plays a key part in implementing the SEND reforms and in supporting joined up working between health services and local authorities.
Development and Behaviour Pathway	Services across Dorset have been working together to improve the way that children, young people and families that have issues with development and behaviour, including ASD and ADHD are identified and supported.
Dorset Nexus	Dorset Nexus is a web platform for educational settings to access information, training and services in a single place.
CAMHS (Child and Adolescent Mental Health Services)	This is a specialist service for children and young people with mental health difficulties
Capital Funding	This is money that can be used for fixed assets such as buildings but can't be used to operate services
Clinical Services Review	This is the way in which NHS Dorset CCG are seeking to change the healthcare system to provide services that meet the needs of local people and deliver better outcomes
Continuous Professional Development (CPD)	This is the way that professionals continue to learn and improve during their careers to keep up to date with changes and provide the best services they can
Family Partnership Zones	This is the way that a range of services and organisations are working together to help families that are facing problems or are likely to face problems and stop them from getting worse. There are seven zones in Dorset. You can find out more here
Health and Wellbeing Board	The Health and Wellbeing Board is responsible for improving health and wellbeing of people in Dorset by ensuring that organisations work together to deliver cost effective services. It is made up of senior representatives of key partner organisations
Healthy Child Partnership	This is a group of professionals from Dorset Health Care University Foundation Trust, Dorset Public Health and the county council that are leading changes in how we support children and families aged 0 to 5 years.
Key Worker	This is a person that works with a family to coordinate the help and support they need
MOSAIC	This is the new electronic case recording system that will be used by professionals in children's services and adult's services when they are working with families
Paediatric Systems Improvement Network	This is part of the Acute Paediatric Vanguard work mentioned above and oversees the way that paediatricians are working together
RIO	This is the electronic case recording system used mostly by health professionals when they are working with children, young people and families

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SEN Resource Provision	This is a separate educational provision provided in a mainstream school or setting that seeks to meet the needs of specific groups of children and young people with SEND such as communication needs or social, emotional and mental health needs.
Strategic Alliance	This is a group of decision makers that come together to plan and monitor services and support for children, young people and their families in Dorset. It includes representatives from education, health, care, voluntary and community sector, parents and carers
Universal settings	These are services that are routinely provided, or available, to all children and their families. They include early years provision, mainstream schools, GPs, health visitors.

Appendix 2: Proposed Governance Structure



Cabinet

Dorset County Council



Date of Meeting	6 September 2017
<p><u>Cabinet member(s)</u> Tony Ferrari - Cabinet Member for Community and Resources Daryl Turner - Cabinet Member for Natural and Built Environment</p> <p><u>Local Members</u> All members (local members affected have been consulted/engaged separately)</p> <p><u>Lead Officer(s)</u> Richard Bates - Chief Financial Officer Mike Harries - Corporate Director for Environment and Economy</p>	
Subject of Report	Quarterly Asset Management Report
Executive Summary	<p>This report is a quarterly report which sets out key issues relating to the various asset classes of Property, Highways, ICT, Fleet and Waste.</p> <p>Some of the key items to note and action are as follows:</p> <ul style="list-style-type: none"> • An update on the Asset Management Plan key performance indicators is provided (Para 2.1) • Approval is sought to transfer the painting <i>The Dorset Yeoman at Agagia, 26th Feb. 1916</i> by Elizabeth Southerden Thompson, Lady Butler, to the Keep Military Museum, Dorchester (Para 3.1) • An update on Monkton Park and a recommendation to retain the site for the time being is made (Para 4.1) • An update on the Youth Centre transfers is provided (Para 4.2) • Proposals for Bovington Park are outlined (Para 4.3) • The proposed disposal of the former Bere Regis School site is outlined (Para 4.4) • A Business Case to support investment from 2017 - 2022 in Dorset Innovation Park, which would require a financial loan from the County Council is outlined (Para 4.5) • The proposed disposal of 8 Glyde Path Road is outlined (Para 4.6) • Proposals to renew the Surface Treatment Framework are outlined (Para 5.1) • Other emerging issues to note are included in the report • Details of the County Council's capital programme are provided (Para 8.1)
Impact Assessment:	Equalities Impact Assessment:

	<p>The most recent equalities impact assessment was undertaken on the Asset Management Plan and identified the need to ensure that the interests and needs of the six equality groups are addressed at service level as part of the service asset management planning process, including consultation with users.</p>	
	<p>Use of Evidence:</p> <p>The Asset Management Plan makes use of the following sources of evidence:</p> <ul style="list-style-type: none"> • The Corporate Plan and Community Strategy • Medium Term Financial Strategy • Outcomes from a Members Seminar on 25 September 2014 • Periodic public consultation • Local and National property performance data • Service (property) asset management plans • Highways asset management planning data • Corporate IT strategy 	
	<p>Budget:</p> <p>If all the recommendations in the report are approved there will remain a capital sum of £0.1m unallocated up to the end of 2019-20.</p>	
	<p>Risk Assessment:</p> <p>Specific project risk registers are in place. None of the recommendations relate to or create high or medium risks.</p> <p>Having considered the risks associated with this decision using the County Council's approved risk management methodology, the level of risk has been identified as: Current Risk: LOW Residual Risk: LOW</p>	
<p>Recommendations</p>	<p>It is recommended that the Cabinet:</p>	
	<p>(i)</p>	<p>Approves transfer of legal title of <i>The Dorset Yeoman at Agagia, 26th Feb. 1916</i> by Elizabeth Southerden Thompson, Lady Butler, to the Keep Military Museum under the terms of Arts Council England's Accreditation standard and the Museum's existing Acquisition & Disposal Policy (Para 3.1.4)</p>
	<p>(ii)</p>	<p>Approves the retention of Monkton Park to explore options for utilisation of the site, including the potential of providing an SEMH Special School, and the re-provision of the Learning Centre on the site (Para 4.1.13)</p>
	<p>(iii)</p>	<p>Approves the use of the County Council's general powers of competence to permit it to grant a 125 year lease of the 10 acre site comprising the former Bovington Middle School site to the Delta Education Trust for the provision of a school for children with Special Educational Needs and Disabilities and otherwise on terms to be agreed by the Corporate Director for Environment and Economy (Para 4.3.6) and the retention of the remaining 7</p>

		acre playing field site at Bovington Park whilst further options for the site are explored (Para 4.3.9)
	(iv)	Approves the disposal of the whole of former Bere Regis Primary School site on terms to be agreed by the Corporate Director for Environment and Economy (Para 4.4.6)
	(v)	Approves resources of £2,276,000 (including a 20% contingency) are made available as a loan for up to a ten year period through Forward Funding from the County Council by way of either prudential borrowing from the Public Works Loan Board or the use of credit balances (Para 4.5.6)
	(vi)	Approves the disposal of 8 Glyde Path Road, Dorchester on terms to be agreed by the Corporate Director for Environment and Economy (Para 4.6.4)
	(vii)	Approves that upon completion of the scoping work, a new Surface Treatment Framework is procured and let (Para 5.1.3)
	(viii)	Approves the overall revised estimates and cash flows for projects as summarised and detailed in Appendix 1 (Para 9.2.2)
	(ix)	Notes the emerging issues detailed in this report.
Reason for Recommendation	A well-managed Council ensures that the best use is made of its assets in terms of optimising service benefit, minimising environmental impact and maximising financial return.	
Appendices	Appendix 1 Financial Summary and Capital Control Totals Appendix 2 Monkton Park Business Case Appendix 3 Bovington School Site Plan Appendix 4 Bovington Children's Service Business Case Appendix 5 Bere Regis Site Plan Appendix 6 Dorset Innovation Park Business Case Appendix 7 Glyde Path Road Site plan	
Background Papers	The Property Asset Management Plan 2015-18 The Highways Asset Management Plan (Vol. 1/Vol. 2)	
Officer Contact	Name: Peter Scarlett, Estate & Assets Service Manager Tel: (01305) 221940 Email: p.scarlett@dorsetcc.gov.uk Name: Tony Diaz, Senior Finance Manager Tel: (01305) 224950 Email: t.diaz@dorsetcc.gov.uk	

1. Background

- 1.1 This report provides an update on key issues relating to various assets, including progress in property asset reduction and rationalisation. It also seeks approval for a number of transactions and project matters.
- 1.2 This report covers all the County Council's asset classes: Property, Highways, ICT, Fleet and Waste (via DWP).

2. Assets/Whole authority performance

2.1 Asset Management Plan Key Performance Indicators

- 2.1.1 The Asset Management Plan (AMP) sets out the key property priorities and strategies of the County Council over a three year period. There are 10 performance indicators detailed within the AMP which detail the progress that the County Council is making in delivering those priorities. Progress against the KPIs is reported on Dorset for You, via this link: <https://www.dorsetforyou.gov.uk/dorset-property/assetmanagement-plan>
- 2.1.2 Some highlights are that the County Council has disposed of 24% of its non-schools property estate over the past 7 years. It has generated revenue savings of £633,000 over 2 years from the disposal of properties and capital receipts in excess of £9.0m over the same period. One of the County Council's key property objectives is to roll out flexible working across its office estate, enabling it to reduce the number of offices that it occupies from 28 down to 8. It has vacated 26% of its office space over the past 2 years and plans are on course to generate revenue savings of £850,000 per annum from its office estate alone.

2.2 The Community Offer for Living and Learning

- 2.2.1 A report was brought to the Cabinet in July setting out the background of this programme and providing an update on progress. A further report on this programme will be brought to the Cabinet at the end of this month.

3. General Asset Management

3.1 Transfer of Oil Painting of The Dorset Yeoman at Agagia, 26th Feb. 1916 by Elizabeth Southerden Thompson, Lady Butler

- 3.1.1 In late 1916, Colonel J.R.P. Goodden, a former commander of the Queen's Own Dorset Yeomanry and leader of Dorset County Council, proposed the idea of a painting of one of the regiment's battles as a memento of their First World War service. Elizabeth Southerden Thompson Butler, a world-famous battle artist of the late 19th and early 20th century, was commissioned to undertake the work and in 1918 it was given to Dorset County Council to be hung in the Shire Hall. The picture now normally hangs in the Members' Room at Dorset County Council offices
- 3.1.2 To facilitate greater public access and an appropriate context, it is now proposed to transfer the painting to the Keep Military Museum. There are two options:

1) A full transfer of legal title, which would essentially constitute a gift from DCC to the museum. The transfer would be contingent on the Keep Museum operating within the Acquisitions and Disposals framework which comprises part of the Arts Council Accreditation standard for museums and galleries. This means that the painting is retained in perpetuity for public benefit and in the event of the museum becoming defunct, the policy requires the ethical distribution of collections, precluding financially motivated

sale and a requirement to seek a non-financial transfer to other accredited museum collections with relevant holdings (e.g. Dorset County Museum, National Army Museum).

2) A ten year loan agreement, again governed by Arts Council Museum Accreditation standards, to ensure judicious care of the item, within recommended temperature, humidity and security conditions. Terms and conditions of loans are relatively standardised within the museums profession and an agreement between DCC and the Keep could be drawn up on this basis.

3.1.3 The Keep Museum will incur some costs in relation to moving, displaying and insuring the artwork. The Museums Advisor will support a grant application to facilitate this.

3.1.4 It is recommended that the Cabinet approves the transfer of legal title of *The Dorset Yeoman at Agagia, 26th Feb. 1916* by Elizabeth Southerden Thompson, Lady Butler, to the Keep Military Museum, Dorchester under the terms of Arts Council England's Accreditation standard and the Museum's existing Acquisition & Disposal Policy (**Recommendation i**).

4. Dorset Property Asset Management

4.1 Update on Monkton Park

4.1.1 In June the Cabinet considered a report on the disposal of Monkton Park and a proposed sale and leaseback to Dorset Development Partnership. After a detailed debate, it was concluded that the whole of Monkton Park, including the Learning Centre (located in the Old Rectory building) subject to its re-location, should be declared surplus and for a report to be submitted to the Cabinet in September 2017 setting out the options for the site.

4.1.2 Monkton Park is situated two miles south of Dorchester town centre, accessed directly off the A354. It comprises a site area of 2.45 ha (6.11 acres). At the present time the site comprises a selection of buildings which are used by several different parties.

4.1.3 The main body of the site (comprising 1.845 ha) is used by Children's Services and the Youth Offending Team (YOT) (this service is now pan-Dorset and is managed through Bournemouth Borough Council) predominately as offices. It is intended that these buildings will be vacated by September 2018.

4.1.4 There is a standalone building, Marvin House, at the east of the site (comprising 0.066 ha) which is leased to Dorset Health Care University NHS Foundation Trust (DHUFT) on a 25 year lease at a peppercorn rent (as DHUFT funded the restoration of the building) expiring in 2036. The service provided from there is CAMHS Swifts service which is for young people with learning disability. The tenant has indicated that it would be willing to move from the building if suitable alternative accommodation can be provided on a rent free basis.

4.1.5 The final element of the site is the Learning Centre (comprising 0.54 ha). Although the buildings that the Learning Centre occupies are old and no longer fit for purpose it would not be straight forward to relocate this function away from the site. The County Council has reviewed its existing assets in the locality and it has nothing that would be a suitable replacement. It would therefore need to acquire either a site and build a new facility on it, or an existing building which could be adapted. A conservative estimate of the costs of re-providing this facility off site is £1.5 to £2.0m including site acquisition costs. As the Learning Centre serves pupils from the West Dorset and Dorchester areas, Children's Services have specified that the building would need to be either in Dorchester, or the town's immediate locality. An additional complication is that the Learning Centre is classified as a maintained school so if the County Council was to move it beyond its immediate locality it would have to undertake a consultation exercise on the proposals.

- 4.1.6 In response to a request for services to put forward alternative options for the site, Children's Services have put forward a business case to use the site for the provision of a Social Emotional and Mental Health (SEMH) special school as none of the special schools in Dorset cater for children whose primary need is SEMH (a summary business case is attached under Appendix 2). The summary business case explains that at the end of March 2017, 72 children with SEMH were accessing their education outside of Dorset. This is obviously not in the best interest of the child and is generally a more expensive option. The current average cost of a placement per annum outside Dorset is £56,000 (based on 2016/17 figures), where the average local authority rate for a special school place is £19,800. Therefore local authority places cost £36,200 less than those outside the county.
- 4.1.7 In the first year the expectation is that at least 15 children would require a place at the new school across all age groups. The forecast is for 7 of these children to be returning from an existing out of county provision, and a further 8 children would be new admissions. Therefore the saving for the local authority would be £253,400 across a full financial year (7 places x £36,200). The 8 new admissions would also avoid the need to pay higher costs of £56,000 per place, and would instead cost the local authority £19,800 per place, avoiding additional costs of £289,600 across a full financial year (8 places x £36,200) This cost avoidance figure would increase as the school gets fully established, with a maximum of 40 children being placed there across all year groups after 3 to 4 years.
- 4.1.8 It has been highlighted in the business case that there is a real lack of alternative sites in Dorset to meet the needs of these children and if this site is not made available there is a real risk that the County Council would not be able to place these children in the county and instead continue to transport them to alternative counties. If the site (or an alternative site) is made available for the provision of an SEMH special school the intention is for an appropriate Multi Academy Trust (MAT) partner to bid for capital funding under the next 'wave' of Free School applications.
- 4.1.9 Assuming that the site was to become operational by 2020, the value of the saving would be £253,400 in the first year, with additional savings probable in future years as other pupils return from schools outside Dorset. In addition there would be the avoidance of extra costs as children could be educated in Dorset instead of in more expensive provision outside the county. The additional cost avoidance figure would be £1,448,000 per year when the school was at capacity (40 pupils x £36,200), which over a 25 year term equates to a net present value £18,400,000.
- 4.1.10 The alternative option of disposing of the site through Dorset Development Partnership has been assessed on the same terms. The net present value of that transaction by comparison is assessed as £2,125,000.
- 4.1.11 Once a suitable partner has been found and a successful capital investment bid has been developed with the ESFA, it is recommended that the County Council uses a proportion of the Monkton Park site for a new SEMH special school. Alternatively this function could be provided from an alternative site that meets the ESFA's criteria. Although sites with good transport links in accessible locations are hard to come by, the surplus land at Bovington Park (see item 4.3 of this report) may also be suitable, and this business case could apply equally to that site. The Monkton Park site could also provide an alternative location for Dorchester Learning Centre, as there is still a significant demand for places and alternative options are limited and would be costly.
- 4.1.12 If the new SEMH School and the Learning Centre were to remain at Monkton Park, they would require all the space on the site, and there would need to be a more detailed feasibility to ensure that the needs of all children could be met appropriately, and within DfE guidelines. But if only one of these provisions were to be placed at Monkton Park, the rest of the site could be released for an alternative use, or for a capital receipt.

- 4.1.13 The Cabinet is requested to approve the retention of Monkton Park to explore options for utilisation of the site, including the potential of providing an SEMH Special School and the re-provision of the Learning Centre on the site. Further work will be undertaken to identify a Multi Academy Trust (MAT) partner to bid for capital funding under the next 'wave' of Free School applications and a further report will be brought to the Cabinet at an appropriate time (**Recommendation ii**).

4.2 Youth Service – Update on the Asset Transfers

- 4.2.1 In May 2016 Cabinet agreed to transfer a number of youth centre premises to local community bodies. Of the 22 Centres which DCC operated:

- 5 have now been transferred to local community groups, either by long leasehold or freehold transfer;
- 6 are in solicitors hands and are close to being completed;
- 3 have been retained for other DCC use, all with a continuing use for local youth provision;
- 4 are now or in the process of being used by schools, 3 of which will have continuing youth provision in due course;
- 2 centres have closed;
- 2 remain under discussion with the local community groups. It is proposed that a deadline of 1st December 2017 is set for the completion of the transfers of these 2 outstanding centres.

- 4.2.2 The matter will be brought back to the Cabinet in December for a further decision if any transfer remains outstanding at that time.

4.3 Proposed disposal of Bovington Park

- 4.3.1 Bovington Park was declared surplus to the County Council's requirements approximately 18 months ago, but the County Council has been unable to dispose of the site up until now as it was waiting for Section 77 consent from the Secretary of State for Education and the former owners, the MoD, were unwilling to negotiate on the lifting of a restrictive covenant limiting the site's use to educational purposes. These two items have now been resolved and the County Council has sought expressions of interest for the site. Two proposals for the acquisition of the site have been submitted, by The Bovington Tank Museum and The Delta Education Trust.

- 4.3.2 The Delta Education Trust has put forward a proposal to acquire the main 10 acre site, which incorporates the existing former Bovington Middle School building (hatched blue on the plan attached as Appendix 3), for the development of a free school to provide for children with autistic spectrum conditions and related anxiety and speech and language needs. The school would serve up to 100 children in Bournemouth, Poole and Dorset, and all three councils have identified a gap in provision in this area, with pupils having to travel long distances to schools out of the area.

- 4.3.3 Delta have their funding in place for the proposed development. Their proposal is for DCC to grant Delta a 125 year lease at a peppercorn rent (similar to the interest granted to other academies). The wider financial and educational benefits to Dorset County Council and justification for a disposal at nil value are set out in the business case attached as Appendix 4. If the proposed lease to Delta is agreed it would pick up the risk on demolition costs.

- 4.3.4 The Tank Museum has also made an offer for the 10 acre site. The bid is on the basis that the buildings are demolished and they have accounted for the potential cost of that demolition in their proposal. They have offered £250,000 for the building with DCC taking on the responsibility for the demolition, or £57,000 with the Tank Museum taking on the

responsibility for demolition (subject to survey). The Museum has sought initial quotes for demolition with the lowest estimate at £193,000.

- 4.3.5 The planning restrictions with this site, the high holding costs and potential demolition costs associated with the existing buildings impact significantly on the prospects for generating a significant sum for the sale. The whole site has been valued at amenity value of £15,000 per acre, giving a total a value in the order of £260,000. Although the Tank Museum has offered a net sum of £57,000 for the 10 acre site it is thought that the true value of this part of the site is in the order of £150,000, which would be foregone if the proposed lease to Delta Education Trust is granted. The loss of such a capital receipt needs to be considered in conjunction with the cost savings and educational benefits derived from DCC commissioning the services of Delta Education Trust, which are conservatively estimated to save the County Council £253,000 and avoid additional costs of £289,600 in the first year, with additional cost avoidance of approximately £1,629,000 for each full year thereafter by educating children in a Dorset school.
- 4.3.6 It is therefore recommended that the Cabinet approves the use of the County Council's general powers of competence to permit it to grant a 125 year lease of the 10 acre site comprising the former Bovington Middle School site to the Delta Education Trust for the provision of a school for children with Special Educational Needs and Disabilities and otherwise on terms to be agreed by the Corporate Director for Environment and Economy (**Recommendation iii**).
- 4.3.7 The Delta Trust does not require the residue land comprising former sports pitches to the west of the site (hatched red on the plan attached as Appendix 3) which comprises circa 7.2 acres. The Tank Museum has separately offered £108,300 for this site. The initial intention would be for the Tank Museum to utilise the land for overflow car parking for their regular events during the summer. Out of season they have indicated a willingness to facilitate Wool Football Club with their desire to utilise the land. The proposed acquisition would assist with the Tank Museum's further growth plans consolidating the 70% growth in visitor numbers seen over the past 10 years.
- 4.3.8 Whilst a disposal of this land to the Tank Museum of future expansion would undoubtedly benefit the local economy, it has been recognised that this site would be a very good alternative location to Monkton Park for the provision of an SEMH special school. The site has good transport links and is located close to the centre of the county, as demonstrated by the Delta Trust's desire to locate its school there. There would undoubtedly be synergies that could derive from having these two schools located side by side.
- 4.3.8 It is therefore proposed that the County Council retains the 7 acre playing field site for the time being whilst it explores the opportunities to procure a partner to construct and operate an SEMH school within the county (as set out in para 4.1.8). This could either be on this site, or at Monkton Park. If this site proves not to be suitable for an SEMH school, the County Council could dispose of the land to the Tank Museum.
- 4.3.9 It is recommended that the County Council retains the 7 acre playing field site at Bovington Park whilst it explores further options (**Recommendation iii**).

4.4 Proposed Disposal of Former Bere Regis School

- 4.4.1 The former Bere Regis Primary School became surplus upon the opening of the replacement school in January 2017. Since then officers have been engaged in discussions with the Parish Council over to the future use of the site.

- 4.4.2 The Parish Council has declared its existing Village Hall no longer fit for purpose and has identified three sites for potential relocation. The former Bere Regis Primary School site is one of the potential locations although not the preferred option which lies on land adjacent to the entrance road to the new school.
- 4.4.3 A master plan has been prepared for the potential redevelopment of the former School site which proposes a residential redevelopment of the site encompassing 22 units (incorporating affordable housing in line with PDC policy at 40%). Redevelopment would be subject to planning consent for the site, part of which sits outside the settlement boundary. The Parish Council, whilst supportive of the proposals in principle, would like the County Council to set aside part of the site for the possible provision of a new village hall whilst they explore the viability of the three options that they have identified.
- 4.4.4 Recent comparable evidence suggests that the value of the site with outline consent for the scheme envisaged above (excluding a village hall) would be in the order of £750,000 - £800,000 (after demolition costs).
- 4.4.5 The master planners have interpreted that the Parish Council's aspirations for the village hall would potentially lead to a loss of 6-8 units from the scheme. It is assessed that there would be a value degradation of circa £220,000 - £290,000 if the required land (highlighted edged red and brown on the plan appended to this report at Appendix 5) is withheld at this stage from any potential sale. Splitting the site may also affect marketability as prospective purchasers might be concerned because of the uncertainty relative to the retained land.
- 4.4.6 Given that the site is not the Parish Council's preferred location for its replacement village hall, and that setting aside land for any such facility would lead to a diminution in the capital receipt that the County Council would obtain and potentially delay the disposal, it is felt that the County Council should proceed to dispose of the whole site. At the same time the County Council should work with the Parish Council as far as it is able to support its aspiration to re-provide the village hall in its preferred location adjacent to the private road to the new school. It is therefore recommended that the Cabinet approves the disposal of the whole of former Bere Regis Primary School site on terms to be agreed by the Corporate Director for Environment and Economy (**Recommendation iv**).

4.5 Dorset Innovation Park – Business Case to support investment from 2017 – 2022

- 4.5.1 Dorset County Council acquired Dorset Innovation Park in March 2017 and are seeking approval to secure a capital investment programme funded by way of prudential borrowing from the Public Works Loan Board or the use of credit balances. The County Council is represented on the EZ Management Board by Cllr Croney.
- 4.5.2 The summary Business Case (attached under Appendix 6) substantially outlines the case which is driven by investment requirements in Years 1-5 identified by the consultants who submitted the EZ Implementation Plan to DCLG in March 2017. The investment requirements have subsequently been analysed by officers and split in accordance with the respective interests in the Enterprise Zone. Dorset LEP has identified expenditure projects of £2,592,000 over the first five years. It is proposed that 50% of the resource, £1,296,000, is made available and funded through retained business rates from the Park (Loan 1). This element includes the cost of the delivery of the Local Development Order to simplify the planning process for faster development delivery in due course. The potential refurbishment of Chesil House is also in the budget, subject to further detailed feasibility appraisals. It is proposed that the remaining 50% of the EZ Strategic Capital expenditure not covered by this Business Case, together with the revenue expenditure required (i.e. for interest payments, EZ Manager and marketing costs) is met from money which Dorset LEP holds in the Growing Places Fund (however this is a decision for DLEP Board, not for the Cabinet).

- 4.5.3 Separately the landowners (Dorset County Council and Purbeck District Council) have identified other works highlighted within the Implementation Plan related to infrastructure improvements on the Park to prepare and facilitate early plot sales. Loan 2 highlighted in the attached business plan is for £980,000 (including 20% contingency) being Dorset County Council's proportion (i.e. 5/6th) of the landowners' capital expenditure. The other 1/6th contribution is being sought from Purbeck District Council, which owns a 1/6th proportion of the Innovation Park. In respect of Loan 2, it is proposed that the landowners' capital receipts from the plot sales at Dorset Innovation Park are initially ring-fenced towards the repayment of this loan.
- 4.5.4 It is projected that Loan 1, with repayments funded by ring fenced retained business rates, will be redeemed in Year 10. Loan 2 is projected to be repaid in Year 3 by way of ring-fenced capital receipts from land sales.
- 4.5.5 Dorset Innovation Park requires the significant investment identified in the Implementation Plan and in the Business Case. If the investment highlighted for the first five years is not funded there is a greater risk to the investors that existing businesses on the park may relocate elsewhere thereby defeating the rationale of the public sector acquiring the park to protect and promote wider employment generation in Dorset. Furthermore, if existing businesses re-locate the landowners will incur greater costs from empty property rates and contributions to the estate service charge whilst losing existing revenue streams.
- 4.5.6 The Cabinet is requested to approve resources of £2,276,000 (including a 20% contingency) to fund loans 1 and 2 are made available as a loan for up to a ten year period through Forward Funding from the County Council by way of either prudential borrowing from the Public Works Loan Board or the use of credit balances **(Recommendation v)**.
- 4.6 **Proposed Disposal Sale of 8 Glyde Path Road, Dorchester**
- 4.6.1 8 Glyde Path Rd is a detached Grade II listed house that has been occupied for many years by the Manager of the Colliton Club. In 2014 the Club's premises and the house were transferred out of County Council control to the Colliton Club Management Committee under two separate leases. (A location plan is attached under Appendix 7).
- 4.6.2 The property has now been returned to the Council with vacant possession and following consultation with local members the initial views of Dorchester Town Council have been sought to ascertain if it might be of interest to their key worker housing Community Land Trust. However because of the potential constraints on redevelopment/refurbishment due to its listed nature it is unlikely to be of interest.
- 4.6.3 PMG has confirmed that there are no Dorset County Council services with an interest in retaining this property and both local members have confirmed that they would have no objection to any such disposal. So it is proposed that the property is declared surplus and placed on the open market as soon as possible.
- 4.6.4 The Cabinet is requested to approve the disposal of 8 Glyde Path Road, Dorchester on terms to be agreed by the Corporate Director for Environment and Economy **(Recommendation vi)**.
- 4.7 **Schools Basic Need Programme, use of delegated authority – to note**
- 4.7.1 The Cabinet previously approved authority to the Director for Children's Services, after consultation with the Cabinet Member for Children's Services and the Modernising Schools Programme Board, to approve individual projects within the Schools Basic Need Programme budget proceeding through gateways of the Capital Project Delivery Protocol.

- 4.7.2 There were a number of recommendations which were due to be considered by the MSP Board at their meeting on 16th May 2017, which were required to enable a major extension project to commence, and complete within the agreed timescale, and to keep the modular classroom works planned for this summer on programme. Due to the Local Government elections this meeting was subsequently cancelled as member appointments had yet to be made to Boards. It was therefore necessary for the Director to exercise the delegated authority to agree the following decisions to allow the projects to proceed on programme:
- 4.7.3 To agree an increase in the budget allocation for the Sherborne Abbey VC CE Primary School extension project by a further £435,000 to enable the project to proceed.
- 4.7.4 To approve 'Commit to Construct' (Project delivery Gateway 6) for the extension of Sherborne Abbey VC CE Primary School to 2FE.
- 4.7.5 To agree an increase in the budget allocation to £700,000 for a new modular building at Shaftesbury Primary School.
- 4.7.6 To agree an increase in the budget allocation to £427,000 for a new modular building at St Michael's CE Middle School, Colehill.
- 4.7.7 To agree an increase in the budget allocation to £547,000 for a new modular building at Mudeford Junior School, Christchurch.
- 4.7.8 All of the above works will be completed within the current MSP capital works budget allocation, and will not create any additional financial pressure.

5. Highways Asset Management

5.1 Surface Treatment Framework

- 5.1.1 The existing Premium Surface Dressing and Micro-asphalt 4 year framework expires on 13th October 2017 and the Carriageway Surface Retexturing Framework expires on 6th July 2018. Due to the similarities with these currently separate framework contracts, the relatively close expiry dates and the similar range of suppliers who are likely to be interested in these opportunities, the Highways Operations team wishes to roll the two frameworks into a single framework which would cover all surface treatments (including some extra treatments not currently covered by any framework).
- 5.1.2 There is an on-going and increasing need to carry out these types of highway surface treatments in line with Highways' established asset management strategy. The aggregated value of this 4 year multi lot, multi supplier framework is £8m which is to be funded through existing budgets. The new framework will be collaborative with Bournemouth Borough Council and the Borough of Poole Council and will be hosted by (and the procurement process lead by) Dorset County Council. In addition, it will also be accessible to other South West Authorities.
- 5.1.3 The contract process is at scoping stage and it is recommended that the Cabinet approves that upon completion of the scoping work, a new Surface Treatment Framework is procured and let (**Recommendation vii**).

5.2 West Stafford Bypass Flooding Improvements scheme – to note

- 5.2.1 Due to the urgency to resolve the issue of the frequent flooding of West Stafford Bypass, a phased approach for the delivery of measures was developed. Phase 1 works were completed in April 2017 and have been successful in preventing a reoccurrence of the highway flooding problem so far. Phase 2, the installation of retention ponds in the adjacent fields, will be instigated if Phase 1 begins to fail in the future.

- 5.2.2 As the County Council was negotiating to acquire some agricultural land for the construction and maintenance of the earth bunds for Phase 1, it has taken the opportunity to acquire sufficient land area for the future Phase 2 retention ponds. The farmer will continue to farm this area until if/when it will be required for the scheme. PMG has approved the acquisition and the Cabinet is requested to note that this scheme is progressing.

5.3 Update on the A350/C13 scheme – to note

- 5.3.1 The A350/C13 Route Management Scheme between Blandford and Shaftesbury is funded by the Department for Transport (DfT) through the National Productivity Investment Fund to the amount of £2.42m and the funding constraints require implementation of the scheme during this financial year. The scheme will address areas of congestion and conflict to ensure that drivers travel appropriately through the various communities including Fontmell Magna, Melbury Abbas, Iwerne Minster and Stourpaine.
- 5.3.2 The scheme includes restructuring, resurfacing and drainage work along various sections of both the A350 and C13. In addition there are a number of traffic management proposals which will require Traffic Regulation Orders (TRO's) to change speed limits, adjust village gateways and to ban certain movements (at the Gore Clump junction to Compton Abbas Airfield and the Pitts Lane junction in Cann). There is currently an advisory signed route for HGV's suggesting they travel south on the C13 and north on the A350. Local concerns about this have been raised through the public consultation process and representations made by local community groups and Parish Councils along both the A350 and C13. Consultation is also being undertaken with the emergency services and the results should be known at the beginning of September.
- 5.3.3 It is anticipated that a Cabinet Resolution will be required in Autumn 2017 on issues surrounding the implementation of a permanently signed route for HGV's on the A350/C13 corridors.

6. Fleet Asset Management

6.1 Vehicle Replacement Programme 2017/18 - to note

- 6.1.1 The vehicle replacement programme has 15 Dorset Travel vehicles to be replaced this financial year. As part of the Council wide review of transport there is a review in Adult Services to understand their future transport requirements. These vehicles will not be replaced until the overall position is resolved.

7. ICT Asset Management

Significant emerging issues – to note

7.1 ICT capacity to manage and maintain its operational services

- 7.1.1 ICT & Customer Services have addressed budget pressures in 2017-18 of £977,000 in excess of the budget control total (gross budget £8.2m/net budget £4.97m). In 2018-19 there is a further £791,000 budget pressure. Capacity has reduced in each of the last 3 years, and will need to do so again in 2017-18 to address this cost pressure.
- 7.1.3 The impact of this on ICT's ability to deliver will inevitably be focused around improving the efficiency of core operational delivery at the expense of supporting wider transformational work. The risk of this capacity reduction has been raised with Cabinet members and CLT and has been acknowledged.

7.1.5 A position statement is being developed which will articulate ICT's capacity to deliver across operations, maintenance projects and transformational projects set against the reduced financial allocations it now has for projects and operational support.

7.1.6 This position statement will help officers and members to have a clear understanding of what ICT can and cannot do, irrespective of whether there can be more investment in ICT. However investment would only be part of the answer alongside ongoing improvement of operational efficiency.

7.2 Cyber-risk and ICT continuity

7.2.1 The County Council has experienced a number of cyber-attacks and continuity incidents over recent weeks. Cyber risk remains at a High Level and is flagged on the corporate risk register. ICT staff are currently trialling some new toolsets with NHS partner authorities that may help detect intrusion more easily and quickly – although this will require investment. The outcomes of this review will be presented to Resilience Group and the Information Strategy Group for commissioning where appropriate. ICT is refreshing its continuity approaches and its risk monitoring such that it can provide better assurance that the risks are being effectively managed.

7.2.2 All staff and members have been asked to complete the on-line cyber security training by the end of August to help mitigate the risk.

8. Waste Asset Management

8.1 No Items to report this quarter.

9. Financial Performance

9.1 Financial Summary and Capital Control Totals

9.1.1 The overall financial position is summarised in Appendix 1. Over the next three years the total sum available is £ 0.1m up to the end of 2019-20.

9.2 Executive Summary of Approved Projects, including significant changes

9.2.1 Details of the approved schemes are set out in the schedule situated on Dorset For You, accessed via the following link: <https://www.dorsetforyou.gov.uk/dorset-property/asset-management-plan>

9.2.2 The Cabinet is requested to approve the overall revised capital expenditure estimate and cash flows as summarised in Appendix 1 (**Recommendation viii**).

Richard Bates
Chief Financial Officer

Mike Harries
Corporate Director for Environment and Economy

September 2017

DIRECTORATE	2017-18 £'000	2018- 19 £'000	2019- 20 £'000
CHILDRENS	22,767	15,671	5,243
ENVIRONMENT	41,604	16,575	14,580
ADULT & COMMUNITY	1,397	3,853	3,600
CABINET / WHOLE AUTHORITY	15,367	5,227	1,893
DORSET WASTE PARTNERSHIP	2,829	3,875	4,732
CAPITAL FLEET REPLACEMENTS	1,539	1,053	510
CAPITAL R & M	6,037	5,967	5,967
TOTAL	91,540	52,221	36,525
Anticipated Slippage	(20,000)	7,500	7,500
Contingency re Risk Items	2,279	0	0
(Overcommitted) / Remaining flexibility (to meet target)	103	0	0
Gross Predicted Capital Spend	73,922	59,721	44,025

Summary Business Case regarding the future use of Monkton Park Cabinet - Quarterly Asset Management Report - September 2017

Context

Currently there are a significant number of children with Special Educational Needs and Disabilities (SEND) who are in various types of care and education placements, inside and outside of the county of Dorset. Better outcomes for children are normally achieved when they are close to their family, community, and support networks. Dorset County Council (DCC) is currently engaging with a number of Multi Academy Trusts (MATs) in order to bring additional capacity to Dorset, particularly for children with Autistic Spectrum Disorder /Condition (ASD / ASC) and children whose primary need is Social Emotional and Mental Health (SEMH).

A successful bid by the Delta Academy Trust for a school for children with ASC / ASD has led the Education and Skills funding Agency (ESFA) to search for a suitable site/property across Dorset, Poole and Bournemouth. This search has only identified one suitable site so far; Bovington Park in Dorset. It is apparent, from this search and other property searches carried out by Dorset County Council for alternative school sites that appropriate places are hard to find.

Demand

Children's Services have already identified the need for a SEMH special school in Dorset, as none of our special schools in Dorset cater for children whose primary need is SEMH. We have engaged with a number of Multi Academy Trusts (MATs) to develop a bid, to the ESFA, for capital investment.

At the end of March 2017, 72 children with SEMH were accessing their education outside of Dorset. This is obviously not in the best interest of the child and is generally a more expensive option. With the rise in the number of children with Education Health and Care Plans (EHCPs) and Statements of Educational Need (SEN), there is further demand expected (see **Appendix A**) over the coming years, and DCC must meet its statutory duty to provide appropriate education for all children in Dorset. This could also release some capacity at Learning Centres, who could then make places available for other children currently waiting to attend their provision with SEMH needs, avoiding the need for further Out of County places.

Financial Implications

The current average cost of a placement outside Dorset is £56,000 (based on 2016/17), where the average local authority rate for a special school place is £19,800. Therefore local authority places cost £36,200 less than those outside the county. The intention is for an appropriate Multi Academy Trust (MAT) partner to bid for capital funding under the next 'wave' of Free Schools. This would allow DCC to start placing children at the proposed SEMH free school, which could be located at Monkton Park, from September 2019 or 2020, reducing the financial demands on the local authority.

In the first year the expectation is that at least 15 children would require a place at the new school across all age groups. The forecast is for 7 of these children to be returning from an existing out of county provision, and a further 8 children would be new admissions. Therefore the saving for the local authority would be £253,400 across a full financial year (7 places x £36,200). The 8 new admissions would also avoid the need to pay higher costs of £56,000 per place, and would instead cost the local authority £19,800 per place, avoiding additional costs of £289,600 across a full financial year (8 places x £36,200) This cost avoidance figure would increase as the school gets fully established, with a maximum of 40 children being placed there across all year groups after 3 to 4 years. The full year effect of avoiding expensive costs once the school is educating 40 children would be £1,448,000 per year.

Risks

If the Monkton Park site is not made available for a new SEMH special school, there would be a real lack of alternative sites to meet the needs of these children as detailed above in respect of the recent search by the ESFA. This would mean that Dorset would still not be able to place

these children in the county and instead continue to transport them to alternative counties for their education therefore costs would not reduce as outlined above.

There is still a demand for places at the Dorchester Learning Centre, and if this provision was not to be delivered from Monkton Park, consideration would need to be given as to an alternative site, and how this would be paid for. There is the potential to keep this provision on the site with the SEMH special school if no alternative site can be identified.

Recommendation

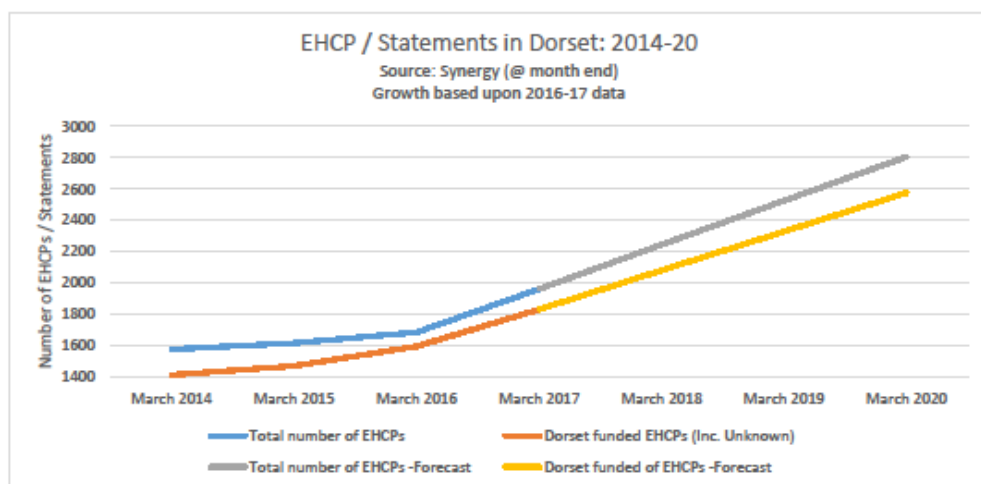
Once a suitable partner has been found and a successful capital investment bid has been developed with the ESFA, Children’s Services recommend that DCC use a proportion of the Monkton Park site for a new SEMH special school. The site area could also provide an alternative location for Dorchester Learning Centre, as there is still a significant demand for places as detailed above.

If the new SEMH school and the Learning Centre were to remain at Monkton Park, they would require all the space on the site, and there would need to be a more detailed feasibility to ensure that the needs of all children could be met appropriately, and within DfE guidelines.

If only one of these provisions were to be placed at Monkton Park, the rest of the site could be released for alternative use, or for a capital receipt (Please see site plan below).

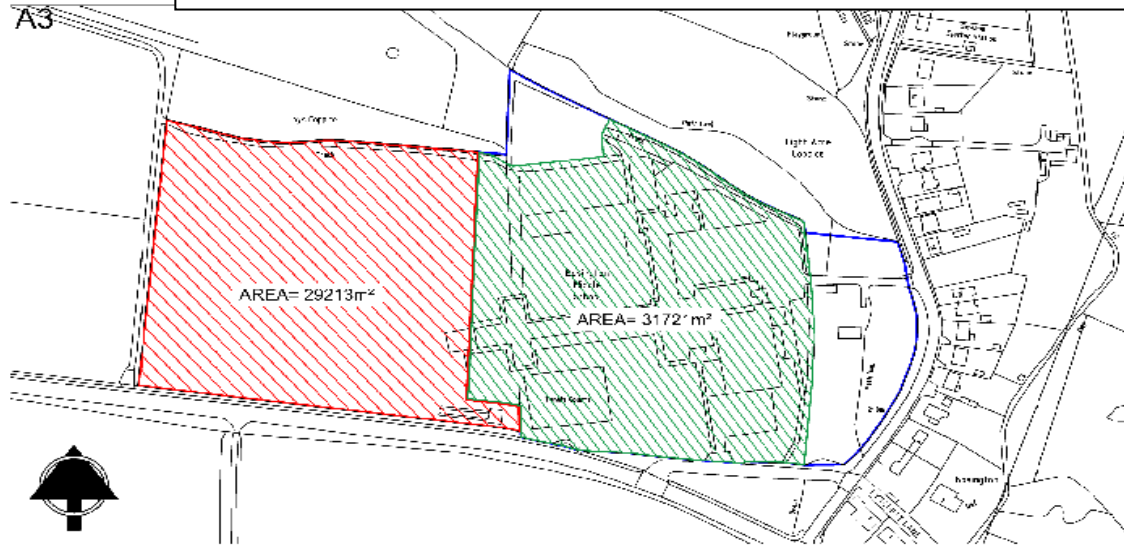
Appendix A

	March 2014	March 2015	March 2016	March 2017	March 2018	March 2019	March 2020
Total number of EHCPs	1578	1618	1686	1962			
Dorset funded EHCPs (Inc. Unknown)	1414	1472	1597	1832			
Total number of EHCPs -Forecast				1962	2246	2526	2806
Dorset funded of EHCPs -Forecast				1832	2081	2329	2577



This graph is based upon an extrapolation of the 2016-17 data.

QAMR 06 Sept 2017 Bovington Park Site Plan



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Notes and Revisions

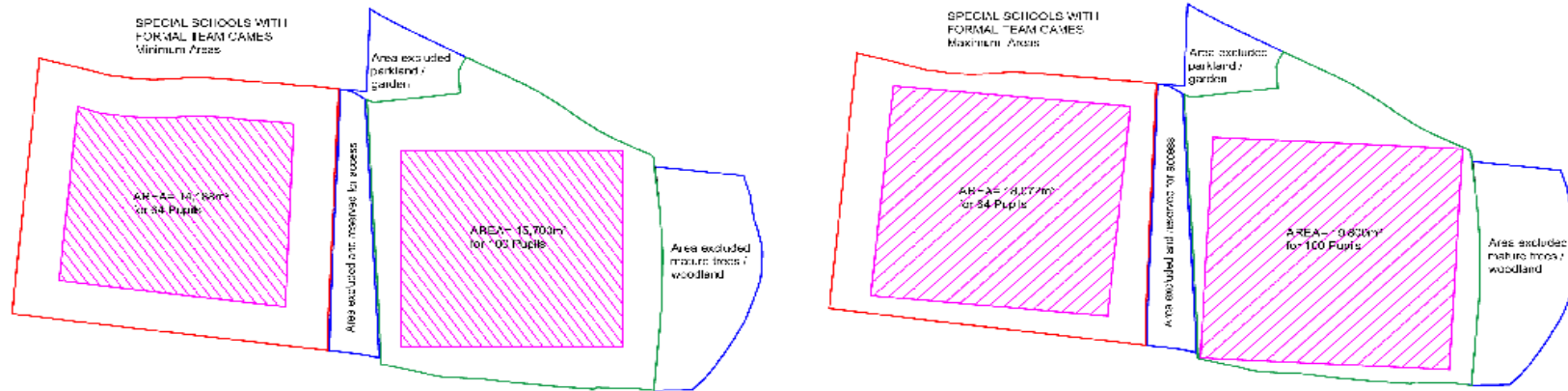
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Client
Children's Services
 S.E.M.H / ASD Site Review
 Dorchester

Drawing Title BOVINGTON PARK SITE AREAS			
SPECIAL SCHOOLS WITH FORMAL TEAM GAMES			
Scale 1:2500 @ A3	Date	Drawn by MK	Flattened
Property Ref. N/A	F.P.S. No. 135523.0514	Drawing No. 33	Revision

Dorset County Council
 Working together for a strong and successful Dorset

Summary Business Case in support of leasing Bovington Park to the Delta Academy Cabinet - Quarterly Asset Management Report - September 2017

Context

Currently there are a significant number of children with Special Educational Needs and Disabilities (SEND) who are in various types of care and education placements, inside and outside of the county of Dorset. Better outcomes for children are normally achieved when they are close to their family, community, and support networks. Dorset County Council (DCC) is currently engaging with a number of Multi Academy Trusts (MAT's) in order to bring additional capacity to Dorset, particularly for children with Autistic Spectrum Disorder/Condition (ASD / ASC), and children whose primary need is Social Emotional and Mental Health (SEMH).

The Delta Academy has made a successful bid to the Education, Schools Funding Agency (ESFA) for capital funding to build a new free school in Dorset, Poole or Bournemouth for at least 60 children with ASD/ASC. Their preferred site, after significant research, is Bovington Park in Dorset for a new school, and they have already been in discussions with Dorset Property regarding an acquisition. The current proposition is to lease the site to the Delta Academy Trust on a 125 year lease, as we do with other academies, and the ESFA will build a new school on the site, catering for children aged 10 to 19.

Demand

DCC has significant demand for this type of provision, and currently educate over 70 children with ASD/ASC outside Dorset. With the rise in the number of children with Education Health and Care Plans (EHCP's) and Statements of Educational Need (SEN), there is further demand expected over the coming years, and DCC must meet it's statutory duty to provide appropriate education for all children in Dorset.

Financial Implications

The average cost of a placement outside Dorset for a pupil with ASD/ASC is £56,000, where the average local authority rate for a special school place is £19,800. Therefore local authority places cost £36,200 less than those outside the county. The intention would be to start placing children at the new free school in Bovington from the opening of the school in September 2019, reducing the financial demands on the local authority.

In the first year the expectation is that at least 15 children would require a place at the new school across all age groups. The forecast is for 7 of these children to be returning from an existing out of county provision, and a further 8 children would be new admissions. Therefore the saving for the local authority would be £253,400 across a full financial year (7 places x £36,200). The 8 new admissions would also avoid the need to pay higher costs of £56,000 per place, and would instead cost the local authority £19,800 per place, avoiding additional costs of £289,600 across a full financial year (8 places x £36,200) This cost avoidance figure would increase as the school gets fully established, with a maximum of 45 children being placed there across all year groups after 3 to 4 years. The full year effect of avoiding expensive costs once the school is educating 45 children would be £1,629,000.

Risks

If this site is not made available, the ESFA will continue to look for alternative sites that would support the needs of Dorset, Poole and Bournemouth children, and with no other alternative sites in Dorset, the expectation would be a school in Poole or Bournemouth. This would mean that Dorset would not be able to place as many children in the school due to travelling distances, and therefore costs would not reduce as outlined. Dorset would still need to identify another partner to build an ASD/ASC school in Dorset, on an alternative site to meet the needs of Dorset children in addition to the need for an SEMH school. If there is any further delay in the ESFA identifying an appropriate site, the school will not be able to open in September 2019, and this will create additional pressure on capacity and costs within the system.

Recommendation

Children's Services recommend that DCC support the leasing of Bovington Park to the Delta Academy Trust, in order for them to build a new free school to meet the needs of Dorset children with ASD/ASC, allowing these children to stay closer to their families, communities and support networks. This would also reduce the SEN placement costs to the local authority.

QAMR 06 Sept 2017 Bere Regis School Community Hall Plan



Dorset Innovation Park – Summary Business Case**September 2017**

Executive Summary	<ul style="list-style-type: none"> • Dorset County Council, together with Purbeck District Council and Dorset Local Enterprise Partnership, has made a significant financial and reputational investment in purchasing the freehold of what is now Dorset Innovation Park, a Government designated Enterprise Zone (EZ). • As an Enterprise Zone there are financial incentives available to business moving onto, or expanding on, Dorset Innovation Park. • The successful development of Dorset Innovation Park would contribute to the achievement of corporate objectives, principally through the creation of some 2,000 new jobs, and provide a positive financial return for the Council. • To realise the full potential of the EZ a programme of works is required.
Recommendation	<p>It is recommended that resources of £2,276,000 (including a 20% contingency) for a ten year period are made available through Forward Funding from Dorset County Council by way of either prudential borrowing from the Public Works Loan Board or the use of credit balances.</p> <p>This funding is to cover the Year 1-5 essential strategic expenditure required for the development of Dorset Innovation Park EZ. This forward funding is to be split into 2 loans:</p> <ul style="list-style-type: none"> • Loan 1: £1,296,000 (including 20% contingency) for 50% of Dorset LEP's EZ Strategic capital expenditure, funded through retained business rates, with repayment forecast in Year 10. The remainder of the funding is expected to come from the Growing Places Fund. • Loan 2: £980,000 (including 20% contingency) by Dorset County Council for its proportion (i.e. 5/6th) of the landowners' capital expenditure. Repayment of this loan is forecast for Year 3. In respect of Loan 2, it is requested that the landowners' capital receipts from the plot sales at Dorset Innovation Park are initially ring-fenced towards the costs of bringing forward future plots. <p>In view of the inter-related nature of the two parts of this projects, it has been decided to submit this as one Business Case, however each party will pay their own interest costs.</p>

Purpose

The purpose of this Summary Business Case is to support Forward Funding, such as borrowing, in order to bring forward the development of the Dorset Innovation Park EZ. The Full Business Case is available to Members on request from Helen Heanes or David Walsh. The Forward Funding is to be repaid from retained Non Domestic Business Rates (NDBR) in respect of year's 1-5 Strategic EZ capital expenditure by Dorset Local Enterprise Partnership (LEP) and plot sales in respect of the landowner's capital expenditure.

Fit with Dorset County Council's Corporate Priorities

This proposal contributes to the prosperous and healthy priorities.

For the Economy Service, one of the key objectives in the Service Plan for 2017/18 is to "Contribute to successful delivery and operation of Dorset Innovation Park". The aim of Dorset Innovation Park EZ is to "stimulate business growth by becoming a catalyst for enhanced economic growth through the creation of highly skilled jobs, the unblocking of employment land, and the encouragement of investment into the area"; with critical success factors of: safeguarding

highly skilled employment in advanced engineering, manufacturing and defence jobs; attracting and creating new advanced engineering and manufacturing, defence, marine, energy and cyber security jobs to Dorset, and; Net zero additional revenue cost implications for DCC

Background

- On 1 November 2015 Dorset Green Technology Park was awarded EZ status for 25 years as part of the government's Wave 2 of EZ's. EZ status came into effect on 1 April 2017 at the same time as the name change to Dorset Innovation Park. Formal launch of the EZ is planned for late autumn.
- On 31 March 2017 DCC, purchased Dorset Innovation Park from the Homes & Communities Agency for £500,000. This was funded by DCC £250,000, PDC £50,000 and Dorset LEP £200,000 grant (repayable if the site is sold in the first 5 years). A partnership agreement is being put in place between DCC and PDC to reflect PDC's 1/6th stake in the site. Originally Dorset LEP was to be a joint owner, however their Board's view was that it was not in the interests of Dorset LEP to become a landowner.
- The biggest employers on the site are Atlas Elektronik UK, QinetiQ, OptaSense and Nuvia. Other employers include Rite Advice, Anetwork and Weatherford Labs. The safeguarding and developing of high skilled employment in Dorset in advanced engineering, manufacturing and defence technologies is the primary reason for the establishment of the EZ and for DCC and PDC purchasing the freehold of the site.

Governance

The EZ Governance structure adopts a three tiered approach. The key decision and information flow is from the Dorset Innovation Park EZ Project Group which develops, works up and implements the Master Plan and Implementation Plan, to the Dorset Innovation Park EZ Management Board which makes the decisions. The EZ Management Board contains Member representation from the Local Authorities, Dorset LEP, the landowner and the EZ tenants. The decisions of the Dorset Innovation Park EZ Management Board are ratified by the Dorset LEP Board. Through this structure the EZ Management Board makes the decisions on how the retained business rates are to be used

Current Operation

- At Dorset Innovation Park, the quadrant workspace scheme, involving £1.2m infrastructure funded through DCC & PDC, is nearing completion. New entrance signs reflecting the name change have been ordered and new road signs and sign "patches" have been installed. On-site signage is still required.
- Dorset Innovation Park EZ has been identified as the priority site to benefit from investment to provide Ultrafast broadband, which is being procured through DCC Superfast Dorset team, making use of £2m grant funding from BDUK's Ultrafast Fund for the SW and £2m grant from Dorset LEP's Growing Places Fund. Delivery is currently planned for 2018.
- Records provided at the time of the site purchase show a small deficit on site operating costs and service charges of approx. £60,000 pa. This is shared 1/6th PDC and 5/6th DCC and is attributable to low levels of occupancy of Chesil House. Works required at Chesil House includes replacing windows, providing fully accessible facilities including disabled toilets, revised door widths, creating meeting rooms and catering facilities.

Developing the Plan

- With an EZ, the business rates from the site for a 25 year period are retained for re-investment in the site. In the majority of instances Forward Funding or Prudential Borrowing are used to fund the upfront infrastructure and EZ development costs, with the borrowing and interest then repaid from future business rate income.
- Dorset LEP employed the consultants Ward Williams Associates (WWA) to develop the Master Plan and Implementation Plan for the EZ. A shortened version of the Implementation Plan was submitted to Government by 31 March 2017 in accordance with the EZ Government Memorandum of Understanding (MoU) requirements.

- The detailed Master Plan and Implementation Plan were considered and approved by the Dorset Innovation Park EZ Management Board on 10 May 2017 and then subsequently by Dorset LEP Board on 23 May 2017. A high level Financial Plan to support the Implementation Plan was also agreed which forms the basis of this Business Case.
- As the plot sales progress the landowners are to get the capital receipts from the plot sales. The price being negotiated for plots on average across the entire sites is currently £679,525 per hectare for a long lease-hold. Significant interest is already being shown by one company to purchase a plot close to the entrance of Dorset Innovation Park. The Financial Plan was put together on the basis of at least 1 plot sale per year, with a slower scenario of 1 plot sale every 2 years. The slower scenario is the basis upon which this Business Case and repayment profiles has been compiled.

Non Domestic Business Rates (NDBR) model

- The Business Case and Financial Model for the development of the Dorset Innovation Park EZ is based on the retention of Non Domestic Business Rates (NDBR) attributable to the EZ over a 25 year period, starting from 1 April 2017. For Dorset Innovation Park the baseline for business rate income is £263,396 p.a. as at 2017.
- As an incentive for early investment in the site a business taking new or additional space at Dorset Innovation Park during the first 5 years of the EZ's operation (i.e. from 1 April 2017) may be eligible for 5 years relief on the payment of NDBR up to a total of £275,000. Under the government's preferred EZ model, the business rates which are foregone through the granting of a 5 year rate relief holiday are repaid to the collecting authority by central government through the Department for Communities & Local Government (DCLG), as per the Government's MoU.
- The business rates are retained by Dorset LEP formally but held by PDC on Dorset LEP's behalf and not redistributed, but invested locally to support the EZ, as per the local MoU for the EZ. DCLG re-credits PDC for the NDBR for new or expanding tenants who are eligible for reduced business rates. The business rate pot is then available to repay any Forward Funding of costs for the EZ.
- At its June 2017 meeting the EZ Management Board approved the 1-5 year investment plan and for the business rates, as a first priority to be used to repay the Forward Funding.
- Quarterly reporting on the amount of business rates received and the amount invested in the site is to be made by Dorset LEP to DCLG.

Future Plans

- The Implementation Plan sets out the works needed to achieve the Master Plan over the 25 year life of the EZ. This shows a front-loading of the work in the early years of the EZ. The intention is to target the essential works which need to be undertaken by the landowners and by the LEP in the first 5 years to get a successful EZ up and running.

Loan 1: Dorset LEP- 50% of Strategic EZ Capital Expenditure, years 1 to 5 (where year 1 is financial year 2017/18); Projects funded through retained business rates			
Works item	Timing	Amount	50%
Gatehouse- temporary visitor centre	Year 1	£10,000	£5,000
Landscape enhancements	Years 1-2	£85,000	£42,500
Signage and wayfinding on site	Year 2	£25,000	£12,500
Redevelop existing Gatehouse	Year 3	£90,000	£45,000
Local Development Order (LDO) n	Years 1-2	£350,000	£175,000
New footpaths & cycle-ways	Years 2-3	£100,000	£50,000
Chesil House refurbishment	Years 1-3	£1,500,000	£750,000
Contingency (20% of project costs)		£432,000	£216,000
Total		£2,592,000	£1,296,000

- It is proposed that the remaining 50% of the EZ Strategic Capital expenditure not covered by this Business Case together with the revenue expenditure required (i.e. for interest payments,

EZ Manager and marketing costs are met from money which Dorset LEP holds in the Growing Places Fund. This will be considered by Dorset LEP Board at their September meeting. Should DCC cease to be the Accountable Body to Dorset LEP, then Dorset LEP will be required to immediately repay Loan 1

Loan 2: Landowners Capital Works, years 1 to 5 (where year 1 is financial year 2017/18); funded through plot sales			
Works item	Timing	Amount	83.3% (5/6ths)
Road replacement and repair	Years 2-5	£300,000	£250,000
Upgrade current footpaths	Years 2-5	£50,000	£41,667
Service plot development (preparation of plots pre-sale @ £50,000 per plot)	Years 1-5	£350,000	£291,667
Foul and surface drainage repair	Years 2-5	£280,000	£233,333
Contingency (20% of project costs)		£196,000	£163,333
Total		£1,176,000	£980,000

- Works at Dorset Innovation Park anticipated for the years 6 to 25 of the Implementation Plan include strategic landscape development and ecological surveys to maintain LDO permissions; further plot development; footpaths and roads; possible amendments to security and fencing; and northern access road.

What is now required

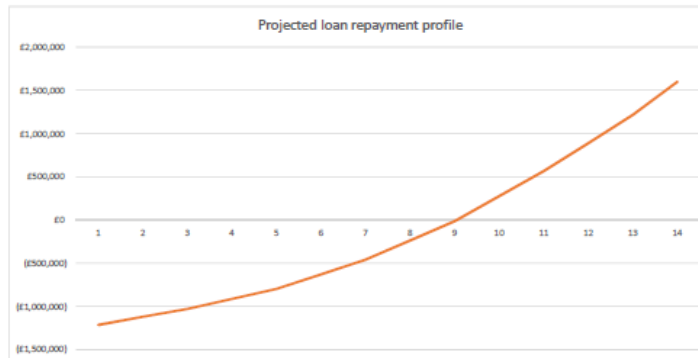
- Following the approval and ratification of the Implementation Plan by Dorset LEP Board 6 options for delivery were investigated; the option to 'Undertake the first 5 years of planned works' was deemed the most appropriate as it enables the site to be developed in the short-term with a reasonable repayment period. Further business cases will be put together at a later date for expenditure relating to the 6 to -25 year period at a timing which better reflects this.
- The development of plots directly influences the growth in business rate income and thereby the ability and speed by which the EZ strategic cost can be repaid. The repayment profiles (shown diagrammatically) and the cashflow forecasts for both the EZ Strategic Capital projects (Loan 1) and the Landowners' capital works (Loan 2) are available at Annex 1. The landowners (in this case DCC only as PDC are securing their own funding for their 1/5th share of the costs) and Dorset LEP will each be responsible for paying their own interest costs., which has been calculated at 2.0% pa on the advice of DCC Investments team.
- For Loan 1 totalling £1,296,000 (i.e. EZ Strategic Capital expenditure funded through retained business rates), the modelling of plot sales forecasts that this Forward Funding will be repaid by Dorset LEP in Year 10 (i.e. 2026/27).
- For Loan 2, totalling £980,000 (i.e. DCC's 5/6th proportion of the Landowners capital expenditure of £1,176,000, funded through plot sales) the modelling of plot sales forecasts that this Forward Funding will be repaid in year 3 (i.e. 2019/20). However as expenditure takes place over the full 5 years, the capital receipts from the plot sales will need to be ring fenced in order for this profile to be achieved.
- For this reason it is recommended that for Loan 2 the capital receipts from the plot sales at Dorset Innovation Park are ring-fenced towards the expenditure required to bring forward future plots at Dorset Innovation Park.

For further information please contact:

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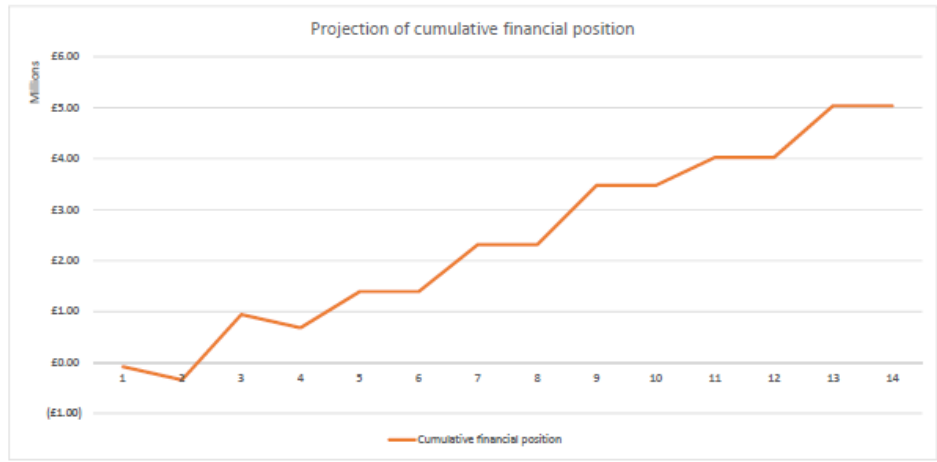
Loan 1: 50% EZ Strategic Capital Project Costs - Realistic Growth scenario

Plot sales happen every other year	1	2	3	4	5	6	7	8	9	10	11	12	13	14		
	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31		
Income																
<u>Actual</u>																
Total		391,015	382,542	371,964	362,195	360,507	367,717	375,071	382,573	390,224	398,029	405,989	414,109	422,391	430,839	
<u>Baseline business rate</u>	263,396															
Remaining business rates		127,619	119,146	108,568	98,799	97,111	104,321	111,675	119,177	126,828	134,633	142,593	150,713	158,995	167,443	
Predicted																
<u>Business Rates Income</u>																
Sub total	£	35,925	£ 76,971	£ 73,068	£ 136,274	£ 136,274	£ 236,278	£ 236,278	£ 331,469	£ 331,469	£ 451,146	£ 451,146	£ 508,145	£ 508,145	£ 612,757	
Less non payment and appeals	3%	£ 35,027	£ 75,046	£ 71,242	£ 132,867	£ 132,867	£ 230,371	£ 230,371	£ 323,182	£ 323,182	£ 439,868	£ 439,868	£ 495,442	£ 495,442	£ 597,438	
Cumulative Total Business Rate Income	£	-	£ 75,046	£ 146,288	£ 279,155	£ 412,022	£ 642,393	£ 872,763	£ 1,195,945	£ 1,519,127	£ 1,958,995	£ 2,398,863	£ 2,894,305	£ 3,389,747	£ 3,987,185	
Annual Business Rate income	£	162,646	£ 194,193	£ 179,810	£ 231,666	£ 229,978	£ 334,691	£ 342,046	£ 442,359	£ 450,010	£ 574,500	£ 582,461	£ 646,155	£ 654,437	£ 764,881	
Cumulative retained business rate income	£	162,646	£ 356,838	£ 536,648	£ 768,314	£ 998,292	£ 1,332,983	£ 1,675,029	£ 2,117,388	£ 2,567,398	£ 3,141,898	£ 3,724,359	£ 4,370,514	£ 5,024,951	£ 5,789,832	
Costs																
Gatehouse temporary visitor centre		-10,000	-10,000.00													
Landscape enhancements		-85,000	-45,000.00	-40,000.00												
Signage and wayfinding		-25,000	-5,000.00	-20,000.00												
Redevelop existing gatehouse		-90,000		-90,000.00												
LDO site investigation & fees (inc Travel Plan)		-350,000	-50,000.00	-300,000.00												
New footpath and cycleways		-100,000		-10,000.00	-90,000.00											
Chesil House refurbishment		-1,500,000		-1,000,000.00	-500,000.00											
Sub-Total		-2,160,000	-65,000	-1,375,000	-720,000											
Contingency (20%)		-432,000	-13,000	-275,000	-144,000											
Total		-2,592,000	-78,000	-1,650,000	-864,000											
50% of Annual expenditure	£	(1,296,000)	£(39,000)	£(825,000)	£(432,000)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	
Payment profiling including loan																
Cumulative Financial position of loan	£	(1,296,000)	£(1,296,000)	£(1,214,677)	£(1,117,581)	£(1,027,676)	£(911,843)	£(796,854)	£(629,508)	£(458,486)	£(237,306)	£(12,301)	£274,949	£566,179	£889,257	£1,216,475
50% of Business rate annual income	£	81,323	£ 97,096	£ 89,905	£ 115,833	£ 114,989	£ 167,346	£ 171,023	£ 221,179	£ 225,005	£ 287,250	£ 291,230	£ 323,077	£ 327,218	£ 382,441	
Cumulative Financial position with loan payments		£(1,214,677)	£(1,117,581)	£(1,027,676)	£(911,843)	£(796,854)	£(629,508)	£(458,486)	£(237,306)	£(12,301)	£274,949	£566,179	£889,257	£1,216,475	£1,598,916	
Revenue - Borrowing Costs																
2% interest cost		£(25,920)	£(24,294)	£(22,352)	£(20,554)	£(18,237)	£(15,937)	£(12,590)	£(9,170)	£(4,746)	£(246)	£5,499	£11,324	£17,785	£24,330	



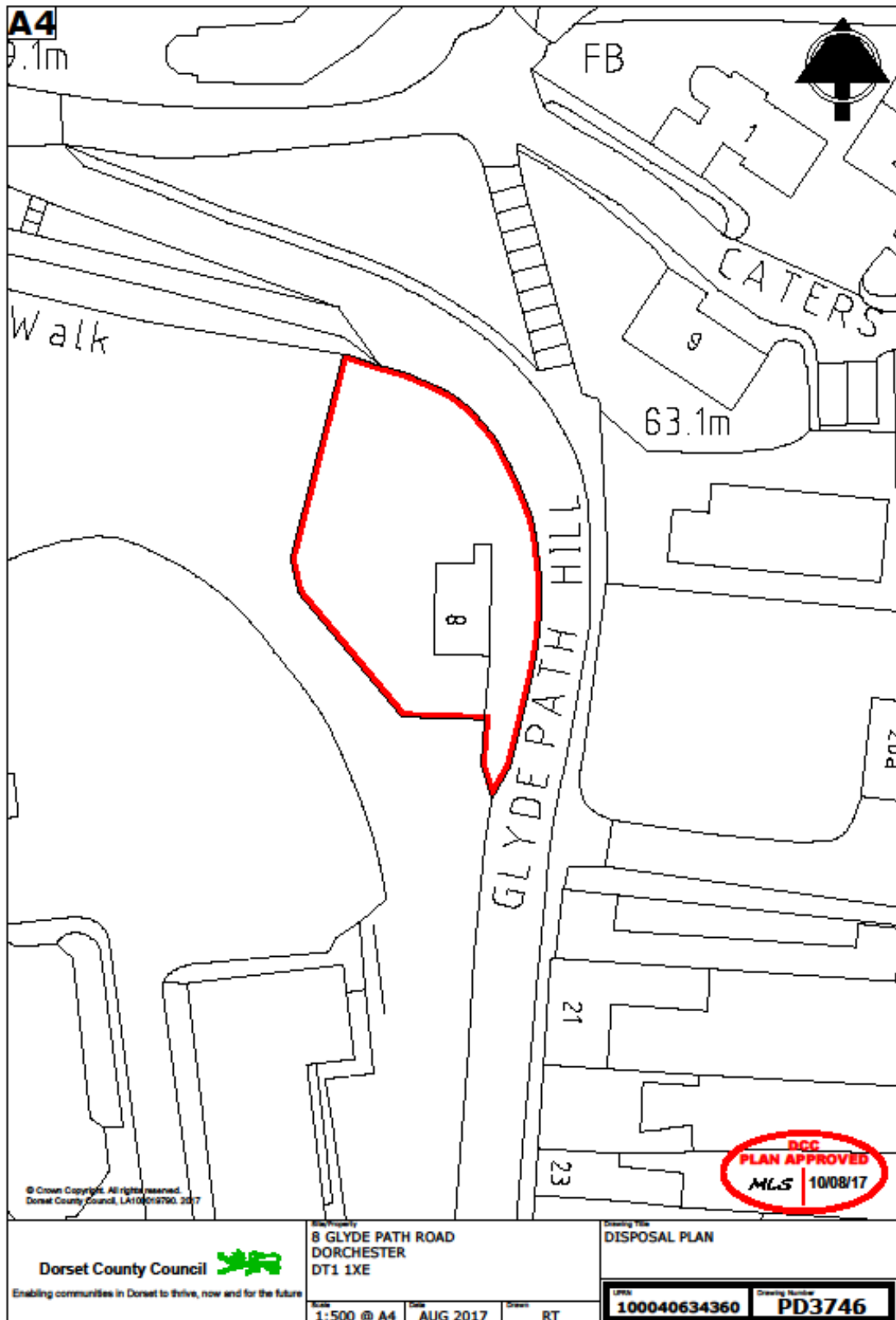
Loan 2: Landowners Capital Works
- Realistic Growth scenario

Plot sales happen every other year		1	2	3	4	5	6	7	8	9	10	11	12	13	14
		2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31
Income															
Predicted															
Plot sales (development sought)	sq m	0		24,300		14,702		13,995		17,596		8380		15381	
Plot Sales income															
Plot sales		£ -	£ -	£ 1,650,000	£ -	£ 998,284	£ -	£ 950,278	£ -	£ 1,194,790	£ -	£ 569,012	£ -	£ 1,044,389	£ -
Cost of sales to agents		£ -	£ -	£ 49,500	£ -	£ 29,949	£ -	£ 28,508	£ -	£ 35,844	£ -	£ 17,070	£ -	£ 31,332	£ -
Total income		£ -	£ -	£ 1,600,500	£ -	£ 968,335	£ -	£ 921,769	£ -	£ 1,158,946	£ -	£ 551,942	£ -	£ 1,013,057	£ -
Costs															
Road repairs and replacements		-300,000	-75000.00	-75000.00	-75000.00	-75000.00									
Upgrade current footpaths		-50,000		-50000.00											
Service Plot Developments		-350,000	-70,000.00	-70,000.00	-70,000.00	-70,000.00									
Foul and surface drainage repair		-280,000	-70,000.00	-70,000.00	-70,000.00	-70,000.00									
Contingency (20%)		-196,000	-14,000.00	-43,000.00	-53,000.00	-43,000.00									
Annual expenditure		£ (1,176,000)	(£84,000)	(£258,000)	(£318,000)	(£258,000)	£0	£0	£0	£0	£0	£0	£0	£0	£0
DCC contribution		£ (980,000)													
PDC contribution		£ (196,000)													
Net Annual Financial Position		(£84,000)	(£258,000)	£1,282,500	(£258,000)	£710,335	£0	£921,769	£0	£1,158,946	£0	£551,942	£0	£1,013,057	£0
Cumulative Financial capital spend		(£84,000)	(£342,000)	(£660,000)	(£682,500)	(£424,500)	£1,392,835	£1,392,835	£2,314,605	£2,314,605	£3,473,551	£3,473,551	£4,025,493	£4,025,493	£5,038,550
Total income from sales in year		£0	£0	£1,600,500	£0	£968,335	£0	£921,769	£0	£1,158,946	£0	£551,942	£0	£1,013,057	£0
Cumulative financial position		(£84,000)	(£342,000)	£940,500	£682,500	£1,392,835	£1,392,835	£2,314,605	£2,314,605	£3,473,551	£3,473,551	£4,025,493	£4,025,493	£5,038,550	£5,038,550
Cumulative sales position		£0	£0	£1,600,500	£1,600,500	£2,568,835	£2,568,835	£3,490,605	£3,490,605	£4,649,551	£4,649,551	£5,201,493	£5,201,493	£6,214,550	£6,214,550



Revenue - Borrowing Costs															
2% interest cost		(£1,680)	(£6,840)	(£13,200)	£13,650	£8,490	£27,857	£27,857	£46,292	£46,292	£69,471	£69,471	£80,510	£80,510	£100,771

QAMR 06 Sept 2017 8 Glyde Path Road Site Plan



Cabinet – 6 September 2017

Recommendation from the Safeguarding Overview and Scrutiny Committee meeting held on 6 July 2017.

Approval of the Youth Justice Plan 2017-18

32 The Committee considered a report from the Corporate Director for Children's, Adults and Community Services which advised members that the Youth Offending Teams were required to publish an annual Youth Justice Plan which needed to be approved by the County Council, Borough of Poole and Bournemouth Borough Council, and highlighted areas for improvement.

The Chairman noted that the format of the Plan was now more readable and user friendly than previously. She highlighted the reference to partnership working which she felt was very useful.

Recommended

That the Cabinet recommend the County Council to approve the Youth Justice Plan 2017-18.

Reason for Recommendation

The draft Youth Justice Plan has been approved by the Youth Offending Service (YOS) Management Board. The plan reviewed achievements in the previous year, detailed the structure, governance and resources of the YOS, and set out the priorities for 2017-18.

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Agenda Item:

Safeguarding Overview and Scrutiny

Insert
Item
No.

Dorset County Council



Date of Meeting	6 July 2017
Officer	Sara Tough, Corporate Director for Children's, Adults and Communities
Subject of Report	Approval of Youth Justice Plan for 2017-18
Executive Summary	Youth Offending Teams are required to publish an annual Youth Justice Plan which should be approved by the local authority for that Youth Offending Team and by the Youth Justice Board. Dorset Combined Youth Offending Service works across Bournemouth, Poole and Dorset. Approval is therefore sought from Dorset County Council, as well as from the Borough of Poole and from Bournemouth Borough Council.
Impact Assessment: <i>Please refer to the protocol for writing reports.</i>	<p>Equalities Impact Assessment:</p> <p>The Youth Justice Plan sets out how the Youth Offending Service (YOS) will develop its work with vulnerable groups. The Plan also includes information about some protected characteristics relating to the YOS's staff and volunteers. No adverse impacts are identified for groups identified by protected characteristics.</p>
	<p>Use of Evidence:</p> <p>The Plan includes performance information relating to the YOS during 2016-17. This information is derived from the Youth Justice Board's national data collection arrangements.</p>

	<p>Budget:</p> <p>The Youth Justice Plan includes a section setting out the resources available to the YOS. The pan-Dorset Youth Offending Service is overseen by a Partnership Board which agrees the contributions from all statutory partners for the provision of the service.</p>
	<p>Risk Assessment:</p> <p>Current Risk: LOW Residual Risk MEDIUM</p> <p>The Youth Justice Plan sets out an achievable strategy for the pan-Dorset YOS to deliver continued high levels of service. There is a potential risk relating to budget cuts; the Youth Justice Board announced extra in-year budget cuts during 2015-16, and further cuts for 2016-17. Youth Justice Board grant levels have not been reduced for 2017/18. The YOS Board has approved the YOS budget plan for 2017-18 which enables statutory functions to be delivered.</p>
	<p>Other Implications:</p>
Recommendation	That Committee recommends approval of the Youth Justice Plan to the Cabinet
Reason for Recommendation	The draft Youth Justice Plan has been approved by the YOS Management Board. The plan reviews achievements in the previous year, details the structure, governance and resources of the Youth Offending Service, and sets out the priorities for 2017-18.
Appendices	The full Youth Justice Plan is attached at Appendix 1
Background Papers	None
Officer Contact	Name: David Webb Tel: 01202 453939 Email: david.webb@bournemouth.gov.uk

1 Introduction

- 1.1. Youth justice services in Dorset were previously delivered by the Dorset Youth Offending Team. This service merged with the Bournemouth and Poole Youth Offending Service, which covered the Bournemouth and Poole areas, to form the 'Dorset Combined Youth Offending Service' in July 2015. Bournemouth Borough Council acts as the lead local authority.

- 1.2. Youth Offending Teams are required to publish an annual youth justice plan. The Youth Justice Board has issued guidance which stipulates what must be included in the plan, and recommends a structure for the plan. The draft Youth Justice Plan for the Dorset Combined Youth Offending Service is attached at Appendix 1.

2. Contents of the Youth Justice Plan

- 2.1. The Plan reviews performance during 2016/17 and reports on progress against last year's priorities. The YOS has continued to perform well against the 3 National Indicators (Reducing First-Time Entrants to the Youth Justice System; Reducing Re-Offending; Reducing the use of Custodial Sentences). Performance in the Dorset area has been particularly strong in reducing the number of first-time entrants into the youth justice system.
- 2.2. The priorities identified in last year's Youth Justice Plan have been achieved. Following the successful merger of the two previously separate youth offending teams in 2015, the new service implemented a new electronic case management system and a new assessment tool for young people during 2016. The YOS was inspected in September 2016, shortly after the introduction of these new systems. The inspection report was largely positive, with some recommendations about increasing the evidence and effectiveness of manager oversight on assessments, plans and reviews. During 2016/17 the YOS also took a leading role in the agreement and implementation of a pan-Dorset Protocol to Reduce the Criminalisation of Children in Care.
- 2.3. The Youth Justice Plan sets out the structure, governance and resourcing of the Youth Offending Service. The Dorset Combined Youth Offending Service is overseen by a Partnership Board comprised of senior representatives of the key partners, chaired by the Director of Children's Services for Dorset. The involvement of senior managers from the 3 local authorities and from the statutory partners (police, health and probation) enables the YOS to integrate its work with other strategic plans and priorities, including strong links to local safeguarding and public protection arrangements. Details about some of the specific operational links between the YOS and other local initiatives are summarised in the 'Partnership Arrangements' section of the Plan.
- 2.4. The Youth Justice Plan outlines the resourcing of the YOS. Local authority and other partner contributions have remained broadly the same since 2014/15, but the Youth Justice Board grant has reduced in that time from £790,000 to £594,000, while staffing costs have increased. The management of vacancies, and the deletion of some posts, has enabled a balanced budget.
- 2.5. The creation of the pan-Dorset YOS and subsequent Youth Justice Board grant reductions led to some posts being removed, though no redundancies were required. The statutory basis of youth offending teams is the Crime and Disorder Act 1998 which mandates minimum staffing contributions from the YOS partners. The combined service continues to comply with these minimum staffing requirements.
- 2.6. The priorities for the coming year include the role of the YOS in local multi-agency arrangements to prevent young people entering the justice system. A national review of youth justice was undertaken in 2016, which has provided some useful ideas for local partners to consider in the way the youth justice system operates in Dorset, Bournemouth and Poole, with particular reference to best practice in police custody and the youth courts. The YOS also aims to improve its collection and use

of information, following last year's implementation of a new case management system and a new assessment tool.

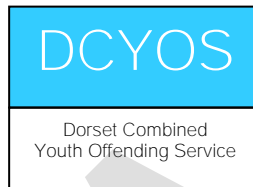
- 2.7. The YOS also has plans to continue to review and improve the quality of its work with young people, including the recruitment of a Speech and Language Therapist to join the team. The multi-disciplinary nature of the team allows us to continue to improve our workforce and to share learning and professional expertise.

3. Conclusion

- 3.1. The Youth Justice Plan provides a summary of the performance, structure, governance, resources and future priorities for the Dorset Combined Youth Offending Service. The full plan is attached at Appendix 1. Committee is asked to recommend approval of the Youth Justice Plan for 2017-18 to the Cabinet.

Sara Tough
Corporate Director for Children's, Adults and Communities
June 2017

DORSET COMBINED YOUTH OFFENDING SERVICE



*Youth
Justice
Plan*

2017/18

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DORSET COMBINED YOUTH OFFENDING SERVICE YOUTH JUSTICE PLAN 2017-18

Introduction

This document is the Youth Justice Strategic Plan for the Dorset Combined Youth Offending Service (YOS) for 2017/18. It sets out the key priorities and targets for the service for the next 12 months as required by the Crime & Disorder Act 1998.

The Dorset Combined YOS is a statutory partnership between Bournemouth Borough Council, the Borough of Poole, Dorset County Council, Dorset Police, National Probation Service Dorset and NHS Dorset Clinical Commissioning Group.

The Youth Justice Strategic Plan:

- reviews achievements and developments during 2016-17
- summarises the YOS structure, governance and partnership arrangements
- outlines the resources available to the YOS, the planned use of the Youth Justice Grant and the plan for ensuring value for money
- describes the partnership's priorities
- summarises the risks to future delivery of the youth justice outcome measures
- sets out the planned actions to enable delivery of the youth justice outcome measures.

This document sets out the YOS's strategic plan. A delivery plan underpins this document.

Service Targets

The Dorset Combined YOS target for 2017/18 is to outperform regional and national averages for the three national performance indicators for youth offending which are detailed in the next section.

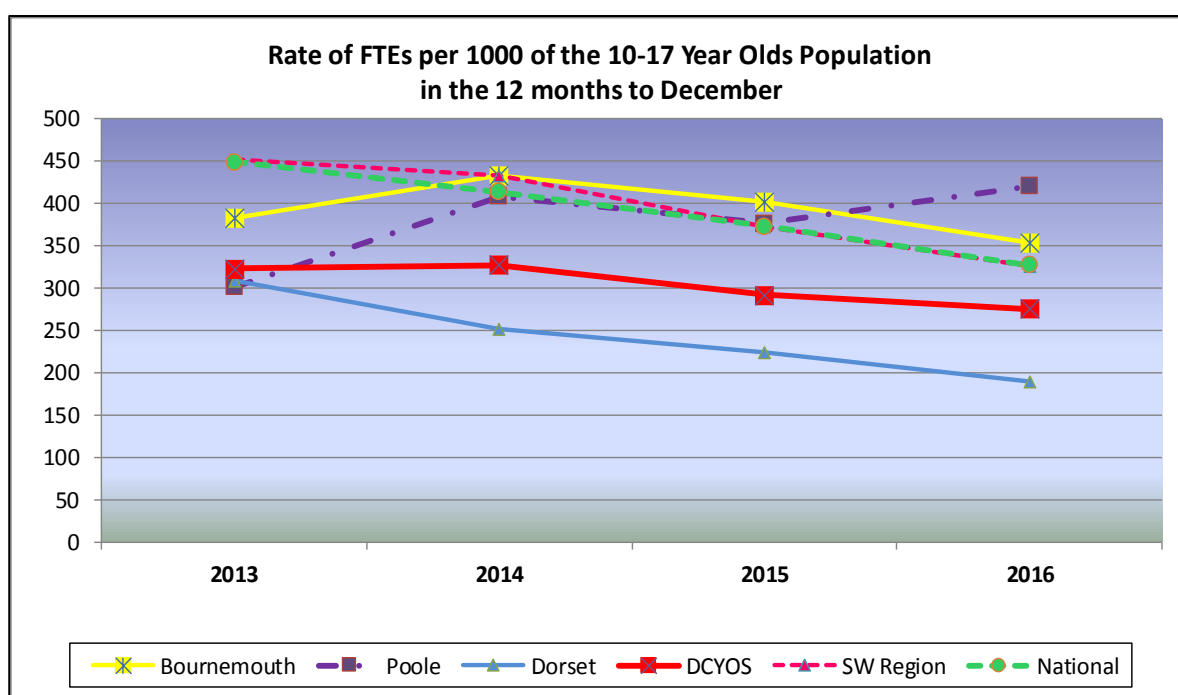
Summary of achievements

This section reports on achievements during 2016/17 by the Dorset Combined Youth Offending Service. Dorset Combined Youth Offending Service was launched on 1 July 2015, through the merger of two previously separate teams – Dorset Youth Offending Team, and Bournemouth and Poole Youth Offending Service. The year 2016/17 was therefore the first full year for the new combined service.

Youth Offending Teams continue to be judged against 3 key performance indicators:

- Reducing First Time Entrants into the Youth Justice System;
- Reducing Re-Offending by young people in the Youth Justice System;
- Appropriately Minimising the use of Custodial Sentences.

First Time Entrants into the Youth Justice System



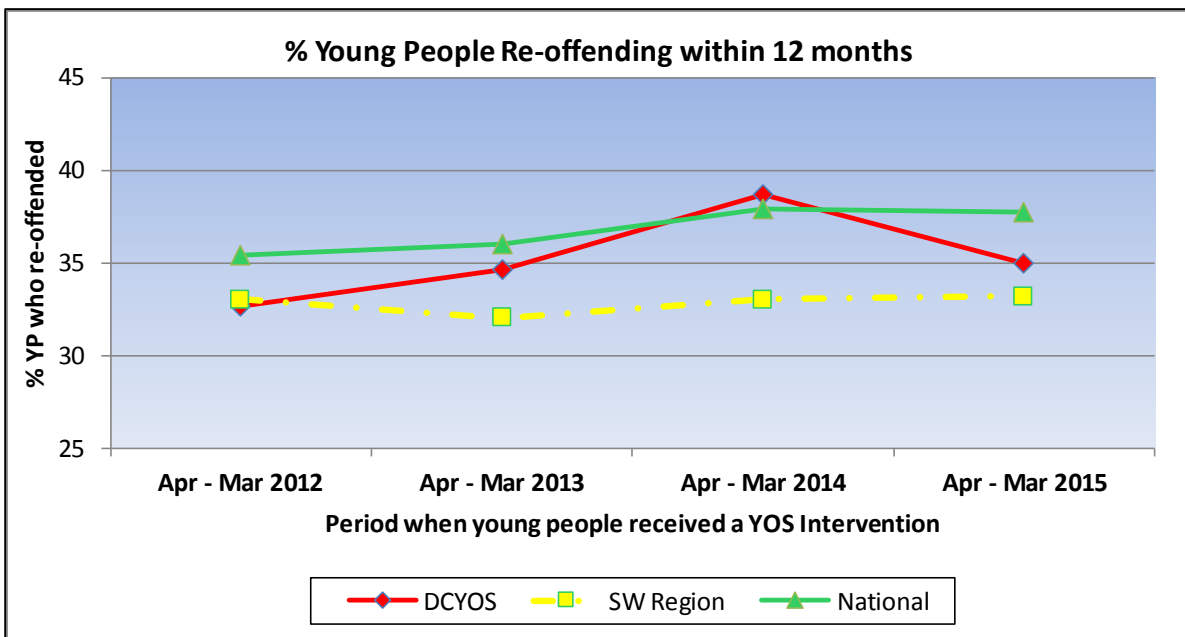
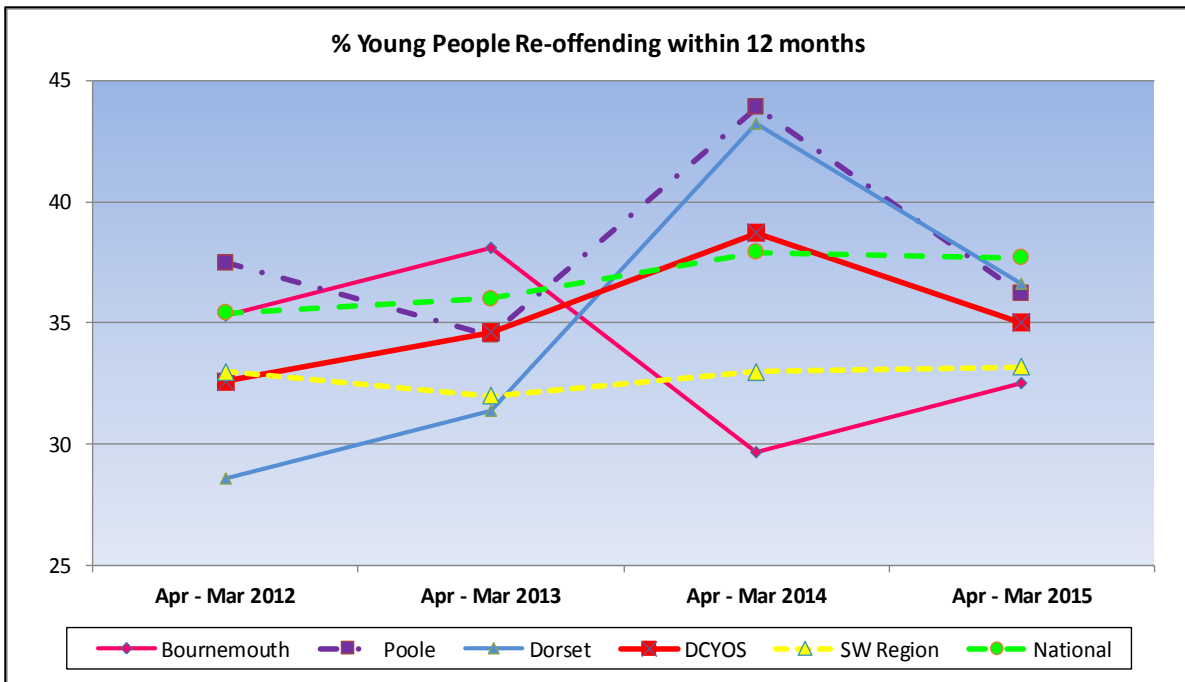
Working with its local partners, Dorset Combined YOS has continued the excellent performance of recent years to keep local young people out of the criminal justice system. The performance of Dorset Combined YOS in this area remains significantly better than the regional and national averages.

All three local authorities have developed and improved their Early Help arrangements during the past year, to help prevent young people being drawn into offending behaviour.

A coordinated, multi-agency approach has been developed across the whole area to reduce the use of justice responses for behaviour by children in care. This led to the launch in January 2017 of a 'Protocol to Reduce the Criminalisation of Children in Care'.

When a young person does commit an offence, Dorset Police work closely with Dorset Combined YOS to identify the best way to respond. Low level offending is assessed so that suitable cases can be dealt with through restorative justice approaches, avoiding the need for a formal outcome. More serious offences, or repeat offending, leads to a formal disposal and therefore to the young person entering the youth justice system.

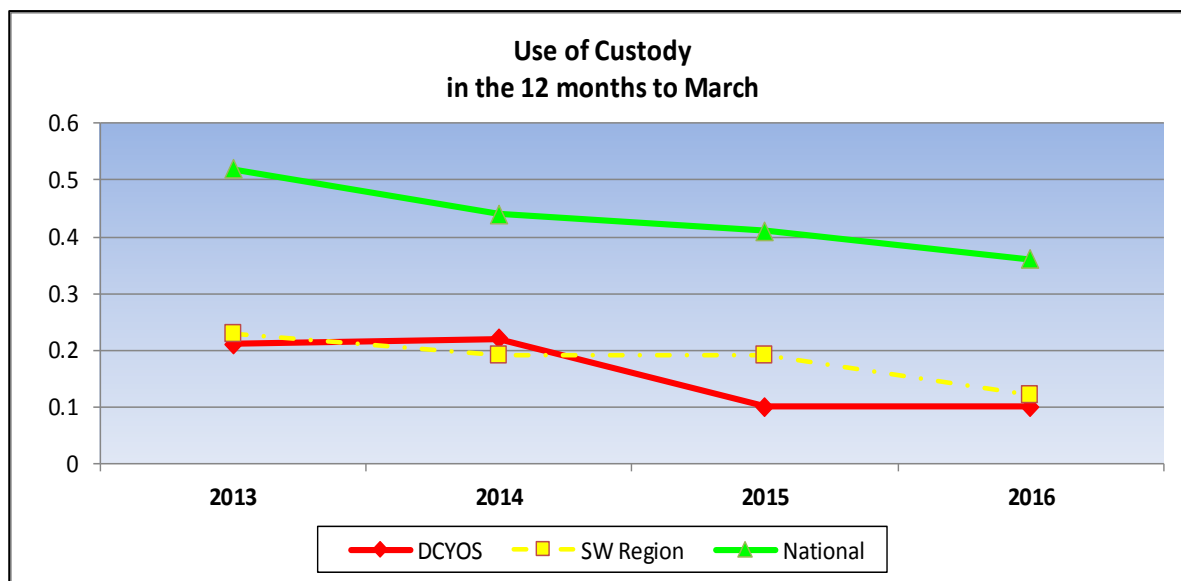
Reducing Re-Offending



The information on re-offending relates to the work of the two previous Youth Offending Teams, prior to the merger in 2015. This is because time needs to elapse to see whether young people go on to re-offend, after their contact with us.

There is a likely correlation between the reducing numbers entering the youth justice system and the increasing rate of re-offending; the YOS now works with a smaller cohort of more complex cases whose re-offending is harder to reduce. It is encouraging that the overall performance of the Dorset Combined YOS areas is better than the national average. It remains a priority to obtain more current data which can identify re-offending patterns at an earlier stage.

Custodial Sentences



Although the YOS works with some complex and risky young people, the use of custodial sentences remains low. The YOS works hard to maintain the confidence of local magistrates and judges in our ability to provide robust and demanding community sentences for those young people who may be at risk of custody. In some circumstances a custodial sentence is the appropriate response to serious or persistent offending. Each time a custodial sentence is passed, the YOS reviews the case in a team meeting to identify any learning points and to check whether any opportunities for a different outcome were missed.

Achievements and Developments during 2016/17:

Our Youth Justice Plan for 2016/17 set out our strategic priorities, which were designed to support our achievement of the three main performance measures for youth justice and to align with other local strategic priorities. A more detailed delivery plan summarised the main actions under each heading.

The 2016/17 priorities are listed below, with sub-headings followed by a summary of progress at the bottom of each section:

The YOS will take a leading role in local initiatives, including:

- Multi-agency strategy to prevent and reduce offending by children in care
- Multi-agency work to reduce the time spent by young people in police custody
- Further development of local arrangements to keep young people safe from exploitation
- Integration of work to address sexually harmful behaviour by young people
- Promotion of a Dorset Restorative Justice strategy for offences by both adults and young people.

The YOS Manager chaired a multi-agency group which devised a Protocol to Reduce the Criminalisation of Children in Care. This Protocol was launched in January 2017. Data from

January to April 2017 shows a significant reduction in police call outs to children's homes, compared to the same period in 2016.

The YOS Manager also took a leading role in multi-agency work to reduce the time spent by young people in police custody. A Protocol was negotiated and implemented which aligns with the draft national Concordat on this issue. Dorset Police have significantly reduced the number of children being arrested, and the time spent in police custody for those who are arrested. Further work is being undertaken to identify local authority accommodation for the small number of young people who are detained in police custody following charge, having been refused bail.

YOS managers and practitioners participate actively in multi-agency processes to protect children from sexual exploitation, and from other forms of exploitation.

The YOS contributed to the Restorative Justice Strategy for Dorset, led by the Office of the Police and Crime Commissioner, which clearly identifies the expertise of the YOS in providing restorative justice for victims of offences committed by young people.

The YOS will make better use of information to improve the impact of our work:

- Transition to a new case management system for recording the team's work
- Use of information monitoring to address outcomes for minority groups
- Updating the YOS Quality Assurance arrangements and evidence of manager oversight
- Enable the YOS health workers to access relevant health recording systems for appropriate and effective information sharing
- Finalise the YOS Participation Strategy to ensure we hear and respond to the views of our service users
- The YOS will raise its profile with partner agencies and with the community

The YOS successfully implemented a new electronic case management system in May 2016, following extensive preparation work. The new system enables us to monitor information relating to specified groups, including children in care and other minority groups who may experience discrimination. Caseload information reporting allows managers to monitor the timeliness and quality of the team's work. We continue to work on improvements and refinements to our use of the case management system in order to improve the quality of our work with young people, parents and victims.

Service user feedback provides an important perspective on the quality and effectiveness of our work. During 2016 we finalised our Participation Strategy, identifying the different ways in which we gather and use the views of our service users. Up to March 2017 we were required by HMI Probation to administer an electronic feedback survey to some of the young people we worked with. Results from those surveys show high levels of satisfaction with our service.

Effective links between the YOS and our partner agencies are essential for achieving good outcomes for young people, and for victims and the wider community. In 2016 we improved our seconded health team's access to Dorset Healthcare recording systems, to enable more integrated health provision to young people. The YOS also established consistent representation and attendance at relevant multi-agency meetings across the three local authority areas. The YOS volunteer coordinator successfully recruited and trained new volunteers to add value to our work and to strengthen our community links.

The YOS will improve the quality of its practice to achieve better outcomes for children, young people, families and victims

- Implementation of the new assessment tool for young offenders, 'AssetPlus'
- Embed core elements of good practice, including Motivational Interviewing to facilitate positive change and Restorative Justice to repair harm to victims
- Develop good practice through improved workforce development
- Improving the team's knowledge and resources for young people with speech, language and communication needs
- Strengthening the team's resources for working with parents and building the team's capacity for family-based work

All Youth Offending Teams were required to implement a new assessment tool for young offenders, 'AssetPlus'. Dorset Combined YOS went live with AssetPlus on 13 June 2016, following significant staff training and preparation. AssetPlus is a more complex and time-consuming assessment process than its predecessor, requiring a lengthy process of adjustment and improvement. YOS managers and case holders attended further AssetPlus training in early 2017 which has enabled us to develop our use of AssetPlus.

The new case management system and the new assessment tool have formed a substantial part of our workforce development plans this year. We have also continued to support our practitioners' expertise in Motivational Interviewing (evidence-based approach to support behaviour change) and Restorative Justice through training events and good practice development sessions. We have also trained more staff to work with young people who exhibit harmful sexual behaviour, and we have utilised clinical advice from a specialist external service in order to build our practitioners' confidence and expertise in this area.

We had previously identified a wish to develop our team's skills and knowledge for responding to young people's speech, language and communication needs, and our capacity for family-based work. In late 2016 we submitted a successful bid to NHS England, under their 'health and justice' funding stream, for a seconded Speech and Language Therapist and for extra resources in our health team to support more family-based approaches.

Inspection reports in 2016/17

Short Quality Screening Inspection

Her Majesty's Inspectorate of Probation carried out a 'Short Quality Screening' inspection of Dorset Combined Youth Offending Service in September 2016. The format for this inspection was scrutiny of 20 cases relating to court orders which commenced in the preceding six months. This meant the inspectors were looking at work undertaken during the period when we introduced our new case management system and the new assessment tool. The inspectors identified the following strengths and areas for improvement:

Key strengths

- The YOS was sufficiently well resourced to enable them to undertake good initial assessments and tailor interventions to the individual needs of children and young people.
- There was evidence that the YOS had good relationships with statutory partners and shared information appropriately.

- Staff found practical ways to support children and young people to achieve their objectives, such as making sure they had the necessary identification documents to allow them to apply for work.
- Most interventions contained an element of practical reparation.

Areas requiring improvement

- Case managers should review their assessments and plans, particularly as they relate to the management of risk of harm and safeguarding, as the circumstances of the children and young people develop.
- Line managers should develop a systematic quality assurance process to make sure that cases have been reviewed appropriately and any actions identified for the case manager are completed in a timely fashion.
- All cases that are assessed as presenting a medium or high risk of serious harm to others
- should have a clear risk management plan that identifies the potential triggers to escalating
- risk and the contingencies that will be put in place should they arise.

An action plan was developed in response to the inspection, overseen by the Partnership Board, to ensure that the necessary improvements were made.

National Standards Audit

Youth Offending Teams are required by the Youth Justice Board to undertake an annual audit of compliance with National Standards. The audit for 2016 was delayed to March 2017 due to the pressure on Youth Offending Teams caused by the introduction of AssetPlus. This year's audit focused on National Standards relating to bail and remand, court work, victim work and long-term custodial sentences.

The results from our National Standards audit showed that, among the cases sampled, the National Standard was either fully met, or met with recommendations, in 80% of cases. Actions have been identified to address the areas where compliance was not present in all cases.

Inspection reports for local partners

Dorset County Council received an Ofsted inspection in January 2017 for its work relating to Special Education Needs and Disabilities. The YOS participated in this inspection, attending relevant meetings with the inspection team. The published inspection report letter did not identify any areas for improvement in relation to the youth justice elements of the SEND Code of Practice.

Other HMI Probation Inspection reports

Among other reports published this year by HMI Probation were a thematic inspection report into Referral Orders, and a full joint inspection of Cambridgeshire YOT. Learning from the report into Referral Orders was reviewed at a meeting with our volunteer community panel members.

Cambridgeshire YOT was selected for inspection as an example of a successful YOT. The learning from that report was shared with the YOS Board and with the YOS team, as part of the consultation process for developing our new Youth Justice Plan for 2017/18.

Structure and Governance

Management and Governance Arrangements

The work of the Dorset Combined YOS is managed strategically by a Partnership Board. The Partnership Board consists of senior representatives of the statutory partner organisations, together with other relevant local partners.

Membership:

- Dorset County Council (current chair)
- Borough of Poole (current vice-chair)
- Bournemouth Borough Council
- Dorset Police
- Dorset Local Delivery Unit Cluster, National Probation Service
- NHS Dorset Clinical Commissioning Group
- Public Health Dorset
- Dorset Healthcare University Foundation Trust
- Her Majesty's Court and Tribunal service
- Youth Justice Board for England and Wales
- Office of the Police and Crime Commissioner
- Ansbury (Connexions Provider)

The Partnership Board oversees the development of the Youth Justice Plan, ensuring its links with other local plans.

The YOS Manager reports quarterly to the Partnership Board on progress against agreed performance targets, leading to clear plans for performance improvement. The Board also requests information in response to specific developments and agendas, and monitors the YOS's compliance with data reporting requirements and grant conditions.

Representation by senior leaders from the key partners enables the YOS Manager to resolve any difficulties in multi-agency working at a senior level, and supports effective links at managerial and operational levels.

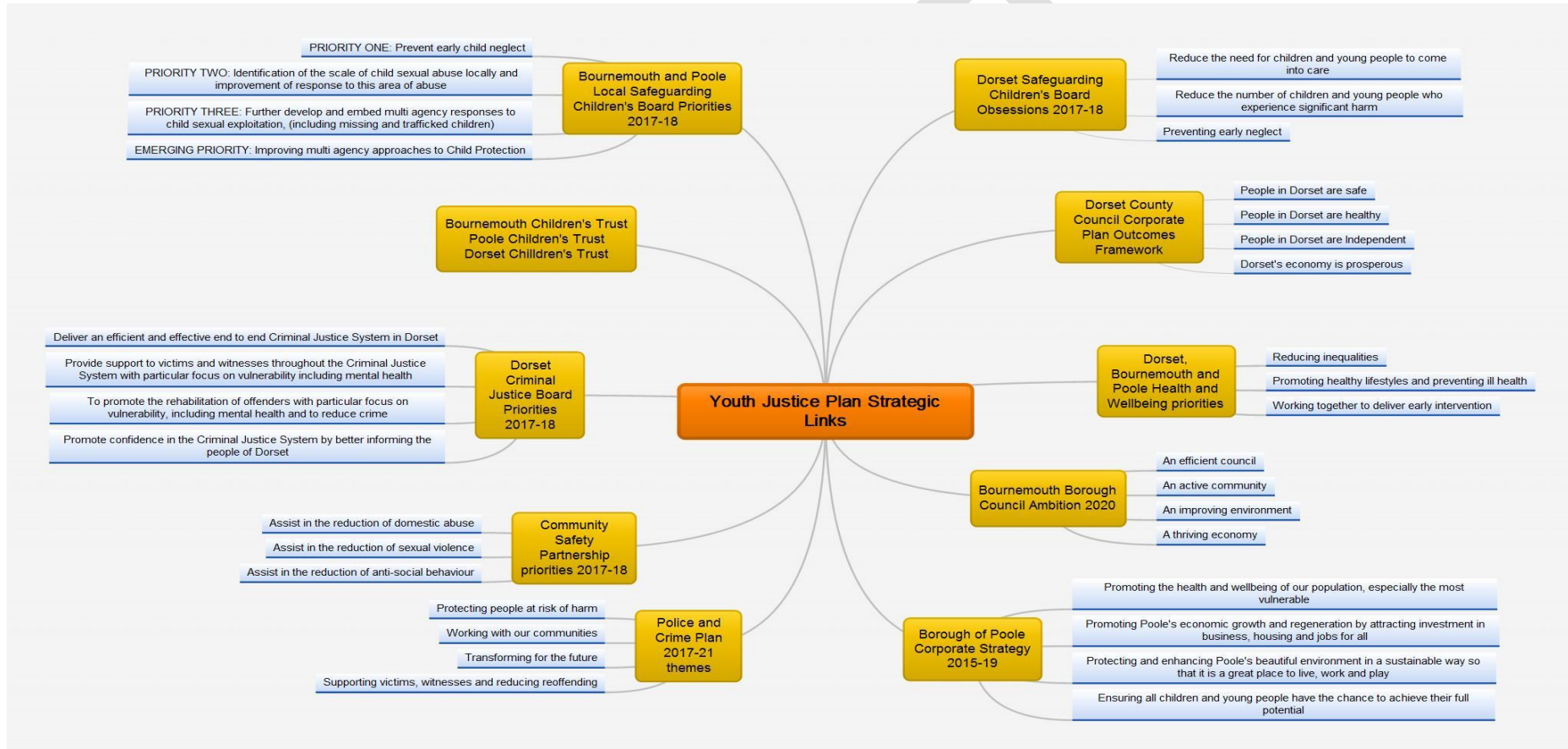
The YOS is party to local multi-agency agreements for information sharing, for safeguarding and for the escalation of concerns.

The Partnership Board also oversees activities by partner agencies which contribute to the key youth justice outcomes, particularly in respect of the prevention of offending.

In 2016/17 the Partnership Board was identified as the appropriate body to provide oversight and governance for the new multi-agency protocols in respect of the criminalisation of children in care and the detention of young people in police custody. The YOS Manager chairs multi-agency operational groups for each protocol and reports on progress to the YOS Partnership Board.

Linking the Youth Justice System to other Plans and Structures

The YOS is a statutory partnership working with children and young people in the criminal justice system and the community safety arena. The YOS is “hosted” by Bournemouth Borough Council, where it sits in the Children and Young People’s Service. We work within the context of several other key strategic partnerships. The map below gives an overview of the direct and indirect linkages.



The membership of the YOS Partnership Board enables the work of the Dorset Combined YOS to be integrated into strategic planning for relevant issues such as Safeguarding, Public Protection, Criminal Justice, Health & Well-Being, and the Children and Young People’s Plans. The YOS Manager sits on both the local Safeguarding Children’s Boards, the Dorset Criminal Justice Board and on the local MAPPA Strategic Management Board.

Partnership Arrangements

The previous section outlined the strategic links between the YOS and the other strategic groups and partnerships. Similar links exist at operational levels, enabling the YOS to integrate its work with young people and families with the work done by partners such as children's social care across the 3 local authorities and the Child and Adolescent Mental Health Services across Dorset.

Safeguarding and public protection

As well as participating in Child Protection Conferences and Multi-Agency Public Protection Arrangements (MAPPA) meetings in respect of specific individuals and families, YOS managers also attend MARAC meetings, local Community Safety Partnership operational meetings, local complex needs panel meetings and meetings in respect of early help and Troubled Families activities in the 3 local authorities.

Reducing Re-Offending

The YOS Manager chairs the pan-Dorset Reducing Reoffending Strategy Group, reporting to the Dorset Community Safety and Criminal Justice Board. Although the group's main focus is on adult offenders, attention is also paid to the youth perspective, particularly for those young people about to transition to adult services, and for the children of adult offenders.

Risk Assessment Panels

The YOS instigates a Risk Assessment Panel process for young people under YOS supervision who have been identified as being at high risk of causing serious harm to others, or of experiencing significant harm themselves. These meetings are attended by workers and managers from the other agencies who are working with the young person. The aim is to agree the risk assessment and devise, implement and review plans to reduce the risks posed by and to the young person.

Harmful Sexual Behaviour

The YOS works with the three local authorities, and with the Police, to agree the best way to respond to young people who have committed harmful sexual behaviour. Some of these young people are also known to the local authority social care service so it is important that we coordinate our work and, where possible, take a joint approach. The YOS and the local authorities use recognised assessment and intervention approaches for young people who commit harmful sexual behaviour.

Child Sexual Exploitation

Young people known to the YOS can also be at risk of child sexual exploitation (CSE). The YOS Manager is a member of the pan-Dorset CSE and Missing Persons sub-group of the two Local Safeguarding Children's Boards. A YOS Team Manager has lead responsibility for the team's operational work on CSE, supported by a designated Youth Justice Officer in our Dorchester office. The YOS participates in local multi-agency information sharing arrangements and meetings to identify and protect children at risk of sexual exploitation.

Preventing Violent Extremism

All relevant YOS staff have received training in raising awareness of 'Prevent'. A YOS Team Manager has lead responsibility for this area of work and attends the pan-Dorset

Prevent Group to ensure that our work is aligned with local initiatives. The YOS has sight of the local assessment of extremism risks. The seconded YOS police officers act as a link to local police processes for sharing intelligence in respect of possible violent extremism.

Young people convicted of extremism related offences will be managed robustly in line with the YOS Risk Policy, with appropriate referral to the local MAPPA process and clear risk management plans, including paired working arrangements and support from the seconded YOS police officers.

Safe Schools and Communities Team

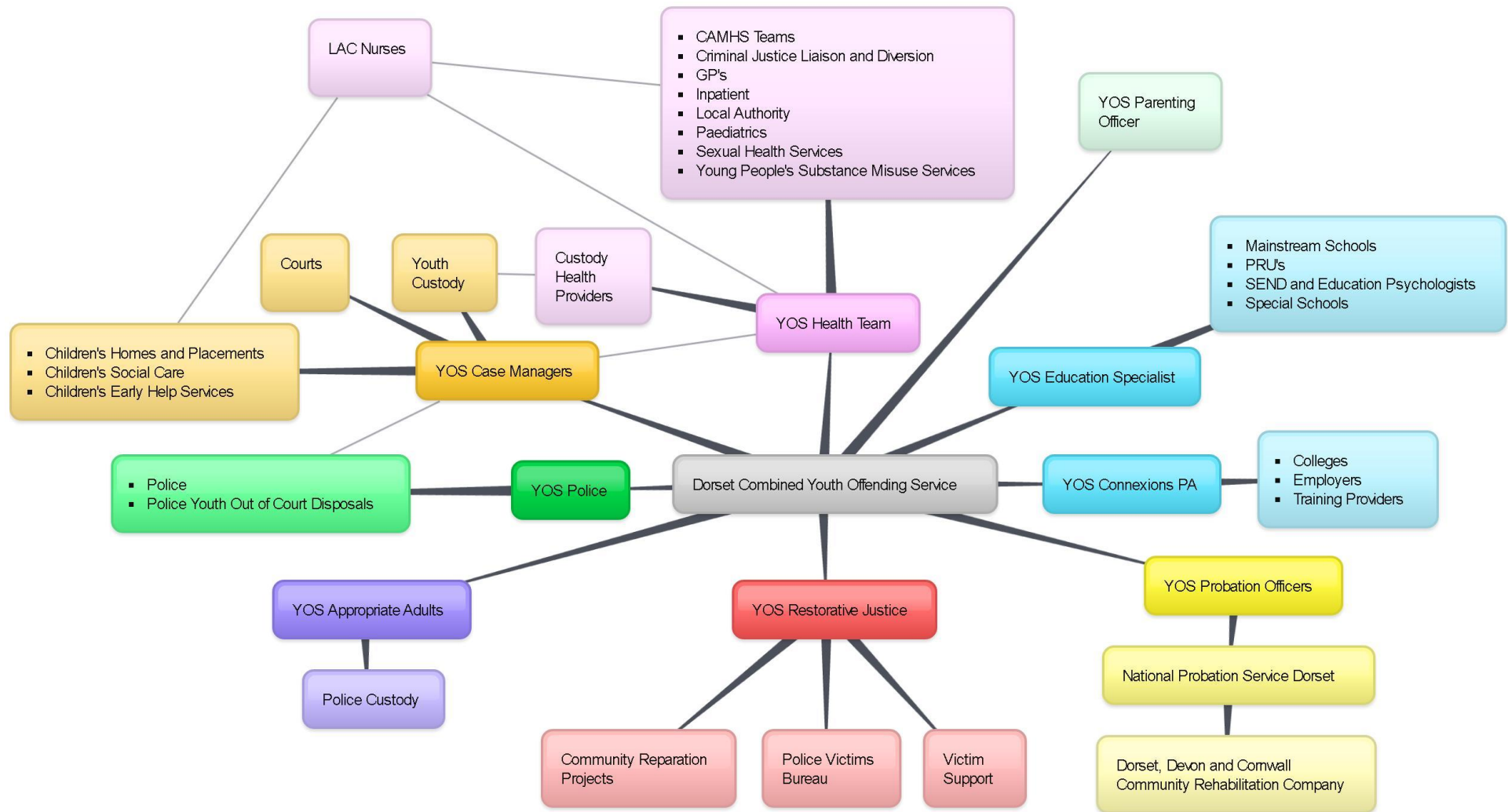
The Safe Schools and Communities Team (SSCT) is a partnership between Dorset Police, the Office of the Police and Crime Commissioner and Dorset Combined YOS. The SSCT plays an important role in preventing offending by young people across Dorset, Bournemouth and Poole. The team provide education, awareness and advice to students, schools and parents. The work of the team is reported to the YOS Partnership Board as an important element of the YOS Partnership's work to prevent youth offending. The SSCT is particularly effective at supporting schools to manage incidents without the need for a criminal outcome, and at supporting internet safety for young people across the Dorset area.

Restorative Justice and Support for Victims

The YOS Victim Liaison Officers provide Restorative Justice activities and support for victims of offences committed by young people. The YOS also links with other agencies through the Victims and Witnesses Sub-Group of the Dorset Criminal Justice Board. The YOS plays an important part in delivering the Police and Crime Commissioner's Restorative Justice Strategy for Dorset, taking the lead on offences committed by young people and supporting the development of good practice with other Restorative Justice providers.

In addition to the team's involvement in these different partnership groups, there is ongoing daily interaction with other local services. These links are illustrated on the following page:

Picture 1 Operational Links between YOS and Partner Agencies



Resources and value for money

The YOS is funded by the statutory partners, by the Office of the Police and Crime Commissioner and a grant from the Youth Justice Board for England and Wales. Local authority staff are employed by Bournemouth Borough Council. Other staff are seconded from Dorset Police, the National Probation Service Dorset and Dorset HealthCare University NHS Foundation Trust. Revenue contributions and the YJB Grant form a Partnership budget.

Statutory partners have maintained funding levels for 2015-16 but the Youth Justice Board grant has been cut by 7.6%. The integration of the two previous teams into the new Dorset Combined Youth Offending Service has enabled some efficiencies and reductions to be made. The YJB grant will be used solely for the delivery of youth justice services. More information can be found in Appendix A.

Partner Agency	17/18 Revenue excluding recharges	Movement 14/15 to 17/18	Staff
Dorset County Council	£531,900	£0	1 Nurse (substance misuse) and 0.3 FTE Psychologist
Bournemouth Borough Council	£257,100	£0	
Poole Borough Council	£244,000	-£13,030	
Police and Crime Commissioner for Dorset	£75,301	-£78,149	2.0 FTE Police Officers. Funding reduction from 14/15 to 15/16 reflects funding of SSCT directly by the OPCC to the Police, no longer via the YOS
Dorset Probation Trust	£10,000	£6,826	2 FTE Probation Officers (reduction from 2.6 FTE up to March 2015, with adjusted funding contribution, after national review)
Dorset Clinical Commissioning Group	£22,487	£0	2.8 FTE Nurses
Dorset Healthcare University Foundation Trust		£0	
Youth Justice Board Good Practice Grant	£594,304	-£196,110	

Use of the Annual Youth Justice Grant 2017/18

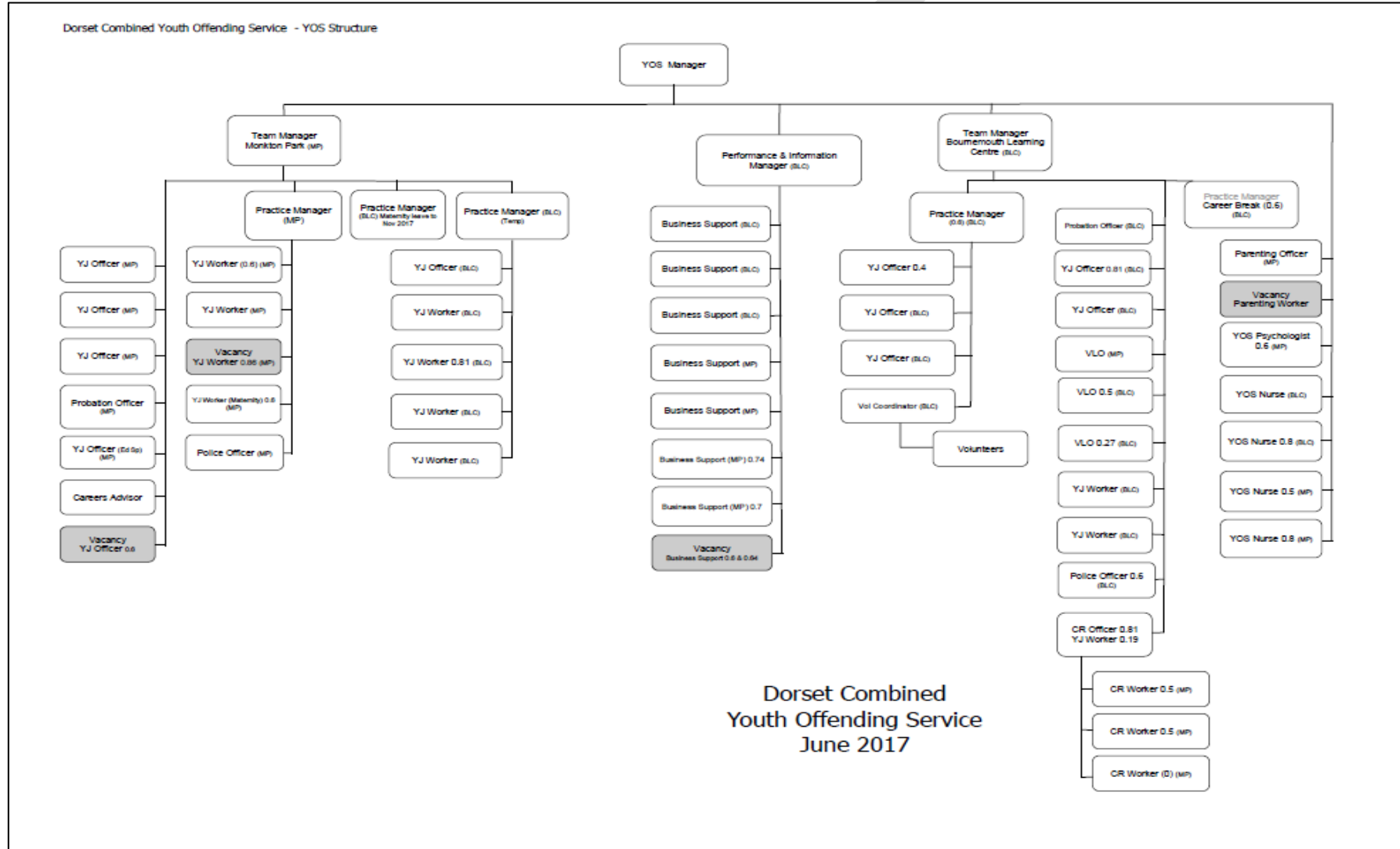
The annual Youth Justice Board grant to Youth Offending Teams is provided for 'the delivery of youth justice services'. A number of conditions are attached to the grant. The YOS Partnership Board receives quarterly finance reports from the senior accountant in Bournemouth Borough Council who oversees the YOS budget. These reports enable the Board to be satisfied that YOS resources are being used for their intended purpose and achieving value for money. This reporting mechanism also enables the Board to be assured that the YOS complies with the YJB Conditions of Grant.

The following table sets out how the YOS uses the Youth Justice Board grant for the delivery of youth justice services:

Activity	Cost
Staff training	£10,000.00
ETE staff	£106,000.00
ICT licences and maintenance	£29,000.00
Interpreter Fees	£2,000.00
Victim/reparation staff	£113,000.00
Psychologist	£18,000.00
Towards cost of Youth Justice staff	£316,304.00
Total	£594,304.00

Staffing information

This chart shows the YOS structure in June 2017. The YOS meets the minimum staffing requirements of the Crime and Disorder Act 1998.



The table below shows the number of staff and volunteers in the service, by gender and ethnicity.

YOS Staff

	Male	Female
White British	13	37
White Irish	1	0
White Other	0	2

**YOS
Volunteers**

	Male	Female
White British	8	16
White and Black Caribbean	0	1

23 staff members and 8 volunteers have been trained as Restorative Justice Conference facilitators.

Risks to delivery of YOS outcome measures in 2017-18

The main outcome measures for the YOS still relate to the numbers of young people entering the youth justice system for the first time, the rate of re-offending by those young people who have committed proven offences, and the use of custodial sentences. The YOS also has a priority to keep the public and young people safe from harm.

Particular risks which have been identified include:

- Uncertainty and possible disruption following the recent national review into youth justice arrangements (published in December 2016). Although the government has rejected the proposals to remove the legislative framework for youth offending teams and the ring-fence on the youth justice grant, other recommendations are being considered as part of a follow-up review. The YOS Partnership remains committed to the recently formed pan-Dorset Youth Offending Service as being the best way to deliver youth justice activities across the pan-Dorset area.
- Local authority boundaries and structures in the Dorset area are being reviewed but all parties remain committed to a pan-Dorset Youth Offending Service
- Reduction in resources due to spending constraints, leading to prioritisation of statutory work and negative impact on work to prevent offending and to build resilience
- Access to suitable education, training or employment provision for young people with complex needs and risks
- Lack of alternative local authority accommodation leading to young people being detained overnight in police custody when they have been refused bail
- Inconsistent responses to teenagers who behave abusively or violently towards their parents/carers, leading to new entrants to the justice system
- Although the overall rate for first time entrants into the youth justice system is good, there are local variations which show higher rates in Poole and Bournemouth than in Dorset. All three local authorities are served by the same police force and the same youth offending service. More work is needed to identify the reasons for these local variations.

These risks have been considered when formulating the YOS Partnership's Strategic Priorities for 2017-18, which are outlined on the following pages.

Strategic Priorities for 2017-18

The strategic priorities for the Dorset Combined YOS align with:

- our 3 main performance indicators
- the strategic priorities of other local partnerships (such as the Safeguarding Children's Boards, Community Safety Partnerships and the Criminal Justice Board)
- relevant local initiatives to reduce offending, protect the public and safeguard young people
- areas identified for YOS improvement.

The following priority areas will be supported by a more detailed action plan used by the YOS team.

Develop the local strategy for preventing young people entering the justice system

- Monitor and improve the effectiveness of the pan-Dorset Protocol to Reduce the Criminalisation of Children in Care
- Lead a multi-agency pan-Dorset group to develop a coordinated, strategic response to adolescent parental violence and abuse
- Work with colleagues in Early Help services across the three local authorities to coordinate prevention and step-down activities with young people
- Work with Dorset Police to develop an integrated Prevention strategy, exploring the opportunities to apply the Adverse Childhood Experiences model
- Work with Dorset Police and local authority Early Help partners to increase the options for diversion from the justice system
- Analyse first time entrant characteristics to target future interventions, particularly for disadvantaged groups

Use the national review of youth justice to improve the way our local youth justice system works

- Work with local partners from the police, local authorities and health to reduce the time spent by young people in police custody
- Develop the YOS role in providing Appropriate Adults for young people being interviewed by police under 'Voluntary Attendance'
- Support the provision of liaison and diversion health services to young people being interviewed by police under 'Voluntary Attendance'
- Work with local authority and police partners to establish a system for transferring young people to local authority accommodation when they have been charged with an offence, refused bail and are awaiting their court appearance
- Work with other court professionals to understand how young people and parents experience the court process and seek improvements where appropriate

Make better use of information to improve the effectiveness of our work:

- Develop information reporting from the case management system to improve the targeting and effectiveness of the team's work

- Use of information monitoring to identify any disproportionate impacts on minority groups
- Develop quality assurance processes for specialist aspects of the team's work, eg health, ETE, parenting, victim work
- Improve reporting to team and Board on quality and impact of team's work
- Ensure quality assurance processes includes service user perspectives
- Develop ability for early identification of trends in re-offending and first time entrants
- Evaluate the impact and effectiveness of different YOS interventions

Improve the quality of our practice to achieve better outcomes for children, young people and families

- Test out new ways of working with young people, parents and education colleagues in order to improve young people's engagement with education, training and employment
- Work with Dorset CCG, Dorset HealthCare and NHS England to recruit a Speech and Language Therapist for the YOS
- Develop the team's capacity and skills in working with parents and whole family approaches
- Increase the team's access to evidence-based resources for working with young people to change their behaviour
- Improve the consistency and quality of our Intensive Surveillance and Supervision programmes for higher risk young people
- Identify and overcome any obstacles to information sharing with partner agencies so as to ensure integrated and effective joint working

Improve the skills and development opportunities for our workforce

- Devise and implement a YOS Workforce Development and Career Progression policy and procedure
- Use seconded staff to develop the skills and knowledge of their YOS colleagues
- Develop the capacity and skills of the YOS health team to work with the effects of trauma
- Develop the team's core elements of good practice, including Motivational Interviewing to facilitate positive change and Restorative Justice to repair harm to victims
- Report to YOS Board on workforce development and its impact on practice and outcomes

Approval

Signatures of Board Chair and YOS Manager

Sara Tough

Director of Children's Services (Chair)

Dorset County Council

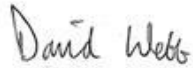


Signed: _____ Date: 21 June 2017

David Webb

Dorset Combined Youth Offending Service Manager

Bournemouth Borough Council



Signed: _____ Date: 21 June 2017

NB This Plan is awaiting approval from Bournemouth Borough Council, the Borough of Poole and Dorset County Council.

DRAFT

Appendix B – Glossary of Terms

AssetPlus	Nationally Accredited Assessment Tool
CAMHS	Child and Adolescent Mental Health Services
CJS	Criminal Justice System
CSP	Community Safety Partnership
ETE	Education Training and Employment
FTE	First Time Entrant into the Youth Justice System
FTE	Full-Time Equivalent (as applied to posts)
ISS	Intensive Supervision and Surveillance
IT	Information Technology
LSCB	Local Safeguarding Children's Board
MAPPA	Multi-Agency Public Protection Arrangements
NEET	Not in Education, Employment or Training
O OCD	Out Of Court Disposals
PCC	Police & Crime Commissioner
RJ	Restorative Justice
SEND	Special Educational Needs and Disabilities
SSCT	Safe Schools and Communities Team
VLO	Victim Liaison Officer
YJ	Youth Justice
YJB	Youth Justice Board
YOS/YOT	Youth Offending Service/Team
YRD	Youth Restorative Disposal
YRO	Youth Rehabilitation Order