

Protocol and Guide for schools on Managed Moves



Updated August 2024

1. Definition of a Managed Move

'A Managed Move is used to initiate a process which leads to the transfer of a pupil to another mainstream school permanently. Managed Moves should be voluntary and agreed with all parties involved, including the parents and the admission authority of the new school. Managed Moves should only occur when it is in the pupil's best interests.'

There is no requirement from The Department for Education for schools to utilise Managed Moves, however in Gloucestershire, the Local Authority recommends schools consider their use where appropriate and it is in the child's best interests.

2. Latest Statutory Guidance:

[School suspensions and permanent exclusions - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/publications/school-suspensions-and-permanent-exclusions)

[Behaviour in Schools - Advice for headteachers and school staff Feb 2024 \(publishing.service.gov.uk\)](https://publishing.service.gov.uk/government/publications/behaviour-in-schools-advice-for-headteachers-and-school-staff)

3. Managed Move Overview

3.1. Managed Move Principles

- A managed move leads to the transfer of a pupil to another mainstream school permanently. The process can include a period of off-site direction initially during which the child is dual registered.
- A Managed Move request should be initiated by the child's original school.
- Parents must be in agreement and willing to support a Managed Move.
- The student must be willing to participate and co-operate in the move.
- Each Managed Move must be individually considered, taking into account the young person's educational, social and emotional wellbeing.
- A Managed Move must form part of a planned intervention and not as an early or first response to behavioral concerns.
- The original school should be able to evidence that appropriate intervention has been carried out, including, where relevant, multi-agency support, or appropriate assessments were done or explored prior to a Managed Move. This should be evidenced through the Graduated Pathway- My Plan/My Plan+.
- Schools must act in a spirit of partnership and collaboration for the Managed Move arrangements to work.
- The original school should continue to offer support and advice to the receiving school during the period of the Managed Move.
- The Managed Move plan must include clear strategies to support the transition including supporting possible issues that arise during the transition period. This should include regular reviews structured at the onset of the plan.
- The new school should provide and adjust provision/support to aid a successful Managed Move.
- If at any point during the agreed period of dual registration, the new school consider the Managed Move to be no longer viable, they should first liaise with the original school and

parents to ensure there are no further actions which can be taken to prevent the breakdown of the Managed Move.

3.2. Benefits of a Managed Move

- A Managed Move is an opportunity for the pupil to have a fresh start in a new school.
- They are most likely to be effective when used as a tool as part of a planned intervention rather than as a reactive alternative to permanent exclusion arising from repeated and serious instances of indiscipline.
- There are a variety of other circumstances where they may also be considered as desirable, e.g. incidences of bullying (perpetrator or victim); serious deterioration in the relationship between home and school; home circumstances; community issues.
- Managed Moves should only be undertaken with the full knowledge and co-operation of all the parties involved, including the parents.

3.3. When is a Managed Move appropriate?

- As an alternative, where the young person is likely to be permanently excluded.
- Where the school's own behaviour management strategies have been implemented to address a series of behavioural concerns and a Structured Support Plan meeting has concluded that a fresh start in a new school would be the most positive intervention strategy to maintain the pupil in education.
- Where there are well documented instances of other interventions and support strategies which have already been tried and are proving unsuccessful.
- Where the relationship between the pupil and either a particular group of fellow pupils and/or staff has broken down to an irrevocable degree.
- Where a pupil is not regularly attending school and the causes of the non-attendance have been fully investigated, and it appears that issues directly linked to the school are the significant factor in the non-attendance, at this stage a Managed Move could be considered, if deemed in the best interest of the young person by the parents, school and the young person themselves.

3.4. When is a Managed Move not appropriate?

- A Managed Move should not be sought for a pupil in Year 11. (A modified program, which might include short-term off-site direction to alternative provision, may be more appropriate).
- A Managed Move should not be instigated for a pupil with a child protection plan, unless the proposed move forms part of this plan.
- When a parent is seeking a straightforward transfer to another school and a managed move would not provide additional benefit for the pupil.
- The pupil is not on a school roll.
- The pupil would not be able to return to the original school if the placement is unsuccessful.
- If parents are not in agreement with a Managed Move – **DfE guidance states:**
'If a parent believes that they are being pressured into a Managed Move or is unhappy with a Managed Move, they can take up the issue through the school's formal complaints procedure with the governing board and, where appropriate, the local authority. Within the

school inspections framework, under leadership and management, Ofsted will consider any evidence found of a parent being pressured into a Managed Move that has resulted in off-rolling and is likely to judge a school as inadequate on the basis of such evidence.'

3.5. Which cohorts require additional input and consideration?

- For a pupil with an **Education Health and Care Plan**, such queries should be directed to the EHCP Team for consideration before any further actions are taken.
 - The new school must be able to provide suitable, full-time education, appropriate to the special educational needs as set out in the EHCP.
 - Any additional support identified through the pupil's EHCP will need to be transferred to the new school from the original school's SEN allocation. This should be agreed prior to the initial Managed Move meeting.
 - Any transport implications need to be taken into consideration as part of this decision.
 - If the Managed Move is successful, an interim review of the EHCP will need to take place. This could happen at the 12 week review meeting. This will provide the necessary information for the LA to consult formally with the receiving school and amend the EHCP to name the new school as the sole registered base.
- Where a pupil is **CIC**, the school should communicate directly with Gloucestershire's Virtual School before any considerations around a Managed Move take place.
- Where a pupil has an allocated **social worker**, they should be consulted prior to and included in any decision making.
- For a pupil identified at **SEN Support** the SENCOs at both schools should meet to ensure all information on needs and support is shared and understood prior to any decision being made.

4. The Managed Move Process

4.1. Criteria for Managed Moves

- The original school can evidence that they have considered if the pupil has unmet special educational needs that require support through the graduated pathway, MyPlan/My Plan+, and have consulted with the SENCO in order to take appropriate action where these have been identified.
- The original school must have set and reviewed agreed outcomes in line with the graduated pathway (MyPlan/My Plan+) demonstrating that a range of strategies have been tried and reviewed.
- The original school has made all appropriate referrals to outside agencies for support.
- The school and family share the view that the original school has, **at present**, exhausted all reasonable strategies to support the pupil.
- There is a clear audit of the pupil's strengths and capabilities that can form the core of a transition plan in the new school.
- The school and family share the view that the new school is likely to be able to offer something sufficiently different to make the Managed Move viable. This may be the size/location of the school or a new peer group/teaching team/curriculum, depending on the particular issues at the original school.
- The family is committed to supporting the process.

5. A model process

5.1. Step 1- Initiating a Managed Move

The head teacher of the original school should contact the parents to agree the appropriateness of a Managed Move in the first instance. It is important at this stage that parents understand the process and their responsibilities. School should identify with parents which school's may be possible in terms of appropriateness, distance and transport. Schools must ensure the parents do not feel under any pressure to accept a Managed Move.

If parents agree that a Managed Move is appropriate, the head teacher is responsible for contacting the head teacher of a new school to request the move, setting out reasons why the move might work. This should generally be the next appropriate school to the pupil's home, unless there are exceptional circumstances.

It should be stressed that the protocol puts Headteachers under no pressure to accept a student when a Managed Move is not felt to be in the interests of the student, or of other students in the school. Nor can a Headteacher be put under any pressure to attempt a Managed Move unless the Headteacher feels it is in the best interests of all parties.

The new school must have reference to their school's admissions code when making a decision about whether to accept a Managed Move.

Once a new school has agreed to the move in principle, we recommend that the head teachers discuss financial arrangements prior to the formal Managed Move meeting. **(Appendix A)**

5.2. Step 2- Information Gathering

Before convening the meeting, the original school will have to gather information to inform the Managed Move Meeting **(Appendix B)**. This should include:

Views of the pupil

While it is expected that that pupil should attend some if not all of the Managed Move meeting and encouraged to express views freely and honestly, it may be difficult to do this during the formal meeting. An adult who has a good rapport with the pupil should find out what they think about the current situation. It may be useful to have the parent or another adult not employed by the original school to help the pupil provide their views. **(Appendix C)**

Evidence of all previous interventions:

- Copies of MyPlan/MyPlan+
- Provision map
- Assessment of need
- Evaluation of any strategies suggested by EPS, APS, ATS
- Summary of the support from any relevant agency already supporting the pupil

- Most recent assessment and attainment data
- Relevant safeguarding information
- Risk assessments
- Behaviour log and consequences
- Exclusion data
- Attendance record and support

Where appropriate:

- KS4 – record of options

The Managed Move will only make a difference if it can provide something new or additional to current provision.

5.3. Step 3- Initial Managed Move Meeting

We recommend that the head teachers of both schools attend all Managed Move meetings. It may help for an additional key member of staff to attend to coordinate the support for the transfer.

Practical arrangements

- The Managed Move meetings are usually held at the proposed new school.
- **The original school** is responsible for inviting parents and appropriate outside agencies giving ample advanced notice. The original school may also liaise with the new school to invite professionals from other agencies e.g. EPS, Health, YST, Social Care who may be able to work with parents, the pupil and the school to make the Managed Move work.
- Parents are a crucial part of the Managed Move process and the school should try to arrange a time when it is convenient for the parents to attend the meetings.

The proposed new school needs to:

- Book a suitable room with comfortable, level seating and a table.
- Offer parents and the pupil the opportunity to make notes during the meeting by providing pens and paper.
- Provide an information pack for the family about the school including key policies and relevant dates.
- School staff should agree with parents whether and for how long the pupil should attend the meeting.

The purpose of the Managed Move meeting is to share an understanding of:

- The reason for the move – briefly, as this will already have been discussed.
- Factors that give the original and proposed new school confidence that the Managed Move will be successful.
- What support that is new or additional that the proposed new school can offer.
- Create the effective integration strategy which can include commitments from both schools, parents and other agencies including targets for the pupil and commitments by both school

and the parents along with any other agency represented in order to make the move successful.

- Identify whether the process for managed move will include an agreed period of dual role (off-site direction).
- Agree date on which managed move will take place and pupil transfers solely to the new school register.
- Clearly outline practical arrangements such as uniform, travel and timetable.

Integration Strategy

DfE Guidance on reintegration strategies (Exclusion Guidance Page 17, paragraphs 27 – 31) should be used to support the planning of the new school's integration strategy.

- Information from the original school, alongside parents and child's views, should be used to decide the most effective forms of support/provision.
- The integration strategy should include direct work to support the 'fresh start' and foster sense of belonging within the new school community. Specific and relevant support related to identified difficulties in previous school should begin immediately. Advice on appropriate strategies can be found in the DfE Exclusion guidance and DfE 'Behaviour in Schools.'
- GCC recommend that a 'trusted person' in the new school is identified to support the transition and meet regularly in the early days.
- Referrals to multi-agency organisations to identify any SEND/health needs and/or provide appropriate external support should be made immediately to support the transition. Where appropriate if any gaps identified in the initial Managed Move meeting the original school can initiate these referrals prior to commencing new school.
- The integration strategy should be communicated clearly to parents and child at the earliest opportunity and prior to starting the first day.

5.4. Step 4- Structure of the meeting-

Chair of the meeting will:

- Lead the Managed Move meeting and complete the Managed Move Initial Meeting document (**Appendix D**) on what is said as a record of the agreement between all parties.
- Circulate a typed copy of the agreement to everyone who attended.
- Set timescales for a review during initial off-site direction period and set date for meeting to finalise managed move. (GCC recommend a total 'Managed Move Process' timescale of no more than 12 weeks with a 6 week review).
- Confirm school responsibilities and that the proposed new school will record weekly attendance data.

6. Step 5- Monitoring

A member of the new school staff will normally meet the pupil regularly to review their progress towards the Managed Move targets. This gives the pupil the chance to identify what has gone well and how to replicate success.

During the Managed Move, the new school should provide the original school with a weekly record of the pupil's attendance.

The key people who attended the original meeting will be invited to the 6 week review meeting and to the meeting to finalise managed move.

During the 6 week review: (*Appendix E*)

- All commitments agreed at the initial meeting need to be reviewed.
- School staff will share reports about the pupil's progress towards the targets.
- Any supporting agencies will report on the commitments they made.
- Staff, parents and other professionals may make adjustments to their commitments if necessary.
- Focusing on solutions is the key to success.

If the current provision does not meet the pupil's needs, further measures should be identified at the review to help them sustain their place in the new school. Occasionally the targets set for the pupil at the initial meeting are not relevant in the new setting whilst other issues have arisen that threaten the success of the move. In such cases the new school should liaise with the original school and the parents. This can happen without the need for another meeting unless the new school feel it is necessary.

At the meeting to finalise Managed Move:

If the period of off-site direction has been successful and all parties remain in agreement then the managed move is finalized. This is an opportunity to congratulate all concerned for making the move a positive one, including the pupil who has responded to the support offered.

The chair of the meeting should:

- Confirm that the process for managed move has been completed successfully and that the original school can remove the pupil from their admissions register.
- Clarify the ongoing support required to continue the successful progress
- Circulate confirmation of successful Managed Move.

7. What if the Managed Move process breaks down?

During the period of off-site direction, if it appears that the Managed Move is no longer viable, the proposed new school will need to call an interim review with parents and the original school to discuss options.

If the pupil behaves in a way that warrants a suspension at the proposed new school, the head teacher should liaise with the head teacher of the original school to discuss the continued viability of the Managed Move.

If the head teacher of the proposed new school feels that the Managed Move is not viable, they will need to:

- Contact parents and the original school– by phone if possible and by letter on the day of the decision, detailing the reason for ceasing the process.
- Prepare a report for the original school detailing the support that had been provided as well as the attendance log. It will help the original school plan for the pupil's return if they know about strategies that had been partially successful as well as those that have not.

The original school will instigate the **immediate** return of the pupil and convene a meeting to agree an education plan for the pupil within 5 school days of the end of the Managed Move process.

The head teacher of the original school will need to consider the reasons for the failure of the Managed Move process and follow the exclusion guidance in respect of any days that the pupil is not permitted to attend school after the off-site direction has ceased.

If the pupil behaves in a way that would normally warrant permanent exclusion at the proposed new school, the head teacher of that school will generally decide to cease the off-site direction. The head teacher of the original school can then consider the information provided by the proposed new school when considering their approach in line with their behavior policy and DfE guidance.

8. Other considerations-

8.1. Registration coding for all Managed Move arrangements

[Working together to improve school attendance - GOV.UK \(www.gov.uk\)](http://www.gov.uk)

Code D: Dual registered at another school

'247. The law allows for a pupil to be registered at more than one school. This code is used to indicate that the pupil was not expected to attend the school in question because they were scheduled to attend the other school at which they are registered. The main examples of dual registration are pupils who are attending a pupil referral unit, a hospital school or a special school on a temporary basis.'

248. Each school should only record the pupil's attendance and absence for those sessions that the pupil is scheduled to attend their school. Schools should ensure that they have in place arrangements whereby all unexpected and unexplained absence are promptly followed up.'

When the placement has been arranged and agreed with a start date: The original school marks the attendance register using 'D'; the new school marks the register with actual attendance.

Schools **MUST** have in place arrangements whereby all unexplained and unexpected absence is followed up promptly.

8.2. Enrolment status

For the duration of the Managed Move process period (off-site direction):

- The original school maintains the pupil's record with an enrolment status of 'M' (current main - dual registration).
- The new school maintains the pupil's record with an enrolment status of 'S' (current subsidiary - dual registration).

On the day it is agreed that the Managed Move process has been successful, the pupil is sole registered at the new school and taken off the roll of the original school.

9. Role of the Local Authority

Managed Moves are an agreement between two schools and as such do not require the involvement of Local Authority Representatives.

Any support from GCC teams will stay in place for the pupil as they change settings. Where an Outcome Co-Ordinator is already supporting a pupil, they can support the Managed Move process however they cannot support the Managed Move process if they have not been involved previously.

10. Further Information

Further information can be found on Schoolsnet:

<https://www.gloucestershire.gov.uk/schoolsnet/your-pupils/exclusions/>

Education Inclusion Service: 01452 427360

Appendix A

Financing of Managed Moved Process

A suggested model for the financing of the Managed Moved Process is as follows:

- An amount of funds is agreed, and issued by the original school to the new school for any period of off-site direction agreed as part of the Managed Move Process. To assist, an Age Weighted Pupil Unit (AWPU) figure can be provided by Education Finance (01452 328861), for all year groups, as required.
- If unsuccessful at any stage, a proportionate amount of funds is returned to the original school.
- When the Managed Move process is finalised, then the original school should forward any remaining funds received (from the date the pupil is taken off the original school roll) for the pupil for the respective academic year to the new school.
- The Local Authority is unable to arrange the transfer of funds on behalf of schools. Financial arrangements should be confirmed and conducted by schools, if appropriate, following the initial and final Managed Move Process meetings.

Appendix B

Managed Move Process			
To be completed by the original school and brought to Managed Move Process initial meeting			
Pupil's name:		School:	
SEND Status:	<input type="checkbox"/> EHCP <input type="checkbox"/> SEN Support <input type="checkbox"/> No SEN Needs	SEN Primary need:	<input type="checkbox"/> Social, Emotional & Mental Health (SEMH) <input type="checkbox"/> Cognition & Learning (C&L) <input type="checkbox"/> Communication & Interaction (C&I) <input type="checkbox"/> Physical Disability & Sensory Needs (PD&S)
Graduated Pathway Plan:	Choose an option	CIC (Child in Care):	Choose an option
Attendance (YTD):		Attendance (term):	
Suspensions (YTD):			
Please tick in one box only for each category	Overall good	Overall satisfactory	Overall poor
Attainment			
Effort			
Attitude to staff			
Attitude to peers			
Homework			
Identified needs:			
Reasons for Managed Move: Why might a move to this particular school be successful?			
Specific Strategies and interventions utilised i.e. what has been implemented within school to support and what has the impact been?	Examples of strategies could include: <input type="checkbox"/> Academic Support in lessons <input type="checkbox"/> Specific interventions to meet need <input type="checkbox"/> Peer Buddying /mentoring <input type="checkbox"/> Alternative curriculum <input type="checkbox"/> Mentoring <input type="checkbox"/> Time-out card/system <input type="checkbox"/> Reduced/changed timetable <input type="checkbox"/> Access to student support out of the		Further information:

	classroom <input type="checkbox"/> Assessment of special educational needs <input type="checkbox"/> Risk Assessment <input type="checkbox"/> Meeting with Parent/s <input type="checkbox"/> Trusted adult support <input type="checkbox"/> Out-reach support <input type="checkbox"/> Counselling <input type="checkbox"/> Other:	
Outside agency support utilised	Examples of agencies could include: <input type="checkbox"/> Education Inclusion Service (EIS) <input type="checkbox"/> The Educational Psychologist Service (EPS) <input type="checkbox"/> The Advisory Teaching Service (ATS) <input type="checkbox"/> Speech and Language Therapy Service (SALT) <input type="checkbox"/> Families First Plus <input type="checkbox"/> Youth Support Services <input type="checkbox"/> Children and Adolescent Mental Health Services <input type="checkbox"/> Alternative Provision School <input type="checkbox"/> Other Alternative Provider <input type="checkbox"/> Voluntary Sector Support Services. <input type="checkbox"/> Other:	
(Key Stage 4) Subjects taken for GCSE and exam board:		
Alternative curriculum arrangements currently in place:		
Transport – It is the responsibility of the original school to liaise with the parent to ensure that the pupil will be able to get to the new school during and after the Managed Move period.		
How will the pupil get to the new school?	Has the parent been involved in making transport arrangements for the Managed Move?	

Appendix C

My thoughts about school			
Name:		Date:	
The things I like best at school are:			
The things I am good at or interest me are:			
The things I don't like about school are:			
I think school would be better for me if:			

Appendix D

Managed Move Process Initial Meeting	
Date of Meeting:	
Pupil's name:	
Address:	
Name of original school:	
Original school representative:	
Name of new school:	
New school representative:	
Other Attendees:	
Reason for proposed move:	
What do staff from original school know about the pupil that makes them think the Managed Move might be successful?	
What needs to happen for this Managed Move to be successful?	
The pupil will:	
The school will:	
The pupil's parent will:	
Any other agencies' commitments to the Managed Move:	

Start date and time of Off-site direction (if required):		Named contact for the pupil and parent:	
Transport arrangements:			
Date of interim review (if required):		Managed Move Finalised:	
If the Managed Move Process no longer remains viable:			
Attendees' Signatures:			
Parent:		Pupil:	
Original school:		Other:	
New school:		Other:	

Appendix E

Managed Move Process Review Meeting			
Pupil's name:		Date of Meeting:	
Address: (If changed)			
Name of original school:			
Original school representative:			
Name of new school:			
New school representative:			
Other Attendees:			
Progress towards integration:			
School support including level of success to date:			
Additional support agreed:			
The pupil will:			
The school will:			
The pupil's parent will:			
Any other agencies' ongoing commitments:			
Outcome of review:			
Attendees' Signatures:			
Parent:		Pupil:	
Original school:		Other:	
New school:		Other:	