

Learning For Living and Work Framework

Guidance notes

January 2009

This publication is designed to help practitioners work together to assess the support needs of young people with learning difficulties and/or disabilities

The Learning for Living and Work framework enables appropriate options to be identified for individuals with learning difficulties and/or disabilities (LDD) who need more support for learning than can usually be provided without additional funding. It is not in itself an assessment but collates information from the individual and their parents/carers, from professionals who know them well and from existing assessments that will enable decisions to be taken in a consistent and objective manner. The options identified will enable the young people to develop the skills they need to be valued members of society and to achieve goals that match their potential and have been developed through processes of person centred planning. The framework is based on a Pathfinder, Improving Choice, operating in the East of England since 2003 and is firmly embedded in the Learning for Living and Work agenda.

These guidance notes are designed to support the planning process and the completion of the Learning for Living and Work framework. They have been developed following consultation with those involved in the Improving Choice Pathfinder and revised to take account of feedback from around the country.

1. Purpose of the Learning for Living and Work framework

The process recorded in the framework is designed to help plan transition from school to college, work based learning or other post school learning packages and to support the individual to work towards their longer term aspirations. It is designed to enable support to be put in place so that the individual can implement their person centred plan; the person centred plan, where an individual has one, should always be the basis for the framework. Where the individual does not have a distinct person centred plan, person centred approaches should be used throughout transition planning. The process:

- Is based on the principles of person centred planning
- Collates information about the individual, their goals, aspirations and support needs and shares these with their potential future learning provider. The total package may include contributions from other agencies and the planning process facilitates partnership working to build the package
- Helps identify the support that will enable the individual to achieve, or work towards achieving, the aspirations identified through a process of person centred planning
- Helps learning providers assess whether they can offer a place to an individual who may need additional support available through an additional funding allocation which will be known as an Individual Learning Support Fund (ILSF)
- Supports a resource allocation system (RAS) that identifies the ILSF and records the LSC's funding decision
- Begins a process of planning for progression to steps beyond learning.

The Learning for Living and Work framework **must** be used for all young people who are seeking an Individual Learning Support Fund in excess of £5,500. In order to allow for a well-managed implementation of the process, **for the first year, i.e. for young people wishing to take up placements in 2009, the framework will be used for those with higher support needs that cost more than £19,000**

The framework is also designed for use as a planning document for all young people with Learning Difficulties and Disabilities in transition to adult life and may be used as a transition plan. It incorporates, in Parts 1 and 2, the assessment required under Section 139A of The Learning and Skills Act 2000 and complies with the recent guidance produced by DCSF. All relevant services and agencies should contribute to the assessment and planning process, in order that it can fully take an holistic view of the aspirations, strengths, needs and interests of the individual. Schools are key partners in the process and, increasingly, mainstream as well as special

schools include young people who may need more support than is usually available. Personal Advisers (PAs) working in mainstream schools will need to understand the Learning for Living and Work framework in order that schools can be informed and the option of an additional funding allocation be considered for all young people for whom it is appropriate.

It is crucial that all agencies work in partnership to ensure the success of the assessment and planning process. Multi agency planning groups will have a key role in agreeing funding responsibilities so that holistic packages can be put in place and supporting their teams and colleagues to work together to complete the process recorded in the framework. Timelines have been provided to ensure that local authorities, including children's services and adult social care, health and any other involved agencies, as well as the LSC, can make timely referrals and funding decisions that support a smooth transition and ensure that last minute activity and delays are avoided.

The process is designed to support coherent planning and, for young people seeking an ILSF, to **objectively** identify essential components of a package that need to be in place to enable the individual to access education and training. This support may enable the individual to move into a mainstream setting. Where an independent specialist provider is being considered, the framework should record the added value that would be brought by a package of learning or training at such a specialist placement. There should **not** be two separate applications that entail a new recommendation for independent specialist provision when a mainstream package has proved inappropriate – local provision will be considered first and where a recommendation for a specialist placement is made, this should flow clearly from evidence that a local placement is inappropriate.

2. When should the framework be completed?

Completion of the framework should be integrated into the transition planning process and, where it is used as a transition plan, the framework should be started in Year 9 – or earlier - and updated as planning progresses. Where it is not used as a transition plan and young people may require an Individual Learning Support Fund, then it should be started two years before the year in which they are expected to leave school, in accordance with the timeline set out in appendix 2. The timeline takes account of the fact that assessment must be planned and take place over a period of time well in advance of transition so that all necessary arrangements can be put in place.

The framework must be fully completed and provide clear and robust information that the individual requires more support than can be provided through Additional Learning Support and about the proposed learning package.

Eligibility and criteria for an Individual Learning Support Fund

Young people, aged between 16 and 25 who, because of a learning difficulty or disability (including hidden disabilities), will require a higher level of support than is traditionally available to enable them to access education and training, may be considered for an Individual Learning Support Fund. These young people are those who have needs for whom Additional Learning Support (ALS) up to £5,000 does not provide an adequate level of funding. As already explained, for the first, transitional year 2009, the young people will be those with higher support needs, which will cost more than £19,000. While many of these young people will have learning difficulties, there will be some young people who have physical or sensory disabilities who will

also require funding at this level. The framework should be used to compile information for those young people and should be completed with a level of detail that is appropriate to their needs. Further guidance is given on this on the relevant sections of the form – sections 2.3-2.10..

An individual will have access to an ILSF to enable them to follow a programme of learning with a clear progression route. The length of the programme will depend on individual goals and support needs and may involve transition from an independent specialist provision to a local provider and beyond that to a meaningful progression route.

The Learning for Living and Work framework will enable the learning or training provider, in consultation with the individual, parents/carers and professionals, to decide whether they can meet the individual's aspirations and needs in existing provision, or whether adequate additional support to do this could be put in place using ALS up to £5,500 (£19,000 in 2009). Where the planning process indicates that further support is **essential** to enable the individual to successfully access learning, then an ILSF can be sought and used creatively to develop an individual and personalised learning or training programme to enable them to work towards the goals set out in their person centred plan (or person centred transition plan) and to achieve their learning or vocational goals

It should also be noted that the assessment process may not lead to the identification of a learning or training placement – for some young people, further education may not be the best next step.

An additional funding allocation **can** be used to:

- Create personalised programmes of learning to support the achievement of individual goals and meet individual needs
- Fund the cost of meeting highly complex needs for an **individual** who wishes to access an existing programme

An additional funding allocation **cannot** be used to:

- Fund support for young people with high incidence needs which can be met through ALS up to £5,500 (£19,000 in the first, transitional, year)

3. The Resource Allocation System (RAS)

When the framework has been completed to 2.12, the RAS will be used to identify an Individual Learning Support Fund. This process will usually be carried out by the individual's PA or lead professional working with the individual and their parents/carers, although there may be occasions when another professional, who knows the individual and the future provision they are considering well, will do this. The RAS allocates an indicative budget based on the individual's support needs. It is a separate process from this framework but is closely linked with it. The RAS considers the support an individual will need to achieve the five outcomes of Every Child Matters in a learning situation. When completing the RAS the framework provides evidence of the level of support the individual is likely to need to access post 16 provision and should be used for this purpose. Separate guidance has been issued to help with this.

While in most cases it will be clear that the individual has needs that will require support costing in excess of £5,500 (£19,000 in 2009), if it is not clear, the PA or lead professional can complete the RAS with the individual and their parent/carer and establish the indicative budget based on support needs before taking a decision about whether the framework should be completed.

4. Who completes the form?

While many people will contribute to the form, one person must be responsible for co-ordinating the information and process. This will usually be the PA but where the lead professional is different, they may take on this role. Clear agreement should be reached about how the co-ordinator is identified and works to achieve the most appropriate provision and support for the individual.

The co-ordinator must have a clear understanding of the process for accessing an ILSF and is responsible for clarifying this to the individual, the family and supporting professionals. The co-ordinator should also ensure that the individual and their family understand and are engaged in the process throughout.

When the framework and the RAS have been completed and an indicative Individual Learning Support Fund identified, the framework is passed to the potential provider who will carry out their assessment and cost the support the individual will need to achieve their educational and training goals. The provider will complete the framework to the end of part 3 and involve the PA or lead professional (or broker if there is a separate role) in completing part 4 and then return all parts to the PA or lead professional. The paperwork (framework and RAS) will then be passed to the LSC for funding approval where the ILSF and the programme costs match, or for review where there is a discrepancy. **The LSC will monitor a proportion of all completed sets of paperwork.**

LEARNING FOR LIVING AND WORK

This framework will be used as the mechanism to:

- clearly identify the aspirations, strengths and support needs of young people who are likely to require an Individual Learning Support Fund to successfully access post-16 or post-19 education and
 - to record the programme they will be offered to help them achieve their goals.

It can be used to support all young people with learning difficulties and/or disabilities in their transition to adult life.

It incorporates the assessment required under Section 139A of The Learning and Skills Act 2000.

It may be used as a transition plan.

The background section should be completed by the co-ordinator, i.e. the person co-ordinating the planning process. This will usually be the personal adviser. The term co-ordinator is used throughout the paper.

Name of individual	
Referring agency	<i>This is likely to be children's services or Connexions where they are separate.</i>
Referring agency contact name, with email and phone no.	<i>Please specify the role of the referring agency contact, e.g. PA, social worker etc.</i>
Lead professional contact (if different from referring agency) with contact email and phone no.	
This form was first completed on	
Last updated on	

I agree that this plan and the attached reports can be shared with the people who will contribute to the completion of the framework, the Learning and Skills Council and the learning and training providers and any other organisations I may apply to, or that may support me, to help them arrange any help I may need. I agree that my lead professional, PA or any provider I apply to can contact any of the people listed in sections 1.2 and 1.3 for more information and that the plan can be shared with them.

I confirm that I wish to participate in this assessment and planning process in order to explore the options that may be available after school and the additional support needed.

Individuals Signature	<i>The individual's lead professional, PA or school should obtain their consent to share the information. The person obtaining consent should satisfy themselves that the young person understands the nature of the permission to share they are giving, involving an advocate if appropriate.</i>	Date	
Parent's Signature	<i>Where the individual may not understand, then the parent or carer's permission should be obtained instead. In cases where the individual is competent to give consent, it will be good practice to obtain the parent or carer's signature as well.</i>	Date	

For electronically completed forms, the lead professional should state where the signatures are held:

A signed, paper copy of the form must be held by the co-ordinator. Should it be, for any reason, impossible to obtain written consent, then a record should be kept of the date, time and circumstances when verbal consent was given.

PART ONE – BACKGROUND INFORMATION

1.1 Personal details *To be completed by the co-ordinator*

Name of individual	
Date of birth	
Address	
Telephone	
Email	
Current learning provision	
Year group	

Details of previous secondary schools/learning provision			
Name	Address	Dates attended	Contact name and email, if known
<p><i>This information can usually be provided by the individual or parents/carers. Where there have been several schools or there is uncertainty about dates, it may be necessary to check with the social worker or SEN department of the local authority.</i></p>			

1.2 Contacts <i>To be completed by co-ordinator</i>			
Name	Contact details (Address, Tel. No(s), email) <i>It is essential that contact details are included for all those listed</i>	Involvement of agencies (For agencies, please say if actively involved or involvement requested) . <i>Please note again the co-ordinator and the lead professional, if different.</i>	<i>Please list the sections you have completed so that /providers and those brokering learning packages can contact you for more information if required. The co-ordinator should ensure that everybody who contributes to the form is listed here.</i>
Parent(s)/Carer(s)			
Main contact at school/current placement			
Named school nurse			
Personal Adviser			
Broker			
Social Worker			
Other Social Services contact(s)			
Local authority education representative			
Other(s)e.g. YOT worker, Speech and Language therapist, CAMHS, Advisory Teachers etc.			

1.3 Other reports and plans *To be completed by the co-ordinator*

Report/Plan <i>It is essential to provide relevant and up-to-date reports</i>	Please ✓ If completed and note date	Attached? Y/N <i>Where this plan is shared electronically, please ensure that electronic copies of supporting reports are attached or note if they are to be sent in hard copy, and how</i>	If not attached, available from (name and email address)
Person Centred Plan or personal statement from individual			
Transition Plan (if separate document)			
Individual Education Plan			
Behaviour Management Plan		<i>Essential for those with behavioural issues</i>	
Risk Assessments		<i>Essential for those with behavioural issues</i>	
Care Plan			
Health Action Plan			
Common Assessment Framework			
Statement of SEN (if still relevant)			
Recent Statement Reviews or SA, SA+ reviews			
Protocols and Procedures for Health Support			
Others: please list			

For looked after children:	If completed show date	Attached? Y/N	If not attached, available from
Pathway Plan			
Personal Education Plan			

1.4 Learning Difficulties and/or Disabilities	
Please describe the nature of the individual's learning difficulty and/or disability (including hidden disabilities and medical conditions) and the impact this has on learning.	Sources of evidence
<i>This section should be completed by the individual's school and should include all learning difficulties/disabilities if there are more than one. Please list these and describe their impact on the individual's learning.</i>	<i>e.g. statement of SEN, psychologist's report, medical report. Do not include medical conditions that have not been clearly diagnosed</i>

1.5. Ethnicity <i>To be completed with the individual by the school or co-ordinator</i>			
Ethnicity	Please√	Ethnicity	Please√
Asian or Asian British - Bangladeshi		Mixed – White and Asian	
Asian or Asian British -Indian		Mixed – White and Black African	
Asian or Asian British - Pakistani		Mixed – any other mixed background	
Asian or Asian British – any other Asian background		White - British	
Black or Black British - African		White - Irish	
Black or Black British - Caribbean		White – any other white background	
Black or Black British – any other black background		Other	
Chinese		Not known	

1.6 Medical support. *To be completed by the school or, if the individual is not in school, by the PA/lead professional in conjunction with the individual, family/carers and relevant professionals. Please ensure this is fully completed and indicate where not applicable. If there is an existing health plan, please attach it. Further help can be obtained from the named school nurse, listed in the contact sheet.*

If the individual has no known medical support needs, please tick this box

Support needs	Details
Support to administer medication	<i>Throughout this section, please do not leave blanks. If something is not relevant, please put n/a.</i>
Supervision to ensure medication taken	
Room to take medication	
Immediate access to medical help when required	
Regular access to nursing care	
Rest periods and dedicated room	
Staff trained to understand the implications of health issues	
Access to therapies (please specify which)	Please detail the amount of therapy per week the individual receives and the level of support specified in their statement
Support to learn to manage own condition	
Support to deal with consequences of missed medication	
Other, including diet and allergies	
Please describe any specialist equipment used	<i>N.B. if specialist equipment is used (e.g. a ventilator) a risk assessment is required.</i>

If the individual requires medical support, please give reason and please note the impact of the medical condition on learning. Please attach details of procedures for medical support, e.g. administration of medication and say what needs to happen in an emergency: Please note any skills staff will require that may require training.

PART TWO – ABOUT THE INDIVIDUAL

2.1 A summary *This should be completed by the PA. It can be used as a “user friendly” version of the Section 139A Assessment and shared with the individual if the whole document is felt to be too complex.*

Please work with the individual, using their person centred plan if they have one, to create a pen picture including:

Current situation, including a summary of strengths and support needs

Goals and dreams, while at school and in the future and the support the individual would like to achieve their goals.

N.B. If the individual is not in education, please describe their current activities and reason for non-attendance.

Think with the individual about the kind of future life they would like. This may include social relationships, how they would like to contribute to their local community, employment, housing and access to leisure opportunities. Please include both the individual’s dreams and fears. Include aspirations in all areas of their life but ensure you include any specific goals the individual has for post school education.

Complete this section after sections 2.2-2.10 have been completed – they will inform what is written here. Please summarise the individual’s support needs and describe the provision required to meet them. Please note the essential features of a package that will make a placement successful. If a specialist provider is being considered, please say why and note the added value it will bring. Please say why an Individual Learning Support Fund is being sought to support a placement and why this is essential for the learner to access education.

Please describe the specific options that have been, or are being, considered for the individual.

Essential features of a package may include support put in place by a learning provider or by another agency. They may relate to educational support or to support outside of the formal learning environment, including at home, that may affect the individual’s ability to access learning. Some young people may have only one specific but intensive support need, e.g. signing support and require no other support than this.

2.2 Parent/carer's perspective

Please describe your hopes and expectations for your son or daughter's future life. Please take account of post school provision, respite care, leisure and housing and anything else that is important to you.

The parents'/carers' perspective is very important and they can be key partners in creating a successful programme. The PA will need to work sensitively with the parents/carers to ensure

- *they appreciate that the main focus of the planning will be on the individual's own goals and plans and on helping them to achieve them.*
- *They understand the LSC process for agreeing an Individual Learning Support Fund*
- *That emotive language is avoided.*

Ideally parents should complete this section themselves, but may ask the PA to do so on their behalf.

There may be some situations where the parent does not wish to complete the section, or where, perhaps because of the individual's age, status or relationship with their family, a contribution is not appropriate. In these cases please indicate how parents/carers have been involved in the planning process.

Name of parent/carer completing form:

Signature:

Signatures should be obtained whether the parent/carer has completed this section themselves or the PA has completed on their behalf.

Where the form has been completed electronically, please say where the signature is held

For many young people there will be reports that add detail to the information requested in sections 2.3-2.9. While these will be helpful and should be attached, please note that it is essential to complete the sections on the form to provide the specific information requested. While, for most young people seeking additional funding over £5,500 (and in the first year over £19,000 all parts 2.3-2.10 will be relevant, there will be some for whom certain sections or detail will not be relevant in terms of their education. Guidance on this is included in these sections.

2.3 Education and Training

Current educational provision - brief description of course/curriculum, including any qualifications and accreditation predicted or achieved.

In terms of comparison, national curriculum level 1 broadly equates to entry level 1, national curriculum level 2 to entry 2 and national curriculum level 3 to entry 3.

This section should be completed by the school, or current provider for all young people for whom the framework is being completed.. Additional reports will be helpful and should be attached but the specific information requested in this section is essential to take the planning process forward and should be recorded here.

Strengths and skills

Please include the individual's perceptions of their strengths and skills as well as the school's/provider's.

Please give specific examples of strengths, avoiding general descriptions such as "good at

Goals and targets - in current provision, and aspirations for the future

Current goals

Goals in post school education/training

Aspirations for future life

Support needs and how to meet them- in current provision, and in the future including staffing and equipment. Please describe how the existing or planned support is, or will be put in place and note whether agencies outside the school, or families and friends, are involved. In looking to the future, please say:

- What support is needed
- Why it is needed
- How it can be put in place.

Current *This section is extremely helpful to future providers in planning ongoing support and considering support needs in the new learning environment. If the individual receives learning support, communication, signing or other specialist support please indicate whether this is 1:1 and for how much of the curriculum/school day it applies*

In post school education and adult life

Please outline your perception of, and reasons for, the likely support the individual will need to

succeed in post school education and the support they are likely to require in adult life. Please complete this section with reference to the individual's aspirations for the future.

Please describe any strategies used to support learning, preferred types of provision, learning styles and environments, and location(s).

Again, completing this section provides information that will help the post school provider plan for a successful placement.

2.4 Work and Employment

Experience of work and employment - Brief description of experiences, including school based work experience or work related activities and part time jobs

This section should be completed by the school in conjunction with the individual and their family. It should be completed for all young people and take account of any feedback from work experience/part time job providers. For those young people who haven't had any work experience please describe the curriculum activities they have been involved in that have raised awareness of the world of work.

Strengths and skills

Please include the individual's perception as well as the work experience or other provider's. Please consider the full range of employability and independence skills the individual may have demonstrated (e.g. relationships with colleagues, ability to follow instructions, punctuality etc.) as well as specific job related skills.. Please give specific examples of strengths, avoiding general descriptions such as "good at."

Aspirations, goals and targets including any further plans for work experience whilst in current provision

In school

In post school education and training *These aspirations relate to work and employment. Aspirations in other areas are covered in other sections. For some young people, they may be very general, others may have a clear idea of what they would like to do. This section should reflect their current stage of thinking. Some goals may be perceived to be unrealistic and the PA, school and college will need to work with the individual to unpick their ideas and build on those that can be taken forward, but it is important to remember that we all have dreams that may be unattainable – these young people have that right too. Others will have the potential and wish to move on to higher education or careers that are perceived to be challenging and will need support and encouragement to pursue these goals.*

Support needs and how to meet them. Please describe the support the individual has had on work related activities to date and why it was needed. Please include any strategies used.

In looking to the future, please say:

- What support is needed
- Why it is needed
- How it can be put in place.

Current *This information is extremely helpful in enabling the next provider to build on current experiences*

In post school education and adult life

Please outline your perception of the likely support the individual will need to succeed in post school education and the support they are likely to require in adult life. Please complete this section with reference to their aspirations for the future.

2.5 Communication Skills and Support Needs

Current situation including detailed information about any specialist equipment used, signing support for deaf learners, or other strategies to support communication. Please note the individual's first language, where this is not English. If the individual has no support needs in respect of communication and is confident in their skills, this should be stated – there is then no need to complete the rest of this section.

This section should be completed throughout by the school with input from the individual, family and other professionals who support communication. Please be very specific, particularly about aids and equipment, and any support the individual needs to use them, to enable the future provider to follow these up. Please indicate whether alternative means of communication have been tried but proved unacceptable/inappropriate for the learner.

Strengths and skills

Information should include how the individual prefers to communicate - sign, symbol, voice, touch etc. (If particular strategies and systems are used, please state the source).

Please give specific examples of strengths, avoiding general descriptions such as "good at."

Aspirations, goals and targets

Current goals

In post school education/training

In adult life

Support needs and how to meet them- **in current provision, and in the future** including staffing and equipment. Please note any staff skills that may require training.

In looking to the future, please say:

- What support is needed
- Why it is needed
- How it can be put in place.

Current *Again, please be as specific as possible*

In post school education and adult life

2.6 Social Skills, Relationships and Behaviour

Current situation - relationships and social skills with peers, professionals and other adults. Please describe any triggers for behaviour, any strategies used to support the individual's behaviour and attach any risk assessments or behaviour management programmes

This section should be completed by the school with input from the family where appropriate.

Please note that it is essential to provide information about behaviour management issues and the context in which they take place so that the future provider can plan ongoing support. Failure to provide such information is likely to mean that the necessary support is not put in place and consequently the learner's placement may fail.

For many young people, behaviour will have improved over time in their current placement. Leaving this placement and/or making a change to a new learning environment may impact on behaviour. Please comment on this possibility and suggest any strategies to deal with it. Such strategies may include a planned transition programme.

Behaviour management plans, if they exist, must be attached.

If the individual has age appropriate social and relationship skills and behaves appropriately, please state this. There is then no need to complete the rest of this section, unless there are strengths and skills that it would be helpful and relevant to include.

Strengths and skills

Please give specific examples of strengths, avoiding general descriptions such as "good at."

Aspirations, goals and targets

Current goals

Goals in post school education/training

Goals in adult life

Support needs and how to meet them- **in current provision, and in the future** including staffing and staff training. In looking to the future, please say:

- What support is needed
- Why it is needed
- How it can be put in place.

Current

In post school education and adult life

2.7 Leisure Interests

Current situation including leisure interests, and details of any relevant groups/networks

This section should be completed by the school, PA or other lead professional, in close consultation with the individual and family. It should include information about leisure interests that are followed through the school, and those followed outside.

For some young people, while it may be relevant to describe their leisure interests, if the individual does not require or want support to develop leisure interests, this section need not be completed.

Strengths and skills

Please give specific examples of strengths, avoiding general descriptions such as “good at.”

Aspirations, goals and targets

Current goals

Goals in post school education/training

Goals in adult life

Support. Please describe the support the individual receives at present to access leisure activities and any they need at present, or in the future, to achieve their goals. In looking to the future, please say:

- What support is needed
- Why it is needed
- How it can be put in place.

Current

In post school education or training and future life

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2.8 Accommodation and Lifestyle, Independence, and Personal Care

Current situation including whom the individual lives with, any current arrangements for additional/respite care, and any changes planned or anticipated. Please indicate if arrangements will need to change for the individual to access future learning and, if they will, please describe how. Please describe the individual's care package, including the amount of personal care received in their current placement and the amount specified in their statement, and if s/he has a care plan, please attach this.
If the individual does not need any more support than other young people to develop the skills for independence, this should be stated. There is then no need to complete the rest of this section.

This section should be completed by the social worker if there is one or the lead professional/PA working in close consultation with the family.

Is the individual in receipt of direct payments or an individual budget? Yes/No (delete as appropriate)

Is the individual on the housing waiting list? Yes/No (delete as appropriate)

Strengths and skills including independent living and domestic skills, and personal care skills

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Aspirations, goals and targets including independent/supported living, and personal care

Current goals
Goals in post school education/training
Goals in adult life

Support needs, vulnerability and risks identified in current situation, and in the future. Please note how support needs can be met and risks addressed, including any skills staff will need which may require training.

Current *In this section, please include any features of current support packages that will be essential to the success of a future placement.*

In post school education and adult life

2.9 Mobility, travel and transport.

Is the individual an independent traveller? Yes/No (delete as appropriate)

This section should be completed for all young people by the school in consultation with the family. Can they use public transport on their own or organise their own transport if mobility requires this? Please say whether the individual can use public transport on learned routes only and how they cope if arrangements do not go according to plan.

If the individual is not an independent traveller, please describe current transport arrangements and whether transport will be required in the next placement. Please describe any travel training that has taken place, is planned or required

*Please include information about whether they require an escort(s) and any particular support that is required during transport.
Please include any travel training that takes place out of school, including with the family.*

Please describe the individual's goals in terms of mobility and travel

2.10 Faith and cultural considerations

Please describe any faith or cultural needs, do not simply name the faith.

This section should be completed by the individual with the support of their family, in accordance with the wishes of the individual,, supported by the school or lead professional

2.11 Transition. Please describe any particular support or additional assessments that the individual will need to make a successful transition into the new placement. This may include a planned transition programme.

2.12 Summary of action to support transition

Actions required	When	By whom

2.13 Budget allocation

This section to be completed by the person who has worked with the individual and their parents/carers to complete the Resource Allocation System (RAS) The information collated to date in the framework should be used to provide evidence for completion of the RAS.

No. of points allocated:

Stay safe	Be healthy	Achieve economic well-being	Make a positive contribution	Enjoy and achieve

Total number of points:	
Budget allocation to meet learning needs (tuition and independent living skills)	

PART THREE – FUTURE PROVISION

Assessment of support needs in post school education and training provision

3.1 Summary of learning provider's assessment

College/provider:

Name of person completing form

Position/Role

One person will complete the form but they will draw on information and inputs from colleagues involved in the assessment process.

Please describe your assessment process, including visits to the individual at school or home, attendance at reviews and multi-disciplinary meetings as well as visits, links and assessments in the planned provision. Please specify the length and nature of the planned assessment within your provision:

Where the individual is expected to require an Individual Learning Support Fund, an in-depth assessment process, appropriate to the needs of the individual is essential. For most young people, and for all young people with learning difficulties, the following elements should be included:

- *Review of paperwork and discussion with referring agency*
- *Visit to current placement*
- *Home visit*
- *Liaison with school attendance at reviews*
- *Liaison with parents/carers (have they visited provision?)*
- *Taster/transition programme*
- *In house assessment – at least two days in planned/proposed provision (following the timeline)*

Please include any other elements of the assessment process and, if you have been unable to carry out any of the above activities, or feel they are inappropriate, please say why.

Please provide some indication as to:

- *How long the assessment period has been – how many days over what time period?*
- *What sorts of activities have been used to generate assessment information – indication of range. This is likely to include personal/independence, social, practical, vocational, functional literacy, numeracy and communication. Where an individual has one specific need, e.g. signing support to enable them to access a specific course, it will be important to assess them in the context of that course.*
- *Methods of assessment – needs to be more than a pen and paper exercise – observational assessment of functional skills will be very important for these learners*
- *Have any specialist assessments been included as part of your assessment, or referred to?*
- *What use has been made of pre-entry information, including written reports, discussions with parents and carers, and any discussions with staff at current placement?*

Who has been involved in the assessment process? (Although one person may be responsible for pulling the assessment information together, you should involve a range of staff in order to get a clear sense of the individual's skills, knowledge, understanding and support needs in a range of settings and activities)

Please describe any further skills identified or support needs noted, in addition to those described in Part 2:



3.2 Additional Assessments required *If you feel that additional specialist assessment might be necessary, identify it here. For example, you might feel that an individual might benefit from physiotherapy but current records suggest they are not getting it at school, or you might feel that assessment by an occupational therapist might be useful to identify adaptive or specialist equipment which would support them in the learning environment. The provider should work with the lead professional to complete this section*

Additional assessment required	√ if required and indicate action taken to obtain assessment	By	Date	Assessment carried out by	Date	Report attached? If not, please indicate where it is available
Speech and language support						
Physiotherapy						
Occupational therapy						
Mobility						
Equipment						
Sensory support						
Dyslexia						
Risk assessment						
Other (Please specify)						
Multi disciplinary assessment						

3.3 Curriculum/programme offer

The curriculum offer should reflect the individual's aspirations, strengths, needs and interests as identified in sections 2.1-2.10 above. The initial offer should be regularly reviewed and the individual's progress monitored to identify and plan for ongoing progression routes beyond the placement being offered.

In the light of this assessment, please describe the curriculum offer you are able to make to the individual, including the number of days per week. Please note how it meets their individual requirements and support needs and puts in place the essential features included in 2.1.

Please include an indication of what the programme will look like (you can give more detail in 3.8) and indicate how many guided learning hours per week it will include.

Please ensure that the programme you describe has a clear link with the outcomes of the assessment in terms of support and content and that it is a personalised programme that enables the individual to work towards the goals described in Part 2. More specific detail can be provided in the next section.

Consider how the programme will support the individual to move on to the next stage of their life. For example, if they wish to live independently, the curriculum may support the development of independent living skills that may help them achieve this.

Please describe the planned learning outcomes and say how your curriculum offer will support the individual to achieve their goals described in Part Two relating to the headings below: *If there are any areas that your curriculum offer does not cover, please note this and give more detail in 3.6*

Education and training:	
Work and employment:	
Communication:	
Leisure:	
Social skills, relationships and behaviour:	
Independent travel	

If you are not able to offer the individual a place, please say why:

It is important to include specific and clear evidence for your decision here. Reasons may include:

- *You are unable to put in place some of the essential features included in section 2.1*
- *Despite broadening and making adjustments to the curriculum you could offer, you cannot make an offer of adequate quality to meet the individual's needs*
- *There may be issues around vulnerability of the individual or other trainees*
- *You may lack, and be unable to access, the level of expertise to fully meet the individual's needs*
- *There may not be an appropriate peer group*

The above is not an exhaustive list – please specify your own reasons for being unable to offer a place.

**if your offer would be dependent on support from other agencies, please note this in 3.6 – please note here if you are unable to offer a place because there is not the local capacity to put in place essential support (e.g. health or therapies). Such a statement should be based on a formal response from the relevant agency.*

N.B. The Disability Discrimination Act means that you must not discriminate against an individual on the grounds of their disability and that you must make reasonable adjustments to accommodate them. It does not mean that you must offer a place to an individual, where, despite making reasonable adjustments, you clearly cannot meet their needs.

3.4 Support to be provided, using the ILSF <i>N.B. If you cannot offer a place, you do not need to complete this section</i>		
Tuition/independent living skills	How will this be provided? (indicate no. of hours of 1:1 equivalent support per week where appropriate)	Can this be put in place by the learning provider?
(Name) requires <i>See Appendix 1 - Assessment of support needs</i> <i>Please detail the support required to meet the individual's needs</i>		
Care and therapy	How will this be provided? (indicate no. of hours of 1:1 equivalent support per week where appropriate)	Can this be put in place by the learning provider?
(Name) requires <i>See Appendix 1 - Assessment of support needs</i> <i>Please detail the support required to meet the individual's needs</i>		
Equipment		
Give details: <i>See Appendix 1 - Assessment of support needs</i>		

3.5 Please note if other agencies will be required to deliver any of the support listed in 3.4. If yes, please discuss with the person brokering the package.

Please note the support you feel will need to be put in place by another organisation. The person brokering the package, would usually liaise and make a referral for this support – what is put in place should be informed by your assessment and it will be helpful at this stage to have a multi-agency meeting to consider the package being developed.

3.6 Please list any of the individual’s goals, defined in Part 2, that you cannot meet within a learning programme and note the action taken, e.g. referral to personal adviser social worker or broker if in post.

*Please indicate why the goals cannot be met within a learning programme – if the goals are not educational but relate to living or lifestyle choices you will have noted in 3.3 how the curriculum will help them develop the skills that will help them achieve the goal.
Goals that are outside of your scope to address should be covered as part of the individual’s holistic package, which should be constructed with the support of the lead professional or other person brokering the package, and discussed with relevant agencies at the multi-agency meeting suggested in 3.5.*

3.7 Offer of a place. On the basis of your assessment, are you able to offer the individual a place:

With no additional support?	Yes/No <i>This means on an existing, funded programme, whether discrete or mainstream</i>
With additional learning support funding under £5,500 (£19,000 for learners taking up places in 2009)?	Yes/No <i>Over and above the funding for an existing programme</i>
With an additional funding allocation, without which the individual will not be able to access education?	Yes/No <i>This must be essential for an individual to access education, not just desirable</i>

Comments:

Provider:

3.8. Timetable

In order to build up a weekly programme that meets the individual's needs it would be helpful to include some information about planned activities and attendance patterns. An outline timetable follows for this purpose.

However, if timetables are not set, please give as much information as possible, indicating the number of half days planned attendance and main activities. The timetable is designed to cover the whole week and thus goes beyond the education or training provider's remit. It allows other agencies to complete sections when they will be providing support. Where an individual does not have support needs outside of education, only the planned educational timetable need be included.

It is recognised that the timetable may well change to meet the individual's changing goals, circumstances and support needs. The review at the end of the first term should indicate what changes have been made and any impact this may have on the funding requested.

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Morning							
Afternoon							
Evening							

Please note any other action required and by whom.

Please note any action you feel should be taken that has not already been mentioned.

PART FOUR – SUPPORT FROM OTHER AGENCIES

This section should be completed by the person brokering the package. This will usually be the lead professional or PA but sometimes there will be a distinct post of broker.

4.1. Please describe how other agencies will support the achievement of education or training goals

Nature of support required	No. of hours	To be provided by	To be funded by
<p><i>This may include other agencies' support delivered on site – e.g. therapies, or other agencies involved in providing parts of the learning programme off site – e.g. social enterprises, mobility trainers.</i></p> <p><i>It would be helpful to include here how the family will support the achievement of education and training goals, although you will probably not be able to specify the number of hours</i></p>			

4.2 Please describe how other agencies will meet any additional personal care or health needs while the individual is on their education or training programme

Nature of support required	No of hours	To be provided by	To be funded by
<p><i>e.g. significant personal care or health inputs</i></p>			

4.3 Please describe the support to be provided by other agencies to support the achievement of non-education or training goals. It would be useful to use the timetable in 3.8 to build up a picture of the learner's weekly activities.

This section should be completed by the person brokering the package

Goal	Support required	No of hours per week	To be provided by
<p><i>There will be an overlap between some educational and non-educational goals and it will be important in constructing the timetable to recognise links between the two, e.g. developing social skills and developing social networks, travel training and getting to work</i></p>	<p><i>As well as support from other agencies, it would be helpful to include any support provided by the family.</i></p>		

<i>experience.</i>			
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4.4 Transport

How will the individual get to their education or training placements, including any off the main provider's site?

It is essential to complete this since lack of transport can clearly prevent access to the learning programme. Where transport must be provided, please include the agency that will organise it in your discussions. Please note any issues that need to be taken into account (e.g. escort(s) and the skills they may need, wheelchair accessible transport, if it is important to have continuity of driver, designated parking spaces for drivers etc.) Please note if there needs to be flexibility in destination for young people attending multiple sites.

Please note if parents will provide transport and any constraints there may be in these arrangements.

Please note if the individual will use public transport and any support he/she will need.

Please describe how the provider will organise transport to off-site activities.

How will transport be funded?

Ensure that those who may have funding responsibilities are included in developing the package.

Who will ensure transport is in place?

This will normally be the lead professional or PA. Once agreement has been reached, contacts would generally be with the individual's parents/carers who may seek the support of the broker or lead professional where there are difficulties.

PART FIVE – FUNDING AGREEMENT

This section is to be completed by the LSC and shared with the person submitting the recommendation so that action can be implemented

Name of individual: _____ Date of birth: _____	
Date of decision _____	
The LSC agrees the proposed Individual Learning Support Fund* (insert sum) *If the LSC does not agree, please say why and indicate the action required to resolve the funding level. Please state the eventual outcome:	Yes/No –(delete as appropriate) Date _____ Date _____
The LSC has reviewed the ILSF requested in the light of discrepancies with the proposed programme costs and agrees to fund <ul style="list-style-type: none"> • (insert sum) as suggested in the ILSF • (insert sum) which has been arrived at following discussion or <ul style="list-style-type: none"> • requires the information detailed in the next column to arrive at a decision* *Where further information is required, please state the eventual outcome:	Date: _____ Date _____

It is important to note that this funding agreement relates only to the support required for learning. Where funding is required from other sources, it is the responsibility of the lead professional, PA or broker (where in post) to liaise with the relevant agencies to ensure a complete package is in place, seeking the support of multi agency transition planning groups where appropriate. The PA/lead professional should complete the following section and follow locally agreed procedures where there are unresolved issues:

Is funding required from another agency to support the individual’s education or training package?	Yes/No
If yes, has this been obtained?	Yes/No Date
Is funding required from another agency to support the individual’s holistic package?	Yes/No
If yes, has it been obtained?	Yes/No Date

Signed on behalf of the LSC: *This funding agreement is subject to the regional manager’s approval. A formal letter of confirmation of funding will follow.
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Name and role:

Date:

Appendix 1

Assessment of support needs

Some considerations

***Developed by Oaklands College, St Albans in collaboration with Alison O'Brien
(Independent Consultant)***

The framework will be used for all young people who are seeking an Individual Learning Support Fund in excess of £5,500 (£19,000 in 2009). This will involve individuals with a wide range of support needs, some of whom will be quite complex. Clearly the more complex the learner, the more detailed the information required to support the allocation of funding.

The framework summarises support needs in terms of five key areas -Tuition, Independent Living Skills, Personal care support, Therapy and counselling and Equipment. The nature and extent of support required will vary hugely according to the dreams, aspirations and needs of each individual.

For some learners, it will be necessary to summarise assessment data outlining support needs in relation to all five areas, for others, perhaps only one or two will be relevant. The guidance below is not exhaustive. It has been designed as a prompt to support those completing the framework to consider some of the factors which need to be taken into account when identifying support needs. It might also be helpful in determining how to present the range and breadth of information required to enable decisions to be made about appropriate levels of funding.

Tuition

How much and what type of individual support does the learner need to access education or training? Will he or she need regular and individual support on a daily basis, or is the need for regular but perhaps less frequent support, for example from a specialist tutor on a weekly or even termly basis to oversee progress and review and address support needs? You might also need to think about what form of support this will take – is it to support communication, in which case you need a skilled communication facilitator, to support literacy and numeracy, to act as an amanuensis, or something else? You might need support in order to produce resources which will enable the learner to access the curriculum, or one to one support to enable him or her to maintain focus. Support might be particularly needed for certain activities or at certain times of the day. For example, a learner might be particularly good at practical skills, but need support with the theoretical learning associated with it. A learner with autistic spectrum conditions might need support during lunchtimes and breaks. This is not about supervision, it is about enabling the learner to develop the skills to cope and interact more effectively in the sort of non structured environment he or she will encounter beyond the learning environment.

Tuition might also identify other aspects relating to how learning is delivered – does the learner need regular changes of activity, a high degree of structure, very good listening conditions and/or an environment which is as free from distractions as possible?

Independent living skills

This section will only relate to those who require support to develop the self help and practical living skills which will enable him or her to live as independently as possible in the future. It may for example include information about the level of support required to facilitate the development of skills in relation to basic meal preparation, travel, road safety and or to increase overall levels of personal safety awareness. It might be about building routines around everyday living skills, to support the learner to acquire skills through practice and repetition.

For some learners, who perhaps have limited mobility and communication skills, the emphasis might be more about learning to take responsibility for, and developing the skills to direct others to do things for them. For others, it might encompass issues around appropriate social behaviour and may well have implications for the level of support required when out in the community. In planning learning

for independent living, it will be crucial to work with the learner to consider how and where he or she is likely to live in the future, in order to identify the key independent skills required so that the independence programme supports the attainment of this overall goal.

Personal care support

Many learners will have no personal care support needs. For those who do, the range and extent of these can vary enormously, and therefore it is important here to be very specific. Does the learner, for example, require occasional prompts, or regular support with intimate personal care? The latter will require not only personal support, but also may have implications for facilities – a dedicated room and/or a hoist may be required. A learner may require physical assistance with some fixings on certain items of clothing or assistance with medication. There may be personal care needs associated with feeding and eating, managing fluid intake, appropriate intake of food or managing medication. Learners with particular medical conditions such as diabetes or epilepsy might have particular needs which should be identified here. This might include the identification of doctor/medical/nursing specialist support. There may be issues around vulnerability which have implications for support and supervision when out in the community, for example accessing public toilets. It is likely that those requiring support with personal care will need an individual risk assessment detailing the nature of support and clarifying the protocols in certain circumstances.

Therapy and counselling

As above, many learners may have no support needs in this area. This section is intended to identify the support needs of those who require therapy and counselling in order for them to successfully access learning. It might identify therapeutic support in terms of speech and language, occupational and physiotherapy. It may also include identified support needs in relation to emotional and behavioural support and counselling. A learner with a deteriorating visual condition, for example, might need counselling support in order to help him or her to adjust to the loss of vision as well as specialist tuition to ameliorate the implication in terms of skills and independence. Some learners may present behaviours which challenge. Where this is the case, clear indication should be given within the relevant section of this form as to the severity, nature and frequency of the behaviour. Are you talking about frequent outbursts of aggressive challenging behaviour, which might pose a risk to the individual or others, and which require immediate intervention, or are there issues around extreme passivity and being hard to engage? Are there issues around inappropriate social behaviour which have implications in terms of supervision and vulnerability for the individual or for those around them? Does the individual need planned and consistently applied management strategies to address behaviour and/or communication? This may have implications for the way time is planned, managed and organised, perhaps in some detail in order to minimise behaviour difficulties. Particular guidelines and boundaries may need to be negotiated relating to certain activities at or times of day. It is likely that the therapeutic input will have implications for the staff training and level of skills of all staff. A speech and language therapist might have input into the assessment of skills and the development of a communication support plan, but all staff will need the skills to implement it consistently and effectively. Similarly, all staff working with a learner with autistic spectrum conditions will need to understand the implications of this in order to provide effective support to facilitate learning. In many respects, the defining characteristic of the “therapeutic” aspect of provision may be about the organisation of the day and the level of staff understanding which facilitates a consistency of approach and expectation. Interventions such as “social skills” work and “social stories” may be appropriate but will need to be reinforced and supported consistently by all throughout the learning environment.

Equipment

What if any, equipment is required to support the individual to access education or training? This might relate to anything from magnification equipment for a learner with a visual loss, to a communication aid. How will you gather information about equipment? What sort of assessments do you need to undertake? Will support involve the input of a specialist and if so how often? A learner with a sensory loss for example, might need regular support and assessment, particularly if the

condition is a deteriorating one. Are there implications for maintenance of equipment, or training for staff? The form should also provide information about what equipment was used in the previous placement. When selecting equipment for example, to support communication, it is important to consider the implications for transferability beyond the placement. It will also be important to keep up to date with developments in technology which may further support an individual's independence.



Appendix 2

Timelines

In order that a full assessment can take place of young people with complex needs it is essential that adequate time is allowed. Two timelines follow – the first (based on the model developed by the Youth Connexions Access Ability team in Hertfordshire in collaboration with partner agencies including colleges of FE and schools and work based learning providers) is the timeline that all areas should seek to achieve, the second the minimum standard that should be met.

Timeline 1: Best practice

STAGE 1 – Best Practice

2 years before leaving school:

Parts 1 and 2 of the Learning for Living and Work Framework is initiated as part of the transition planning process two years in advance of leaving schools – **Year 9 for Year 11 leavers and Year 12 for Year 14 leavers.**

All relevant agencies are involved in gathering information.

RAS completed after initial information is gathered and indicative ILSF is allocated.

STAGE 2 – Penultimate Year at School

Mainstream provider's assessment completed one year in advance of leaving school. Full Learning for Living and Work Framework available by the end of Year 10/13.

By end Autumn term: Young people for assessment identified during the setting of Partnership Agreements with Connexions at the start of the year.
Schedule for assessment agreed and attached to the Partnership Agreement.
Multi Agency transition planning group shares information and plans assessment including

- Support required at assessment
- Resources required to carry out assessment

Spring/Summer term: Taster visits for young people and carers
Assessment undertaken

End Summer term: Transition programme developed
Individual's needs and resource implications identified

Multi agency transition planning group assesses viability of learning programme.

STAGE 3 – Final Year at School

Individual attends college transition programme

- RAS reviewed in the light of any changed needs and ILSF finalised, taking account of any changes to the price point in the previous two years
- Support package for following year secured
- Education or training programme developed and adjustments planned
- Transport planned, initial timetable agreed
- Completed Learning for Living and Work Framework submitted to LSC **by end of Autumn term**
- LSC reaches funding decision **by end of Spring term**

STAGE 4 – Post School

Individual commences post school programme
Multi agency planning groups review progress of programme
Multi agency planning groups continue to plan for progression from learning



Timeline 2: At the latest

Stage 1: Two years before leaving school

Begin to collect information for Parts 1 and 2 of the Learning for Living and Work Framework as part of the transition planning process – **Year 9 for Year 11 leavers and Year 12 for Year 14 leavers**

All relevant agencies are involved

Learners are discussed at multi agency planning meetings

STAGE 2 – Penultimate Year at School

Stage 2 – Penultimate year at school

Continue to collate information for Parts 1 and 2 of the Framework, involving all relevant agencies and to update at multi agency planning groups

RAS completed after information is gathered and indicative ILSF is allocated

N.B. where the multi agency planning group believes that a recommendation to an independent specialist provider may be appropriate, information sharing and assessment at a mainstream college should take place in the penultimate year, so that a timely application can be made.

Stage 3 – Final year at school

First half of autumn term, Parts 1 and 2 of the Learning for Living and Work Framework are completed and shared with learning provider

RAS reviewed in the light of any changed needs and ILSF finalised, taking account of any changes to the price point in the previous two years

End of autumn term, assessment completed and programme offer made. Resource implications identified and shared with multi-agency planning group
Learning for Living and Work Framework completed to end of Part 4 and returned to PA. Broker or PA liaises with relevant agencies with regard to additional resources required.

Autumn/spring term, the recommendation is taken to the LSC and negotiations take place with partner agencies. A decision about funding is reached by **the end of the spring term**.

Summer term: link/transition programmes take place

Stage 4: post school

Individual commences post 16 programme

Multi agency planning groups review individual's progress and continue to plan for progression from post school provision

N.B. If the process is completed outside of this timescale, there is no guarantee that a decision can be made in time for a September start.



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