SCHOOL CONNECTION

School Inclusion

From Strategy to Practice

A working pack for school and trust leaders preparing, delivering and reviewing an inclusion strategy. Use it alongside the connected editorial programme, with the SENCO, school business professional and the colleagues who will deliver the chosen activities.

Begin with a barrier that your school can describe and evidence. Follow it through to a chosen activity, a realistic cost, a named responsibility and a review. Carry the same Barrier ID and Activity ID through each record.

Working record	Use it to	Page
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Activity costing	Account for resources, staff time and funding	3
Provider comparison	Compare the help available and the work required	4
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Use the pack with your own records

These are original School Connection working tools. Some fields go beyond the publication requirements to help schools organise delivery. They do not replace the optional DfE statement template or your school's existing SEND, finance and safeguarding records.

Keep confidential pupil information in approved school systems. Record cohort themes and evidence references here, rather than pupil names, diagnoses or case histories.

School or trust, academic year and record owner

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Open the programme and current resources

WORKING PACK / 02

Barrier planner

Establish the problem before selecting the activity

Bring classroom observations, pupil and family views, assessment and attendance information into the discussion. A signal may show that something is difficult without explaining why. Describe the barrier in terms of access to learning or participation, then identify what would improve.

Record detail	School response
Barrier ID and date	
Cohort or setting covered	
Barrier to learning or participation	
Evidence and its date	
What pupils and families have told us	
What is already being tried	
What we still need to understand	
Intended improvement and starting position	
Responsible lead and next review	

Move from a description to a decision

“Some pupils find lunchtime difficult” is a starting observation. The next enquiry is which part is difficult: the noise, the transition, the social demands, the activities available or another factor. Avoid choosing a resource before that distinction is clear.

The priority we will carry into activity selection

Read the connected chapter on understanding barriers

WORKING PACK / 03

Activity costing

Include the work that makes delivery possible

Use one activity record for each selected response. Record the basis of a quotation or estimate and distinguish new expenditure from staff time already funded. Keep separate costs visible so a small purchase does not conceal a larger delivery commitment.

Activity ID	Barrier ID	Universal or targeted	Responsible lead

Activity description, evidence and intended outcome

Cost component	Basis of calculation or quote	Amount GBP
Resources or equipment	Quantity x unit cost	
Training or specialist input	Scope and quoted cost	
Staff preparation and delivery	Hours x full hourly cost	
Cover or release time	Hours or sessions x rate	
Implementation and other costs	Specify what is included	
Total activity cost	Add relevant components once	
Continuing cost after this period	Record separately from the total above	

Funding source	Amount GBP	Confirmed or to be agreed
IMF		
Core or other identified budget		
Unfunded amount or decision required		

A school's grant allocation is not a spare supplier budget. The published activity cost may combine IMF and core funding. Check eligibility and the school's financial arrangements before committing expenditure. IMF does not fund capital works or simply subsidise pre-existing activity.

Use the workbook for editable calculations and totals

WORKING PACK / 04

Provider comparison

Compare the additional work and the conditions for success

Start by checking what the school can deliver internally and what publicly funded support is available locally. When additional expertise is useful, compare a specific scope of work. A generic service description will not establish whether it addresses the barrier.

Decision	Option A	Option B
Provider or delivery route		
Activity and intended outcome		
Evidence relevant to our cohort		
Staff preparation and time required		
Full cost and contract period		
What is excluded		
How delivery and outcomes will be reviewed		
How the activity can be adapted or ended		

Resolve these questions before agreement

Ask the provider to explain the difference between the proposed work and support already funded or in place. Establish who prepares staff, how advice reaches everyday practice and which school colleague can authorise changes.

Preferred option and the reasons for choosing it

Unresolved question, responsible person and decision date

Read the connected chapter on choosing support

WORKING PACK / 05

Publication checklist

Make the strategy recognisable and usable

For relevant mainstream school IMF recipients in England, the first 2026/27 statement is due on the school website by 31 December 2026. Each academy needs its own statement, including where resources are pooled. Check the grant conditions and DfE guidance for the setting concerned.

Check	Evidence, owner or remaining action
The statement identifies the barriers across our cohort	
The chosen activities connect with those barriers	
Activity costs include the relevant IMF and core budget spend	
Intended outcomes are clear and realistic	
Our use of evidence is explained	
The statement reflects this school's circumstances	
Relevant leaders and governors have scrutinised the plan	
The public version avoids confidential pupil information	
Families can find and understand the document	
Publication and review arrangements are recorded	

The DfE template is optional. Its suggested 500 words concerns the statement of intent, rather than the whole strategy. The retrospective review of the previous academic year starts from year two. Our checklist also includes practical publication checks recommended by School Connection.

Final publication action, responsible person and date

Read the connected chapter on approval and publication

WORKING PACK / 06

Delivery plan

Turn the public commitment into an ordinary school routine

Use these review periods as an adaptable School Connection planning tool. They are not DfE deadlines. Set dates that fit your activity, staffing and school calendar. Ask whether the planned change could still be delivered when a colleague is absent.

Activity ID	Barrier ID	Delivery lead	Start date

Period	Preparation or delivery action	Lead and date	Evidence for the review
First 30 days			
Days 31 to 60			
Days 61 to 90			

Check capacity before the start

Delivery condition	Arrangement or unresolved action
Staff understand the activity and have time to prepare	
Resources, space and access are ready	
Cover, supervision and absence arrangements are clear	
Families know what will happen and when it will be reviewed	
A colleague will check whether the activity is being delivered	

The issue that needs a leadership decision now

Read the connected chapter on the first 90 days

WORKING PACK / 07

Outcome review

Separate delivery from the change pupils experience

A completed training session or purchased resource shows that something happened. It does not establish whether the activity reached pupils consistently or addressed the intended barrier. Review implementation alongside pupil experience and outcomes.

Record detail	Review evidence
Activity ID, Barrier ID and review date	
Intended outcome and starting position	
What was actually delivered and how consistently	
What pupils, families and staff have observed	
Outcome information and its limitations	
Other changes that may have influenced the result	
Costs, staff time and continuing capacity	
Decision and its reasons	
Next action, lead and review date	

Choose whether to continue, adapt, investigate further or stop. Record uncertainty when the evidence is incomplete. An improvement following an activity does not, by itself, prove that the activity caused it.

What this review changes in our next strategy

Read the connected chapter on reviewing impact

WORKING PACK / 08

Trust register

Make shared provision visible at each academy

Pooling resources can support shared expertise and delivery. Each school still needs a recognisable account of its own barriers, activities and intended outcomes. Use this register to trace the shared arrangement into each academy's practical provision.

Academy and identifier	Local priority and activity	Resources and responsible lead	Review or decision date

Check the arrangement across the trust

Question	Trust record
How does each academy's cohort inform the shared activity?	
How are costs and benefits explained to individual schools?	
Who checks whether the support reaches the academy?	
Which decision sits centrally and which sits with the school?	
Where is each academy's statement published?	

Use the TrustRegister worksheet for a larger school list. Keep the same school identifier and Activity ID across central and local records to avoid losing responsibility in repeated documents.

Read the guide to trusts and shared support

WORKING PACK / 09

Worked example

A fictional school follows one decision through the pack

Ashfield Primary is a fictional school used solely to illustrate the planning process. The example does not describe a real school, an evaluated intervention or achieved outcomes. Costs and results have deliberately been left for a school to establish.

Stage	Illustrative planning record
Barrier B01	Some pupils lose track of spoken instructions. Staff need to establish when this occurs and whether routines and visual prompts would help.
Evidence to collect	Compare observations across lessons, examine existing support and hear from pupils and families. Avoid treating the observation as a diagnosis.
Proposed activity A01	Agree a consistent instruction routine, prepare appropriate visual prompts and give staff time to practise and review their use.
Intended improvement	Pupils can begin and continue the agreed classroom task with less repeated clarification. The school must establish its starting position and success criteria.
Costing	Identify preparation, training, resources and any cover. Record the funding source and continuing staff commitment before agreement.
Delivery	Name the staff lead, preparation date, start date and first check of classroom use. Decide how new or absent staff will be supported.
Review	Record whether the routine was used, what pupils and teachers experienced, and what other factors may explain any change.

The same fictional school is also investigating unstructured lunchtimes. Keep that as a separate barrier, B02. A proposed structured activity, A02, should have its own rationale, staffing plan and review. Two barriers do not automatically justify one combined purchase.

Follow the worked example through the programme

WORKING PACK / 10

Leadership meeting record

Leave the discussion with an owned next step

Use this record with the colleagues who can make the decision and those expected to deliver it. A useful meeting can expose a plan that needs to change. Keep the unresolved question visible rather than turn an uncertain commitment into confident public wording.

Meeting detail	Record
School or trust and date	
Colleagues and roles present	
Barrier and Activity IDs considered	
Decision required	

Decision made and the evidence supporting it

What remains uncertain or depends on another decision

Next action	Responsible person	Due date	How completion will be checked

Return to the relevant chapter

Revisit barrier identification when the problem is unclear. Return to activity selection when the proposed response lacks a convincing fit. Review costing when staff time or continuing funding is unresolved. Use the outcome review when the school needs to decide what changes next.

Open the complete editorial journey

WORKING PACK / 11

Sources and important distinctions

Use the current guidance with the record it informs

The pack concerns the 2026/27 mainstream school inclusion strategy in England. Early years, standalone post-16 settings, special schools and independent schools have different scopes and reporting arrangements. Check the conditions that apply to your setting.

Publication and funding

The December publication requirement is a condition of the relevant IMF grant. It should be kept distinct from proposals for wider legal reform. Schools do not have to distribute funding across every inclusion principle. The selected activities should address their cohort's barriers and draw on evidence.

IMF cannot fund capital works, general running costs or simply subsidise pre-existing activity. The school grant permits carry-forward, with funds to be used by 31 March 2028 under the applicable conditions. A published strategy does not show that every activity is awaiting a supplier.

Support and review

DfE provides an optional strategy template and free in-house SEND and inclusion training. Local Experts at Hand arrangements should be checked before commissioning overlapping specialist help. Our 30-, 60- and 90-day prompts, costing fields and meeting record are optional planning recommendations.

DfE school grant conditions 2026 to 2027

DfE guidance on developing an inclusion strategy

DfE best practice and optional strategy template

DfE SEND and inclusion training for mainstream schools

DfE Experts at Hand guidance

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