



3.4 Managed Moves Guidance for Schools

Working together to support South Gloucestershire Children and Young People

A school can also transfer a pupil to another school – a process called a ‘managed move’ - if they have the agreement of everyone involved, including the parents and the admission authority for the new school.

- Current government guidance Exclusion from Maintained Schools, Academies and CYP Referral Units (2017)

Contents

1. Background
2. Principles of the managed moves scheme
3. Guidance on the process
4. List of associated documents

1. Background

These protocols have been written to promote a commitment to South Gloucestershire children and young people to support South Gloucestershire maintained and academy schools to work together to take collective responsibility for all South Gloucestershire children and young people. Managed moves support inclusive practice by providing a strategy, within the range of strategies available to schools. This guidance document and procedure promotes a collective agreement of responsibility between all schools in South Gloucestershire, to meet the needs of and take responsibility for vulnerable children and young people.

As part of ‘The South Glos Way’ of doing things, it is agreed that there is a common, preventative approach to supporting CYPs in a variety of ways and if done effectively, for the right reasons, in partnership with parents/carers, a managed move for some CYP can be effective.

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This document is part of The South Glos Way SEND and Inclusion toolkit and links to the following key documents:

3.2 The High Risk Group

3.3 Fair Access Protocol

3.8 Alternative Provision Guidance

Other relevant supporting documents can also be found in section 3: Understanding SEMH and reducing exclusions.

As part of this guidance document, all headteachers are legally required to have due regard to equality considerations whenever significant decisions are being made. Government departmental advice for school leaders, school staff, governing bodies and local authorities on the Equality Act 2010 is available [here](#).

Current government guidance Exclusion from Maintained Schools, Academies and CYP Referral Units (2017) advises school leaders that: 'A school can also transfer a CYP to another school – a process called a 'managed move' - if they have the agreement of everyone involved, including the parents and the admission authority for the new school. Schools cannot force a parent to remove their child permanently from the school or to keep their child out of school for any period of time without formally excluding. The threat of exclusion must never be used to influence parents to remove their child from the school.'

Sir Alan Steer in his report Learning Behaviour: Lessons Learned. A review of behaviour standards and practices in our schools (DCSF 2009) described Managed Moves as: ... an appropriate strategy to promote the reduction in numbers of CYPs being excluded in mainstream schools. This should be seen as a piece of preventative work to support CYPs at risk of exclusion. However, the DfE guidance also notes, "Informal' or 'unofficial' exclusions, such as sending CYPs home 'to cool off', are not allowed, even if they are with the agreement of parents. Any exclusion of a CYP, even for short periods of time, must follow the formal process including being formally recorded (see below). Any fixed-period exclusion must have a stated end date.'

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.

2. Principles of the Managed Move scheme

- The educational needs and social, emotional and mental health (SEMH) needs of the CYP should be paramount in any decision to instigate a managed move
- The objective of a managed move should be to initiate a formal process leading to the transfer of a CYP to the roll of a new school.

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- A managed move must occur with the consent and signed agreement of all parties, including the parent/carer(s) (including those who have day to day care of the CYP) and the school should alert the SEND cluster as to the planned arrangements. Schools should ensure that parents/carers have been given clear information and guidance about what a managed moves process is and their rights as parents/carers. The SEND Local Offer for parents and carers website can be found [here](#).
- The managed move is most likely to be effective when used as a tool for early intervention, rather than as an alternative to permanent exclusion arising from repeated and serious instances of indiscipline.
- The managed move should be preceded by high quality information sharing between the two schools (e.g the single roll school and the dual roll school) and a clear assess, plan, do review process, including data on prior and current attainment, academic potential, a risk assessment and advice of effective risk management strategies.
- The managed move should be monitored closely by both schools the progress and impact of the managed move to be shared with the SEND cluster to avoid suggestions of collusion, to ensure equity across the schools and to allow access to extra resources, where these are required to support the managed move.
- Where a CYP is at risk of permanent exclusion, schools should contact the Education Inclusion Officer (EIO) to ensure early advice, guidance and support and possible access to the High Risk Group (High Risk Group guidance document 3.2 in the toolkit).
- CYPs with trauma and attachment needs will need to be carefully assessed as to the suitability and potential success of any managed move. Co-production in the decision making processes with parents/carers is essential.
- CYPs with medical needs will also need to be carefully assessed, in consultation with health professionals as to the suitability and success of any managed move. The managed move decision making would need to consider the CYP's medical health care plan carefully. Again, co-production in the decision making processes with parents/carers is essential.
- If an alternative school place is being sought for a CYP with an Education Health and Care Plan, such queries should be directed to the 0-25 Team for consideration through the correct channels and should not be considered under the managed move process.

3. What is a managed move?

- A Managed Move is a voluntary agreement between two schools, a child, young person and his/her parents/carers. It allows a CYP at risk of permanent exclusion to have a trial transfer to another school on a dual registration basis. The move requires the agreement of the CYP's parent, the head teacher of

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the CYP's current school (the home school) and the head teacher of the receiving school.

- The purpose of a managed move is to facilitate a formal process leading to the transfer of a CYP to the roll of a new school. There must be a planned transition process between the schools, involving the parent/carer and CYP at every stage.
- A managed move is one strategy in a toolkit of potential interventions. It is expected that the range of support and intervention strategies available to schools will be deployed before consideration is given to a Managed Move. This should include consultation with your SEND cluster for advice and support, contacting the EIO (when a CYP is at risk of exclusion), advice and early intervention from Integra Inclusion/Behaviour Support, engagement with the Educational Psychology Service, Education Welfare Officer Support (if appropriate), Individual Medical Support Plan/Health Care Plan (where appropriate)
- Managed Moves are most effective as a tool for early intervention. A managed Move is a consensual process, and for a CYP with an identified SEND, should be as part of the Assess, Plan, Do, Review (APDR) cycle where all parties (schools, CYP, parents / carers) must be in agreement. Any SEND needs must be identified and be a key focus of the APDR process.
- Managed moves must only be undertaken when it is in the best interests of the CYP.
- Appropriate management of risk (including a completed written and signed risk assessment (see section 6.12 Individual CYP Risk Assessment) and sharing of information must be central to the Managed Moves process.
- If a CYP moves from school to school within an academy trust, this is still a managed move and the Local Authority urges trusts to follow this best practice guidance.

When is a Managed Move appropriate?

- When all parties, including the parent/carer and CYP agree that the managed move and chosen school is in the best interests for the CYP.
- As part of an early intervention approach to support the CYP to experience success.
- When a CYP is displaying the level of resilience required to be able to successfully transition to a different school. (Appendix A – For example, when a CYP is scoring 70%+ on the readiness for integration assessment)

When is a Managed Move not appropriate?

- A managed move is not appropriate when:
- A Headteacher cannot evidence that all preventative/alternative approaches has been exhausted, including referral to external agencies for the

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appropriate support (See section 3 - as part of an assess, plan, do review process).

- A young person is subject to a child protection plan or child in need plan cannot have a managed move unless this forms part of the plan.
- There has been other unsuccessful managed moves.
- A CYP has an Education, Health and Care Plan (EHCP) or is undergoing an EHCP needs assessment. The school should contact the EHCP Co-ordination team and request an early annual review or seek advice (EHCP CYP) careful consideration must be given to whether it is appropriate to follow the Managed Move process since it could cut across statutory process: where an annual review meeting concludes that the school cannot meet the CYP's needs, the SEN caseworker will apply due process leading to a new school being named in part 4 of the statement.
- The identified new school has CYPs or cohorts with previous disruptive activity in or out of school, which may detrimentally affect the transition of the CYP.

Other considerations of when a managed move would not be appropriate:

- A Managed Move must not be used as an alternative to permanent exclusion.
- Schools should consider the appropriateness of a managed move after Term 4 of Year 10. It would not be appropriate for the CYP to return to the home school if a placement is unsuccessful.
- It should not be used as a result of poor attendance.
- If a parent/carer is seeking a transfer to a new school, a school must not insist on a managed move without parent/carer agreement. A parent/carer should submit an in-year admissions application. Guidance can be found [here](#).
- Where a CYP is Looked After, a managed move can only be considered after all avenues have been explored and with the full involvement and agreement of the Virtual Headteacher, The LAC Teacher in Charge and the social worker who is responsible for the care plan.
- Pathways Learning Centre do not admit CYP as a managed move/preventive permanent exclusion. (See section 3.5 PLC provision placement process).

4. How does a Managed Move work?

For CYPs with an identified SEND, there should be a cycle of assess, plan, do review in place to support needs, planned in partnership with parents/carers (see Section 6.2 My Support Plan)

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Step 1

1.1 A lead professional is identified to ensure a key contact for co-ordinating the process and liaising with the parent/carer and CYP to ensure effective communication throughout the process.

1.2 When a school has exhausted all other interventions and support approaches, and is of the opinion that a managed move may be an appropriate option, they should hold a Team Around the Child (TAC) meeting with the child, family and any agencies who have worked with the child and family. A risk assessment (appendix B) should be undertaken, to ensure the team has sufficiently detailed information available to make an informed decision. If necessary, a Single Assessment Framework for Early Help (SAFeH) should be considered to ensure there is a complete assessment of the CYP's needs, including the voice of the parent/carer and child in this process.

1.3 The SAFeH should include notes of any discussion relating to a managed move and indicate the agreement of the parent/ carer and CYP. The school should invite the attendance of the other agencies. The school should ask for preferences for an alternative school which the TAC group will take into consideration; however the school must make clear that the TAC group will have to make the decision based on a range of factors; for example the balance of managed moves between schools, numbers on roll, cohort information.

Step 2

2.1 The home school would approach the preference school(s) and share relevant information with the consent of the parent/carer.

2.2 Once the receiving school has been identified and agreed, plans can be put into place to organise the transition meeting.

Step 3

3.1 A transition meeting is held at the receiving school with attendance of a staff member from the home school. The meeting should be attended by the CYP and parent(s), as well as the relevant professionals from both schools and the Education Inclusion Officer (EIO) (if CYP is at risk of exclusion) wherever possible.

The purpose of the meeting should be:

- To fully understand the needs and package of support for the CYP to enable successful transition and review dates, including criteria for success.
- To communicate the receiving school's expectations, policies and procedures.

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- To discuss and complete the risk assessment – including safeguarding, travel to school etc.
- To detail the CYP's and parent/carer's contribution towards making the move a successful one.
- To agree practical arrangements such as starting date, tutor group, timetable, travel and uniform.
- To ensure the parent/carer knows who a parent/carer needs to contact.

Step 4

- The home school completes the managed move paperwork (Appendix C)
- If the CYP has an identified SEND, the home school informs the SEND cluster of the planned managed move.
- Whilst the managed move takes place the home school maintains responsibility for the CYP. The receiving school should supply weekly attendance data and should also ensure accurate recording of any alternative provision that is being used (See section 3.8 Alternative Provision Guidance).
- At the meeting, and if the parents and CYP agree to the managed move, the following arrangements should be recorded on the managed move agreement form (Appendix B)
 - background to the managed transfer request the starting date for the transfer
 - what will constitute a successful managed move?
 - any agreed attendance arrangements; e.g. an initial part-time programme may be agreed specific targets for the CYP
 - the length of the managed transfer (usually one term)
 - planning the response of the receiving school should instances of poor behaviour occur
 - the dates set for the review meetings
 - arrangements for recording and reporting actual attendance
 - any other issues needing clarification e.g. transport, learning support

The meeting should be minuted in the form of a managed move agreement and signed by all parties. Where the parent acknowledges difficulties with the child's behaviour, consideration should be given to establishing a parenting contract.

Monitoring:

A member of the receiving school staff will normally meet the CYP and parent/carer regularly to review their progress towards the managed move agreement outcomes

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(appendix B). This gives the CYP the chance to identify what has gone well and how to replicate success.

The key people who attended the original meeting should be invited to the 6 week and to the 12 week review to examine progress.

If it appears that the Managed Move is failing between review periods, the receiving school will need to call an interim review with parents/carers and the home school to discuss options.

Step 5

At the 6 Week Review:

Parents/carers and CYP (where appropriate) should be invited to the review meeting. All commitments agreed at the initial meeting need to be reviewed. School staff will share reports about the CYP's progress towards the managed moves agreement outcomes. Any supporting agencies will report on the commitments they made. Staff, parents/carers and other professionals may make adjustments to their commitments if necessary.

The outcomes set for the CYP usually stay the same for the 12 week period. Focusing on solutions is the key to success. If the current provision does not meet the CYP's needs, further measures should be identified at the review to help the CYP sustain their place in the receiving school. Occasionally the targets set for the CYP 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 receiving school should liaise with the home school, the parents and other professionals (if involved).

This can happen without the need for another meeting unless the receiving school feel it is necessary.

Step 6

A successful move - At the 12 week review:

If a Managed Move is still in place by week 12, it is expected that the receiving school will deem it has been successful. The 12 week review is an opportunity to congratulate all concerned for making the move a positive one, including the CYP who has responded to the support offered.

When a receiving school decides that a CYP is ready to join the new school permanently within a further 12 week period they should hold a review with all parties – the home school, the receiving school and CYP and family. The review should formally recognise the placing of the CYP on roll at the receiving school. The receiving school and home school should ensure the data transfer is updated on the school's information management system and that the Local Authority are informed. If the school is not signed up to the automatic data transfer system within the LA, the school must inform LA school admissions department within 5 school days.

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School staff may continue to support and monitor the CYP's needs as in most cases the child will continue to have ongoing needs despite the progress they have made.

5. Contents of managed moves information pack

The following documents must be supplied by the home school prior to a managed move being agreed to by all parties:

- SAFeH paperwork
- Completed managed moves agreement paperwork (Appendix B)
- South Gloucestershire Individual Child Risk Assessment Plan
- Current Attendance Print Out
- Copies of behaviour log from previous two terms.
- Copies of any Exclusion letters from previous 12 months (where appropriate)
- Copies of SEND Assess, Plan, Do , Review cycles (if applicable)
- SEN EHCP and Annual review (if applicable)
- Personal Education Plan (PEP) (if applicable)
- CP Plan or CiN plan – detailing the agreed plan for the managed move

Appendix A: EIO Readiness scale for reintegrating children with social, emotional and behavioural difficulties into mainstream classrooms

(Rebecca Doyle, Norfolk CC - BJSE vol 28, No3 (September 2001))

For an excel version of this screening tool, please email adrew.holliday@pathwayslearningcentre.org

This assessment is a screening for suitability for inclusion and gives a diagnostic developmental profile. Used over time it gives a clear measurement of pupil development skills in each area.

It is a specific, quantitative assessment tool to help analyse behaviour; measure readiness to reintegrate; and highlight specific areas that need further development.

Student Name	d.o.b	Referring School	YR Group

- The profile considers five main areas:
- Self-control and management of behaviour
- Social skills
- Self-awareness and confidence
- Skills for learning
- Approach to learning

Allocate a score of between 1 and 4 to each of the statements as follows:

1= rarely fulfils this criterion

2= sometimes fulfils this criterion

3= frequently fulfils this criterion

4= almost always fulfils this criterion

The numerical score at the end of each main area is totalled and plotted on the baseline assessment with a maximum score of 312; an overall score of 218 (70%) or above gives an indication that the pupil may be ready for transition into their mainstream classroom.

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The profile will indicate areas of relative strength as well as areas for further development. The profile can therefore be used to inform IEP targets, track progress and inform planning for reintegration.

This profile is based on materials developed by Rebecca Doyle (2001) and Jane McSherry (1999).

Self-Control and Management of Behaviour

	Score (1-4)
Can accept discipline without argument or sulking	
Can arrive in classroom and settle down quietly and appropriately	
Does not leave the room without permission	
Can accept changes to plans or disappointments with an even temper	
Shows some self-discipline when others try to encourage deviation	
Is aware of normal sound levels and can be reminded of them and respond appropriately	
Does not seek confrontation during unrestricted times e.g. break	
Behaves in socially acceptable manner in public e.g. outings	
Can maintain appropriate levels of behaviour when the classroom routine is disrupted	
Will abide by accepted rules of an organised game	
Goes to and stays in designated areas when requested e.g. playground, hall, etc	
Controls emotions appropriately when faced with difficulties e.g. does not fight, strike out immediately, run away and hide or become excessively withdrawn	
Behaves appropriately in all areas of the school building	
Total	0
Percentage	0

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Social Skills

Can ask a question and wait for the answer	
Has appropriate communication skills e.g. asking questions and listening	
Can work alongside others in a group situation without disruption	
Interacts in positive ways with peers	
Apologises without reminder	
Asks permission to use objects belonging to another person	
Will show empathy for and comfort peers	
Chooses own friends and maintains reciprocal friendships	
Makes and accepts normal physical contact with others	
Accommodates other pupils who ask to join in an activity	
Is self-reliant in managing own hygiene and basic needs	
Shows genuine interest in the news and activities of another pupil	
Contributes actively during unstructured times with two or more children	
Shows variation in the roles undertaken during unstructured time e.g. does not always dominate activities, etc	
Engages in appropriate conversation with another pupil, exchanging information and using appropriate dialogue	
Addresses adults and children appropriately by name and with eye contact	
Shares legitimately required equipment with another pupil	
Can take turns in question and answer sessions	
Total	0
Percentage	0

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Self-awareness and confidence

	Score (1-4)
Willing to ask for help	
Can accept responsibility for actions without denial	
Can acknowledge own problems and is willing to discuss them	
Can risk failure	
States feelings about self, e.g. happy angry, sad, etc	
Maintains appropriate eye contact	
Contributes to class discussions	
Participates in group work, making constructive suggestions and adapting ideas	
Responds appropriately to emotions of others, in fiction or real life e.g. able to recognise someone as funny, kind, scary, bad, etc	
Participates in large class activities e.g. dance, role plays, performances, etc	
Accepts public praise and congratulation appropriately e.g. when good work is shown to peers, etc	
Shows pride in achievements and presentation of work	
Has self-Esteem	
Total	0
Percentage	0

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Skills for learning

	Score (1-4)
Can work alone without constant attention for brief periods	
Can attempt to listen to explanations and instructions and attempt to act on them	
Understands the structure of the day	
Understands the role of the teacher and other adults in the room	
Understands the structure of discipline – what happens if he/she does not complete work, does not conform to playground rules etc	
Understands that there are different places for lessons other than the classroom e.g. library, hall, etc and behaves appropriately	
Can constructively use unstructured time in the classroom	
Can organise him/herself if help is not immediately available	
Responds appropriately to personal request from teacher	
Will work alongside another pupil without attempting any distractions	
Can organise the materials needed for a task and clear them away appropriately	
Shows appropriate levels of curiosity when changes to the room routines are observed	
Reading and numeracy up to level that can be coped with in a mainstream classroom given reasonable support	
Shows a willingness to improve own literacy and numeracy	
Can read sufficiently well to understand basic instructions needed for completion of tasks	
Has developed some self-help strategies (at own level) e.g. using reference materials as word banks	
Does not get up and wander around the classroom without a purpose	
Needs a mainstream curriculum	
Does not get impatient if help is not immediately forthcoming	
Is willing to try complete a task independently	
Pays attentions to class discussion and instructions	
Total	0
Percentage	0

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Approach to learning

	Score (1-4)
Is prepared to work in lessons	
Uses appropriate language and gestures	
Wants to be reintegrated	
Has parental support	
Is courteous, and shows positive attitude towards staff	
Can show an interest in lessons	
Treats school property with care	
Listens with interest to class explanations	
Can accept disappointments e.g. when not chosen to participate in an activity	
Will sit appropriately without causing a disturbance in both class and general school areas on request	
Shows a sense of humour	
Total	0
Percentage	0

Totals

Totals

Area	Score	Out of	%
Self-Control and Management of behaviour		52	0
Social Skills		80	0
Self-Awareness and Confidence		52	0
Skills for Learning		84	0
Approach to Learning		44	0
Total	0	312	0

Appendix B:

A managed move is the transfer of a CYP to another school on a trial basis for a CYP who is not experiencing success at their current school due to deteriorating

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behaviour or SEMH needs and there is a risk of exclusion (or other specific circumstances). It enables a CYP to transfer to a new school, where there is potential for success, given a fresh start. A managed move is a voluntary process and will only take place if the headteachers, parents/carers and CYP are all in agreement. During the trial period, the above CYP will stay on the roll of the home school. If the 12 week trial period is successful, they will move onto the roll of the receiving school. If the trial period is unsuccessful or the transfer breaks down, then the above CYP would normally return to the home school. However the home school may take account of any new incidents at managed move school on making a decision to exclude.

Supportive Parents is the South Gloucestershire Special Educational Needs Information, Advice and Support Service (SENDIASS). SENDIASS is a statutory service provided by South Gloucestershire Council. Parents and Carers can phone Supportive Parents on 0117 9897725 or using the email contact form <http://www.supportiveparents.org.uk/> for advice and support.

CYP name:						
Date of birth:						
Year Group:						
Address:						
SAFeH iPlace?	Medical Plan?	SEND – Code of Practice Level and area of need	LAC Status	Ethnicity	Attendan ce (current academic year)	Exclusio ns (current academi c year)
Yes/No	Yes/No					
Home School:						
Receiving school:						
Lead Professional who will be the key						

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contact for the managed move:			
Reason for the managed move:			
Start date of managed move:		6 week review date:	
Potential end date of managed move (12 school weeks from start date)			

Interventions and Support already taken by the home school	Level of Success
Alternative Curriculum Arrangements in Place	Names and Contacts of Relevant Professionals involved
	(This maybe referenced in the SAFeH paperwork)

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Transport: It is the responsibility of the home school to liaise with the parent/carer to ensure that the CYP will be able to get to the proposed new school during and after the managed move period.

How will the CYP get to the proposed school?

Has the parent/carer been involved in making transport arrangements for the managed move?

Attendance Arrangements

Please specific timetable, any part time plans or alternative providers to be used (See section 3.7 Reduced Timetables Guidance and section 3.8 AP Guidance)

CYP Voice: My Thoughts About School (This will be on the APDR if SEND)

Name

Date

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How I learn best
What my strengths are & what lessons I look forward to
What I enjoy & what is important to me
What my areas for improvement are
What I wish my teachers knew....
What my teachers can do to help me learn
Things that have been tried and tested and do not work

What needs to happen to make the managed move successful?

The home and receiving school will:
The CYP's parent/carer will:
The child will:
Other agencies commitment to the managed move:

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Planned Outcomes	Who or what will help me?

Attendees Signatures	
Parent/Carer:	Child/Young Person:
Home School:	Other Professional:
Proposed School:	Other Professional:

6 week review meeting

People Present at the review:	Date:
Planned Outcomes	Progress towards the outcomes

Attendees Signatures	
Parent/Carer:	Child/Young Person:
Home School:	Other Professional:

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Proposed School:	Other Professional:
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12 week review meeting

People Present at the review:	Date:
Planned Outcomes	Progress towards the outcomes

Attendees Signatures	
Parent/Carer:	Child/Young Person:
Home School:	Other Professional:
Proposed School:	Other Professional: