



## **G-Cloud 15 Service Definition Document**

**SEND Funding Genie** (part of the SEND Genie Toolkit)

**Smarter funding. Fairer outcomes. Faster working.**

# Imosphere SEND Genie Toolkit



The only integrated toolkit combining EHCP drafting, funding allocation, and real-time insight in one connected system.

# Service details

## **SEND Funding Genie** (part of the SEND Genie Toolkit)

- England's only digital needs-led banding and funding framework for SEND – giving local authorities visibility and control of their spending.
  - Use our national-ready model.
  - Or use your own descriptors and banding calculation within the platform.
- AI support for speed and defensibility.
- Developed with multiple councils with continuous improvement since 2015.

SEND Funding Genie is used by an active community of forward-thinking LAs, building a **smarter future** for SEND services.

# Product overview – SEND Funding Genie

- Structured Needs Profile with clear guidance – used for new plans, reviews and phase transfers.
- Banding calculation and locally configured values per band.
- 'Imogen' AI assistant:
  - Extract evidence from uploaded EHCPs to support accurate selection of descriptors
  - Flag quality gaps in EHCPs which may impact accuracy
  - Generate a clear, defensible funding rationale
- In-depth needs/costs analysis for chosen cohort(s) with delivery of actionable insights.
- **OR:** Bring Your Own Model option: run your LA's descriptors and calculation inside Funding Genie.
- Real-time dashboards to monitor usage and band distributions.
- Export to Word/PDF for saving or upload to case management system.
- Benchmarking across anonymised LAs to inform local values and best practice.

# Real-world outcomes and ROI

## Return on investment:

- Save ~£98,000 over 5 years by reducing time spent on funding decisions by ~70%.
- Gain greater control of spend by achieving 87% consistency in cases per band across settings.
- Reduce costly challenges and target funding better due to ~1% variance vs actuals.
- LAs using Funding Genie perform ~25% better on average against the 20-week EHCPs measure.

## Better quality and relationships:

- Enhance quality of EHC assessments & plans by tying them directly to funding decisions.
- Improve relationships with families & schools through more transparent conversations.

**As of early 2026, SEND Funding Genie has calculated banding/funding estimates for over 22,000 children/young people – including allocation of over £186m in top-up funding**

# Two configuration routes

- **Route A: Funding Genie model** (where your local model isn't working well or you want more consistency)
  - Our multi-authority co-produced descriptors and best-of-breed algorithm – based on 10+ years of development
  - Configurable to your local settings.
- **Route B: Bring Your Own Model** (where you're happy with your local model)
  - We configure your local descriptors (and scoring rules/calculation where used) – but you retain ownership of the logic.
  - Keep what works (same descriptors and rules your teams already know)...
  - ...but gain time-saving digital workflow, AI support/evidence, and auditability.
  - Clear rationale and audit trail linked to source documents.
- **Note:** You can use a combination of Route A and Route B – and you can start with Route B and change to Route A at a later point.

# Year 1 at a glance

- Get up and running generating bands on the platform in 1-2 weeks.
- **Route A** (Funding Genie model):
  - Initially: Banding of all or an agreed % of relevant children and young people within Funding Genie
  - Then: In-depth Imosphere analysis of current top-up allocations VS Funding Genie bands – to inform whether to:
    - Take actions based on data insights
    - Proceed to full roll-out (configure values-per-band, comms with schools and parent/carers re change of process)
- **Route B** (Bring Your Own Model):
  - Discovery: Pass us your descriptors and rules.
  - Build: Evolve descriptors into digital form → Build scoring/banding rules.
  - Sign-off and go live.

# System requirements and data security

- Requirements:
  - Web-based – no local installation.
  - Modern browser with reliable HTTPS connection required.
  - Two-factor authentication.
  - Word/PDF reader required for document exports to attach into local case management system.
- Security:
  - Encrypted in transit and at rest.
  - All data stored in the UK; managed UK-based services.
  - Uploaded EHCPs encrypted and stored temporarily during active session – with secure deletion on completion.
  - AI processing in memory with outputs discarded after use and no personal data shared with third parties.
  - Audit trails.
  - Business continuity and disaster recovery aligned to ISO-based controls.

# Support, SLAs and availability

- Service desk: Monday to Friday 09:00–17:30 UK time.
- Response targets:
  - P1: Notify within 1 hour and restore within 24h
  - P2: First response 4 hours.
  - P3: 1 working day.
  - P4: 3 working days.
- Guaranteed 99.99% availability, measured monthly, excluding planned maintenance and force majeure events.
- Included in contract:
  - Regular product enhancements (including continued alignment to national policy and AI improvements that support, not replace, professional judgement).
  - Local configuration updates.
  - Product data insights.
  - Online learning resources.

# Commercials and trials

## Commercials:

- Licensing by council population served.
- Bring Your Own Model available with ongoing support for rule updates during the contract.

## Try before committing longer-term:

- 2-week free trial using our DEMO system:
  - Use sample/anonymised EHCPs
  - A low-effort way to explore functionality using our DEMO system
- Other options for trialling can be explored.

# Responsibilities

## Imosphere:

- Support specification of local requirements.
- Configure platform (Funding Genie model or BYO).
- Provide online learning resources.
- Conduct data analysis and deliver data dashboard.
- Provide ongoing support – including periodic product performance reviews.
- Facilitate collaboration and benchmarking across LAs.

## Local authority:

- Nominate a project lead.
- Provide descriptors/rules if BYO.
- Provide practitioner resource for initial data entry.
- Use data dashboard to inform local values per band and keep these up to date over time.
- Measure success criteria/ROI (initially and over time).
- Agree updates to local ways of working.
- Contribute to best practice community.

# Exit and data return

- On contract end – supplier will:
  - Export and supply customer data.
  - Disable system access.
  - Securely delete customer data (other than data to be held in line with retention policy).
  - Confirm deletion.
- Optional migration/export services may be explored on request.

# Related services

- EHCP Genie:
  - Part of the same SEND Genie Toolkit software.
  - AI-led drafting, QA and redrafting for new plans, reviews and phase transfers.
  - Use together with Funding Genie for higher-quality inputs leading to more accurate banding.
- Other Imosphere toolkits to support setting of funding:
  - Adult Social Care.
  - Continuing Healthcare.

# Customer Testimonials

“The tool has made the funding process more transparent and defensible – reducing negotiation time and improving confidence across teams.”

“Allocates funding based on identified needs... simpler process and better understanding for parents and schools.”

**Head of SEND & Inclusion**

“We see far fewer queries from our schools and colleges about the estimated provisions... helping to improve our working relationships.”

**Principal SEND Manager**

“We’re now making much smarter, more targeted use of our resources.”

**Associate Director for SEND**

“A catalyst for change in how we think about the EHCP and annual review process.”

**Project Manager, Achieving for Children**