Insight
Updates, guidance and resources for your whole leadership team

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The Effective School Governance Award

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16th Annual SEND Update
Using Research to Inform Practice for Pupils with SEND

oego.co/SC_SENDUpdate  #oeSEND

Expert speakers include:

Dr. Andrew Curran
Author, Presenter & Neurobiologist

Dr. Chloë Marshall PhD
Professor of Psychology, UCL Institute of Education

Melanne Maddalene Randall MSc
Occupational Therapist & Director, Maximum Potential

KEY BENEFITS

LATEST RESEARCH
What does evidence tell us works in SEND?

MOVE AWAY FROM LABELS
Focus on strengths and challenges of individuals

IN THE CLASSROOM
Equip staff with skills to support all types of need
Welcome to Optimus Education Insight

Dear Reader

The world of education is subject to trends, but the drive towards evidence-based practice is one that I hope is here to stay. We’ve had requests from the membership network for more research-focused content, and this term’s issue reflects that desire to learn from what works. I’ve been reading research reports to find out what raises achievement for disadvantaged pupils (see page 16), and in the school business management section, Nickii Messer explores what schools can learn from industry about effective appraisals. In the teaching and learning section, James Mannion advocates for a greater focus on oracy, and Bradley Busch extrapolates valuable lessons from cognitive research into what motivates us.

Last term I attended our Developing Resilient Learners conference. Out of a day of positive and informative workshops, one that stood out was the session Dave Boden, strategic lead for ethos development at Grace Academy Trust, gave on demonstrating the impact of SMSC, wellbeing activities and ‘whole-person’ development. He shared the approach taken in his academy and gave a wealth of practical ideas on evidencing change and impact – or ‘playing detective’. Dave has written up his workshop (see pages 62-64) for all our members: do take a look.

Liz Worthen
Head of Content
Optimus Education

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Conference Calendar

Optimus Education’s one-day conferences bring school leaders and managers together, helping you stay up to date with new legislation, guidance and best practice in education. Find out what’s coming up in your focus area.

April

17th Annual PE & School Sports Conference & Exhibition
THURSDAY, 19 APRIL, LONDON
Get new ideas to motivate pupils, build staff confidence and support healthy, active lifestyles across your school.
Teaching and Learning

Supporting Student Wellbeing in Independent Schools
THURSDAY, 26 APRIL, LONDON
Network with experts and practitioners in the independent sector and gain insights into key issues such as anxiety, stress, online safety and resilience.

May

17th Annual HR & Employment Law in Education
THURSDAY, 3 MAY, LONDON
Hear from leading education law firms, remain compliant with the GDPR and effectively manage absence and staff performance.
School Business Management

Achieving Efficiencies in Schools and Multi-Academy Trusts
WEDNESDAY, 9 MAY, LONDON
Develop innovative procurement strategies and centralise common functions to improve efficiency, while ensuring great educational outcomes for students across your MAT.
School Business Management

June

Annual SEND Update 2018
TUESDAY, 22 MAY, LONDON
Find out about the latest research surrounding SEND, dispel neuroscience myths and take away strategies for meeting different types of need.
SEN and Safeguarding

Engagement & Progress in Reception
THURSDAY, 24 MAY, LONDON
Get practical strategies to build engagement with parents, tips on creative, balanced classroom provision, and better clarity on the issues surrounding inspection and reporting.
Teaching and Learning

September

MAT Leadership Programme: Module 1
TUESDAY, 11 SEPTEMBER, LONDON
This module helps those in senior positions to make the transition to becoming a MAT leader and will focus on strategic management, priorities and decision-making.
Leadership and Governance

Child Protection in Education
TUESDAY, 11 SEPTEMBER, LONDON
TUESDAY, 18 SEPTEMBER, BRISTOL
THURSDAY, 4 OCTOBER, MANCHESTER
Clarify the latest safeguarding risks, remain legally compliant and ensure robust child protection procedures across your school.
SEN and Safeguarding

October

MATs Summit 2018
WEDNESDAY 10 – FRIDAY 12 OCTOBER, BRIGHTON
Designed exclusively for MAT leadership teams, this immersive event aims to provoke thought, inspire change and enable you to build your network nationally.
Leadership and Governance

Delivering Statutory RSE
TUESDAY, 16 OCTOBER, LONDON
Ensure your school is prepared and staff are confident in delivering age-appropriate RSE. Attend sessions focused on curriculum development and parental engagement.
SEN and Safeguarding

For a full list of our upcoming conferences, half-day briefings and training days, please visit my.optimus-education.com/conferences. For further information or booking queries, please call the conference team on 0845 450 6404.
Next month sees the arrival of new data protection laws under the GDPR. If you’re in the middle of a data audit or need advice on consent, turn overleaf for help. Social mobility has also hit the headlines recently, so we looked at the research into what works for raising the achievement of disadvantaged pupils and summarised the findings on page 16. A good reputation and strong brand are vital when attracting parents and pupils, particularly for independent schools who can use Justin Smith’s strategies to build their brand and work with the local community. For heads, Anita Devi has five ways to help you support SENCOs and ensure a whole-school approach to SEND, and former headteacher Karen Burns tells us about her career progression from head to MAT CEO in her blog post on page 14. As always, don’t forget to read your weekly member email for more new and popular resources every Monday!

Lisa Griffin, Content Lead

Contributors in this issue

**Ruchi Sabharwal** is deputy headteacher at The Weatheralls Primary School. She is responsible for teaching and learning, behaviour and inclusion and overseeing the maths and English curriculum.

**Justin Smith** is managing director of Chameleon Training and Consultancy. He previously worked at Wymondham College as director of marketing and development.

**Fiona Carnie** runs training workshops on behalf of Parentkind. An expert on parental engagement, her books include the *Parent Participation Handbook* and *Harnessing Parent Power*.

**Karen Burns** is chief executive of Victorious Academies Trust in Manchester. An experienced headteacher, she is also executive principal of Inspire and Discovery Academies.

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What’s in this month’s Leadership and Governance section?

GDPR: your questions answered
oego.co/GDPR-questions

From vision to action: establishing a vision for your school
oego.co/establish-vision

Ofsted is coming: demonstrate a safeguarding culture
oego.co/safeguardingblog

See more at blog.optimus-education.com

Insight 15 Book 1.indb   7
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How to undertake a data audit

The GDPR requires you to maintain records of your data processing activities. We describe how to carry out an audit of the personal data and information you hold, where it came from and who it’s shared with.

To help ensure you are compliant ahead of the new General Data Protection Regulation (GDPR) in May 2018, you need to understand all your current data processes by mapping them. From here you’ll be able to clearly spot any gaps.

The data audit should identify the personal data and information you currently hold, where it came from and who it is shared with. Ask the below questions during your audit.

- What is the legal basis for processing personal data?
- Whose personal data is processed?
- What personal data is processed?
- When is personal data processed?
- Where is personal data processed?
- Who is personal data shared with?

Who audits the data?

Personal data is anything that can be used to identify an individual. From salary details to medical or special needs, schools hold a vast amount of it on staff, pupils, parents and governors.

Because of this, it may be necessary to involve many people in a data audit, depending on what the specific data is. This will include the SLT, HR, medical team, governors, head of IT and any marketing or fundraising teams.

These people and groups of people will hold and use personal data for a variety of reasons so it is important to ensure that all processes are clearly mapped.

Auditing electronic and paper files

To begin with, record and map all the categories of data you hold, such as medical information or that on previous pupils. Record where this data comes from and who it is shared with.

How is the data stored? You’re likely to have information held both on computers and paper files so will need to review processes and rules regarding where and how files are stored.

For school computers and personal workspaces, how secure are users’ accounts and passwords? Are passwords written down on paper anywhere or shared? Are there processes for sharing information outside of the school and how are these enforced?

Unlike electronic files, which can be encrypted and limited access given to people to increase security, paper files are more likely to be accessible to a larger number of people. You need to be confident that only the appropriate staff have access.

Review how and why you keep your paper files. If they duplicate what you have stored electronically, consider whether you need to keep them.

Do you know if hard copies of files are being taken out of the school, perhaps to external meetings or home? Are they kept in a secure place, such as a locked cupboard, or stored in an open filing cabinet?

After undertaking your audit of data held on electronic and paper files, you may decide that new policies and procedures are needed. In turn, you’ll likely need to update staff training on data management and security, both on and off site.

Privacy notices

Review your current privacy notices to ensure they are compliant with the GDPR. The most common way of ensuring transparency while providing information to individuals about how you’ll use their personal data is to state this in your privacy notices.

The privacy notice should cover such issues as the information being collected, who is collecting it and how, what the
Consent
Consent is strengthened under the GDPR and should be ‘freely given, specific, informed, unambiguous’.

Consent is a lawful basis for processing personal data. Where it is difficult to get consent, another lawful basis may be more appropriate. These include:

- necessary for a contract
- necessary for compliance with legal obligation
- vital interests
- public interest
- legitimate interests.

Consent should not be a precondition of a service. If it is, consent is unlikely to be the most appropriate lawful basis.

Consent (or explicit consent) can legitimise the use of special category data, such as that connected with employment, restricted processing, automated decision-making or overseas transfers.

Consent requires a positive opt-in: pre-ticked boxes are not allowed under the GDPR. Offering clear and concise consent should hand individuals more control of the data held on them and build trust between data processors and individuals.

Appropriate methods include:

- signing a paper consent statement
- ticking or clicking an opt in button or link
- selecting from yes/no options
- choosing technical settings/through a dashboard
- answering ‘yes’ orally to a clear request.

Explicit consent requires a clear statement of consent, rather than one of the methods above.

It should be as easy for consent to be withdrawn as it is to give it, so make it clear how an individual can do this. For your records, you should keep evidence of consent – who, when, how, and what you told people.

Marketing and fundraising
If you send any advertising or marketing material to particular individuals you are undertaking direct marketing. This includes sending a fundraising appeal to someone in the post, via email, or calling them on the phone.

Advertising or marketing material is anything which promotes the aims and objectives of your organisation, as well as products or services. Direct marketing includes sending newsletters, fundraising appeals, or campaigning material to people using their contact details.

Under the GDPR you need a lawful basis to send direct marketing to an individual. The two most appropriate are likely to be consent and legitimate interest.

As part of your data audit, review any current marketing or fundraising you carry out and include these processes in your privacy notices.

Ensure you have appropriate consent, or other lawful basis, for using personal data in marketing and fundraising activities and update your records as evidence.

If you share information with third parties, such as payroll or catering companies, you’ll need to review your contracts. If they go beyond 25 May 2018 they will require amendment to reflect GDPR changes.

With thanks to our partners Browne Jacobson and Veale Wasbrough Vizards.

Download your data audit template at my.optimus-education.com/gdpr-data-audit-template-and-guide

GDPR in a nutshell training course
This new course will provide you with an overview and supporting resources regarding the current data protection and GDPR legislation.

The course will ensure all school staff are equipped with the knowledge and information about what the changes will mean to them as individuals, and what whole-school changes will need to be implemented by May 2018.

Units 3 and 4 of the course provide the school leadership team with valuable practical resources to ensure every school is GDPR-ready.

Premium and Premium Plus members can access the course at my.optimus-education.com/training/gdpr-nutshell
LEADERSHIP AND GOVERNANCE  @OptimusEd
Cross Phase | Leadership Skills

Challenging your team:
10 questions and phrases

What does useful feedback look like and how should you provide it? RUChI SABHARWAL provides middle leaders with questions to ask their team to aid development and ways to phrase feedback

A feedback culture is about collaborative, honest, fair and constructive conversations. It comes down to person to person conversations, trust and engagement.

I recommend three golden rules: timely feedback, regular dialogue and focused questioning. Sounds pretty obvious but in a busy working week these can slip by the wayside far too easily. Urgent matters take priority and the important stuff gets pushed back.

Reflective questioning

How do you make an impact as a leader? How do you make the leap from managing your team to leading them?

Think about all the leaders that have inspired your growth in your teaching career — what set them apart? I guarantee that somewhere in the mix was their ability to challenge your thinking and draw your attention to details you hadn't previously considered.

Now, think a bit more carefully: did they tell you how to improve through suggestions and checklists, or did they guide you into thinking of your own ways to develop? It's easy to think we are developing teachers, or even pupils, by telling them what to do. It's also a lot quicker to do it for someone, which is a common trap to fall into due to time constraints.

When feedback puts teachers in a role of passive compliance, it removes the greatest opportunities for professional growth. More importantly, when feedback is a one-way transfer of expertise from observer to teacher, it limits the opportunity for you as leaders to continue to grow.

Being asked 'How do you think it went?' after an observation is such a simple question but one that is often interpreted as, 'Am I good enough?' These intrusive thoughts can act as blockers to even the most effective constructive conversations. As middle leaders, you need to think carefully about how you approach feedback with your team.

Who is the feedback for? What is the feedback for? The purpose of feedback is to improve a teacher's performance — not to put a damper on it.

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10 questions to invite thinking

1. What are some of the things you noticed that let you know the lesson was going well?
2. What might be some important parts of the lesson you want to remember as you plan for the next lesson?
3. What were some decisions you made during the lesson that supported your pupils' success with the lesson?
4. Did you model the things you wanted?
5. How was your lesson designed to help all pupils make progress?
6. How was the learning? Did the pupils meet the objective in the way you had intended?
7. How might the way the lesson went compare to how you planned it?
8. As you reflect on your lesson, what are you learning that you might want to carry forward for next time?
9. Based on what you’re learning about yourself during this lesson, what might you commit to applying next time?
10. How has this conversation helped your thinking?

Thinking about feedback

Seeking feedback is intrinsic to human nature: we want to learn, we want to improve and we crave purpose. It's our job as leaders to provide this.

Even the best of us worry about receiving critique. 'Was my lesson good enough?' (often interpreted as, 'Am I good enough?'), 'How do I compare to colleagues?' and worst of all, 'Is this going to affect my pay review?'

These intrusive thoughts can act as blockers to even the most effective constructive conversations. As middle leaders, you need to think carefully about how you approach feedback with your team.

Who is the feedback for? What is the feedback for? The purpose of feedback is to improve a teacher’s performance — not to put a damper on it.
The goal of feedback is to guide and empower with an 'I can do this' attitude which will lead to an increase in performance and, ultimately, improved outcomes for pupils.

10 ways to phrase feedback
1. I noticed that you [ ]...could you talk to me about how that fits within this lesson or unit?
2. Here’s what I saw: [ ]...is that what you thought was happening at the time?
3. I noticed that [ ]...how did you feel about how that went?
4. I noticed that pupils [ ]...how did that compare with what you had expected to happen when you planned the lesson?
5. I saw that [ ]...what did you think of that, and what do you plan to do tomorrow?
6. At one point in the lesson, it seemed like [ ]...did it seem that way to you, too? What was your take?
7. Tell me about when you [ ]...what made you choose that response?
8. I noticed that [ ]...could you tell me about what led up to that, perhaps in an earlier lesson?
9. I found myself wondering if [ ]...is that something you’re thinking about?
10. What effect do you think it had when you [ ]?

Key ingredients for effective feedback
Timely: verbal feedback on anything needs to happen on the same day. Make it practical, actionable and supportive. Your role is to guide teachers to reflect on their own practice, not tell them how you would do it.

Regular: it’s easy to assume that your team know they are good enough or that your appreciation for their hard work is obvious. It’s not. Everyone needs to know they are doing a good job; to feel noticed is to feel valued. Make a point of leaving a positive post-card for the class and teacher every time you do a learning walk. A simple, but fortnightly, ‘Great maths lesson this morning!’ can have a lasting impact. Even one line in an email is enough to make a difference. Find an approach that suits you and run with it.

Focused: be clear about the focus of the monitoring. If you discuss this with your team/individual teacher first, you’ll have a better, coaching-led conversation.

Fearless: be bold and brave enough to offer suggestions for improvements. If a member of staff needs challenging, be confident in your assessment, gather the facts and make it succinct. Once the message has been delivered support your colleague by working together to find a solution. Support and open communication is vital to ensure buy-in from your team.

Align: if you think the conversation is going to be a challenge, bring everyone back to the common moral purpose: pupil outcomes. Know your school’s vision and remind staff about those collective values.

Top tips
- Encourage staff to regularly share their feedback with each other, both good practice and next steps.
- Lead the way by sharing your own areas for development or observation feedback, highlight areas that everyone could work on and set this as a focus for Key Stage meetings.
- Observe a range of others giving feedback and reflect on what was successful. Pay extra attention to voice, delivery and language and find what would work for you.
- Your questions need to allow your colleague to explore their thinking, rather than yours.
- Ask someone to observe you giving feedback and allow yourself to feel vulnerable when they return the favour; this will help you find empathy when you coach others.
- Know your team and personalise your approach. Be clear on who you can stretch and who might need extra scaffolding.
- Notice specific aspects of the lesson and share those observations with the teacher as the starting point for the discussion.
Cross Phase | Leadership Skills

CASE STUDY

Staff development and retention in a MAT: case study

Teacher recruitment and retention is a huge challenge. SUZANNE O’CONNELL spoke to a MAT CEO about how they have developed a successful and sustainable workforce.

School information

Trust name: Leigh Academies Trust
Number of academies: 16 (eight primary, seven secondary and a special school)
CEO: Simon Beamish
Location: Kent

‘In a job advert for a maths teacher we had 29 candidates,’ explains CEO Simon Beamish. Simon was previously a principal within the trust and became chief executive of Leigh Academies Trust in November 2013.

There are perhaps many reasons for the strength of their recruitment, and nurturing staff is definitely one of them.

Developing leadership

Simon sees the focus on leadership recruitment and retention within their schools as key. ‘The leader is crucial,’ he explains. ‘They’re the kite if you want the school to fly.’ As such, they have developed a strong in-house process for developing their leaders.

The trust operates a peer review programme in which schools undertake a review once a year or every two years depending on the needs of the academy.

In order to carry out the programme, they hire trained Ofsted inspectors who work alongside senior leaders from one of their other schools to conduct the review.

‘This is extremely beneficial for the academy being reviewed,’ explains Simon. ‘It’s also very good professional development for the reviewer too.

‘Many of those involved have said it’s been the best professional development experience they’ve had.’

Networking and collaboration among staff

On a more informal basis there is a networking system within the trust. This allows all the principals to meet together every six weeks and all those on the second tier, such as heads of school, to meet together within the same time frame in their own group.

‘This is an opportunity to look at the national picture,’ explains Simon. ‘They have the chance to share best practice across our academies.’

In addition, an annual trust conference is provided for all staff and governors. Strong links have been developed between English, maths and science subject leaders across secondary schools and between literacy and numeracy leaders across the primary schools.

‘We are increasingly developing these cross-academy links,’ says Simon. ‘However, we are also aware of the need to maintain a balance. These people are teachers, firstly, and they don’t want to spend too long outside the classroom.’

Leadership programme

A bespoke leadership programme is one of the trust’s new ventures. The programme is aimed at those who are just below tier two of management and leadership responsibilities and a key element is the coaching and mentoring strand.

Those involved in the programme are invited to listen to keynote speakers and must complete a project to then be presented at their regional conference.

All senior leaders are involved in governance and attend governors’ meetings. Soon the trust will offer secondments to other schools within the group.

There are three trust clusters and plans to extend this to a fourth. The proximity of academies within and between the clusters is a key factor that enables this movement and sharing of practice without staff having to move to a new house or live away from the family.

‘Once staff are recruited they can be assured that excellent career progression opportunities will be available’
‘Strong collaboration and teamwork so that we are much greater than the sum of our parts’ is one of the value statements of the MAT. It is clearly being put into practice with their existing staff, but how are they recruited in the first place?

Recruitment
There is a strong tradition of recruitment within the trust, aided by the schools’ locations along the M20 and M2 corridors. ‘We keep an eye on people who are ready to move,’ Simon explains. ‘If there are no opportunities within their own academy, perhaps because there is already someone in post, then we are alert to this and there will be opportunities in another academy.’

‘80 per cent of appointments are internal promotions and we ensure that we have a strong pipeline of talented staff. Staff don’t need to look outside the trust because there are plenty of opportunities within it.’

Although commuting between the schools is possible, they still cater for a range of catchment areas that enable staff to develop a breadth of experience.

The trust provides School Direct teacher training in conjunction with Kent and Medway Training (KMT). They train about 150 new teachers a year and around 80 per cent of these are then employed by other consortium schools.

Simon feels this is an important contribution that the trust can make not only to its own development but to the wider pool of high-quality staff for schools generally.

The principals who head each of the trust’s academies are able to draw on the expertise of the trust’s own HR facility. The HR team provide the support required to recruit staff and build capacity through a database of possible candidates.

‘We have very few supply teachers’, explains Simon, ‘and no vacancies. We have plenty of candidates for all our advertised positions.’

Retention
Once staff are recruited they can be assured that excellent career progression opportunities will be available. However, it isn’t just about career progression. The trust is also quite clear about the importance of working conditions, availability of resources and personal and professional support to retain the good staff they have.

A key feature of the trust is emphasis on the importance of the environment. There has been heavy capital investment, which means that the buildings are fit for purpose and pleasant to work in. Investment in IT and resourcing makes teaching easier and better.

‘Where we know there is a deficiency then we make funds available. For example, we have just given a grant to one school to develop provision in the early years,’ says Simon.

One of the trust’s objectives is to grow the effectiveness of its workforce. The commitment to initial teacher training, cross-trust support and career progression means that this is one objective the MAT should have no problem in fulfilling.
In transitioning to CEO, the prime change for me as a headteacher who took a very pro-active role in the school community was the significant shift in my relationships with pupils, staff and parents.

As responsibility increases to multiple schools it isn’t feasible for the headteacher to be the point of contact for day to day school eventualities. While it was no loss to miss out on daily ‘nitty gritty’, it was difficult at first to accept and execute a more detached position.

The new rules of engagement
In addition to grappling with the change of role and the initial feelings of guilt and detachment, it was essential that the message of my movement to a new role was communicated to all stakeholders. This was vital in ensuring that all members of the school community were clear on the new ‘rules of engagement’ and that misperceptions weren’t created by my progression to a more strategic role.

Moving to executive head, the first change for me centred on relationships rather than needing to undertake any new learning. The usual measures of performance which exist for a single school were extended to multiple settings and while this provided greater challenge for me, I felt fully versed in understanding those measures and the methods of achieving them.

It was important for me to empower my senior leaders and pass on responsibility and opportunity to them. I also had to develop a focus on the outcomes of all the development plans presented to me rather than the actions which would secure them.

Small changes, big wins
Another change was the removal of the need to be on site first thing in the morning as the responsibilities which dictate this presence are carried out by the SLT at the setting. Even small changes like not leaving home until 9.30am provided a couple of hours of quality working time as I then spent 20 minutes travelling to the schools rather than more than an hour sitting in rush hour traffic!

The working day of an executive headteacher or CEO is far more flexible than that of a headteacher. Initially there is almost a guilt presented in this, but the flexibility allowed me to manage the significant rise in workload and maintain a level of personal wellbeing.

A whole new ball game
My move into the role of CEO was far more of a learning curve… a very steep one! The responsibilities of being CEO are markedly different to that of being an executive headteacher and the accountability to the board of trustees and members is a whole new ball game.

The increased level of business, sales, marketing and finance acumen required to fulfil the role of CEO is notable and once again the presence of specialists around me with those specific skills was pivotal to my success.

I believe the key to embracing the role of CEO is to listen as much as you can, speak knowledgeably about education (our area of expertise after all) and be open about requesting, and accepting, help. Where possible, I have broached new situations independently and tackled the matter in hand to the best of my ability, without letting on that at times I felt somewhat out of my depth!

As CEO, I experienced a significant increase in the level of personnel with whom I was liaising. As a headteacher my most ‘highbrow’ meetings would be with local councillors at the town hall whereas as CEO I find myself meeting with MPs and Lords at Westminster!

Throughout my career, I’ve needed strength and resilience to combat a natural fear and lack of confidence when presented with new tasks and challenges. However, I believe that an unflinching vision, core purpose to make a difference and intrinsic ambition for impact are the key features of success for any individual and the practical elements of their pathway are by far subservient to character and aptitude.
I spend a lot of time building capacity with senior leaders in schools and the same question comes up every time: how can we increase capacity and develop staff with budget cuts and time constraints? Here are five cost- and time-saving approaches you can use to help support and develop your SENCO.

1. Interviews and induction
As a senior leader/SENCO, one of the questions I ask all teachers at interview is: ‘What can you tell us about the graduated approach?’ This terminology should be familiar to potential candidates and is a requirement for QTS. Since the Carter Review in 2015, ITT and ITE has moved on leaps and bounds in terms of SEND training provision for trainees. The NASBTT SEND ITT Toolkit (www.nasbtt.org.uk) has information to support setting/placement partners, mentors and school-based tutors.

I believed CPD was more than just training sessions, workshops or discussions. I would source relevant articles and send round a copy to staff with a top cover sheet. Staff were expected to read, sign and pass on. When the Code of Practice was first published, we adopted a similar approach, allocating different chapters to be read by relevant phases. This proved a great strategy for induction, challenging unprofessional practice and evidencing staff knowledge on the SEND reforms.

2. CPD
Staff are the largest cost in any budget and should also be our greatest investment spend. Since the introduction of the 2014 Children and Families Act, many schools have adopted the ‘drip-feed’ model to SEND CPD, which is far more effective than overload through half a day or a full day.

This involves dedicating 10 minutes in each (or every other) staff meeting to discuss SEND. In early years and primary the drip feed can occur weekly. In secondary and FE settings department meetings work well. It’s vital that between meetings mini gaps are set to change practice in the classroom and this can be monitored through learning walks.

**Remember:** Your approach to CPD is one of the points that need to be addressed in the SEN Information Report. You could state: ‘We regard SEND to be an important issue. We discuss it regularly at our meetings, so staff are up to date.’ Then list what topics have been covered and the impact.

**Top tip:** This could be done at the beginning of the meeting to enable support staff to attend and then leave.

3. Information portal
Give your SENCOs time to set up four folders on your shared drive/portal on the four areas of need (Chapter 6). In each, they can also set up sub-folders to cover research, resources, useful contacts, dyslexia, working memory and so on.

As staff go on training or come across new information, they can file it in the relevant folders. If you have a child or young person arrive with identified needs, staff can undertake background research by searching the folders.

4. Defining QFT
For me, understanding the three principles of the Code of Practice (pages 19 and 25) is fundamental. Many settings fail to clearly define, jargon-free, what quality first teaching (QFT) looks like in their organisation and thereby fail to articulate what reasonable adjustments and ‘additional to and different from’ provision is in place. It’s also important to be clear on the difference between differentiation and personalisation.

**Top tip:** Encourage staff to read the 2014 Sutton Trust publication, ‘What makes great teaching?’

5. Paperwork
Support your SENCO in minimising paperwork, enabling them to spend more of their time on learning in the classroom. Ask your SENCO to draw a flow chart of the paperwork they have to do and consider such things as whether there is duplication, whether the information is synthesised and used collectively across the setting, and whether the information is used at the point of planning and delivery. Finally think about ways to reduce paperwork and enhance provision and the recording of impact.

**One final thought**
Encourage your SENCO to read the ‘Take Time ebook: time management tool for SENCOs’ – it will change their life! It’s available at my.optimus-education.com/take-time-ebook-time-management-tool-sencos
Raising the achievement of disadvantaged pupils

What does the research tell us about effective strategies for narrowing the gaps? Where might you focus your pupil premium spend? LIZ WORTHEN explores findings from useful reports.

Reports such as the DfE’s ‘Supporting the attainment of disadvantaged pupils’ (November 2015) share findings from research into differences between schools in the performance of pupils from disadvantaged backgrounds. What are schools that have been successful in narrowing gaps doing compared to less successful schools? What can we learn?

1. There’s no single, quick fix solution

The 2015 DfE report found that on average, schools had used 18 strategies since 2011 (when pupil premium funding was introduced). The most popular strategies focused on teaching and learning.

Leaders in schools that were more successful in raising the attainment of disadvantaged pupils said that there was no single intervention that had led to success. Implementing strategies in greater depth and paying attention to detail seemed to be more significant.

These leaders also said that it had taken around three to five years to see the impact of changes introduced on pupil results.

2. Treat pupils as individuals

One of the seven recommendations from ‘Supporting the attainment of disadvantaged pupils’ is to:

‘Have an individualised approach to addressing barriers to learning and emotional support, at an early stage, rather than providing access to generic support and focusing on pupils nearing their end-of-key-stage assessments’.

For example, staff in more successful schools are more likely to:

• identify the barriers to learning for each individual pupil
• select or devise interventions which were appropriate to individual needs
• put effort into supporting individuals
• identify issues early.

Lambeth Council’s report, ‘Raising the achievement of white working class pupils’, echoes this finding, highlighting the importance of data. Schools that were more successful in raising achievement had a focus on tracking individual pupil progress:

‘...in these schools they realise the potential of every pupil. They know the data and they identified the percentages as actual children. Real children and real progress matters to them and they translate numbers into action. They use data effectively for school self-evaluation and tracking pupil performance.’

3. Have high expectations

This is the top recommendation from ‘Supporting the attainment of disadvantaged pupils’ and, along with addressing attendance and behaviour, forms the basic building block for raising attainment.

Don’t assume that the reason disadvantaged pupils have lower attainment is due to a lack of resources and support at home. Be wary of focusing pupil premium funds on compensating for poverty or providing access to resources (e.g. subsidising equipment, uniform and trips; providing computer access) at the expense of promoting attainment.

Similarly, ‘Raising the achievement of white working class pupils’, calls for leaders who:

• promote a culture of high achievement
• prioritise teaching and learning
• provide role models for the communities they serve
• have a strong commitment to raising achievement.

4. Self-belief matters too

The Sutton Trust’s report, ‘Believing in better’, explores the influence of young people’s aspirations, their beliefs about their ability and their school experiences in shaping A-level outcomes at 18.

The research found that ‘academic self-concept’ – a student’s beliefs about their academic performance and abilities – plays a significant part in A-level outcomes, ‘over and beyond the important influence of background’.

• Students who had a stronger belief in their own abilities in English and maths at age 13 to 14 were twice as likely to go on to take three or more A-levels than those with less...
favourable views of their own abilities.

- Students with a stronger belief in their own abilities in Year 11 (aged 15 to 16) were almost four times more likely to go on to take three or more A-levels than students with a weaker belief.

The impact of self-belief is also mentioned in the Social Mobility Commission’s report, ‘Downward mobility and opportunity hoarding’, which identifies locus of control as an influencing factor.

‘In terms of social and emotional skills, early low attainers are found to have lower self-esteem and are less likely to have a sense that they are in control of their own destiny’, whereas ‘a high locus of control could result in individuals being prepared to put more effort into study or work.’

5. Do your homework
The ‘Believing in better’ report links good homework habits and the home learning environment with self-belief and better academic outcomes.

Spending two/three hours a night on homework in Year 9 almost tripled the likelihood that a student believed getting a university degree was very important.

The report recommends:
- providing support to help students engage in self-directed study
- making sure students do sufficient homework
- encouraging students to read more.

6. Timetable carefully
The Sutton Trust’s interim report, ‘Improving the impact of teachers on pupil achievement in the UK’, highlights the difference that an effective teacher makes, particularly for pupils from disadvantaged backgrounds:

‘…over a school year, these pupils gain 1.5 years’ worth of learning with very effective teachers, compared with 0.5 years with poorly performing teachers. In other words, for poor pupils the difference between a good teacher and a bad teacher is a whole year’s learning.’

If high quality teaching is a key factor in raising attainment, then are you thinking carefully about who is teaching your disadvantaged pupils? For example:
- do pupil premium students feature in timetabling discussions?
- if you set by ability, do you find that your lower sets have fewer or less able students? And if so, who teaches those sets?
- do you try and avoid split classes for vulnerable groups?
- are you supporting early intervention by ensuring good teaching early in the key stage, rather than always putting your most effective teachers into Year 6 or Year 11?

Seven building blocks for success
By comparing more and less successful schools, the DfE study identified seven building blocks for success.

1. Promote an ethos of attainment for all pupils, rather than stereotyping disadvantaged pupils as a group with less potential to succeed.

2. Have an individualised approach to addressing barriers to learning and emotional support at an early stage, rather than generic support and focusing on pupils nearing their end-of-key-stage assessments.

3. Focus on high quality teaching first rather than on bolt-on strategies and activities outside school hours.

4. Focus on outcomes for individuals rather than on providing strategies.

5. Deploy the best staff to support disadvantaged pupils; develop skills and roles of teachers and TAs rather than using additional staff who do not know the pupils well.

6. Make decisions based on data and respond to evidence, using frequent, rather than one-off assessment and decision points.

7. Have clear, responsive leadership: setting ever higher aspirations and devolving responsibility for raising attainment to all staff, rather than accepting low aspirations and variable performance.

Food for thought
For some other perspectives on social mobility, see Debra Kidd’s blog post ‘Class confusion’ and Sonia Blandford’s TES article ‘We must end this obsession with working class gentrification’. They question the implicit assumption that being ‘working class’ is something to escape from and that everyone should aspire to a place at university and within the middle classes.

Research reports for reference
‘Believing in better: how aspirations and academic self concept shape young people’s outcomes’ Sutton Trust (2016)
‘Improving the impact of teachers on pupil achievement in the UK – interim findings’, The Sutton Trust (2011)
‘Raising the achievement of white working class pupils: barriers and school strategies’, London Borough of Lambeth (2014)
Managing high parental expectations

Over-engaged parents can be challenging for schools to work with. FIONA CARNIE offers ways for schools and parents to build and maintain successful relationships.

Schools cannot educate children to reach their maximum potential on their own. In our complex, diverse and fast changing world it is unrealistic to think that one institution can take sole responsibility for young people's learning. Every child is an individual with different talents and needs. Providing the experiences, creating the opportunities and addressing the challenges which will help each one to make sense of their world and chart a way forward is a considerable undertaking. It is crucial therefore that parents and teachers work together.

Knowing the child

Most parents know their children better than anyone else and that knowledge is key to ensuring their child's needs and aspirations are taken account of. Teachers must also get to know their pupils. As American educator, Ted Sizer, said, 'I cannot teach a child that I don’t know well'. Teachers and parents working in partnership are most likely to be able to provide the mutual care and support to help children thrive.

According to researcher John Hattie, parental engagement in their child's education makes a difference of two to three years in the child's progress. The onus is on schools to ensure that they do everything they can to build a positive home school partnership so that all parents understand how they can best support their child.

Over-engaged

While many schools struggle to involve their parents, others have the opposite challenge. Parents with high expectations are sometimes seen as too involved or 'over-engaged'. At fee-paying schools expectations on staff can be even greater. Parents who have invested financially sometimes put pressure on a school in an attempt to guarantee high results for their child.

To schools, this over-protectiveness can seem counter-productive, getting in the way of children becoming independent and self-confident. The relationship with parents of boarders provides yet another challenge. In their absence they may want constant reassurance that all is going well. At the other end of the spectrum they may be hard to contact when the school needs to be in touch.

It is a fine balance and if relationships with parents are not well-managed, this critical partnership can easily be damaged. How then can schools work with their parents to get the best outcomes for all of their pupils?

Channelling parent expectations

First and foremost is the need for a shared mission. If parents understand what the school is trying to achieve for their pupils, what their child is learning and how they as parents might best support them, this dispels the need for constant contact. Too often schools fail to provide adequate information which means that parents can feel in the dark.

Providing an outline of the curriculum, letting parents know about homework assignments and offering information and ideas about how they could help their child are all beneficial. Schools also have a critical role to play in ensuring that pupils are not put under too much pressure, either at school or at home. This is particularly true in dealing with highly ambitious parents.

Children in the UK are some of the most tested in the world, and there are concerns that the stress that this causes may contribute to the increasing prevalence of mental health issues in young people. It is crucial therefore that schools clearly prioritise children's wellbeing by focusing on their all-round development. Communicating this to parents and providing regular opportunities for discussion helps to channel expectations.
High quality and timely communication
Secondly it is important to have clear lines of communication. Gone are the days when annual parents’ evenings and yearly reports were the main vehicles for dialogue between home and school.

In our world of instant communication, schools can use social media, apps, email, text-messaging and the school website to keep parents up-to-date. Phone calls home and face to face contact are invaluable too. If parents are properly informed this reduces the need for them to be in constant contact. Providing regular feedback on progress is much more effective than taking action when things go wrong.

It is important though that communication is not just a one way street. Parents can’t help being concerned about their children and need to know that if they are worried about something they can get in contact and will receive a timely response. Having a clear communications policy, drawn up with parental input, can help to ensure that schools are communicating with parents in ways that meet the needs of both parents and the school.

Skilling up staff
Thirdly, there is a need to consider staff training requirements. The majority of teachers do not receive any training to work with parents. Many lack confidence in this, particularly young or inexperienced staff.

Parental engagement can be included in formal CPD or Inset days to build a whole school approach. Parentkind (www.parentkind.org.uk/), in association with Parent Councils UK, runs a range of workshops and provides resources to support this work.

Alongside more formal training, staff can be supported with coaching and mentoring, or by shadowing more experienced staff. Sitting in on meetings or phone calls conducted by senior staff can be invaluable. Small group staff discussions can also be helpful in identifying and troubleshooting specific issues that arise.

It is not just teaching staff who benefit from training opportunities. All those who come into contact with parents (such as reception and office staff, learning mentors, classroom assistants and family liaison workers) need to be equipped to work with parents. Using role play to practice difficult conversations can help to build confidence.

Parent partnership: a force for good
For many schools, a focus on parent partnership requires a cultural shift. Transition is a critical time to start the dialogue with parents. Clarity about expectations from the outset can lay the foundations for a good working relationship.

There must also be ongoing opportunities for parents to contribute to discussions about those aspects of school policy which affect them. When they are involved in this way it creates a powerful sense of partnership. A parent voice group such as a parent council or forum can provide a valuable framework for such dialogue. By listening, the school is better placed to meet the needs of its community.

There are lots of other ways in which parents can contribute. Parents can be invited to share their skills and knowledge on different aspects of the curriculum. They might be able to help in the classroom or assist with after school clubs. Some may be able to offer work experience opportunities for pupils. Others might work in community or arts organisations which can arrange visits or supply resources. Asking parents how they can support the school sends a clear signal that they are valued.

Working together
Teachers and parents are allies – all wanting the best for children. By developing a shared mission and working together, parents will better understand the many challenges of running a school and teachers will be better placed to help their pupils.

Those schools which have an open and caring ethos and where all parents feel welcome will be most successful in building a genuine partnership to support children. As the saying goes, it takes a village to raise a child.

LPPA
The Leading Parent Partnership Award will help you develop and implement strategies to engage all groups of parents in supporting their children’s learning and development, from early years to post-16. Find out more at oego.co/OE-LPPA
Reputation is synonymous with success in education, none more so than within the independent sector. There are many factors which can influence parental decision making when it comes to choosing a fee-paying school for their children, but the reputation, respect and credibility afforded by the school brand plays a significant part.

Independent schools carry a reputation not only for academic excellence but for less tangible benefits too, such as access to the best universities. It is certainly true that coming from a prestigious school may carry weight when it comes to entering professional life.

The academic gap between the state and independent sector is not what it once was, and coupled with rises in fees, private schools are having to work harder than ever to encourage parents to part with their hard-earned cash.

Successful state boarding schools offer an alternative, with parents funding purely the boarding element of their child’s education, typically at a third of the cost of private schooling. Wymondham College, the largest of the 37 state boarding schools in England, sits academically in the top 5% of non-selective schools in the country, offering a direct challenge to surrounding independent schools.

Realising that academic excellence alone isn’t enough to attract parents, independent schools are increasingly using slick marketing campaigns. Against this backdrop, what strategies can smaller independent schools adopt to cope with competition from high-flying state schools and the squeeze on disposable household income?

Unique selling points
What makes your school standout? If the academic gap between state and private is narrowing then schools needs to define what makes them unique. Smaller independent schools ought to focus on those qualities which differentiate them from competitors – the defining characteristics that set them apart from larger opposition. Unique selling points (USPs) can be identified during a value mapping exercise to help define and articulate key messages.

These simple exercises allow focus groups of staff and students to develop core values that underpin their unique brand. The values, phrases or strap-lines can be integrated into the marketing strategy and used consistently across all campaigns. It is by identifying and fine tuning those unique characteristics that smaller independent schools can seek competitive advantage over larger rivals.

Branding
Understanding what makes your school competitively distinctive is a huge part of the marketing battle. A structured approach to marketing can help not just to recruit new pupils and staff but to define core values, articulate key messages and develop a strong brand.

The brand is always unfolding, and new fans of the brand are always embracing it and helping to live and tell that story. Defining our key messages and articulating them in a way that resonates with our audience builds our brand. If we want our school’s message to stick and be memorable, it needs to be told as a story, with a hook, a plot and heroes.

The competitive edge
Marketing plans will identify specific elements of the school offering which ought to be highlighted to new prospects. With state funding moving away from non-core subjects such as the arts and music, independent schools can heavily promote these aspects of school life, knowing that they may well have a competitive advantage over their state sector rivals. Their abundance of extra-curricular activities and well-equipped grounds and facilities offers something different to other schools.

By identifying the elements which give competitive advantage, independent schools can then adopt multiple approaches to promoting them. Research from the 2017 Private School MarCom report, ‘Brilliant ideas & brain food for private school marketing and communications’ (www.inspiredsm.com/2017-marcom-survey-download), indicated that social media is readily
adopted to communicate on all levels, with most schools running Pinterest, Twitter and Facebook accounts for their alumni, sports groups and whole school activities.

The report highlighted word-of-mouth as the most effective marketing tool (82% of respondents), closely followed by direct parental referral and tours of the school, underlining the value of traditional, face to face promotion.

Smaller schools can cement their reputation by being consistent in their promotion of key messages and their USP, whether that be unrivalled SEN provision, unparalleled levels of extra-curricular choice and such like.

Communication, consistency and clarity
The communications arm of a school marketing strategy covers areas such as business continuity, managing public relations and crisis management. Not all news is good news, and the way a school reacts and responds can play a significant part in determining how badly, if at all, a reputation is tarnished.

The two pillars of a communications strategy are consistency and clarity, which if adhered to, can help schools steer through negative publicity. Reputation is built on trust; parents and other stakeholders are likely to be more willing to accept negative press if their perceptions of the school are fundamentally positive.

Re-engaging with communities
For smaller private schools, adopting an outward facing approach to the local community can be advantageous. Supporting local business, charities and third sector organisations helps promote positive messages and perceptions of the school and builds brand value.

Having a business directory, accessible from the school website, can be a way of introducing a win-win solution with like-minded commercial supporters. This is especially true with smaller, local suppliers for whom the business relationship with the school may be especially important. Being able to formally advertise their relationship with a reputable local private school could offer real benefits to that business and a small annual fee for advertising in an online directory would be quite a cost-effective proposition.

The school alumni community is a valuable network for local business: online directories, business breakfasts and advertising within annual yearbooks offer considerable opportunities for business. The business network offered by Millfield School in Somerset, for example, demonstrates the extent to which schools and business can collaborate.

Once USPs and key messages are identified, you’re equipped to identify and approach suitable commercial partners or sponsors who share the school mission and philosophy.

Working closely with a wider range of audiences such as state primaries, for example, helps reach new markets. Proactive engagement with feeder schools, nurseries and prep schools, supported by well drilled admissions and enrolment processes can also help smaller schools maintain relationships and keep abreast of local issues, addressing parental concerns at a micro level.

Social responsibility
Surveys carried out by Populus (www.isc.co.uk/media/2589/2012_attitudesurvey_isc.pdf) indicate that people support the offering of bursaries by independent schools to children from lower income families (59%). There was also a net agreement (51%) on sharing sporting facilities as well as sharing lessons, knowledge and skills with state schools.

This survey demonstrates that the public recognise the variety of approaches that independent schools can take to live up to their responsibility as charities. There is a great deal that local independent schools can offer to their communities, engaging in a way which cements their reputation as a viable and socially responsible alternative to state schooling, rather than an insular, elitist club.

Download the school profile template to communicate your school ethos, achievements and development to potential pupils and the rest of your community my.optimus-education.com/school-profile-template

Unique selling points can be identified during a value mapping exercise
Preparring an asset management plan

Schools need to have an up-to-date asset management plan, but what does it include? CAROLINE COLLINS provides a checklist for governors and guide for SBMs

The Schools Financial Value Standards (SFVS) states: ‘All schools should have an asset management plan which includes a strategy for developing, adapting and eventually replacing buildings, which is part of the school’s overall planning for delivery of education’.

What is an asset management plan?
A good plan would cover three key areas: premises improvements including a costed three to five-year plan, planned maintenance including costed maintenance contracts register and ICT assets.

The school’s three to five-year premises maintenance and improvement plan may be kept as a separate document but should be incorporated within the asset management plan. This could be as an appendix or fully integrated within the asset management plan, and so making the premises plan surplus to requirements.

Like any policy or procedural document, the asset management plan needs to be current, clear and unambiguous and shared with staff.

Premises improvements
In this section the plan states why improvements are important, the school’s strategy for maintaining and improving the premises, how potential projects are identified, how contractors are selected and how the school ensures that projects are good value for money.

2. Planned maintenance
A planned maintenance section should outline routine cyclical maintenance, listing what maintenance is carried out in-house and what is out-sourced. An outsourced section should list details about the contract, including who it’s with, the frequency of maintenance and the date of the last maintenance visit.

The plan should then go on to cover the use of contractors, outlining how contractors are commissioned, whether a contract is already in place, and how value for money is achieved. The plan should also refer to financial management, for example with a statement like that used in the premises improvements section, outlining how the school ensures it complies with relevant financial management policies.

3. ICT assets
The final section should cover all ICT assets, including asset register information on its location, what information it holds, who is responsible for maintaining it, how it’s maintained and how it’s checked. It should also cover assets on loan, what the school policy is for loaning ICT assets and how the school manages them.

How the school disposes of its equipment should be explained, along with what it will do with any assets that are obsolete and of no value to the school (e.g. donation, disposal etc.). A section on general security would include where and how ICT assets are stored, access to assets and ensuring the recording of serial numbers in the asset register.

The plan should include computer security information, listing the dangers to hardware, what the school is doing to minimise the danger of loss or theft and what users must do to minimise the risk of damage. It will also cover dangers to software through unauthorised access and accidental loss of data and the risk of corruption from viruses.

Finally, the procedure for the unauthorised use of software and data protection should be explained. It will correlate with the school’s data protection policy and outline which member(s) of staff is authorised to send data to third parties and by what means. It should clearly state what action will be taken by the school in the event of any breach of the plan and policy.

Who is responsible for producing the plan?
Ultimately the governing body has responsibility for producing the school’s plan and reviewing it on an annual basis. Like most school plans and policies, somebody in school needs to provide the information to the governors, or, more commonly, draft the plan.

The person most likely to have most, if not all, the information needed is the SBM, with input from the ICT coordinator, technician or network manager and site manager.

Head to my.optimus-education and search for ‘asset management plan’ to download the checklist.
What’s in this month’s School Business Management section?

Staff wellbeing has been a top priority for members recently. We’ve been exploring how to track and evaluate impact in this area (see page 34 for ideas). Staff absence levels can be an indicator of staff wellbeing. Hilary Goldsmith has been totting up the real cost of absence in terms of learning opportunities lost, and suggests ways to reduce spend. But it’s not just schools in the state sector that are feeling the economic pinch. Some independent schools, particularly smaller establishments, are struggling under the weight of competition and economic uncertainty. Justin Smith provides a six-step plan for improved income generation on page 28. Collaborative purchasing may be another way forward: chief operating officer Karen Sayers-Irving shares how her MAT is striving for better value services. And while a staff restructure may look like a valid way of creating efficiencies, it brings its own challenges and costs. Take heed of lawyer Heather Mitchell’s advice before acting!

Liz Worthen, Head of Content

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How to carry out a compliant restructure

Restructures can be painful. Ensure you plan and prepare appropriately to minimise negative consequences with this 10 step guide from education lawyer HEATHER MITCHELL

'The main thing that staff want to know is how they are potentially affected and what their options are'

There are two main reasons you may be considering a restructure: you need to save money, and/or your current staffing structure no longer meets your needs. Follow these 10 steps to ensure that your restructure is done in a way that:
- is legally compliant and minimises the risk of legal challenge
- considers staff morale and minimises the disruption to teaching and learning
- complies with good practice while minimising prolonged uncertainty.

1. Is restructure the best option?
If the main driver for your restructure is staffing cost, consider other options first. For example, do you have a high level of staff absence that’s draining your budget? If so, can you improve your absence management process and reduce that cost? Simply instigating a consistent procedure for return to work interviews could make a difference.
Are there fixed term contracts you can end? Do vacancies need to be filled? Don’t let adverts go out for a post without first checking if a ‘like for like’ replacement is really needed.
Are you getting full value from your more experienced (and more expensive) staff? Are you making use of appraisal or performance management processes?

2. Plan carefully. What will it cost?
Planning is key to a successful restructure. Start by checking what it will cost.
Restructures are expensive! Take account of pay protection, which is three years for teachers and typically one year for support staff if redeployed to other roles on lower pay.
There is a strain on the pension when any LGPS member over the age of 55 is made redundant. This can be expensive so ask your pension authority for an estimate of costs in advance. LGPS members who are 55 or over must access their pension if made redundant and the employer must meet the cost of pension strain – so get costs in advance.
Check your policy to see if you offer enhanced payments, and check your funding agreement as the ESFA may fund redundancies (in some but not all cases).

3. Work out timings
When do you want your new structure in place? Work back from that date to see when the process needs to start. It’s probably earlier than you think, particularly when you take into account contractual notice periods (October, February and May for teachers; no specified date but up to 12 weeks for support staff).
If your restructure involves teachers, work back from the notice dates and ensure steps in policy, including dismissal meetings, happen in time. Don’t forget half term holidays: exclude them for the purpose of the process. Make sure you add in contingency for slippage of dates.

4. Be aware of numbers
If your restructure is likely to result in more than 20 redundancies, there are additional requirements to take into account. An HR1 Form must be completed if 20 or more staff are at risk. Be warned: if you miss their notice periods you cannot make any redundancies. Note that consultation periods are longer if 20 or more redundancies are being made within a 90 day period.

5. Put together your business case
Having a clear business case document is a vital. It will be shared with staff and used as the basis for consultation. Your business case should:
- summarise the case for the restructure and who and how staff are affected
- outline the process involved and timelines
- include your current and proposed organogram, along with any financial implications.

All staff must receive a copy of the business case, including any absent staff. It should also be sent to your trade unions. You may want to share the
business case with trade unions before any announcements to staff. However, there is then the risk that if internal reps are made aware, information gets leaked to staff.

The main thing that staff want to know is how they are potentially affected and what their options are. Ensure this is as clear as possible to minimise uncertainty and have meaningful consultation.

Your business case should include details regarding who is deemed to be in each selection pool and why. Give careful thought to this; don’t rely on job titles alone. Seek advice, don’t have favourites and don’t use selection pools as a way of dealing with poor performance. Include proposed selection criteria or methods in the business case so that they are part of the consultation process. Consider how you will select for redundancy (if redundancies are likely to occur).

6. Consider offering voluntary redundancy
Offering voluntary redundancy (VR) is a way of reducing the number of compulsory redundancies. However, offering VR does carry risks, such as losing key or high-performing members of staff.

- Decide if VR will be offered to all staff, or affected staff only (or to none).
- State clearly that voluntary redundancies will be accepted on an individual and case-by-case basis, ensuring the needs of the school and pupils are met.
- Requests do not have to be agreed (but seek advice).
- Ask for VR ‘declaration of interest forms’ to be completed by the end of the consultation period.
- You can incentivise VR by offering pay in lieu of notice.

7. Consult
Staff can raise very genuine points or proposals during consultation which may alter the new structure – that is the point of consultation. Be ready to listen and take on board feedback.

Consultation meetings are held on a one-to-one basis with the employee and a representative (if applicable). Notes should be taken. Have redundancy figures ready and decide in advance about any enhancements for volunteers.

8. Provide support
Be ready to offer support to displaced staff. For example, giving paid time off for interviews; helping staff in updating their CV; providing interview tips or practice; allowing time to access support from trade unions.

Be aware that some staff may not have applied for a job in a number of years – and it can be a daunting prospect. If you are in a MAT, you have a duty to consider suitable alternative roles in other academies.

9. Expect the unexpected
Restructures can have an internal impact and bring about unexpected or negative consequences. In some cases staff have gone on strike, or passed a vote of no confidence in the headteacher.

Restructures can leave staff demoralised; those who remain might be affected by ‘survivor syndrome’. With termination meetings likely to be held in the summer term exam period, you may even find that pupil performance is affected. There could be an external impact too, such as negative reporting in the local press, or parents or staff writing to Ofsted to complain.

Seek support and advice where needed. Communicating your business case clearly and conducting appropriate consultation should mitigate the risk of negative consequences.

10. An opportunity for change?
If you could design staff contracts from scratch, would they include pay protection, enhanced sick pay and so on? Is your TLR structure fit for purpose? Is the need for TLRs justified in every case? Some academies and trusts are moving away from traditional models. A restructure could be an opportunity to think differently and make changes.

Example timetable
For the new structure to be in place for September, the process starts in January.

<table>
<thead>
<tr>
<th>Action</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trade union officials notified</td>
<td>w/c 9 January</td>
</tr>
<tr>
<td>Formal announcement staff meeting</td>
<td>16 January</td>
</tr>
<tr>
<td>Individual consultation meeting</td>
<td>w/c 23 January</td>
</tr>
<tr>
<td>Consultation ends</td>
<td>3 March</td>
</tr>
<tr>
<td>Selection process begins</td>
<td>15 March</td>
</tr>
<tr>
<td>Outcome of selection process</td>
<td>w/c 21 April</td>
</tr>
<tr>
<td>Formal dismissal meetings (if applicable)</td>
<td>w/c 10 May</td>
</tr>
<tr>
<td>Appeals (if applicable)</td>
<td>June</td>
</tr>
<tr>
<td>Outcome of appeals (if applicable)</td>
<td>June</td>
</tr>
<tr>
<td>Termination date</td>
<td>31 August</td>
</tr>
</tbody>
</table>

The information contained in these notes is based on the position at November 2017. It does, of course, only represent a summary of the subject matter covered and is not intended to be a substitute for detailed advice.

CONFERENCE
HR & Employment Law in Education
Want to hear from leading education law firms and gain clarification on the top employment law issues and cases that will affect your school this year? Come to the 17th employment law conference, updated this year to include the GDPR and a mock disciplinary. Details at oego.co/ELU-HR (3 May, London).
Counting the cost of staff absence

Staff absence is one of the hardest budget areas to predict. Hilary Goldsmith looks at the real cost of staff absence, and what can be done to reduce it.

Most school business leaders will have a fair idea of their staff turnover factors, average maternity costs, likely incremental progression and any planned changes to the staffing structure due to retirements, departures or changes to the curriculum. But the one area that can cause even the most locked-down budget to burst its seams is the cost of covering staff absence. Impossible to predict and tricky to manage, staff absence is a huge issue for leaders, and with supply costs ranging from £160 to £250 per day, it’s a cost that can cripple schools in more ways than one.

In term of supply costs alone, if an average daily supply teacher costs £200, and a school has just one teacher off sick each day, that’s a whopping £38,000 a year. As we know, the teaching profession is also under immense pressure: incidents of stress-related absence are increasing year on year, and the length of time that absent teachers are away from work is also on the rise.

A teacher on long term sick leave for six months, on full pay, can cost a school close to £20,000. Add a couple more teachers off sick, plus the day-to-day absences of minor injuries, ailments, colds and flu, and an average secondary school could easily be looking at a six-figure absence bill.

The hidden costs

And that six-figure sum is just the cost of putting a body in a classroom. What are the hidden costs of a three-day sickness absence?

- One single day of absence is five hours of lost learning for 30 pupils, for say, five lessons a day. Over three days, that’s 2,250 lost learning opportunities. To contextualise that further, that’s the equivalent of the guided learning hours of 18 GCSE German courses.

- It’s also three break or lunch duties that might not be covered, increasing the risk of incidents of poor behaviour or bullying. That’s two hours of unsupervised time.

- On top of that there’s the time for other colleagues to pick up those behaviour incidents and deal with them. That’s maybe another three hours.

- There’s the admin time of booking supply, inducting them, setting cover work, photocopying it, delivering it, and paying the agency invoice. Let’s say three more hours.

- Then there’s the lost meeting time, one hour a week, lost collaboration and CPD opportunities, another hour, and let’s not forget the two hours of PPA.

- That’s a total impact of 2,260 hours. For just three days.

So what can we do?

There are some obvious first steps. Cover supervisors are employed in many schools to pick up the first days of an absence, but after day three most absences will need to be covered by a qualified teacher. Cover supervisors might cost you around £18k per year, which is the equivalent of 90 days of daily agency supply. So, if your school is experiencing more than 90 days of short term sickness a year, this might well be a cost-effective solution for you. However, that relies on the absence being split evenly throughout the year, and not all happening in the same cold week in January!

Many primary schools buy into a sickness absence insurance scheme. Fewer secondary schools have opted into such schemes, as traditionally a larger staff has given more opportunity for internal cover. But as the cost and impact of sickness in the teaching profession increases, more large schools are turning to insurance schemes as a way of limiting their financial exposure.

Another solution might be that departments arrange cover between themselves, on a mutual basis, knowing that if they are ever off their classes will be covered by a respected colleague. Some schools operate a system where staff can volunteer to take on cover lessons which are then banked to be taken off at a later, agreed time. Others have a pool of casual supply teachers who they employ directly, who are retired or part time, are happy to help when needed and don’t incur those costly agency charges.

The real solution, of course, is prevention. Much work is being done in the education sector to research and highlight methods of protecting the wellbeing of school staff, and our hope is that solutions will be found and implemented nationally. However, schools themselves have a vital role to play in creating an environment which builds staff wellbeing into its operational and strategic priorities.
The role of middle managers
Middle managers are critical to the effective management of sickness in the workplace. Team leaders should be able to gauge the mood and wellbeing of their staff through daily interaction. A morning catch-up over a cup of tea, and a chance to share the woes and stressors of each other’s lives, is a way to support each other and build relationships. It’s also an opportunity for the manager to pick up the early signs of a struggling colleague and to intervene with support strategies to help them through difficult times.

A consistent approach to absence management is also vital. The return to work meeting (RTW) is a perfect opportunity for the middle manager to really explore the cause of the absence, not just how to get the employee back into the classroom again as soon as possible. Schools should arrange training for middle managers, particularly those new to the role, in how to carry out an effective RTW meeting. Many new managers will have little to no HR experience, and staff who receive an invite to such a meeting may be tense, expecting a punitive approach. If the RTW meetings are conducted appropriately and consistently, they will become a normal part of the absence process.

Only human
Finally, never forget that people get sick. They don’t mean to, they don’t want to, but they do. Don’t lose sight of the person behind the sick note. For many employees, being absent from work can be hugely stressful in itself. Having to miss vital lessons, set cover work, catch up with meetings, emails and marking make taking time off far from easy. While it’s essential to manage absence from work, it’s just as important to keep an eye on those who do turn up and struggle on, pushing their minds and bodies to breaking point, when they really need to stop and rest.

The return to work meeting is an opportunity for the manager to explore the cause of the absence

'Schools have a vital role to play in creating an environment which builds staff wellbeing into its operational and strategic priorities'

Tips for a productive return to work meeting
- Welcome your colleague back to work, check how they’re feeling and if they’re able to resume their full role. The focus should be on them and how you value their return – not just what they missed and how others filled in for them.
- If they have a medical certificate, talk through any advice given by the GP about any temporary adjustments and how you can accommodate them. Any complex adjustments, or those with an impact of more than a few days, will need to be referred to your HR team or occupational health provider.
- Discuss the nature of the absence and if there might be any underlying causes of which you are not aware. For example, the colleague may have become sick or injured through an activity they took part in outside of work; they may be worn out by caring for an elderly relative or young child. Or there may be a workplace issue (such as workload, bullying, or a difficulty with another colleague) that needs to be explored.
- If you feel there is room for improved attendance, an attendance target should be set and the employee must be made aware of the possible outcomes if their attendance does not improve. Refer to your school’s own policy on the details of next steps, but ultimately, staff need to be made aware that continued absence could put their job at risk.

Download an example absence management policy from my.optimus-education.com/absence-management-policy-and-procedure
Income generation for independent schools

When generating income, smaller independent schools need to find creative ways to compete with larger schools. JUSTIN SMITH provides six strategies to try

A survey of bursars from the independent school sector, carried out by accountancy firm Scott-Moncrieff, found evidence of unease about the financial future of the sector, with growing concerns that smaller schools may struggle. Competition comes from rival private schools and the growing number of high achieving state academies and free schools.

Income generation strategy

To balance the books, establishing a coherent income generation strategy is vital. Understanding what the school is looking to achieve and developing a structured programme to suit is the first step towards realising those aspirations.

The plan should consider all six cornerstones of income generation:
1. Lettings
2. Donations
3. Grants
4. Events and clubs
5. Sponsorship

Every school has its own strengths and challenges with regards to increasing revenue but each one of these cornerstones should be considered when it comes to supporting specific projects. The plan should encompass the key elements of an executive summary, including:
- situational analysis (understanding the context the school operates in)
- the projects (longer- and shorter-term)

'Business network breakfasts provide opportunities to engage with a new audience'

- the programme (action points and delivery dates)
- resources available
- monitoring and evaluation.

Lettings: school facilities

Traditional sources of income will include facility hire. With school buildings and grounds only used for mainstream education for up to approximately 55% of the year, there is an opportunity to sweat these assets and exploit those empty spaces.

Although more complicated for boarding schools, where a proportion of the student and staff population are on site beyond the traditional school day, with robust safeguarding procedures this revenue stream is still worth consideration. Wymondham College, the largest of the 35 state boarding schools, limits its hire period to outside of term time, but still generates in excess of £150,000 annually in lettings.

An added benefit of facility hires such as this is that it provides an effortless way to market to potential recruits.

Donations

The Gift Aid Small Donations Scheme allows charities to make claims on small donations of £20 or less without the need for obtaining a Gift Aid declaration from the donor. Gift Aid can also be claimed on donations providing an additional 25% on the value of the donation. With exempt charity status schools can claim on payments retrospectively for up to four years.

The latest Independent Schools Council census report (see www.isc.co.uk/research/annual-census) highlighted the number of private schools who have launched their own bursary fundraising campaigns, calling on alumni and parents past and present to contribute.

Some are aiming to be able to offer more than 25% of places as fully funded...
bursary places. Others are hoping to become ‘needs blind’, which means that any child who would benefit from going to the school would be able to have a place, irrespective of their family income.

**Grants**

There is around £1.5 billion available each year in grants and trusts for schools to apply for. There are hundreds of grant funders willing to support schools, though some of these are not available to the independent sector.

It may be worth subscribing to a grants database to help refine the search for suitable funds. Bid writing is a skill and something that develops over time. (For tips, search for ‘How to write that winning bid letter’ on the Knowledge Centre.)

Putting time aside to complete applications properly is essential, and careful consideration should be given to the application guidelines.

**Events and clubs**

Hosting events can be time consuming but they are invaluable when it comes to raising awareness of fundraising projects and the profile of the school in general. Careful planning and preparation can help share the burden, ensuring events are not only successful but eagerly anticipated too.

Encouraging local clubs to utilise school facilities is a great way of generating regular income, and it also helps foster positive relationships. These relationships can be incredibly helpful when it comes to applying for funding too, as testimonials and letters of support from community groups are gold dust when it comes to providing evidence of collaboration and partnership working.

One thing to be conscious of is the pricing structure for club facility hire. There is a tendency to offer spaces at overly-competitive rates so schools should be aware of their costs and local competition before agreeing charges.

**Sponsorship**

Many local and national organisations have a natural desire to engage with our schools. Some may do so for purely altruistic reasons, some may be attracted by the thought of accessing local talent pools for recruitment purposes, while others may view the relationship as beneficial to meeting its corporate social responsibility mandate.

When developing a sponsorship package, it is important to ensure the advantages to the sponsor are clear and transparent. Various levels of investment could be available, with benefits such as advertising in newsletters and publications, regular posts on school social media outlets, a presence on a school commercial business directory and so on.

Hosting business network breakfasts, in association with your local chamber of commerce or another network group, can help reach out to the business community and provide opportunities to engage with a new audience, encouraging support for school projects.

**Services**

The operation of our schools involves a multitude of separate business units, from printing and photography to catering and maintenance. Private schools will often have good quality equipment, facilities and highly qualified staff that can be hired out, at a price, to local businesses.

Additionally, staff with specific skills (maintenance especially) can support other local schools at highly competitive rates.

**Repeatability**

For a small school with limited human resources, it is important to select income generation activities that generate high return with less effort, and those which have an element of repeatability about them.

Regular lettings fall into this category, although there will be some pain before the gain as establishing lettings policies and costing structures takes time.

To make ends meet, schools can either cut costs, increase pupil numbers or increase their fees. Expanding revenue is a far more effective and reputationally enhancing solution as it allows the school to maintain its current pricing strategy while buffering against increased costs with an expanding revenue stream.

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**CONFERENCE**

**Supporting Student Wellbeing in Independent Schools**

Our first conference dedicated to the needs of independent schools takes place on Thursday, 26 April in London. With mental health problems on the rise and anxiety in young people at the highest level to date, it’s vital that staff are equipped with the skills and knowledge to offer meaningful support. Details at [oego.co/Independent-2018](http://oego.co/Independent-2018)
Centralisation and creating efficiencies: a MAT case study

How do you balance autonomy, accountability and value for money in your MAT? KAREN SAYERS-IRVING talks about centralisation and efficiency at Partnership Learning

**Partnership Learning’s motto** is ‘Excellence for All.’ The trust’s vision is to maximise social mobility, giving pupils the same opportunities as most favoured peers. They provide local support for schools in difficulty, and maintain a family of schools alongside the LA.

Partnership Learning is currently responsible for nine schools and 5,000 pupils, across three LAs. They are heavily involved in the free schools programme, with four already open, a further three approved to open and more bids in progress.

Karen Sayers-Irving is chief operating officer at Partnership Learning. She’s been involved in the trust from the start, having previously been business manager at The Sydney Russell School in Dagenham, a founding school in the trust.

Karen is also an ISBL fellow and one of the DfE’s new school efficiency advisors. At the recent Effective Financial Management in Uncertain Times conference, Karen spoke about how Partnership Learning provides value for money through centralised services for its schools.

**What’s centralised at Partnership Learning?**

All of the trust’s schools buy into some central services:

- finance
- HR/payroll
- school improvement
- governance
- assets.

There is a business manager within each school, but the central team provides expertise where specialist advice is needed, for example accountancy support, or the services of the premises team. The central team consists of:

- chief executive
- chief operating officer (including HR)
- director of finance

'A per pupil charge

Unusually, the trust doesn’t top slice from their schools’ budgets. Instead they charge a per pupil fee (£75 in 2017-18; planning to reduce to £65 in 2018-19).

The trust makes use of bought-in services where they think it offers best value for money. For example, they buy in HR and clerking services from EES for Schools (which is owned by Essex County Council).

The trust’s aim is to cut the core subscription fee every year. They can do this by growing the number of schools in the trust, as well as by selling services both inside and outside of their MAT.
The trust has 'levels of expectations' (SLAs in all but name) for the services they provide, even the compulsory buy-backs such as payroll and governance.

**Balancing autonomy and accountability**

Schools in the trust have flexibility in many areas. For example, how they run performance management. However, heads in individual schools cannot sign contracts.

But schools use consistent documentation. The benefit of this was particularly noticed recently with a business manager on long-term sick in one school. Another business manager has been able to cover part-time, and with the same documentation being used, it's easy to pick up what's going on.

The headteachers and business managers in the individual schools manage their own budgets. Of course, there are checks in place and the central team can see the budgets and raise any issues.

Termly business manager meetings play a key part in keeping schools and the trust in touch, with the business managers giving frank feedback about the services the trust is providing.

**Plans for the future**

Centralisation is a process: you cannot (or at least it’s not advisable to) do everything at once. Partnership Learning doesn’t currently have a centralised back office team, and there’s a recognition of the need to balance the drive for efficiency with the upheaval that restructures and changes can bring.

They have a centralised photocopying service, and Karen’s next project is a review of cleaning services. She will be weighing up the pros and cons of tendering out, bringing it in-house, or maintaining their current local authority contract. It’s always about getting the best value for the Partnership Learning schools.

**Challenges**

One of Karen’s main challenges has been stepping away from the day to day SBM role. She’s still based in the school where she was SBM, so both she and the staff have had to learn that she’s no longer the person to tell when there’s a spillage or something isn't working.

Karen is still learning in her role. Sometimes a perceived lack of specialist knowledge can be a barrier to tackling problems. For example, Karen isn’t an accountant, and in the early days of the trust, there was a time when Karen felt they weren’t getting the best financial advice, but didn’t have the confidence in her knowledge to act on that. Having now nearly completed the CIPFA level 7 certificate in school financial and operational leadership, Karen is ready to tackle anything!

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**Impact case studies**

The DfE have added further examples to their schools financial efficiency case studies (see [www.gov.uk/government/collections/schools-financial-efficiency-case-studies](http://www.gov.uk/government/collections/schools-financial-efficiency-case-studies)) to highlight the impact of school business professionals.

In a primary school in Lancashire, the cost of property services was reduced by 50%, thanks to newly promoted school business lead Maria Taylor. Through a careful process of review and following audit trails, Maria was able to identify significant scope for savings. Following a presentation to governors, her alternative system was approved. Not only have the changes saved money for the school, but they’ve saved time and provided the opportunity to strengthen ties with the local business community.

In a nearby special school, strategic business lead Fiona took on the challenge of creating a new, environmentally friendly building, designed to give children a safe space for learning. With Fiona leading on the project from every aspect – engaging with stakeholders, working with the architects and surveyors, fundraising, etc. – the headteacher has been able to focus his time and attention on other vital aspects of school life.

Many local authorities are facing the challenge of needing to create additional pupil capacity in their schools. In Grantham, executive business leader Debra Moore worked with the local authority to access £300,000 of funding, which enabled a primary school to increase their places by 25%. This involved the creation of a business plan, the building of a new classroom, and a marketing plan to ensure the new places were filled.

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**CONFERENCE**

**Achieving Efficiencies**

Karen will be speaking at the new Achieving Efficiencies conference, taking place in London on 9 May. With talks on cost-effective centralisation, benchmarking, procurement and financial self-assessment, it’s a valuable opportunity to meet with peers and learn from other MATs and networks. Details at [oego.co/Efficiencies-2018](http://oego.co/Efficiencies-2018)

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Performance appraisals: what can we learn?

Is it time to overhaul your appraisal processes? NICKII MESSER reviews the research and shares implications for schools

Watching the Winter Olympics made me think about performance management. In particular, the cumulative impact on athletic performance of continual, ongoing, 1% improvements (even 0.01% improvements); the trust between coach and athlete; and the relationship between individual and team.

How well would these ultimate athletes have performed if they only had one annual review, with one set of targets, and limited or non-existent training opportunities?

School staff don’t need to be world class athletes, although the ability to hit the ground running is absolutely a prerequisite! But would the research agree that there are similarities, or lessons to be learned, when comparing what makes for excellence in athletics with excellence in the workplace?

Views from research
I found two research documents particularly helpful in summarising convergent sides of current thinking around performance management.

Firstly, ‘The Performance Management Revolution’ (Harvard Business Review: 2016). This appears to advocate abandoning the performance management or appraisal process altogether, in favour of ‘giving people instant feedback, tying it to individuals’ own goals, and handing out small weekly bonuses to employees they saw doing good things.’ I’m not sure how weekly bonuses would work with current school budgets and, of course, we have a statutory requirement for formal appraisal for teachers. However, the research focuses on the fact that formal appraisal, with a framework for annual review, tends to ‘hold people accountable for past behaviour at the expense of improving current performance and grooming talent for the future, both of which are critical for organisations’ long-term survival’.

Instead, the research advocates a focus on continuous feedback to build individual accountability, within the framework of the team. The research acknowledges that there will be resistance to abandoning the formal appraisal process. However, it judges that this is more about a desire to retain established processes, systems and practices, rather than any justified opposition to a different way of working.

The second research comes in the rather catchy titled ‘Rapid evidence assessment of the research literature on the effect of performance appraisal on workplace performance’ (CIPD: 2016). The CIPD report starts by deriding the Harvard Review’s concept of abandoning formal appraisals altogether. However, it does conclude that formal appraisals may only be constructive if certain essential conditions are met.

- Appraisees feel that the performance management process is fair.
- Feedback is positive and useful.
- Appraisees have a voice in the format of the process.
- There is a relationship of trust and respect between the appraiser and appraisee.
- Appraisees have the right personality to receive feedback positively.

Implications for recruitment
Individual performance management should start at recruitment. Make sure that not only the job description, but also the person specification, clearly spells out the role and responsibilities, the skills and knowledge needed and personal attributes and behaviours required. These should be proactively articulated throughout the entire recruitment process. Likewise, line manager job descriptions and person specifications need to reflect performance management responsibilities and the skills, behaviours and attributes needed to carry them out successfully.

Recruitment is also the time to establish whether or not any potential new colleague will engage with the school’s performance management approach. Whether they will have the desire for continual improvement, an understanding of the need for the highest quality of service provision both as an individual and within the team, and the personality and motivation to receive criticism positively and respond accordingly. As Stephen Covey says: ‘Motivation is a fire
Setting the tone
Your performance management or appraisal process should be clearly set within the context of the school’s values, vision and aims. Make sure that these are clearly shared with all staff. Start the performance management cycle with a whole staff Inset briefing to engender understanding and a sense of shared direction and ambition. Please don’t let support staff miss out on this: everyone needs to hear, understand and buy into these important messages.

A vital aim of performance management is to support every member of staff to be their very best. But have you agreed what ‘the very best’ looks like? Every colleague provides at least one service to the school – whether it be a leadership, management, teaching or supportive service – and many of these services are positioned within established teams. Agreeing and articulating quality of service for each team should be a key team leader responsibility, especially as these need to be aligned to the overall values, vision and aims of the school.

Team appraisal
Following the initial Inset session, and before moving to individual performance management, give teams the opportunity to meet for a ‘team appraisal’. Look back on the past year, celebrate successes and reflect on lessons learned. In more complex settings, a service level agreement can help the team to consolidate their service provision, agree what they need to improve and define what training and support might be required. This process can also help vital cohesion within the team and remind individuals of the role they play as team members.

Individual performance management
Although the Harvard research suggests that formal appraisal no longer has a place in the modern world, it is still invaluable for conducting individual ‘health checks’ and to provide scaffolding for personal and professional improvement plans. However, it should not be seen as an event, and never ‘done unto’. Instead it should be part of a continual cycle with a clear sense of direction and shared purpose, within the context of the school improvement plan and the needs of the team. For teachers, where appraisal is a statutory requirement, this formal annual process should be scaffolded by continual support, encouragement, coaching and an ongoing drive for cumulative 1% gains. (For more detail on 1% gains, see my.optimus-education.com/nqts-building-effective-habits)

Line manager responsibility
The CIPD report underlines the reliance on the abilities and behaviours of the line manager (appraiser) for the process to be effective. The line manager is responsible for building trust, ensuring fairness and making sure that the performance management cycle is a positive process that colleagues have confidence in. Line manager behaviour is crucial in helping colleagues feel safe, valued, inspired and motivated – so that they can try out new ideas, make continual small (but cumulative) improvements, and understand the imperative of providing the very highest quality of service.

Targets
It is useful to include behaviours in performance management targets. Consider how well the colleague demonstrates those attributes pertinent to their role, and how they can be improved. Some examples might be: team spirit, leadership, ability to work on own initiative, remain calm under pressure, able and willing to learn new skills, embraces change, is resilient and so on. Where these are set within the person specification, they can easily become an intrinsic and constructive aspect of performance management.

In conclusion
The most important lesson to take away from this is that performance management should not be taken for granted. Just because it is working, doesn’t mean it is working well, and only constant review and improvement will ensure that it is not only fit for purpose, but is a positive and rewarding experience.

As I summarise, I feel I need to mention the children. I am acutely aware that they have not appeared anywhere in this article and they need to be central to all and every performance management and improvement activity. The Winter Olympics were all about developing top athletes to win medals. Working in school is all about improving the life chances and wellbeing of children. So, recruit wisely, articulate the important messages, and remind everyone why they are working in a school – for the children. If that doesn’t make them want to be their very best, then perhaps they are in the wrong job!

Further reading and references
Demonstrating the impact of staff wellbeing

How do you go about evaluating the value of staff wellbeing activities or initiatives? LIZ WORTHEN provides suggestions

There are a variety of reasons for demonstrating the impact of staff wellbeing activities or initiatives. For example, you may have been tasked with reporting to governors, or justifying a cost or resource time. You might want to know if something has improved, or what interventions have proved most effective. Or you might be keen to share successes with stakeholders.

Whatever your reason for evaluating your work around staff wellbeing, it’s reasonable to assume that you should follow a similar approach to any other intervention, programme or policy.

1. Define your intended outcome.
2. Establish a baseline.
3. Put plans into practice.
5. Evaluate and share your findings.
6. Refine and repeat.

What’s your intended outcome?

It may sound obvious, but you can’t demonstrate an impact without knowing what you wanted to achieve in the first place. What are you aiming to achieve by focusing on staff wellbeing and/or reducing staff workload? It might be one or more of the following.

- Improve retention/reduce staff turnover.
- Reduce staff absence days and cost.
- Reduce number of extra hours staff are working (i.e. outside teaching/core time).
- Improve staff morale and happiness.
- Improve staff engagement and productivity.
- Create a better work-life balance for staff.
- Make our school more attractive for recruitment purposes.

Tempting as it may be to say ‘all of the above’, for the purposes of demonstrating impact to stakeholders, decide on your top one or two priorities.

Establish your baseline

To demonstrate change, you need to know what the situation was at the outset. For example, if your intended outcome is to improve staff retention, you could review your staff turnover for the last three academic years. Is there an average per cent you can use as a baseline?

This might give rise to some useful follow-up questions, such as:

- if your figures for the last three years vary significantly, is there a known reason for this?
- is there a contrast in turnover between teaching and support staff?
- are there particular groups more likely to churn? E.g. early career teachers (2-5 years)
- are there particular groups more likely to stay? Can you identify common factors?
- where did leavers go? Can you access exit forms or interview information for further detail?
- how does your staff turnover compare with other local schools, or schools like yours? How can you find out?

The DfE publish annual reports based on the school workforce census. These include national data on teacher sickness absence as well as teacher ‘flow’, which could be useful for establishing a point of comparison. You can download the reports from www.gov.uk/government/collections/statistics-school-workforce

Identifying a baseline is more difficult for outcomes such as ‘improve staff morale and happiness’ as it’s more about perceptions and feelings. To establish a starting point, you could ask staff for their views on the current situation. A survey would be one way of doing this. Conducting staff focus groups could...
give you the opportunity to probe further and identify particular issues or challenges.

**Put plans into practice**

Using the information gathered from your baseline investigations, decide what you’re going to do (or are doing already) to improve or change the current situation. For ideas, look at the list of suggestions at [my.optimus-education.com/what-do-we-do-staff-wellbeing](http://my.optimus-education.com/what-do-we-do-staff-wellbeing)

Your plans could incorporate a range of activities. For example, if your staff survey and focus groups revealed that teacher workload was the biggest cause of stress, you might plan to:

- review deadlines for data collection, report writing and so on, to avoid ‘clumping’
- review what paperwork teachers are completing – is it all necessary?
- use the workload impact assessment (see overleaf) before introducing a new policy, project or initiative
- overhaul your marking policy and practice
- reduce time spent in meetings
- invest in some productivity training
- put an email curfew in place.

**What’s changed, and how do you know?**

Returning to your baseline measure and asking the same question/s is one way of finding out if anything has changed. However, you may not want to wait a whole year to re-assess your absence rates or find out how many staff have resigned.

Look for evidence that fits with your specific objectives.

Returning to the teacher workload example, your evidence of change and impact could include:

- use of the workload impact assessment has led to a decision NOT to do some things
- data collection processes have been simplified
- attendance at the productivity training sessions
- stories of change e.g. ‘Turning off email at weekends has helped me to spend more time with my family’
- more live marking is taking place in lessons
- fewer exercise books are being taken home for marking
- staff car park is empty at 5.30pm.

**Evaluate and share findings**

Your next question is likely to be: which activities or interventions had the biggest impact? What do we need to make sure we continue doing, and what was less significant? As well as scrutinising your evidence, answering this will probably entail seeking further feedback from staff. Maybe another (short) survey, focus group or interviews with individuals, for example.

Think about how you want to share and celebrate successes. Of course, you need to consider appropriateness and privacy, but successful wellbeing initiatives are a great story to share with stakeholders, your community and prospective pupils, parents and employees.

**Suggestions for sharing success**

<table>
<thead>
<tr>
<th>What</th>
<th>Why</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report to governors</td>
<td>Demonstrate value, show how resources have been used, highlight improvements.</td>
</tr>
<tr>
<td>Social media posts</td>
<td>Share ‘feel good’ stories, demonstrate your values in action and market your school.</td>
</tr>
<tr>
<td>Staff briefing</td>
<td>Maintain staff engagement by sharing outcomes of activities, highlights, what’s coming up next.</td>
</tr>
<tr>
<td>School newsletter</td>
<td>Keep stakeholders informed, communicate changes, seek feedback and celebrate staff achievements.</td>
</tr>
<tr>
<td>Presentation to senior team</td>
<td>Keep staff wellbeing high on the strategic agenda. Share evidence of impact, lessons learned and next steps.</td>
</tr>
</tbody>
</table>

**More resources for promoting staff wellbeing**

- **Staff wellbeing model policy**
  Write a staff wellbeing model policy for your school using this template as a guide. [my.optimus-education.com/staff-wellbeing-model-policy](http://my.optimus-education.com/staff-wellbeing-model-policy)

- **Staff wellbeing poster**
  Put this poster up in your office or staffroom as a reminder of 12 steps to boosting wellbeing. [my.optimus-education.com/staff-wellbeing-poster](http://my.optimus-education.com/staff-wellbeing-poster)

- **Time saving marking: key techniques**
  Keep teacher workload under control with five strategies to cut marking time in half. [my.optimus-education.com/time-saving-marking-key-techniques](http://my.optimus-education.com/time-saving-marking-key-techniques)

- **What do we do for staff wellbeing?**
  Download a list of suggested strategies to stimulate ideas and discussion. [my.optimus-education.com/what-do-we-do-staff-wellbeing](http://my.optimus-education.com/what-do-we-do-staff-wellbeing)

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**Wellbeing is the responsibility of all members of the school community. The Wellbeing Award for Schools (WAS) provides a framework for schools to evidence good practice. Find out more at oego.co/OE-WAS**
Workload impact assessment

Concerned about staff workload? JOSEPHINE SMITH provides a checklist to use before a new or revised initiative is introduced

In the world of education, new policies, ideas, programmes and plans come in abundance. When that new policy or initiative offers the promise of improving pupil achievement, or appears to be approved by inspectors, it’s very hard to say no.

However, ensuring your staff have capacity to take on a new task is vital to its success and their wellbeing. There’s no point in taking on something new if it means other important work will be neglected, or you don’t have the resource to do it properly at the current time.

This simple checklist is one way of health-checking new policies or initiatives before they’re rolled out to staff.

Workload impact assessment checklist

(School name) has an agreed system to monitor the workload and working hours of teachers including members of the senior leadership team and the headteacher. This includes monitoring the impact on a teacher’s workload of the introduction of a new or revised policy.

The following checklist should be used and made available to staff on completion before a new or revised policy is introduced.

<table>
<thead>
<tr>
<th>Policy title: (Proposed) Date of implementation:</th>
<th>Yes/No/Additional notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>The policy complies with and is consistent with teachers’ contractual entitlements (e.g. DfE School teachers’ pay and conditions).</td>
<td></td>
</tr>
<tr>
<td>The policy and any related procedures will be introduced following consultation with the school’s trade union representatives.</td>
<td></td>
</tr>
<tr>
<td>The policy and any related procedures include a specific statement regarding workload impact.</td>
<td></td>
</tr>
<tr>
<td>The policy has been piloted/trialed to enable an assessment of workload impact to be made.</td>
<td></td>
</tr>
<tr>
<td>The policy does not duplicate any other existing policy.</td>
<td></td>
</tr>
<tr>
<td>Any similar policies have been reviewed to assess whether any are outdated and unnecessary.</td>
<td></td>
</tr>
<tr>
<td>The school has identified the resources necessary to support the policy, including staff time, any additional support staffing and appropriate equipment.</td>
<td></td>
</tr>
<tr>
<td>Implementation of this policy will not result in additional meetings/activities that have not been identified within the school calendar, published and revised in consultation with staff.</td>
<td></td>
</tr>
<tr>
<td>All staff (including the headteacher) have had training to ensure that the policy and any related procedures are carried out without increasing workload burdens.</td>
<td></td>
</tr>
<tr>
<td>The policy and related procedures are reviewed regularly to ensure that additional workload burdens have not been added over time.</td>
<td></td>
</tr>
</tbody>
</table>

Download an editable version of the impact assessment from my.optimus-education.com/workload-impact-assessment-form
What’s in this month’s Teaching and Learning section?

If the prospect of weeks of revision, tests and exams is getting you down, turn first to page 38. It’s a heart-warming case study about a project bringing together nursery children and care home residents for intergenerational activities. Participants both young and old have benefited from sharing time and are forging ‘unbreakable bonds’.

We’ve been pursuing the research theme in this issue: Bradley Busch explores what light cognitive studies can shed on how we develop good independent learning habits, and James Mannion shares the research basis behind oracy – which he believes is as vital as literacy and numeracy in providing a foundation for learning. So how do we best support pupils for whom English is an additional language? In an extract from his training course, Hamish Chalmers explores five fundamentals for an EAL-friendly classroom and shares strategies for teaching vocabulary (see pages 40-42).

A relentless focus on tracking – of progress, revision activities and organisation of work – is a key weapon in Ruth Powley’s armoury when it comes to engaging more able, underachieving boys. Turn to page 44 to find out more.

Contributors in this issue

Dr Karamat Iqbal is an education and diversity practitioner, with a particular interest in disadvantage. He has experience in youth work, secondary/post-16 education and LA advisory work. @ForwardPartners

Ruth Powley has been teaching for 22 years in a variety of roles including head of department, senior leader and consultant. She is currently deputy headteacher at Wilmslow High School in Cheshire. @powley_r

James Mannion is a final year PhD student and an associate of Oracy Cambridge. He’s also the director of Rethinking Education, specialists in evidence-based school improvement and impact evaluation. @rethinking_ed

Sam Attwater is director of nurseries at Aurora Academies Trust (AAT) and holds an NVQ4 in early years. AAT consists of four primary schools and one all-through school in East Sussex.

Liz Worthen, Head of Content

Top teaching and learning blogs

- Bringing video-based CPD into focus oego.co/video-CPD
- ‘Alexa, teach me’: the future of artificial intelligence in education oego.co/alexaAI
- 10 resolutions for new teachers oego.co/new-resolution

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A project for old and young in the early years

Unique opportunities to hone communication skills can be crucial for children in the early years. **SAM ATTWATER** describes how her nursery organised weekly trips to a local care home.

Research and introductions

Bringing young and old together has been something that Oakwood has wanted to do for many years. In 2010, we held a ‘grandparents day’, which proved successful. However, the grandparents who took part were far younger than we had anticipated. We then started to look at what American and Brazilian schools in particular were doing to encourage intergenerational activities. From their findings, we knew that a project of our own would have a positive impact on our early years children.

Previously, when broaching the idea to residential homes, we would get no further than the children being invited to sing on special occasions, such as Christmas. But after the success of the Channel 4 programme, Old People’s Home for 4 Year Olds, we decided to give it another go.

Our initial conversations with staff at Sunrise of Eastbourne made clear that we share many of the same values. We met with Tom Niedzialkowski, activities coordinator, and Fiona White, general manager. Both agreed that it would be a great initiative for the residents to be involved in.

‘The relationship between old and young isn’t a path well-travelled in the UK,’ admits Tom. ‘These days, it often seems that the intergenerational gap has widened beyond reach. Kids gaze at their smartphones and tablets while the elderly wonder where such things will lead.’

After this first meeting, I asked Tim McCarthy, CEO of Aurora Academies Trust, for permission to go ahead with the project. I shared with him the information I had gathered in my research. We also obtained permission from the parents of the children we wanted to take, showing them the risk assessments and safeguarding checks we had carried out.

With parents’ approval, the nursery’s deputy manager, Harriet Sinclair and I took on the task of organising transport to and from Sunrise. Harriet has maintained regular contact with Tom, and together they choose the main activity each week. This is usually based on what children and residents have enjoyed doing the week before.

Organising the visits

Each Friday session is supposed to consist of three parts, but as with many things in nursery, we are often guided by how the morning flows. After the usual welcome greetings, we have around 30 minutes of free play in the care home’s activity room. In past weeks, this has included pantomime and superhero dress-up, ball games, parachutes and catwalk shows.

This time is an important opportunity for the children to re-acquaint themselves with the environment as the residents have breakfast and make their way to the activity room.

Next on the agenda is circle time, which we’ve seen grow in popularity week after week. Singing the ‘hello song’ is our way of reminding everyone of names, which is as helpful to the residents with dementia as it is to the children.
as to the children. We then run the first planned activity of the day, which has included baking, arts and crafts, playdough making and even baking dog biscuits for a local charity!

Structured activities like these allow Sunrise residents to share their past experiences and reminisce about old times. We have found that the children and residents support each other equally during these times, listening and interacting continuously. We have also found that the children can concentrate for longer during these activities than at other times of the day. We believe this is because they need to think more carefully about how they interact with the residents, which is different to how they interact with their peers. They need to be more aware of their voice and articulation. They need to be patient and listen carefully to what the residents are saying.

We dedicate the third part of the day to free conversations and exploration. As relationships between children and residents have blossomed, we have started offering drinks and biscuits at this time. The residents and children sit closely to one another and cuddle. Saying goodbye takes longer each week, but there is always the promise of the next week’s visit. Throughout the morning, care home residents are free to come and go. Initially we had only a couple of residents that would stay for the morning. But steadily these numbers have grown, and on the last visit we saw 12 residents stay for the full day.

Closing the generational gap
It is beyond doubt that the children and residents have benefited from sharing time together and taking part in the same activities. Skills that we often take for granted, but that both groups need to be continuously developing, are where we have observed the greatest improvements since the project began, namely:

- fine manipulative skills
- balance
- memory
- speaking
- listening.

The children are also gaining significant life experience. Just as we know that different cultures have a great deal to learn from each other, the residents of Sunrise have a lot of knowledge to share. For those residents with dementia, having children around can spark memories of the past as the oldest memories are often the last to fade. It was important that the nursery staff team were given dementia training before starting this project, so we could understand the residents and interpret what they say in a way that the children would understand.

Blossoming friendships
Just before Christmas, the Sunrise residents were invited to be the VIP audience at Oakwood’s nativity play. During this time, we introduced one of the parents to a resident, which became a special moment for them both. The mother decided to make a lovely Christmas card with her child for this resident to keep. Watching the child give his Christmas card to his new friend, there was not a dry eye in the house! Moments like these make the visits so special.

You might ask why visits like these are so important to ‘getting it right’ in the early years. In addition to being a day of fun and games, we have seen that each visit supports the children in their prime areas of learning, and improves their behaviour. They have learned to respect difference and develop positive relationships.

‘We can see how much the children’s visits mean to our residents and we can also see how much developmental progress the young children are making,’ Fiona adds.

I’ll leave the last word to Tim, our CEO: ‘This is clear proof that young and old can provide mutual support to each other. It is wonderful to hear about unbreakable bonds being forged between the residents and our children. We look forward to building on this for future generations.’

Read the full programme for our Engagement & Progress in Reception conference: oego.co/Reception-2018
Providing in-classroom support for EAL pupils

In this extract from an in-house training course, HAMISH CHALMERS shares classroom strategies for meeting the learning needs of EAL pupils.

**The purpose of** this training unit is to help teachers understand the importance of their role in supporting the needs of pupils with English as an additional language (EAL) in their classroom and to describe ways in which they can meet those needs. The training unit is part of the EAL for Classroom Teachers course which can be accessed at my.optimus-education.com/training/eal-classroom-teachers.

**Resources and timing**
You will need a laptop and projector, with audio and internet for accessing a YouTube video. It will be helpful to have the Frayer Model and example on a handout for reference, as well as the example content and language objectives.

Using the activities described below, the session will take approximately 45 minutes.

**The five fundamentals**
Introduce the five fundamentals to the group. These fundamentals constitute the minimum requirements for an EAL-friendly classroom. Explain to the participants that to meet the needs of their EAL learners, they should plan and deliver their lesson according to these five fundamental strategies.

1. Determine content and language objectives for each lesson.
2. Connect content to EAL pupils’ background knowledge.
3. Provide comprehensible input.
4. Use cooperative learning strategies.
5. Modify vocabulary instruction for EAL learners.

**Content and language objectives**
Teachers are well skilled in writing learning objectives and success criteria for their English first-language pupils. When you have EAL pupils in your classroom it is important to set explicit language objectives to accompany your content objectives. This clarifies what you are expecting to see and helps them to focus their attention.

**Activity**
Think of a lesson you have just taught or are just about to teach. What was the content objective? How would you phrase a language objective to go with it? Write them both down and share with the other participants in your group. Critically comment on your colleagues’ objectives.

<table>
<thead>
<tr>
<th>Geography Objective</th>
<th>Science Objective</th>
</tr>
</thead>
<tbody>
<tr>
<td>Describe the processes present in the water cycle.</td>
<td>Explain the importance of lab safety and describe ways of staying safe in the lab.</td>
</tr>
<tr>
<td>Write a short sentence for each of the steps in the water cycle. Each sentence should begin with a time connective such as ‘First’, ‘Then’, ‘Next’, ‘After that’.</td>
<td>To use the language of cause and effect in compound (two-part) sentences. For example:</td>
</tr>
<tr>
<td>• If you wear a lab coat then you will protect yourself from chemical spills.</td>
<td>• Tongs should be used to handle hot beakers because hot beakers can burn your skin.</td>
</tr>
</tbody>
</table>
Connect to background knowledge

Explain that the background knowledge EAL pupils bring to each lesson helps them to make sense of what you are intending to teach them. However, pupils who have different cultural experiences to you may have different background knowledge to you.

If they went to school in their home country before joining your class, they may have similar background knowledge which is temporarily ‘locked up’ in another language.

It is important to find ways to allow EAL pupils to activate their existing knowledge as this helps them to make connections between concepts and language. For example, if they have already learned the skill of telling the time in their home language, they do not need to relearn the entire concept of telling the time; they just need to learn the English labels used to demonstrate that skill. They should be supported in making connections between English words and their equivalents in their home language.

Give EAL learners opportunities to demonstrate their existing knowledge to you. This allows you to give them appropriately relevant and challenging learning activities. For example, if you are planning to have your pupils write ghost stories set in an old spooky house, you will find it useful to know that a Thai pupil may conceptualise such a house as small, wooden, with a raised floor and with spirits living in the banana trees in the garden, rather than a large, cold, gothic-windowed mansion next to a cemetery.

Comprehensible input

Language is not just ‘soaked up’. Suggest that participants try listening to a radio news broadcast in Mandarin Chinese (or any other language in which they are not proficient) to get a sense of how futile context-free, passive listening is as a way to learn a language.

EAL pupils need to be given opportunities to experience language delivered in such a way as to be comprehensible. Share this key advice.

- Give time (through slowing down the speed at which you talk).
- Offer visual cues (such as by miming, gesticulating and using real objects and pictures to accompany what you are saying).
- Challenge pupils by hearing language just above their level of proficiency so that they are always in a position to be learning.
- Lecturing in front of the class, even for periods much shorter than you might expect, causes EAL pupils to switch off and become demotivated.
- Instead, aim to make your lessons as visual as you can.
- Introduce vocabulary and concepts with maps, graphs, photographs, videos, drawing and charts.

- Use members of the class to demonstrate. Spend time looking at the figures in text books.
- Present concepts using graphic organisers to allow EAL pupils to experience your input in a variety of ways and to teach them how to organise information.

Activity

Play approximately one minute of the video at www.youtube.com/watch?v=YKBsuOe4oeQ – but don't allow participants to see the screen. (You could set the video to play but switch to a different tab, or ask participants to close their eyes.)

Ask participants to suggest what they think is being discussed. Then play the same section of video, but this time allowing participants to watch.

Ask them again what they think is being discussed, then ask them to suggest what might come next. Can they describe some of the features that they would expect of this kind of ‘lesson’?

Explain that their prior knowledge (of kitchens, chefs, cooking, recipes, cookery shows and possibly Thai food) and the comprehensible input of the pictures have already led them to be much more likely understand the lesson's content.

Cooperative learning strategies

Explain that lecture-style teaching excludes EAL pupils from the learning that is going on in the classroom. However, it is not helpful or equitable to replace this unintentional exclusion with intentional exclusion by removing them from the class to work with a support teacher. A far better approach is to offer regular opportunities for EAL learners to engage in cooperative tasks with other learners, monitored and guided by you or a support teacher.

An important aspect of successful language acquisition is having authentic reasons to use it. When EAL pupils must work with other pupils, especially native English speakers, they stand a better chance of being motivated to use English and therefore to develop their command of it.

Ensure they take an active role in the group tasks and give them specific roles to play. For example:

- emergent EAL pupils can keep a list of vocabulary, and put a tick by it every time they hear it being used by others in the group
- advanced EAL pupils can act as scribes or take on the role of spokesperson for the group, after coaching from other members if appropriate.

Modify vocabulary instruction

EAL pupils need to be explicitly taught the vocabulary needed to succeed in mainstream content areas. This is not limited to low frequency, subject specific vocabulary but, crucially, the high frequency words that occur across a variety of domains in mature...
Providing in-classroom support for EAL pupils continued....

discourse (tier 2 vocabulary).

For example, if you are teaching a science lesson on changing state you might expect to deliberately teach the terms solid, liquid, and molecular structure. However, in order for these to make sense in context, they must be used with transferable words like expand, as a result, and the grammatical form known as the passive voice. (‘When a solid material is heated its molecular structure expands and as a result it changes into a liquid.’)

You should not overwhelm your EAL pupils with huge lists of unfamiliar words presented out of context. Choose those that are absolutely necessary to achieve the content objective of the lesson. Present them first in familiar, colloquial terms, such as by identifying solid things in the classroom like tables and chairs. Then move on to the more abstract concepts used in science.

When the lesson is complete, add the new vocabulary to a word wall so that they serve as a visual reminder and can be referred to on an ongoing basis. EAL pupils need repeated exposure to vocabulary and so should be given plenty of opportunities to see, hear and use them.

Beware also of idiomatic terms which we often take for granted as being self-explanatory. Keep in mind the effervescent headteacher who was so pleased with the progress being made by one of his EAL learners that in assembly he brought her to the front of the hall and said to the school at large: ‘Cho is a shining star. I want you all to take a leaf out of her book’ before sending an utterly perplexed pupil back to her seat.

Activity

Give each participant a copy of a Frayer Model (see diagram). This is a vocabulary development tool that allows pupils to create a visual reference for new terms. It draws on prior knowledge to make connections and personal associations and it encourages critical thinking about words. The word to be learned or consolidated should be written in the centre.

- Pupils should write their own definition of the word (based on teacher or peer input if necessary) in the first quadrant.
- In the second quadrant, they write a bulleted list of the word’s characteristics (with pictures if they like).
- In the third quadrant, they list examples of the word.
- In the final quadrant, they list examples of things which are not the word.

Ask participants to choose a word from the following list and complete a Frayer Model for that word.

- English language learner
- Cooperative learning strategy
- Language objective
- Tier 2 vocabulary
- Comprehensible input

You can share the bilingual example to illustrate.

The Frayer Model

<table>
<thead>
<tr>
<th>Definition</th>
<th>Characteristics</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Bilingual</strong></td>
<td></td>
</tr>
<tr>
<td>Definition</td>
<td>Characteristics</td>
</tr>
<tr>
<td>- Somebody who is able to speak two languages.</td>
<td>- Might have been born in a different country or worked for a period in another country.</td>
</tr>
<tr>
<td>- They do not have to be equally proficient in both languages to be considered bilingual.</td>
<td>- Is able to switch between languages.</td>
</tr>
<tr>
<td>- Might need modified instruction at school if their strongest language is not English.</td>
<td>- People who can speak one verbal language and who can also use sign language.</td>
</tr>
<tr>
<td>- Monolinguals</td>
<td>- Things that can’t speak or write at all</td>
</tr>
<tr>
<td>- My mum</td>
<td>- My mum</td>
</tr>
</tbody>
</table>

Example Frayer Model
The cost of educational underachievement

The benefits of receiving an education are matched only by the cost of not receiving one. **KARAMAT IQBAL** explains why underachievement is potentially life-changing

They say: ‘You don’t know the value of something until it’s gone’, and education is no exception to this rule. It is easy to say that education is a good thing. But why? Given that it is almost universally available and has been so for some time, its value has never come under much scrutiny.

Until three years ago, I had never given a second thought to my ability to go to the toilet or walk. Why would I? Such bodily functions are normal, aren’t they? Well they are, unless something goes wrong, which is exactly what happened. Now that I am back to normal I am conscious of them more than ever before and thankful to God for being so blessed.

Similarly, if we imagined a world without education, we would come to realise its worth and be conscious of how it benefits us, individually and as a society.

**Better livelihood**

The potential of education to enable higher earning and better livelihoods, and to prevent the inheritance of poverty from one generation to the next, is not just true in the poorer countries.

We too can appreciate the wider benefits of education, which go beyond the purely economic – health, wellbeing, social cohesion and community participation. It has been shown that higher levels of educational attainment are likely to lead to higher levels of life satisfaction and better mental health. The opposite is equally true.

Educational underachievement can arise in several ways such as poor school leaving qualifications, dropping out from further education or failure to access higher education. Just as education can benefit us, the absence of education can incur costs.

As well as individual level costs, there can be wider costs at community or society level. The families of those who do not or are slow to reach their educational potential are more likely to be dependent on welfare benefits for a much longer period of time. There are resource or opportunity costs such as poor workforce skills and loss of taxation income.

**Lisa’s story**

With the help of hypothetical case studies from the DfE 2011 report ‘Estimating the Cost of Being “Not in Education, Employment or Training” at Age 16-18’, we can see the typical life trajectory for young people who underachieve at school. The financial cost can accumulate to a large sum over the course of their life.

Based on 2002 figures, for Lisa, the costs were £314,387. She had left school with no qualifications. Soon after, she moved in with her boyfriend in a council flat. She became a teenage mum, and then a single parent after splitting up from her boyfriend. She struggled with substance and alcohol abuse which continued throughout her life.

Lisa occasionally enrolled in further education but then dropped out. She had a few periods in low paid and unskilled jobs. She suffered from ill health, including chronic conditions. She died at the age of 77.

**Vicious circle**

Educational underachievement can be the cause of a particular life trajectory, such as becoming a NEET (not in education, employment or training) upon leaving school. Such a person can have a higher propensity to substance abuse than other young people and be more likely to drink alcohol, smoke and take illegal drugs, all of which can have an impact on their lives.

As well as incurring social services costs, unemployed young people are more likely than others to be involved with crime. The ‘vicious circle’ for such a person can mean greater difficulty in obtaining or holding down a job. The public finance costs of crime relate to police and criminal justice system costs. It has been estimated that the first year in prison for an individual can cost society as much as £105,000.

**The challenge ahead**

In my recently completed doctoral research in Birmingham, I showed that over a 10-year period some 10,000 Pakistani young people underachieved at school. It is worth reflecting on the long-term implications this will have.

How many of them will become NEETs or become involved in anti-social behaviour? In fact, Muslims currently represent four per cent of the general population but 15.2 per cent of the prison population. What can we do as a system or society to meet the challenge through education, so we can transform individual lives, national economies and our world altogether?
Engaging more able underachieving boys

Not all more able students are committed and hardworking. RUTH POWLEY shares strategies used in her school to engage underachieving boys.

In the old world of threshold performance measures, more able underachieving boys were not a focus as they could usually pull C grades 'out of the bag'. However, as we move into the Progress 8 world, the performance, or underperformance, of your more able boys can make all the difference.

Here are 10 strategies designed for impact. For illustrations and accompanying resources, head online to my.optimus-education.com/engaging-more-able-underachieving-boys-strategies-impact

1. Use a tracker to incentivise students

An interactive tracker can be used to keep heads of year and other whole-school staff updated about any issue you want to focus on, such as homework completion, attending interventions or concentration in lessons.

Having the snapshot for a whole year group on one page can create a powerful impression of what is going well and where you need to focus. Conducting conversations with students using the tracker to show how they are doing compared to everyone else can also have a powerful impact on complacent more able boys with an ‘it’s not just me’ mentality.

How do you make it work?

• Ask your data manager or IT expert to design an interactive spreadsheet that teachers can colour code easily. A well-designed spreadsheet should only require the teacher to type the letter R, A or G into a cell.

• Provide a regular opportunity for teachers to do this.

• Provide a regular opportunity for all staff to look at this to draw conclusions and take actions.

• Don’t be afraid to share the information with students.

2. Track the completion of revision activities

How do you know that your more able boys are doing the things that you need them to be doing and not just ‘making the right noises’? For example, have you seen their revision timetables, the books and folders they intend to revise from and how they intend to plan their time?

How do you make it work?

• Set up a spreadsheet with tabs for each form.

• Decide what you want form tutors to check.

• Use a RAG code:
  • green = in place and looks sufficient
  • amber = in place but does not look sufficient
  • red = not in place.

• Find time for form tutors to check what is in place.

• Have a plan for ensuring that every student is green.

3. Use knowledge organisers

Knowledge organisers are an idea from Michaela Community School. They are a way of setting out for both teachers and students exactly what knowledge is vital in a specific curriculum area or topic. Given that underperforming more able boys are often held back by a lack in their organisation rather than their intelligence, they are useful in helping boys to organise their knowledge.

Students can design their own knowledge organiser or use one that you have provided. If they are designing one themselves, ensure that you check it so that students are not learning incorrectly organised knowledge.

How do you make it work?

• Decide what topic the knowledge organiser will cover.

• Identify what every pupil must know by the end of the unit. This could include key words, dates, facts or quotations.

• Adapt an existing template or create a new knowledge organiser with tables, diagrams, and timelines.

• Have a plan for using your knowledge organisers, for example as the basis of in-class quizzes or revision checklists.

Joe Kirby, assistant headteacher at Michaela Community School, provides a detailed guide to using knowledge organisers and an example at pragmaticreform.wordpress.com/2015/03/28/knowledge-organisers
4. Build relearning into curriculum planning
Think about why more able boys underperform. It’s not usually because they didn’t understand in the lessons. It’s because they knew it and then forgot it. Therefore, a key strategy for raising the attainment of more able boys is preventing them from forgetting learning.

Rawson and Dunlosky suggest that students should practice until knowledge is correctly recalled once, but then have three further relearning sessions across a course or syllabus. Achieving this requires careful planning.

For more information, read their research paper on effective practice testing (artofmemory.com/files/rawson-dunlosky-2012.pdf).

5. Use book and folder checks
This links back to strategy 3: more able boys are more often held back by their lack of organisation than their lack of intelligence. More able boys who are well organised and produce clear and thorough work are much less likely to underperform.

Ensure that you build time into classwork and homework for boys to review, organise and improve the organisation of their work. An audit tool will prove useful here, allowing boys to evaluate their own works against the criteria you set for a high standard of work.

For a full example audit tool, head to my.optimus-education.com/engaging-more-able-underachieving-boys-strategies-impact

6. Use parental guidance work packs
The parents of underperforming more able boys can be an untapped resource. More able boys are bright enough not to need teacher supervision; they often just need supervision. Where parents are clear about what is needed they can provide that watchful eye.

Holiday work packs are a useful way of getting more able boys to do the necessary work. Clear instructions for parents can help them to provide effective supervision.

7. Provide more exam practice
More able students can underperform due to the ‘illusion of fluency.’ They may mistake understanding something in the lesson, or when the topic was being taught, for having learned it permanently. Extra exam practice can be useful in giving students more opportunities to practice under exam conditions and therefore to find out what they do and don't know, as well as honing their exam technique. At my school we have instituted ‘Exam Thursdays’ to provide an opportunity for students to improve exam technique and timing. They run each week after school, from the end of March until the start of the exam season. To take part in Exam Thursdays, students need to speak to their subject teachers.

8. Use exam observations
You may find that observing your more able boys in mock examinations tells you a great deal about how they could improve their performance.

• How well do they follow exam technique instructions?
• How long do they write for?
• How much do they write?
• Do they check their answers?

In our English mock exam, we noticed that despite instruction from class teachers and the chief invigilator, only 163 of the 235 students taking the exam started the writing section of the paper first, as instructed. Only 17 students had watches on their desks, and very few seemed to be proof reading at the end of the exam.

9. Insist on high quality oracy
Are you insisting that your more able boys always speak and write with necessary detail and precision? In his blog post ‘10 Silver Arrows: Ideas to penetrate the armour of ingrained practice’, Tom Sherrington nominates ‘say it again properly’ as one of his silver arrows. Every time students give a verbal answer and before they are asked to write anything, ask them to re-form their initial responses into well-constructed sentences using the key words and phrases you’ve discussed. Do it relentlessly, every time.

Question: ‘What does the graph tell us?’
First attempt: ‘It goes up.’
Second attempt: ‘The speed on impact increases as the mass of the trolley increases.’

10. Test regularly for effective learning
Testing allows us to know what we don’t know. More able underperforming boys can be too complacent about what they think they know. Ensure that your learning plans contain plenty of testing:

When is practice testing most effective?
• Repeated tests followed by spaced restudy.
• Feedback on mistakes.
• Retrieval from long-term memory rather than recognition-based tests (e.g., multiple-choice questions).

Some key words and phrases you've discussed:

Question:
First attempt: '10 Silver Arrows: Ideas to penetrate the armour of ingrained practice', Tom Sherrington nominates 'say it again properly' as one of his silver arrows. Every time students give a verbal answer and before they are asked to write anything, ask them to re-form their initial responses into well-constructed sentences using the key words and phrases you’ve discussed. Do it relentlessly, every time.

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Cross Phase | Learning and Thinking Skills

Promoting independent learning strategies

How can we encourage students to take ownership of their learning? BRADLEY BUSCH shares key principles from research findings.

Why do students start a piece of work with the intention of working hard at it, but sometimes fail to follow through with their good intentions? Are they lying, either to themselves or to you, when they make bold predictions about how hard they are going to study either at home or in their free periods?

To answer this question, we must examine the findings of the 'Daffodil Days' study (see the first reference in the list at the end of this article).

Once a year, over four days in spring, students at Cornell University are encouraged to buy a daffodil. All the money raised goes to the American Cancer Society. A month before the daffodils are due to go on sale, researchers asked 251 students if they were planning to purchase a daffodil and if so, how many they would buy. Over 80 per cent of students said they would and that on average they would buy at least two. However, when the researchers went back after the event, they found that less than half of those students bought a daffodil, and those that had had only bought one.

The researchers concluded that a significant gap can exist between someone’s good intentions and their actual following through with the necessary behaviour. This would go some way to explaining why students struggle to revise and work independently.

Helping students become independent learners and take responsibility for their learning is the holy grail of education. The older students are, the more important this skill is. Independent learning requires motivation, concentration and effort.

Based on research studies from cognitive psychology, I've provided a few principles that should be kept at the heart of your teaching.

Encourage a sense of purpose

This is all about getting students to care about what they are doing. If they care about it, they are more invested in it and are more likely to apply themselves. The study ‘Providing a Rationale in an Autonomy-Supportive Way’ illustrated this by manipulating the environment that students were taught in.

- Some were told that they had to study hard in preparation for a test.

'Left to their own devices, people tend to procrastinate'

- Others were told that such hard work was simply expected of them.
- Others were told that what they were learning would help them achieve their goals.

The result? Those who had the explanation as to why learning the topic would be useful to them (i.e. those that had a sense of purpose) rated the material as more important, and were more likely to put in more effort.

If students identify how the material will help them or what skills it will develop, they are more likely to engage. Something as simple as completing the sentence, ‘Doing well at this will help me because […]’, is a good starting point here.

Focus on mastery, not comparison

John Nicholls’ seminal study on student motivation (‘Causal attributions and other achievement-related cognitions’, 1975) found that students can view a forthcoming exam in a variety of ways.

Some of the participating students saw the exam as an opportunity to see how much they had learned, while others saw it as an opportunity to compare themselves with their peers. From this study, Nicholls characterised two different types of motivation: mastery orientation and ego orientation.

The first, mastery orientation, describes students who feel most successful when they have mastered a task. This is usually characterised by individuals putting in maximum effort, and where pleasure is gained by improving and developing their skills. On the other side of the coin, students who feel most successful when they have done better than their peers are said to have an ego-orientation.

The emphasis here is on displaying superior ability and knowing where they rank against their peers.

One study of students’ motivational beliefs (Wolters et al, 1996) concluded that students who compare themselves to others tend to have lower levels of motivation, confidence and self-regulation, as well as performing more poorly academically and
'Independent learning requires motivation, concentration and effort'

having increased anxiety.

To encourage a mastery orientation rather than an ego orientation, teachers can encourage students to:

- measure themselves against their previous effort
- focus on ‘improving themselves rather than proving themselves’
- reflect on what they have learned from each experience.

Remove distractions

Perhaps not surprisingly, the ‘Mind wandering during lectures’ study found that students’ minds were most likely to wander in class on Mondays and Fridays. Presumably, thoughts about the previous or upcoming weekend are just too distracting.

However, research shows that better concentration is something teachers can encourage in their pupils, even from a very young age. Our ability to focus is not a fixed quantity. One study found that simply having your phone out, even if you aren’t using it, can make you perform up to 20 per cent worse in cognitive tests.

One of the most famous studies in psychology, the Marshmallow Test, found that students who did not look at the tempting marshmallow in front of them were less likely to engage with it. It’s not just visual distractions either: a recent study found that students who worked in silence performed 20 per cent better than those who worked while listening to songs with lyrics.

So, to improve student concentration, remove potential distractions from the immediate environment before starting work.

Choose your study partner wisely

Working with other people has been associated with reducing stress, improving performance and developing resilience. It can also help boost focus and work ethic. Such were the conclusions of a recent journal, which found that if the person next to you is working hard then you are likely to work harder as a result. Interestingly, this was found to be consistent regardless of whether your partner was completing an easier, more difficult or even completely unrelated task to yours.

Avoid the planning fallacy

Left to their own devices, people tend to procrastinate. Some studies have found that 75% of students consider themselves procrastinators, with 50% doing so regularly and to a level that is considered problematic. Research suggests that most students are poor predictors at estimating how long a task will take to complete, as they get distracted or face unexpected obstacles along the way. This is called ‘the planning fallacy’.

If a teacher sets small, regular deadlines, they are more likely to help students avoid the planning fallacy. The ‘Procrastination, Deadlines, and Performance’ study demonstrated that this helps students manage their time better and reach better outcomes as a result.

Research reports for reference


'The relation between goal orientation and students’ motivational beliefs and self-regulated learning’, Learning and Individual Differences (1996)

'Mind wandering during lectures I: Changes in rates across an entire semester’, Scholarship of Teaching and Learning in Psychology (2016)

'Psychologists have shown that it’s possible to train one-year-olds’ attention skills’, The British Psychological Society Research Digest (2017)


For regular research digests, check out the Inner Drive blog at blog.innerdrive.co.uk/
Why oracy matters: learning from research

Oracy impacts on cognitive, social and emotional and ultimately life outcomes. JAMES MANNION explains why it should be a priority for all teachers.

Make no mistake: oracy is in the ascendant, and not before time. Search the word on Twitter and you will be faced with a daily flurry of tweets emphasising its importance, or bursting with effusive praise for children’s spoken language skills. This is an entirely welcome development, and long may it last.

However, we should not rest on our laurels. In the grand scheme of things, this is likely to be a Twitter bubble arising from the hard work of a few key individuals and organisations. The truth is that enthusiasm for (and even awareness of) oracy remains a mere trickle when really it deserves to be a raging river, flowing through our classrooms alongside the Amazon and Nile of literacy and numeracy. The Orinoco, perhaps?

What is oracy?
The word oracy was coined by the British researcher Andrew Wilkinson in 1965, who defined it simply as ‘the ability to use the oral skills of speaking and listening’. The choice of word was clearly a deliberate attempt to place speaking and listening on an equal footing with written literacy and numeracy.

Viewed from a historical perspective, Wilkinson was not really trying to elevate oracy to the status enjoyed by literacy and numeracy, but merely to restore it. Throughout the middle ages, rhetoric was a part of the Trivium (alongside logic and grammar), a core curriculum first established in ancient Greece. Indeed, as the political speechwriter Simon Lancaster points out in his brilliant TEDx talk, ‘Speak like a leader’. In London, right the way through to the 19th century, it was possible to get a free education in rhetoric, but not in mathematics, reflecting the importance that was placed on the topic.

Of course, there is much more to oracy than rhetoric. Public speaking, formal debates, philosophical inquiries, group discussions, paired talk, exploratory talk, listening skills and so on. There are many ways for teachers to promote oracy in their lessons, be it as a curriculum to be learned, a pedagogical approach or a method or focus of assessment.

Why does oracy matter?
The research on oracy is clear: the benefits of teaching children effective speaking and listening skills are significant and wide-ranging. Some of the key findings from the research literature are summarised in Table 1, under three headings: cognitive outcomes, social and emotional outcomes, and life outcomes.

There isn’t space to do justice to even this small sample of the research literature here, suffice to say that from an educational perspective, things don’t really get more impactful than spoken language. My own experience of helping young people develop oracy skills is that once they find their voice, their confidence grows. They walk an inch taller, and feel able to take the world on. In the words of Vass and Littleton (2010): ‘It is through speech and action with others that we learn to reason and gain individual consciousness’.

On the one hand, it is profoundly troubling that people’s life chances can be predicted so powerfully by their exposure to and immersion in spoken language as children. On the other hand, it’s empowering (and a little bit daunting) to realise that teachers are uniquely positioned to make choices when planning and teaching lessons that will have a significant impact on the life outcomes of future generations.

How can I get involved?
There are lots of things you can do to get started, or to take things to the next level. Here are some recommendations.

• Thinking Together (University of Cambridge) resources are free and easy to use. Setting up ‘ground rules for exploratory talk’ will transform the quality of pupils’ talk in a single lesson. It’s time well spent.

• Voice 21 is the sister organisation of School 21. Their fantastic resources are free if you enter your email address at www.voice21.org

• The English-Speaking Union also has many excellent free resources, suited to different age groups.

• Watch ‘Speak like a leader’, the TEDx talk mentioned above. Ask pupils to include some of these rhetorical devices next time they present to the class. Review the video (available on YouTube) before sharing this with pupils though – he uses a naughty word around the 16-minute mark!

• Oracy Cambridge is a repository of excellent blogs, covering a range of issues from the role of oracy in inclusion to the difference between
oracy education and dialogic teaching. The links page is a portal to further reading, resources and organisations.

**Top tips**

1. Make oracy visible in your classroom and in your practice. Use the word alongside literacy and numeracy, and make sure your pupils know it too. Have an oracy presence on your classroom walls. This might include drafts of speeches, sentence starters, a shared language of learning or any subject-specific terminology that is relevant to current learning.

2. Work with your pupils to co-create a set of ‘ground rules for exploratory talk’ (also known as discussion guidelines). These should be displayed permanently, large and well placed so that pupils can read them from anywhere in the room. The ground rules should be co-written with each class, rather than imposed from above, and revisited at the start of any discussion task.

3. Consider making speaking and listening a regular part of your assessment regime. The Oracy Assessment Toolkit can help you with this. Alternatively, consider an oracy-based assessment of curriculum content instead of a test oracy-based assessment of written exam. As far as possible, allow pupils to set their own short-term targets for improving speaking and listening. Work with your pupils to devise exercises to practice their skills. Give them ownership over their own learning journey.

4. Model and guide your pupils’ use of language for reasoning. Ask children to give reasons to support their views, engage them in extended discussions of topics, and encourage them to see what makes discussion productive.

5. Over time, explore a range of ways in which you can promote oracy in your teaching, such as through short burst talk tasks, extended discussions, philosophical inquiries, structured debates, Harkness tables, using talking points instead of questions etc. Try using oracy-based objectives alongside curriculum learning objectives, to ensure that oracy is taught, practiced, reviewed and reflected upon as an everyday activity.

Most of all, ensure that your pupils get this message, loud and clear. Yes, there are times in life when you have to sit down and shut up. But there are also times when you need to stand tall and speak truth to power.

### Table 1. The impact of oracy: key research findings

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<thead>
<tr>
<th>Category</th>
<th>Area of impact</th>
<th>Example citations</th>
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<tbody>
<tr>
<td>Cognitive outcomes</td>
<td>Improved attainment in English, maths and science</td>
<td>• Adey &amp; Shayer, 2015</td>
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<tr>
<td></td>
<td>Improved literacy skills</td>
<td>• Bishop &amp; Snowling, 2004</td>
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<td></td>
<td>Improved verbal, non-verbal and quantitative reasoning</td>
<td>• Alexander, 2008</td>
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<td>Enhanced communication for pupils with SEND</td>
<td>• Goatley, 1996</td>
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<td></td>
<td>Transfer of comprehension and reasoning skills to other subjects</td>
<td>• Adey &amp; Shayer, 2015</td>
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<tr>
<td>Social and emotional outcomes</td>
<td>Enhanced communicative and cognitive skills for bilingual pupils</td>
<td>• Akerman &amp; Neale, 2011</td>
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<td></td>
<td>Engagement and on-task focus</td>
<td>• Chiou, 2004</td>
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<td></td>
<td>Social development and peer interactions</td>
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<td>Life outcomes</td>
<td>Greater empathy</td>
<td>• Jensen, 2008</td>
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<td></td>
<td>Ability to handle stress</td>
<td>• Akerman &amp; Neale, 2011</td>
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<td>Overcoming social disadvantage</td>
<td>• The Communication Trust, 2013</td>
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<td></td>
<td>Fewer exclusions and less juvenile offending</td>
<td>• Bryan et al., 2007</td>
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<td></td>
<td>Improved future earnings</td>
<td>• Ashley et al., 2015</td>
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One of the most depressing things about attending CPD sessions is when the self-appointed gurus or odd-ball suppliers of Inset refer to educational research that is dead in the water. Their PowerPoint presentations are littered with fake news, misconceptions and faulty messages often masquerading as neuroscience. Spotting this stuff isn't always easy. A good pitch will use the trappings of scientific respectability and seduce us with the PhD effect of brain metaphors.

Of all the various educational myths, fakes and charlatans we need to debunk, below I name the five that most urgently need lobbing into an active volcano.

1. Learning styles
   Widely condemned as a 'zombie theory' and a 'rusting can of worms', the notion of preferred learning styles – that we have preferences for experiencing information presented in a particular style (e.g. auditory, visual, kinaesthetic), which can lead to better outcomes – is one of the most notorious pieces of edu-claptrap. The academic consensus maintains that no evidence exists to back a 'matching' hypothesis of learning styles. Although pupils can develop subjective preferences for studying or digesting material, there's no proof that they learn better through a self-reported learning style.

2. The learning pyramid
   This bogus favourite lingers in countless presentations and is plastered on many a classroom wall. It purports that we remember 10 per cent of what we read, 50 per cent of what we see and hear and 90 per cent of what we do.
   A possible inspiration for the learning pyramid is Edgar Dale's cone of experience, which caught on without any hard data to back up the claims.
   Different approaches can influence the efficiency in learning, but Dale himself saw the visual aid as a visual metaphor without statistical data. Convincing as these rounded-off generalisations might seem, we need to give them a wide berth.

3. Maslow's hierarchy of needs
   Adding to the complex of phoney pyramids is Abraham Maslow's so-called hierarchy of needs. In fairness, Maslow did not initially conceptualise his theory of motivation and personality as a pyramid. Although the most popular representations take the form of a hierarchy, this never actually appears in Maslow's original work.
   What about the content? Maslow's theory was not based on any credible empirical research, but based on his own personal observations and his biographical scrutiny of individuals who he considered to be 'self-actualized'. Maslow's work is flawed and research has found there to be little or no evidence for the validity of the five-need hierarchy. Needs are not hierarchical but interconnected and part of a dynamic system.

4. Brain Gym
   Pat your head, rub your tummy and press some 'brain buttons' all you want, but the supposed benefits of a 'brain gym' are pure moonshine, with no tangible benefit to your memory, concentration or intelligence.
   The reasoning is that moving and carrying out brain training exercises will lead to optimal learning, but there's no actual evidence of this. Academics have jumped in to point out that Brain Gym is just wishful thinking and should be renamed brainless gym.

5. Multiple intelligences
   First articulated by Howard Gardner in 1983, the theory of multiple intelligences defines intelligence as being a set of specific types rather than as a single, general intelligence. Each person's abilities within each intelligence type are different, and this variance determines our ability to acquire particular skills or knowledge.
   The theory of multiple intelligences is based on an inaccurate description of the mind. Psychometricians point out that Gardner had not conducted any empirical research to test that his 'intelligences' are autonomous faculties, or anything more than talents, preferences or skills.

Lead us not down the garden path
   We need to base what we do in schools on what works, not what doesn't. We need to know when to take a more sceptical approach to educational panaceas. If there is no scholarly, peer-reviewed evidence of success, ditch it.
What’s in this month’s SEN and Safeguarding section?

This is the issue for budding detectives. For teachers, getting to know your pupils with SEND will help you make more informed decisions in the classroom. You’ll find our advice overleaf. The signs of relatively unknown conditions such as fetal alcohol spectrum disorder can be particularly easy to miss, but with timely identification and support, those with the condition can thrive in later life. Turn to page 54 for some compensatory strategies.

Most young people will experience the loss of a loved one, and it’s vital that school staff can recognise the impact of bereavement. On page 59, Zoe Dale explains how you can support the pupils in your care. Whatever you do to enrich their lives, you need to be able to measure the impact. Strategic ethos lead Dave Boden suggests a variety of methods on page 62.

Jack Procter-Blain, Content Executive

Top SEN and safeguarding blogs

- Why we need more ethical SEND leaders
  oego.co/ethical-SEND
- ‘It’s cool to have ADHD’: Marcus’ story
  oego.co/marcus-ADHD
- How to respond to peer-on-peer abuse
  oego.co/peer-abuse

See more at blog.optimus-education.com

Contributors in this issue

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Dave Boden is the strategic lead for the development of Christian ethos at the Grace Academy Trust, where he oversees the embedding of values at every level of school life.

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Understanding your pupils’ learning needs

The purpose of assessment is not to fill checkboxes but to inform better teaching. NANCY GEDGE explains how you can get to know the children you teach

Getting to know the children in your class as learners is vital for effective teaching. If you don’t know what they know (or what they don’t), or what they find easy or difficult, you can’t make effective decisions on what they need to know next. Primary teachers are generally at an advantage to secondary teachers here as they teach the same class every day. Nevertheless, there will always be some children who are easier to get to know than others.

Teachers need to move the learning on for everyone in the class, not just those who like extra attention. Having a system for getting to know your learners means you can avoid such traps. To get to know your pupils, you need to:

- read the paperwork
- understand and use the data
- talk to parents, support staff and pupils
- teach.

'Teachers seem to spend an age filling in online pupil trackers with endless checkboxes'

Read the paperwork

Some children come into your class with very little documentation, and others with reams and reams of it. Where a child has documented SEND, or an EHCP or Statement in place, the class teacher has a responsibility to read the relevant paperwork, no matter how intimidated you might be by it.

SEND can seem like a foreign language to the mainstream teacher, so SENCOs need to be aware of this, and how their teachers might be feeling. At the start of the year, teachers can absorb an enormous amount of information, juggling the demands of the curriculum, planning and marking. Anything that can streamline the process and communicate the essentials clearly will be worthwhile. A brief, one-page profile will prove invaluable in the early days of getting to know your pupils. This could be prepared by the SENCO, and contain information from the child on ‘what helps me learn’.

The assessments carried out by the multi-disciplinary team in the creation of an EHCP are interesting and insightful in themselves. Equally, it’s a good idea to read any notes from Common Assessment Framework or Team Around the Child meetings. It’s vital that you read this paperwork before too much time has passed. Otherwise, opportunities for learning will be lost. A one-pager is useful, but it can never tell the whole story.

Understand the data

We can think of data as something very numerical. Teachers seem to spend an age filling in online pupil trackers with endless checkboxes, which they then spend another age fiddling with so that the levels of attainment that are shown on the tracker match with what they know about the pupil.

However, with regard to literacy in particular, there is more to data than what appears on the computer screen. Schools are stuffed full of important data sources that teachers can mine for information that will improve their teaching and ensure that all learners make progress.

Parents

There is a difference between what children can do in the heightened learning atmosphere of the classroom and what they can do on their own in their homes, and teachers need to pay attention to this and what it might mean. Equally, there are going to be parents who tell us that their children are bored and finding everything too easy.

Support staff

School support staff are invaluable in many ways, but not least for their unique insight into how a pupil is getting on with their learning. Teachers and TAs need to develop ways of communicating so that this information can be shared effectively.

Pupils

Children with literacy difficulties, which can manifest as memory problems connected to dyslexia for instance, are often far more aware of what helps them to learn than we give them credit for, and they become more able to tell us as they grow up.

Sometimes it is a case of reading...
the instant feedback in terms of their behaviour. At other times, something more formal such as a pupil conference or review meeting gives us the opportunity to hear their views.

**Summative assessment data**
There are huge amounts of literacy data you can collect, through tests such as the Single Word Spelling Test (SWST), Helen Arkell Spelling Test (HAST) and New Group Reading Test (NGRT). Many schools will also hold more formal writing assessments at specific points in the academic year. Bringing these different forms of data together will help teachers to build up a better picture of a learner and their needs.

**Use the data**
While tracking progress is important, especially for those pupils we are worried about, we can also use this data formatively, that is, to help us to plan more effectively for learning in the future. With this in mind, it is important to get the right tool for the job – and also remember that one tool can do several jobs.

For instance, both the SENCO and the school’s literacy lead can use dyslexia screeners or age-related dyslexia screening tests to identify the literacy difficulties pupils have experienced and how to best address them. Then follows a more in-depth diagnostic assessment, using tools such as GL Assessment’s Dyslexia Portfolio. Alternatively, you could contact the British Dyslexia Association for an assessment from a specialist teacher.

Spelling assessments and tests are another example of how you can use summative assessment to inform teaching strategies. An analysis of the errors a pupil is making in their spelling will help you to understand what their barriers to learning might be and which teaching strategies are likely to be most effective. It may be that your school needs further training or a refresher in teaching spelling.

It is important that any assessment leads to action (remember the assess, plan, do, review cycle) and that SENCOs and literacy lead teachers work together to catch not only those pupils with very pressing needs, but also those ‘at risk’ learners who so easily fall between the cracks.

**Teach**
It is worth remembering that the most important, and old fashioned, way of getting to know the pupils you teach is, simply, to teach them.

Talk to them, sit with them, mark their work with them – don’t resort to handing them over to someone else, or presume that because they have a SEND of some kind that they somehow belong to someone else. Putting in the time is fundamental to all pupils making progress in their learning.

Download our example of a student passport – a one-page profile of vital information – from the Knowledge Centre at my.optimus-education.com/student-passport-template
Identifying and supporting pupils with FASD

It’s easy to miss the initial signs of fetal alcohol spectrum disorder. JOANNA GRACE suggests some compensatory strategies.

Unlike conditions of similar prevalence, such as autism spectrum disorder (ASD), little is known about fetal alcohol spectrum disorder (FASD). Incidence of FASD is rising steadily in the developed world, and approximately two to five per cent of the population of the UK is thought to have the condition (in comparison, ASD is thought to affect one per cent). But whereas many teachers would be able to describe at least one strategy for supporting pupils with ASD in their school, the same is not true of FASD.

Speaking at a conference on inclusion, Professor Barry Carpenter named FASD as the leading cause of learning disabilities in the UK. The assumption that the condition is rare has made it difficult to persuade commissioners to fund assessments and support services. This leaves schools with a near-invisible population of pupils with very high care needs.

What is FASD?
FASD is a physical disability in the brain. The brain is physically altered as a consequence of prenatal exposure to alcohol, with parts missing, reduced in size or not operating correctly. The scale of damage is different in each individual, determined in part by how much the mother drank and at what stage of her pregnancy she drank. Some of the symptoms researchers have observed include:

- reduced neuroplasticity
- motor delays
- deficits in the area of the brain responsible for attention
- poorer impulse control
- difficulty understanding time and ‘cause and effect’
- poorer working memory
- poorer executive functioning
- poorer social awareness
- difficulty in coping with stress.

These primary disabilities can sometimes have broader consequences, such as inappropriate sexual behaviour, learning delays, mental health issues or emotional and behavioural problems.

Common misconceptions
The SENCO should not be expected to do the work of a diagnostician, but being aware of how the condition manifests can help you to recognise and support the affected pupils in your care. Let's start with three basic misconceptions.

1. The condition cannot be that serious if I haven’t heard of it.
Pupils with FASD have a variety of cognitive, behavioural and neurological impairments, including structural brain damage. These become more severe with age and are at risk of becoming serious co-morbidities in later life, including an increased risk of suicide. Early intervention can significantly improve life chances for young people with FASD, so it is important that schools are able to recognise the signs.

2. You can identify someone with FASD by their facial features.
Although it is true that some people with FASD will display a unique set of facial features, including pronounced epicanthal folds around the eyes, a thin top lip and flat filtrum, these would seem to be a quirk of genetics occurring only in approximately 10 per cent of cases. Up to 90 per cent of individuals do not present with physical abnormalities, which greatly hinders diagnosis. The presence of the facial features associated with FASD does not indicate the severity of the condition. The most severely affected individuals may not have the facial features commonly associated with FASD.

3. FASD is the same as ADHD.
FASD is commonly misdiagnosed as attention deficit hyperactivity disorder (ADHD) and the conditions share many traits. ADHD is the most common secondary condition with which someone who has FASD may be diagnosed. However, several researchers have highlighted the risk that children with...
FASD may be misdiagnosed with ADHD due to their similarity (Kingdon et al. 2016). Distinguishing between the two conditions is vital.

- Young people with FASD do not respond as well to stimulant medications commonly used to treat ADHD. While the relevant medication might help a child with ADHD, giving the same medication to a child with FASD has no proven therapeutic benefit, and certainly won’t help their learning.

- Young people with ADHD and FASD experience executive functioning difficulties, but these are more pronounced in the latter group. In individuals with FASD, executive functioning weaknesses are most consistent for measures of planning, fluency and set-shifting. FASD is also associated with global executive impairments.

What can a school do?
There is evidence to suggest that teachers can help young people with FASD develop the neurological skills they may not acquire naturally. This is something you might already do for pupils with other conditions. For example, those with a visual impairment can be taught information about the physical world that sighted children acquire incidentally, for example that rooms have ceilings.

For FASD, you may need to overtly teach social awareness where the brain does not have the capacity to acquire these skills. Planning interventions that will develop a pupil’s self-regulation and executive functioning skills are likely to prove more effective than using that same intervention just to cover curriculum content. It’s also a good idea to develop skills for memory and attention giving (Pei et al., 2013).

Positive behaviour strategies
One of the leading research teams, Pei et al., has stressed the importance of recognising that the behavioural challenges young people with FASD can present are a consequence of neurological impairment, not wilful disobedience or non-compliance.

Behaviour is influenced by an individual’s personality and their environment. While we are not able to change the way the brain works, we can change the environment to which the brain responds. Teachers can remove barriers to learning for pupils with sensory needs by enriching the classroom environment. If we are to trust the modest amount of research, the same is true for FASD.

What isn’t clear is what an ‘enriched environment’ for FASD would look like, but it ought to be one where pupils are explicitly aware of their activity within that space. The busy, bright displays of your average primary school classroom are not likely to make learning easy for these pupils – consider something that engages the senses but set against a muted background.

Encourage exercise. For pupils with neurological impairments, aerobic exercise can be a good way to start redressing the balance. You can find a guide to encouraging low-level sustained aerobic exercise for different groups via The Sensory Projects (see: www.thesensoryprojects.co.uk).

Identify strengths. What are your pupils good at? Tapping into a young person’s strengths in order to compensate for the other areas in which they struggle should be our primary responsibility. If a pupil likes to sing, how much lesson content can you fit into a song?

References

Register your place at the Annual SEND Update conference to gain classroom strategies for every type of need: oego.co/SEND-2018
Questions for interviewing SENCO candidates

Getting the interview right is crucial to finding a SENCO who will meet the needs of your pupils. LORRAINE PETERSEN offers some example questions.

The ideal SENCO interview process should last at least half a day, and give pupils and parents the opportunity to help find the most suitable candidate. The order in which the interview process takes place may vary, depending on the day the candidates are interviewed.

Firstly, pupils lead candidates in a walk around the school, explaining each area and answering any questions the candidate may have. They will gain an impression of the candidate which they can feed back to the interview panel once the tour is completed.

A group of pupils on the SEN register should then have the chance to ask the candidate a few questions, grading each answer on a scale of one to five. The supervising teacher then feeds back the answers to the school's interview panel, which comprises the headteacher, the SEN governor, a teaching assistant and a parent of a child with SEND.

After these questions comes the ‘desk task,’ an opportunity for the candidate to demonstrate a sound awareness of the school's SEND policies and procedures. This could involve giving the candidate a copy of the school's SEN Information Report, and asking them to describe what the school is currently doing to support pupils with SEND and how they might improve the quality of provision over the next 12 months.

At the end of the day, the interview panel conducts a formal interview with each candidate, recording comments and observations where necessary. There should also be time throughout the day for candidates to spend time with pupils and meet other members of staff.

These example questions will help you determine a candidate's suitability for the role. You can adapt them to meet the needs of your setting.

<table>
<thead>
<tr>
<th>Question</th>
<th>Mark</th>
<th>Comments and observations</th>
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<tbody>
<tr>
<td>Why do you want to be the SENCO at this school?</td>
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<td>What do you like doing outside school?</td>
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<td>How would you help me if I was having trouble with my work?</td>
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<td>What skills will you bring to this role?</td>
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<td>What are the aspects of the job you:</td>
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<td>• are looking forward to?</td>
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<td>• think might be challenging?</td>
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<td>Do you have a favourite book or author, and why?</td>
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<td>What is the best lesson you have ever taught?</td>
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### Questions asked by the panel

Candidate:

<table>
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<tr>
<th>Question</th>
<th>Comments and observations</th>
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<tr>
<td>What duties does the SEND Code of Practice place on schools?</td>
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<tr>
<td>What are the main responsibilities of the SENCO as set out in the Code of Practice?</td>
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<td>What experience and skills do you have that will benefit you in your role as SENCO?</td>
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<td>The SENCO role can be very demanding. How would you prioritise your time to ensure that you are effective in your role?</td>
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<tr>
<td>In order to become a SENCO, you must complete the National Award for SEN Coordination within three years of appointment. What will you benefit from completing the award?</td>
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<td>What have you done to develop your knowledge of SEND in the last six months?</td>
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<td>How would you support and develop the skills of TAs to ensure they are used effectively?</td>
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<tr>
<td>The Code of Practice states that there should be a member of the governing board or a subcommittee with oversight of SEND provision. How would you ensure that this individual has a robust understanding of the school’s SEND policy and practice?</td>
<td>How do you think the SEN governor might assist you as a SENCO?</td>
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<td>How would you describe an inclusive school?</td>
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<td>The school is due an Ofsted inspection this year. How would you ensure that you and your colleagues are fully prepared for the inspection?</td>
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<td>How would you ensure that teaching staff have the knowledge and skills to meet the needs of all learners?</td>
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<td>What resources have you used in the past to support pupils with SEND?</td>
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<td>How might you use technology to support a pupil with a learning difficulty?</td>
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<td>If a new pupil arrives with limited information, how would you assess the pupil? What tests would you consider appropriate?</td>
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<td>Why is transition to the next phase of education an important process for pupils with SEND?</td>
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<td>How would you prepare a pupil for transition? What information would you share with their new school?</td>
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<td>What steps would you take to involve parents in their child’s progress?</td>
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<tr>
<td>In order to ensure that all pupils have their needs met you may need to commission specialist services to support you in your work. How will you ensure high quality as well as cost-effective support and provision?</td>
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</table>
Too often the focus of SEND provision is those pupils with more complex needs or EHCPs. This means that young people with SEND who are identified at school support stage are not receiving appropriate help, especially under the current funding arrangements. Coupled with a suspected raft of illegal exclusions, SENCOs have a lot to overcome as they advocate for young people and their families.

What can we do?
The need for more funding, resource and trained professionals becomes ever more apparent as I speak to different schools and families. How can we make as great a difference as possible with the money we have?

While I don’t think I can give a definitive answer to that question, I can explain what works well for us and what constitutes a ‘good investment’ for colleagues. For a while now, I have championed a whole-school approach to meeting individual needs. In fact, considering the issues outlined previously, the economies of scale and wider effectiveness of a whole-school approach are now integral to SEND provision.

Each school and setting is different, and there isn’t a one-size-fits-all approach. However, I doubt many schools have the luxury of being able to use historic models of intervention and support, such as dedicated one-to-one literacy support and centralised specialist teaching teams. This is a sad reality, no doubt about it. But no school can afford to forget the many young people with SEND who don’t have EHCPs. Helping them to reach the best possible outcomes has to be a collective responsibility.

Meaningful training
How leaders coordinate CPD and staff training is an important part of a school’s approach. It’s clear that schools are no longer wedded to five whole-day Insets; often some of these are disaggregated and form ‘twilights’ throughout the year. My advice is now to undertake an audit of staff training requirements. From that audit, ensure you schedule appropriate training that will meet the needs you’ve identified. There’s nothing worse than having to attend a meeting or training session that has little relevance to you, especially if you have a pile of books to mark or exams to plan for.

To put it simply: targeted training will have the greatest effect on teaching, which in turn constitutes the most effective support for all young people (not least those with SEND but without an EHCP).

Clubs and interventions
Consider the interventions you carry out and the clubs you run. Are they still going simply because they’ve been running for ages? Have you taken any time to analyse their quality or impact? Having these critical conversations with your pastoral team and academic colleagues will help give you a better understanding of what you currently offer, and how you can refine provision. Look at your existing provision. If you cannot identify the impact it’s having on your pupils’ outcomes, is it really a useful spend? Don’t be afraid to make difficult decisions – only be afraid of making them without sufficient evidence.

Think big
Now is the time to think about your curriculum offer, options and planning for September. Meet with your SEN governor and headteacher, to discuss the identified needs of your pupils. What do you do? What could you do differently? Start thinking!

The whole-school approach
A whole-school approach is cohesive, collective and collaborative action in and by a school community that has been strategically constructed to improve student learning, behaviour and wellbeing, and the conditions that support these. It consists of an inclusive curriculum offer, leadership that values diversity, a truly inclusive whole-school approach and the education of staff, other adults and peers.
Supporting bereaved pupils

Coming to terms with bereavement can be especially difficult for children and young people. **ZOE DALE** offers advice for staff

**Bereavement and loss** are essential to the human experience. At some point in their childhood or adolescence, most children will experience the death of a loved one. Often they will manage this grief with the support of their family and friends.

The death of a parent or main carer remains the most traumatic and painful loss for a child. Following the loss of a parent, 19 per cent of children continue to experience significant psychological problems, such as trauma or a prolonged grief reaction, one year later, according to research by William Worden (1993).

Children do not have the emotional resources or cognitive capacity to stay with feelings of grief for a prolonged time (a common adult experience). The Child Bereavement Network likens this to ‘puddle jumping’, whereas in contrast adults ‘may wade through rivers of grief or become stuck in the middle of seas of distress’.

After losing a loved one, children may swing from crying one minute to playing the next. This can be distressing for their parents or carers, who may also be grieving, to observe. This fluctuation in mood does not mean the child isn’t sad or they have finished grieving. On the contrary, it can form an important defence mechanism against becoming overwhelmed by loss. It is also normal for children to feel depressed, guilty, anxious or angry with the person who has died, or another close person to them.

Some children will struggle to express their feelings through words, so exploring sensitive children’s books about death (such as Michael Rosen’s *Sad Book*), drawing pictures and playing with puppets or figures are important alternative ways of expressing feelings.

**The developmental perspective**

A child’s stage of development partially determines their ability to grieve and understand the notion of death. Children below the age of seven struggle to realise that death is permanent, and may confuse it with sleep. They may believe that the person will come back, as the concept of ‘forever’ is difficult for them to understand.

Younger children have difficulty distinguishing between thought and action. They may become convinced that the person died because they were angry with them, or did not love them enough. Regressive behaviour may occur, with periods of bedwetting, thumb-sucking and seeking greater comfort. Seven- to 11-year-old children begin to grasp the finality of death, but may have difficulty processing that it will or could happen to them.

In early adolescence, young people begin to accept that they too will die. However, the significance of death is not fully realised until adulthood. Even as adults, we continue to struggle to accept our own mortality. Children and young people who have experienced significant loss or multiple bereavements may come to understand the inevitability of death far sooner than their peers.

**The grieving process**

Parents and carers will typically request psychological support when children react to grief and loss in ways that are not expected or perceived as usual. Explaining how the process of grief for children can be distinct is integral to helping adults make sense of the significant transition children and their families go through when a loved one dies.

1. **Shock.** This is the most common initial reaction. It can manifest in physical pain, numbness, apathy or withdrawal.
2. **Denial.** Unconscious avoidance of the reality of the bereavement. This could last minutes, days or even months. Children may behave as though the deceased person is still living and may talk about future plans with them.
3. **Yearning and searching.** Children may frantically search for a lost loved one, on a quest to find them. They may attempt to phone them, report having seen them or mistake other people for them.
4. **Depression.** The gradual realisation of the finality of the loss. Effects include low energy, disturbed sleep, change in appetite, difficulty concentrating, and possible withdrawal from friendships or previously loved activities.

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Continued ››
5. **Anger.** This is a profound and often underestimated part of the grief. It can lead to defiance, outbursts, challenging behaviour and a refusal to attend school. Some young people may turn to alcohol and drug abuse as a means of managing their emotions.

6. **Anxiety.** Angry outbursts may be followed by intense feelings of remorse, guilt and the fear of retribution. Young children may fear going to bed alone, becoming clingier. Older children and young people may fear dying of the same illness, or experiencing a similar accident.

7. **Guilt and bargaining.** ‘Was I to blame?’ ‘Could I have done more?’ Severe feelings of guilt may trigger profound feelings of worthlessness and, for a small minority of children, suicidal thoughts.

8. **Acceptance.** The child accepts that the person is no longer living. Children will remember through looking regularly at photographs, gifts and belongings associated with that person. This can be painful for grieving adults to observe, as it can activate their own grief.

**What schools can do**

Children and young people are affected by the grief processes of those around them. Encouraging parents, carers and involved friends to seek help for their own distress is profoundly important in supporting and protecting grieving children.

At times where the experience of loss is traumatic, such as the Grenfell Tower fire or Manchester Arena bombing, significant changes to a child’s understanding of the world can prolong the grieving process. We need to be aware that these children and young people may also be experiencing trauma (PTSD) and may require specific psychological treatment to process their grief.

In the development of The Resilience Framework, research from Boingboing has suggested that children reach acceptance sooner if they are well supported by families and the school community in the early stages of grief. See the boxes above for illustrations of how a school might respond to a bereaved pupil.

**Advice for all staff**

- Reassure children that feeling sad is an important part of our feelings when someone dies. Sharing how we feel is important, helps look after ourselves and develop
Alex
Alex is 14. He has just lost a dearly loved aunt to breast cancer. While foreseeable, her death has come as a significant shock to Alex’s family. On the surface Alex appears unaffected, determined to work hard but not performing well. He becomes increasingly worried about his own physical health, asking the school nurse for a health screening. He admits to staff that it has become harder to concentrate, and he struggles with staying awake during the day and getting to sleep at night.

Alex’s parents are frustrated. Their son seems just to mope around, having not really reacted at all to his aunt’s death. He appears to have lost interest in all of his hobbies, and it’s hard to take his health concerns seriously when his mother and her sisters are now preoccupied with their own cancer risk. Staff also find themselves forgetting that Alex has been bereaved.

After a consultation with the local CAMHS, school staff are concerned that Alex may be depressed. They arrange a meeting with Alex and his parents, in which Alex breaks down, admitting the guilt he has felt for not having been able to visit his aunt one last time before she died. He was terrified by how ill she had become. His parents admit that, in the struggle to manage their own time before she died. He was terrified by how ill she had become.

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Now encouraged to grieve more openly at home, Alex becomes more present at school, and less preoccupied with his health.

appropriate coping mechanisms.

- Be emotionally present and able to offer compassionate responses.
- Acknowledge the loss. Children will remember and greatly appreciate this. For example: ‘I heard your dad died last week. I’m so sorry, that must be feeling so hard.’
- Stay with routines and keep the child’s life as normal as possible. Being able to play and keep learning are all important aspects of building resilience.
- Children will have difficult questions about why and how people die. Do your best to answer them simply and honestly. If you can’t answer a question, say so. How might you find out together?

Advice for teachers and middle leaders
- Tell friends and the wider class, but be sensitive. They will find out anyway and it is important that this information is shared in a clear and helpful way.
- Use time out cards to allow children to share grief and gather themselves when situations at school become overwhelming.

Advice for senior leaders
- Consider attending the funeral or have a representative attend on behalf of your school. Funerals are instrumental to providing closure and the support of the school community.
- For the benefit of children who can’t attend the funeral, create a short-term place of remembrance in school (to leave flowers, pictures, messages, releasing balloons) and consider a longer-term memorial, such as a tree or a bench.
- Following the death of a parent, children may become very anxious about the welfare of their other relatives. Reassure children they will be loved and cared for, and that school is also supporting their family.
- Consider whole-school and year group assemblies to help process the death of a child or a staff member, or a significantly traumatic event in the local community. Remember that schools are often central to explaining why and how someone has died. If a child/young person continues to be unusually upset and unable to cope with their grief (becoming depressed, unable to function/learn, angry, disruptive, potentially self-harming), then seek advice from your local CAMHS.

What to avoid
- Don’t volunteer too much information. You should respond to child-led questions.
- Don’t feel that you have to help a child stop crying – it is important that children feel adults can stay with their sadness.
- Children’s understanding is literal, so avoid statements like ‘passed on’. Be explicit with explanations; ‘they have died’. More distress is caused by this not being made clear for children. To develop healthy coping mechanisms, children need a clear understanding of what actually happened, however traumatic.
- Don’t ignore your own grief – seek timely support for yourself. Remember children will follow the grieving patterns of adults around them.
- Where possible, avoid becoming uncontrollably distressed when around children. If children are witness to adults struggling with their grief, it can be more difficult for them to process their own losses.
- Don’t avoid conversations with parents about how they are feeling. Remember, if a parent is struggling to cope, there is a risk that their children are supporting them, rather than processing their own feelings.
- Remember that unresolved grief is deeply distressing and potentially life changing for children and young people. Support access to specialist psychological help when needed.
Demonstrating the impact of personal development

How to measure the intangible? DAVE BODEN provides suggestions for evaluating and sharing the impact of your SMSC, character and wellbeing initiatives

The secret to bridging the divide between academic progress and emotional wellbeing is finding ways to measure the impact of everything a school is doing to shape a positive future for its students. In addition to those all-important grades on results day, you need to show that you are improving students’ wellbeing, providing character and SMSC development, and embedding British values.

We developed the Christian ethos of Grace Academy Trust around five shared values of grace, respect, integrity, potential and excellence. To support these values, we have embedded themes such as ‘building healthy relationships’ across the curriculum. We can already see that this has made a difference. Nine out of 10 Year 7 students have a clear understanding of what our values are and know how to put them into practice. In the same year group, 96 per cent of students say they ‘feel better prepared to make healthy choices about sex and relationships’ because of our work.

However, the stories of students like Laura matter the most. Laura came on one of our international house building trips to Mexico. She summed up her experience: ‘I used to think that I would have never been capable of anything that I have achieved this week. I was immature and not very sensible and very loud. Now I feel like I have matured quite a lot. At 16 years old, I built a house! I am proud.’

The words of students like Laura spur us on in keeping academic achievement and personal development at the heart of what we do. We’re not alone here. Schools across the country have focused on developing the whole young person. We have simply devised a procedure for recording, evaluating and sharing our efforts. Here are some suggestions for doing the same in your own setting.

Why measure impact?
- To measure the success of your intended outcomes. Defining what you want to achieve is the first step to measuring impact. Only then can you record, monitor and evaluate your work against the measurements you’ve set.
- To help you explain the value of your provision to key stakeholders. Ofsted ask schools to demonstrate that they are providing SMSC development. You may also be asked to explain the significance of what you do to school leaders, which can be helpful when it comes to securing funding.
- To inform your future planning. Knowing what is working well can help you allocate time and resource to doing more of what works and less of what doesn’t.
- To help you share your success. The more widely you share positive news, the more you can shape the kind of community that aligns with your intended outcomes.

Start by answering two simple questions. Firstly, what do you want your school to look and feel like when you walk through the door in the morning? Secondly, how can you begin to measure the impact of your steps towards this vision?

Time is a precious commodity, so it’s vital you take an approach to measuring impact that means staff can work smarter, not harder. This means making impact evaluation a normal part of the planning process. You can save time by making this collaborative – we’ve found that our students love to get involved.

Building a clear picture
We built our strategy for measuring the impact of our SMSC, character and wellbeing development around three elements: statistics, student voice and stories.

Statistics
You determine what constitutes a significant impact by linking relevant statistics to your intended outcome. Being clear on what you want to achieve at the planning stage will help you to produce tangible evidence of success when you come to gather data.

Student voice
Listening to what students say matters. This is not just about having comments written down and recorded. It is about creating an environment where students have time to reflect on and articulate what they have learned about themselves and the world around them.
Remember that an inspector can ask any student a question to help triangulate evidence. In one of our recent inspections, the Ofsted inspector told me that they didn't need to ask about our work around British values, because the students had already told them what they needed to hear.

**Stories**
We collect one-sentence summaries of our impact on individuals. These simple case studies and anecdotes can be a powerful way to demonstrate you are making a difference.

**Playing detective**
School life is made up of lessons, tutor time, assemblies, after-school clubs, off-timetable days, trips and visits, and other forms of enrichment that provide the basis of your character, SMSC and wellbeing provision. Looking across these, you can begin to play detective, looking for evidence on a micro or macro scale. This is less about painting a masterpiece and more about building a mosaic, from which an indication of broader impact will emerge.

**Creating your feedback toolkit**
Some sources of evidence to help you evaluate the impact of your provision include:
- audits of curriculum subjects and topics
- baseline assessments of knowledge, attitude and skills
- focus groups
- journals
- learning walks
- letters and emails
- photographs
- plenary tasks
- students’ verbal feedback
- surveys.

It’s worth explaining how you can use each of these to collect evidence of impact.

**Audits**
An audit doesn’t have to be a massive tick-box exercise. Begin a training session by asking staff to consider a theme such as SMSC. Ask them to work in teams to identify what you already do and what you could do in the future. You could allocate 20 minutes for this group discussion and a further 40 minutes for one person to collate each group’s ideas. Not only have you produced a whole-school snapshot in a single hour, but you now have a clear action plan for moving forward in each department. See table below.

**Baseline assessments**
You can create a baseline assessment based on what you want to achieve. This is a useful way to capture improvements in knowledge, attitude and skills. To do this, you just need to create a set of varying ‘agree’ to ‘disagree’ statements to ask of your students. You then compare the results before and after you carry out your intervention. There may be off-the-shelf examples out there already.

**Focus groups**
Gather a small group of students from a particular demographic, ask them questions on a specific topic and record the responses. This simple tool takes very little time but provides a real insight into how students are responding to your input.

**Journals**
As part of tutor time, give each student a blank exercise book in which they write down an answer to the question, ‘What have you learned today?’ This gives students a space to reflect on their development, and as they articulate what they have learned you are effectively gathering evidence.

**Learning walks**
Make sure you have space for monitoring

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**Group audit template**

<table>
<thead>
<tr>
<th>What do we do already?</th>
<th>In every lesson</th>
<th>In schemes of work</th>
<th>In other ways</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spiritual</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Moral</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Social</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cultural</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
SMSC on all lesson observations and learning walk forms. Train your staff to spot and record signs according to what you want to highlight.

**Letters and emails**
Always print out and keep a record of recent responses from any external or internal voices that highlight where you are getting it right.

**Photographs**
Take pictures that highlight the great things you are doing across the school. Always focus on one clear shot that sums up what is going on, with happy students as the focus.

If you want to gather evidence in a key area then why not set a fun challenge for staff or students? For example, ask them to take a shot of every after-school club that helps sums up why it is making an impact. Link these pictures with some simple student quotes and then you have ready-made evidence of impact.

**Surveys and feedback forms**
Simple surveys and feedback forms are great ways to collate headline statistics after an event, intervention or programme. If you don’t have time to survey a whole year group, use a selection of students as a sample. Always remember to compare the results against your original learning outcome for that activity.

**Make a difference**
Now it’s your turn to start evaluating the impact of the amazing work you are already doing to improve the lives of your students. What practical steps will you need to take to build a better picture of your provision?

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**What**
- Master folder
  - Keep an up-to-date folder for each academic year. Have your overview in the front with the evidence to back it up at the back.
- Curriculum snapshot
  - Once you have completed a curriculum audit, put one or two highlights for each subject on a one- or two-page ‘snapshot’.
- One-page impact report
  - After each big event, programme or activity, create a report that includes a summary of what happened, what the students said, relevant statistics and pictures. Keep this short and specific.
- Case study
  - A case study tells a story, usually when you have made a specific impact on one person. These can be as simple as one sentence: ‘Morgan was a Year 7 student who moved from being shy and reserved in a club to leading activities and inviting friends’.
- Notice board
  - Use the statistics and pictures you have collected to create a visual display or installation.
- Poster
  - Creatively display quotes and statistics throughout your school.
- Staff briefing
  - Share a simple success story or piece of evidence with staff – this will help you build a positive culture.
- Social media posts
  - Recount success stories on your Facebook page, and tweet all about it!
- YouTube
  - Film a few students talking about the difference a project has made to their character or wellbeing. This could be an ideal task for media students!
- ‘Thank you’ email
  - Use this to circulate evidence with the staff and students who took part in the project, or helped make it happen. People love being appreciated as much as they love knowing the difference they’ve made.

**How**
- Keep an up-to-date folder for each academic year. Have your overview in the front with the evidence to back it up at the back.
- Once you have completed a curriculum audit, put one or two highlights for each subject on a one- or two-page ‘snapshot’.
- After each big event, programme or activity, create a report that includes a summary of what happened, what the students said, relevant statistics and pictures. Keep this short and specific.
- A case study tells a story, usually when you have made a specific impact on one person. These can be as simple as one sentence: ‘Morgan was a Year 7 student who moved from being shy and reserved in a club to leading activities and inviting friends’.
- Use the statistics and pictures you have collected to create a visual display or installation.
- Creatively display quotes and statistics throughout your school.
- Share a simple success story or piece of evidence with staff – this will help you build a positive culture.
- Recount success stories on your Facebook page, and tweet all about it!
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**Demonstrate your commitment**
Download our template grid for evidencing your students’ spiritual, moral, social and cultural growth.
my.optimus-education.com/template-grid-evidencing.smsc

Show how your school actively promotes British values with this statement template.
my.optimus-education.com/british-values-statement-templates-your-website

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The Wellbeing Award for Schools (WAS) provides a framework for schools to evidence good practice. Find out more at oego.co/OE-WAS
Maintaining the single central record

A robust and compliant single central record is one of the first things inspectors will look to see. ABI CLAY offers some advice for efficient record keeping.

I always advise schools to keep the single central record as just that: single. Keep other records separately. Too often, training records are mixed in with the single central record, and the records of former staff are not archived. If the record contains only essential information, it should be straightforward to maintain. It’s good to have your safeguarding governor carry out on-the-spot checks.

Each school in a multi-academy trust should have a single central record of its own. If a member of staff works across schools within the trust, this should be recorded on one record, with reference made to it in the others.

Finally, be mindful of the Data Protection Act when adding or removing documents from the record, and also be prepared for the expectations of the GDPR from May (turn to page 8 for a guide to undertaking a data audit).

What you need to include
- Details of identity (name, age, address)
- Evidence of ID (including photograph)
- Qualification(s) required
- Evidence of qualification(s) and date checked
- Barred list check (if in regulated activity) and date received
- Prohibition check (for teachers) and date checked
- Right to work in UK and date checked
- Overseas checks and date checked
- Teachers sanctioned in other EEA member states list check

What the guidance says
Guidance for Ofsted inspectors stipulates they ‘should check the single central record early in the inspection in the expectation that it will be complete and meet statutory requirements’. While there is room for minor administrative errors, it’s better to aim for complete accuracy.

‘Keeping children safe in education’ (KCSIE) is clear about the expectations of the single central record. All staff who work at the school (including supply staff and trainees) need to be appropriately checked. If your organisation is large, you should consider having different tabs on the record for each type of staff member. These would usually be for governors, agency staff, volunteers and contractors.

Agency staff
There appears to be some confusion about the requirements for vetting agency staff. The information you collect should include a confirmation of checks, the date that confirmation was received and the DBS provided, and the date of the DBS certificate (for independent and non-maintained special schools).

If you use more than one agency, note which agency the staff are from.

Prohibition checks
Some schools and colleges believe that prohibition from teaching checks (previously known as List 99) are completed as part of the enhanced DBS, but this is not the case. This is a separate check, a requirement put in place over four years ago but still routinely missed. It does not rely on someone having qualified teacher status (QTS). The process for checking without QTS can be laborious, but still must be done.

Although these are checks on teachers, it would make sense to check other staff too. Do teaching assistants require this check, for example? According to Ofsted, ‘there is no statutory requirement for a prohibition check to be made on applications for any school staff position, unless they will carry out unsupervised/undirected teaching work’. Generally speaking, this will not apply to TAs.

Renewing a DBS
There is no requirement to renew an enhanced DBS every three years, unless there has been a break in service for three months or more. That said, it is important to foster an organisational culture wherein staff disclose any change to their circumstances, or incidents where there may be a (real or perceived) change to risk. KCSIE recommends a risk-based approach and in my experience, this is a good way to develop a culture of safeguarding. If in doubt, ask for advice.

You can download a full record template from my.optimus-education.com/central-record-recruitment-and-vetting-checks
What’s new in the Optimus Education network?

Catch up on the latest news and updates from OPTIMUS and our colleagues at PROSPECTS and SHAW TRUST

Optimus Education is part of Shaw Trust, a national charity working to create brighter futures for the people and communities it serves. Shaw Trust supports over 50,000 people a year, providing employment opportunities, skills development training and health and wellbeing services across the UK. The Shaw Trust also works alongside the Shaw Education Trust.

As an Optimus member, we wanted to let you know what’s happening across our network and update you on who we’ve been working with lately.

MAT Leadership Programme

This training provides multi-academy trust leaders with the knowledge and support they need to lead their MAT to successful growth, performance and improvement.

Growing a successful MAT requires a strong leadership team, and at the heart of this team should be executive leaders with the willingness, skills and ability to work together.

Programme modules

Module 1: Making the transition to MAT leader
- Developing yourself and others as strategic managers
- Values and vision: slogans or driving forces?
- How to develop an effective strategy
- Priorities and decision making
- Making and implementing strategic choices

Module 2: A two-day residential at the Optimus Education MATs Summit

Module 3: Strategies for school improvement
- Structure and objectives for MATs
- Improvement journeys
- Authority and responsibility
- Accountability
- Focus, investment and performance management

The MAT Leadership Programme focuses on teams working collaboratively to get a clear sense of what they need to do to effect changes. It’s aimed at those who have recently made, or are in the process of making, the transition to MAT leader.

The programme consists of six one-day training events, held across the country, plus attendance at the Optimus Education MATs Summit in October. Each training event will include a guest speaker: either a current MAT leader with real and practical experience of leading a successful MAT, or a business leader offering valuable insight into organisational management.

Between the live training events, delegates will get online access to additional learning materials. They’ll also automatically become members of a closed online community, where they can continue to exchange ideas and experiences.

The programme starts in September 2018 and runs through to May 2019. See left for the first three programme modules and find out more at oego.co/mat_leadership

I am Resilient

A 360° wraparound programme offering school leaders, mentors and service users the skills to build resilience, I am Resilient is aimed at supporting people with low levels of resilience in one or more of the following areas:
- Lifestyle
- Self
- Future
- Relationships.

The programme’s tailored approach provides training, mentoring, monitoring and evaluation for individuals, groups and staff. I am Resilient also includes a customisable app to support young people in becoming resilient and training for key staff, parents and professionals.

Find out more about the programme at oego.co/resilient-project

Prospects Professional Training & Consultancy (PPTC)

The PPTC Qualifications Centre has been established for over 15 years and is the UK’s largest provider of Careers Education, Information, Advice and Guidance (CEIAG) related qualifications. The courses and qualifications provide the ideal platform on which to develop high quality careers education and guidance that meets sector requirements.

A range of qualifications are available, relevant to staff in schools and colleges including diplomas in career information and advice, levels 4-6. Delivery of these qualifications is through a flexible programme of skills and knowledge workshops, combined with tutorials and assessment (both online and in the workplace). Find out more at oego.co/professional-training or contact PPTC on 0121 521 2389
Receive your own copy of Insight magazine

Join a growing community of school leaders by becoming a member of Optimus Education

‘As the demands of compliance increase, Optimus provides just the right level of support and guidance.’

Tracy van der Heiden, Head of Communications, St Edward’s School

Explore Optimus Education today at oego.co/join-OE
14th Annual Child Protection in Education

Clarify the latest safeguarding risks, remain legally compliant and ensure robust child protection procedures in your school.

VENUES AND DATES

London, 11 September 2018
Bristol, 18 September 2018
Manchester, 4 October 2018

Book your place at oego.co/CPinEd_18