Insight
Updates, guidance and resources for your whole leadership team

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SEND: more than just paperwork
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DO YOU HAVE A WHOLE-SCHOOL APPROACH TO SUPPORTING MENTAL HEALTH AND WELLBEING?

The flagship mental health conference to equip you with the strategies, knowledge and skills you need to ensure early identification, early intervention and appropriate action to fully support pupils with mental health needs.

KEY TOPICS BEING COVERED ON THE DAY:
- Anxiety
- Building Resilience
- Self-harm
- CAMHS
- Depression
- Parents

PLUS, hear an inspirational address from Laura Nuttall, blogger and winner of the MIND Media Awards 2015 on the important role schools play in supporting young people and, using her first-hand experience, what really works.

For more information and to register visit www.healthinschoolsuk.com

SUPPORTED BY

*Save £30 off the standard rate when you book before 15/09/16. Not in conjunction with any other offer.
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Develop your roadmap for joining or forming a MAT

Retain your school’s identity and understand the pros and cons of different models, know what options are available and act on practical, unbiased and legal guidance.

Expert speakers include:

**Sir David Carter**  
National Schools Commissioner

**Cathy Paine**  
Deputy Chief Executive, REAch2 Academy Trust

**Brian Lightman**  
Education Consultant and former General Secretary of ASCL

Book your place today at www.oeconferences.com/mat-formation

KEY BENEFITS

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<th>PROS AND CONS</th>
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*Unlimited CPD members are entitled to book a place for one delegate per conference. Unlimited CPD members can purchase additional delegate places at a discount of 50% off the standard price. All conference places are subject to availability and bookings are taken on a first come, first served basis.*
Welcome to Optimus Education Insight

Dear Reader

The autumn term begins! At Optimus HQ we’re looking forward to supporting your professional development journey through the year. This term’s magazine features two skills audits you can use to diagnose CPD needs. Turn to page 11 for the senior leader audit and page 48 for a skills audit for more able coordinators.

Having assessed needs, review the guidance on cost-effective professional development (page 40) and get ideas for effective CPD sessions (page 38). If you are investing in external training days, use the ‘sharing learning from external CPD’ template (see Issue 9, page 12) to get the best value for money.

Swamped in work with no time for your own CPD? Read about Nickii Messer’s INVEST approach to delegating tasks (page 28) and how Anita Devi reclaimed her life as a SENCO by taking time (page 56).

Last but by no means least, remember that your own wellbeing is vital in meeting the challenges of the year ahead. In her webinar on stress reduction (page 14), Viv Grant shared two key pieces of advice: to ‘capture the golden moments’ and ‘put yourself first’.

Liz Worthen
Head of Content, Optimus Education

‘Growth and wellbeing for the year ahead’

Get involved in the Optimus Education network

Not yet a member?
If someone has shared this magazine with you but you don’t currently have an Optimus membership, we’d love to hear from you. Call us on 0845 450 6404 and you can speak to one of our account managers about membership options and take a demo of the website.

Want to contribute?
We work with a wide range of practitioners to bring members the most relevant, useful and up-to-date content. If you would like to contribute by writing for us or presenting at a conference, please get in touch via customer.services@optimus-education.com

Got something to share?
We offer selected opportunities for relevant suppliers to share their services with our members, from conference sponsorship to magazine advertising. To find out more about these opportunities, contact Matt on 020 7265 4173.

1 Remember to visit the website at my.optimus-education.com

Optimus Education Insight editors: Owen Carter, Lisa Griffin, Alex Masters, Evie Prysor-Jones and Liz Worthen.

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Conference Calendar

Optimus Education’s one-day conferences bring school leaders and managers together, helping you go back to your school ready to implement practical strategies and new policies that work. Find out what’s coming up in your focus area.

September

Mental Health Roadshow
MONDAY, 26 SEPTEMBER, OLDHAM;
THURSDAY, 29 SEPTEMBER, NORTHUMBERLAND;
FRIDAY, 21 OCTOBER, WAKEFIELD
Get practical strategies to build resilience and support pupils’ emotional wellbeing. (Free for members.)
SEN and Safeguarding

Supporting the More Able
TUESDAY, 27 SEPTEMBER, MANCHESTER & TUESDAY, 4 OCTOBER, LONDON
Learn more about maximising potential, developing mastery and supporting the achievement of the more able pupils in your school.
Teaching and Learning

Challenge & Differentiation
TUESDAY, 27 SEPTEMBER, OLDHAM; WEDNESDAY, 5 OCTOBER, GRIMSBY; TUESDAY, 18 OCTOBER, LONDON
Free for Optimus members, this practical training day will provide you with easy-to-implement strategies and ideas to create stretch and challenge.
Teaching and Learning

October

Child Protection in Education 2016
THURSDAY, 6 OCTOBER, MANCHESTER
Book now to get legal guidance and updates on the most pressing safeguarding issues and the impact of ‘Keeping Children Safe in Education’.
SEN and Safeguarding

Relationships & Sex Education
TUESDAY, 18 OCTOBER, LONDON
Get best practice strategies and expert guidance for delivering high-impact, age-appropriate PSHE and SRE in the primary and secondary classroom.
SEN and Safeguarding

November

Mental Health & Wellbeing 2016
THURSDAY, 10 NOVEMBER, LONDON
Gain vital skills to support and manage mental health needs, find out what recent changes will mean for you and take back resources for colleagues.
SEN and Safeguarding

Rethinking Lesson Observations
TUESDAY, 15 NOVEMBER, BIRMINGHAM
Attend this training day for research updates on sustainable teacher development through observation and gain strategies for an effective transition to ungraded, developmental observation.
Teaching and Learning

Establishing or Joining MATs
TUESDAY, 15 NOVEMBER, LONDON
Clarify the process of joining or forming a MAT, retain your school identity and understand the pros and cons of different models.
Leadership and Governance

PE, Health and School Sports
FRIDAY, 18 NOVEMBER, LONDON
Tackle your challenges head on with a day packed-full of timely keynotes, case study sessions, resources showcases and in-depth masterclasses.
Teaching and Learning

Middle Leadership Essentials
TUESDAY, 22 NOVEMBER, LONDON
Attend this training day and study online modules to get practical leadership and management skills, develop your team, successfully communicate impact and lead progress across your school.
Leadership and Governance

December

Efficiencies in Schools
TUESDAY, 22 NOVEMBER, LONDON
With recruitment, staff absence and managing performance proving to be expensive challenges, this training day will equip you with the knowledge and skills to achieve personnel efficiencies in your school.
School Business Management

SEND Partnerships
THURSDAY, 24 NOVEMBER, LONDON
Get practical strategies and expert guidance to enable you to work effectively with local authorities, health, parents and your pupils to improve outcomes.
SEN and Safeguarding

January

Data in Secondary Schools
TUESDAY, 17 JANUARY, LONDON
Make sure you are equipped to set reliable targets, track progress and manage the impact of 1-9 GCSEs, KS2 scaled scores and Progress 8.
Leadership and Governance

February

SEND Assessment to Support Progress
Thursday, 9 February, London
Find out how to establish robust assessment models, appropriately benchmark your school and your pupils and effectively demonstrate impact.
SEN and Safeguarding

Safeguarding in Education
Wednesday, 22 February, London
With safeguarding obligations constantly growing, get best practice guidance to protect against dangers online, emerging threats and mental health issues.
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 0207 954 3421.
What’s in this month’s Leadership and Governance section?

September is in full swing and we have a great range of resources in this issue to help get the year off to the right start. Check out the write up of our stress reduction for leaders webinar for some thoughtful advice on why looking after your wellbeing is so important. Our senior leader skills audit template will aid performance management and highlight staff strengths and areas for improvement, and our top tips for gaining positive publicity for your school offers great advice on enhancing your reputation. With MATs firmly on the education agenda, take a look at some of the questions you should be asking before making the decision to join an existing MAT. Here at Optimus we had a busy summer planning our upcoming content and events. This issue features a preview of just some of the resources and training planned for you this term – remember to head online for much more!

Lisa Griffin, Content Lead

Contributors in this issue

Viv Grant is a former headteacher and director of Integrity Coaching. Viv has written Staying Ahead: The Stress Management Secrets of Successful School Leaders.

Josephine Smith is acting headteacher of a school in Lincolnshire, educational writer and research associate for the National College. Her books include The School Recruitment Handbook.

Paul Sample is a school marketing consultant and owns The Mustard Agency, one of the UK’s leading school website design and marketing companies.

Lisa Griffin is content lead for leadership and governance. An experienced editor and content manager, Lisa is interested in leadership support and development.

Top tweets from @OptimusEd

Read our latest blog on The Standard for Professional Development #oeblog http://owt.li/5TKx302nUYz

Dear Justine...what would you ask the new Education Secretary for? Share your wish list!

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Ask the Experts
Got a specific question? Get in touch with our expert panel by submitting your query via the blue speech bubble at optimus-education.com

Twitter
Want to get engaged in discussion and connect with your peers? Follow us on Twitter @OptimusEd

Download a digital version of your Optimus Education Insight magazine by logging into your My Account area on optimus-education.com
An independent school ISI inspection: what to expect

How does an Independent Schools Inspectorate (ISI) compare to Ofsted? SUZANNE O’CONNELL spoke to a recently inspected independent school

Earlier this year the ISI undertook an integrated inspection of Brockwood Park School and Inwoods Small School. Founded by educator and philosopher J. Krishnamurti in 1969, the schools are both governed by the Krishnamurti Foundation Trust Ltd. Antonio Autor and Dr Gopal Krishnamurthy are co-principals of Brockwood Park School. Mary-Ann Ridgway is the headteacher of Inwoods Small School. It was the school’s first inspection by ISI and it is fair to say that there was a little anxiety about the inspection.

Not only was this the first integrated inspection for the school requiring them to comply with all the regulatory requirements of the Education Regulations 2014 (Independent School Standards), but they must also meet the National Minimum Standards for Boarding Schools 2015.

‘As this was our first ISI inspection,’ explains Antonio, ‘the whole process, from the moment we received the call until we received the report, was an exciting and challenging experience.’

There were five inspectors including the lead inspector, two team inspectors, an inspector for boarding and one for early years. The inspection lasted a total of five days.

Independent Schools Inspectorate (ISI)
Both Ofsted and ISI report against the Independent School Standards Regulations but have different frameworks and different criteria. There is no single overarching judgement from ISI but they do use the descriptors ‘excellent,’ ‘good,’ ‘sound’ and ‘unsatisfactory’.

In an integrated inspection inspectors report against:
• the success of the school
• the quality of academic and other achievements
• the quality of the pupils’ personal development
• the effectiveness of governance, leadership and management.

The inspectors at Brockwood found that its academic and other achievements were good and that its personal development and governance were excellent.

Although they felt prepared there was still an element of trepidation. ‘The staff here have several areas of responsibility,’ explains Antonio. In common with other small schools, the task of ensuring that everything is covered is not an easy one.

The inspection process
Antonio identifies three stages to the inspection process: pre-inspection, inspection and post-inspection.

Pre-inspection is from the time you receive the call from the ISI to notify you of the inspection until the inspectors arrive at the school. ‘The amount of work the inspectors do before they arrive is amazing,’ says Antonio.

‘The school is compliant and the feedback ranged from good to excellent. Nevertheless, the inspection team did have recommendations to make’
‘They had a good understanding of all the school policies and documents as well as the school in general.

‘In addition, parent and student questionnaires were sent out and the responses were surveyed so that they could follow up on any concerns during their visit.’

During inspection, all the areas of the schools were observed and investigated. The inspectors met almost every staff member and student either in a small group or one-to-one interview.

The inspectors observed the school meeting, morning meeting, morning jobs, rota, morning assembly and observed classes and academic advising sessions too.

Despite months of preparation and build up, the inspection was still a challenge for the school. ‘Everybody in our community rallied together and worked hard in meeting this challenge,’ says Antonio.

A positive report
Although the final ISI report was complimentary about all areas of school life, it was particularly the pastoral areas and SMSC where the school stood out as being excellent.

Antonio puts this down to the special ethos they have there. ‘We have a different philosophy and we look at learning together with our students. We learn about life and explore areas of enquiry together.’

Students are valued throughout the school and are encouraged to make an impact. As the report said: ‘They are highly independent and self-motivated learners who develop a keen sense of inquiry and a love of learning for its own sake.’

At the end of the inspection the inspectors read out the draft report to the leadership team and the report’s publication then followed a similar process to that of maintained schools. ‘We were allowed to correct any factual errors but not content as such,’ says Antonio.

What next?
‘We were relieved that the team were supportive and we were pleased with the results,’ says Antonio.

‘We understand that it is very rare for a school to be fully compliant on its first inspection. Where a school is healthy and running well this must be reflected in the inspection report. The inspectors did dig deep and walked the school from top to bottom. They were very open with us and this came as a pleasant surprise.’

The school is compliant and the feedback ranged from good to excellent. Nevertheless, the inspection team did have recommendations to make.

‘We have to work at our recording and planning in the EYFS and provision of training opportunities for all our staff,’ points out Antonio.

Antonio and his team are very aware that they still have a difficult job ahead of them ensuring their continued compliance against all the legislation that covers the breadth of provision they offer at Brockwood Park.

Action points and recommendations from the report are already being implemented or planned and the team is dedicated to ensure their ongoing compliance.
LEADERSHIP AND GOVERNANCE   @OptimusEd

What can you expect from us this term?

Your Optimus membership gives you access to a range of exclusive events and resources. Here’s a sneak peek of what’s in store.

**The best professional** development is achieved through sustained practice over time, with support and challenge from colleagues. Standalone training sessions don’t really cut the mustard: what makes them powerful is when they are supplemented with opportunities for reflection and a commitment to next steps and action points to reach them.

Successful professional development comes from finding ways to embed best practice from an Inset day or training session, working through specific elements of the learning to engage staff and make sustained improvements over time.

To help Optimus members in developing a culture of continuous improvement in school, we plan training, events, webinars and content to complement each other, help you address pressing issues and provide a long-term package of support and learning for your whole school.

Take a look at our preview of just some of what we have planned for you and your leadership team this autumn term. And don’t forget to head to our website for more resources and upcoming events!

**The Multi-Academy Trusts Summit #oeMATs (Berkshire 13th – 14th October)**

MAT leaders from across the country will be joining us for two days of talks from high profile speakers, in-depth masterclasses and networking opportunities. Before or after the event, make sure you head online to download our due diligence checklist and get key questions to ask when creating or expanding your MAT. We’ll also be providing post-event webinars focusing on key issues including succession planning in a MAT and delegated leadership – watch this space!

Please note this event has sold out but we have day passes available.

Contact Sara Boomsma on 0207 265 4222 for more information.

**Establishing or Joining Multi-Academy Trusts #MATformation (London 15th November)**

Thinking about starting or joining a MAT but have questions? Get them answered at this conference with legal advice and step by step guidance. Ahead of the event, we’re hosting a webinar with our partner and education lawyers Browne Jacobson on ‘MAT myth-busting: positives and pitfalls’ (9th November).

We also have an upcoming webinar on ‘Brave leadership: taking risks in education’ which includes advice on how to cope positively with change and increase resilience (18th October).

**From teacher to middle leader: middle leadership essentials #MiddleLdrs (22nd November)**

Gain practical leadership skills to develop your team, successfully communicate impact and lead progress across your school.

This new event is part of a training programme made up of six units and two live events, designed for new middle leaders to get to grips with the realities of team leadership and managing people.

Check out the In-House Training area online for our new middle leader training units on ‘Getting to know your team’ and ‘Developing and communicating a shared team vision.’ Visit the website for upcoming middle leader webinars on key areas such as techniques for delivering difficult feedback www.oeconferences.com/middleleaders2017

**CPD Standard**

In July, the DfE published their Standard for Professional Development and called for school leaders to prioritise CPD that:

- has a focus on improving and evaluating pupil outcomes
- is underpinned by robust evidence and expertise
- includes collaboration and expert challenge
- is sustained over time.
Skills audit template for senior leaders

JOSEPHINE SMITH provides a template to help evaluate senior leadership skills and prepare for your performance management.

Use this template to provide examples of when you have demonstrated leadership skills in the following areas.

<table>
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<tr>
<th>Proficiency</th>
<th>Criteria</th>
<th>0 = no proficiency or experience</th>
<th>5 = an average standard of proficiency for someone with your leadership experience</th>
<th>10 = area of considerable proficiency or experience in your opinion</th>
<th>Provide examples of when you have demonstrated this (in the past 12 months) using the following prompts</th>
<th>Measureable outcomes for the school as a result of your work/contribution</th>
<th>Any other comments</th>
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<tr>
<td>Leading pupil achievement</td>
<td>Secure outstanding results for pupils</td>
<td>• Classes you taught • Intervention sessions that you have led</td>
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<td>Enable others to secure outstanding results for pupils</td>
<td>• Performance of the teams that you lead • Leadership of intervention activities across the curriculum</td>
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<td>Analyse and interpret a range of information to judge effectiveness</td>
<td>• Leading the performance management of middle leaders • Contribution to the whole school SEF • Ensuring middle leaders have completed their departmental SEFs</td>
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<td>Leading strategic change</td>
<td>Be innovative</td>
<td>• Input to the school improvement plan • Developing creative solutions to school wide issues • Developing policies</td>
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<td>Proactively take on new professional challenges</td>
<td>• Developing school initiatives • Involvement with the implementation of new initiatives • Leading new developments</td>
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<td>Have a clear vision for development</td>
<td>• Leading the performance management of middle leaders • Supporting middle leaders with their data analysis</td>
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<td>Clearly articulate the school vision</td>
<td>• Speaking at events and highlighting the school vision e.g. parents evening and open days • Leading staff meetings and focus groups • Leading school assemblies</td>
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<td>Set clear milestones for self and others</td>
<td>• Setting milestones in the school improvement plan • Helping middle leaders set clear milestones</td>
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<td>Prioritise effectively</td>
<td>• Meeting deadlines and milestones • Holding middle leaders to account over decisions</td>
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<td>Generate commitment in others to change</td>
<td>• Helping middle leaders understand how their improvement plan links to whole school targets</td>
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<td>• Leading on staff support plans</td>
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<td>Realise a vision</td>
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<td>• Breaking strategic work into steps and achieving change over a period of time</td>
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<td>Manage change promptly</td>
<td>• Efficient work on projects that have led to improvement</td>
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<td>Strike the right balance between strategic and practical leadership</td>
<td>• Delegating tasks to your team</td>
<td>• Making a project sustainable</td>
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<td>• Leading aspects of a project yourself</td>
<td>• Effective budget management</td>
<td>• Embedding change</td>
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<tr>
<td>Develop 'expert' knowledge in (a) relevant area(s)</td>
<td>• Reading/research used to support change</td>
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<tr>
<td>• Leading whole school CPD sessions</td>
<td>•Contributing specific knowledge/skills to the leadership team e.g. timetabling</td>
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<tr>
<td>Develop 'expert' knowledge in (a) relevant area(s)</td>
<td>• What reading/research have you undertaken to support your change?</td>
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<td>• Have the performance management targets you have set for your middle leaders been deemed suitable by the head?</td>
<td>• Is there evidence of positive impact in other schools?</td>
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<td>• Have you trained other colleagues in this area?</td>
<td>• Offering challenge</td>
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<tr>
<td>Leading development of self and others</td>
<td>Have high expectations of yourself, staff and pupils</td>
<td>• Setting aspirational whole school targets</td>
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<td>• Have the performance management targets you have set for your middle leaders been deemed suitable by the head?</td>
<td>• Have the performance management targets you have set for your middle leaders been deemed suitable by the head?</td>
<td>• Offering challenge</td>
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<tr>
<td>• What CPD have you engaged with this year?</td>
<td>• Setting aspirational whole school targets</td>
<td>• Offering challenge</td>
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<tr>
<td>Show commitment to your own CPD</td>
<td>• Have you kept to the performance management schedule?</td>
<td>• Offering challenge</td>
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<tr>
<td>• Offering challenge</td>
<td>• Are you supporting middle leaders with informal support plans?</td>
<td>• Offering challenge</td>
<td></td>
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<tr>
<td>Recognise others’ skills, develop and utilise them</td>
<td>• Are you managing any formal support plans?</td>
<td>• Offering challenge</td>
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<tr>
<td>• Identifying and nurturing the skills of those you line manage</td>
<td>• Have you given middle leaders feedback from your quality assurance activities?</td>
<td>• Offering challenge</td>
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<tr>
<td>Engage in a range of CPD opportunities</td>
<td>• Online courses, face-to-face training or school programmes</td>
<td>• Offering challenge</td>
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<tr>
<td>• Leading CPD activities for wider groups of staff</td>
<td>• Have you kept to the performance management schedule?</td>
<td>• Offering challenge</td>
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<tr>
<td>Give challenging and supportive feedback which facilitates improved performance</td>
<td>• Are you supporting middle leaders with informal support plans?</td>
<td>• Offering challenge</td>
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<tr>
<td>• Have you kept to the performance management schedule?</td>
<td>• Are you managing any formal support plans?</td>
<td>• Offering challenge</td>
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<td>• Have you given middle leaders feedback from your quality assurance activities?</td>
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<td>• Offering challenge</td>
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<td>Develop parental engagement in their child’s learning</td>
<td>• Leading sessions for parents</td>
<td>• Offering challenge</td>
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<td>• Writing materials or resources for parents, which enable them to support their children</td>
<td></td>
<td>• Offering challenge</td>
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<td>Celebrate pupil and staff achievements</td>
<td>• Supporting school reward systems</td>
<td>• Offering challenge</td>
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<td>• Celebrating best practice</td>
<td>• Appointing staff</td>
<td>• Offering challenge</td>
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<td>Leading collaboratively</td>
<td>• Developing new skills in staff</td>
<td>• Offering challenge</td>
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<td>Lead team development</td>
<td>• Supporting the success of a team</td>
<td>• Offering challenge</td>
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<tr>
<td>• Providing support and challenge</td>
<td>• Creating the conditions, organisation and climate for teamwork</td>
<td>• Offering challenge</td>
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<tr>
<td>Create the conditions, organisation and climate for teamwork</td>
<td>• Empower others</td>
<td>• Offering responsibility</td>
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<td>• Encouraging responsibility</td>
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<td>• Chairing working parties</td>
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<tr>
<td>Empower others</td>
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<td>Leadership Skills</td>
<td>Examples</td>
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<td>Work effectively with people in a range of different contexts</td>
<td>• Line managing support staff • How do you work with other senior leaders?</td>
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<td>Positively influence and motivate others</td>
<td>• Do you coach or mentor others?</td>
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<td>Work effectively with the governing body</td>
<td>• Presenting at governors meetings • Working with governors on quality assurance • Writing a report for the governors</td>
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<td>Leading with courage: In challenging situations</td>
<td>• What have been your biggest challenges this year? • How have you overcome these challenges?</td>
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<td>Sustain good performance but strive for outstanding</td>
<td>• Recognising effective practice • Knowing what to do to move to outstanding • Ensuring your middle leaders understand the difference between outstanding and good teaching</td>
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<td>Challenge others/hold others accountable</td>
<td>• Performance management/appraisal • Quality assuring the work of the people you line manage • Supporting your middle leaders in quality assurance processes</td>
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<td>Create a whole school culture of aspiration</td>
<td>• Ensuring excellent pupil behaviour • Supporting colleagues’ understanding of the behaviour management system • Ensuring the behaviour management system is used appropriately</td>
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<td>Have challenging conversations</td>
<td>• Resolving challenging conversations with parents and staff</td>
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<td>Show emotional resilience</td>
<td>• Remaining positive in the face of difficulties • Demonstrating a positive and proactive attitude</td>
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<td>Leading with sensitivity: Support others</td>
<td>• Supporting middle leaders and other staff to manage pupil behaviour • Advising colleagues on how to make improvements</td>
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<td>Make the right decisions at the right time</td>
<td>• Intervening when needed • What interventions have you chosen to make?</td>
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<tr>
<td>Demonstrate emotional intelligence and a genuine interest in other people’s success and wellbeing</td>
<td>• Helping middle leaders stay positive • Understanding the challenges of those you line manage • Knowing what the aspirations of middle leaders are</td>
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<td>Leading with integrity and by example: High level of attendance</td>
<td>• Is attendance consistently high?</td>
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<td>Demonstrate determination</td>
<td>• Finding solutions to move forwards when difficult situations arise</td>
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<td>Contribute to extra-curricular life of the school</td>
<td>• Leading trips, visits, clubs or activities • What extra-curricular activities have you supported this year?</td>
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<td>Gain the respect of colleagues</td>
<td>• Do others seek your support and advice?</td>
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<td>Have conviction, enthusiasm and optimism</td>
<td>• Remaining positive through challenging times and new initiatives</td>
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Download this template online at my.optimus-education.com/skills-audit-template-senior-leaders
**LEADERSHIP AND GOVERNANCE**  
Leadership Skills

**WEBINAR REPORT**

**Stress reduction for school leaders**

The health and wellbeing of a school leader is crucial to a successful school. **LISA GRIFFIN** reports back on the recent webinar with Viv Grant

**School leaders need** to give their best to their school but this is impossible without looking after themselves. Finding a way to achieve this, both personally and professionally, was explored by Viv in the webinar.

Data from The Education Support Partnership (2014) tells us that 80% of people working in education have suffered from stress, with 89% stating that workload was the main cause of their mental health issues.

We also know that recruitment and retention of school leaders is becoming increasingly problematic and needs addressing. One way of doing this is attending to wellbeing.

**Work on wellbeing**

Viv used the image of ‘the impact of living an unconscious life’ versus that of ‘living a conscious life’ and asked the webinar attendees which one they related to.

During her time as a head, there was a period where Viv strongly related to the ‘impact of living an unconscious life’. This was caused by not attending to her wellbeing and resulted in feelings of distress and frustration. By realising that you need to address wellbeing, you are able to more closely relate to the ‘impact of living a conscious life’ image. You are in control of your ship. You know the direction you are going in and how to steer yourself and your school there.

**The super-head**

Viv discussed the idea of the ‘super-head armour’. This is worn by school leaders who feel that they must always keep a brave face on for everyone else, to the detriment of themselves. Improving your wellbeing starts with recognising that you have feelings and emotions, just as everyone does.

The best leaders are emotionally literate and we all have basic emotional needs. We need to feel accepted, listened to, valued and supported.

When these emotions are met, healthy behaviour follows. This applies to everyone: pupils, staff and yourself. We need to have systems in place to meet these emotional needs but this isn’t always easy.

'School leaders often develop coping mechanisms to ignore the impact and emotional drain that school leadership can have'

Schools are emotionally complex places and the individuals in it normally are too. Your role demands that you display all the expertise and knowledge of a trained and experienced psychologist to deal with the complexities of human behavior – both yours and others! To add to this, most of the time you are required to do it without any support.

**Coping mechanisms**

Running a school goes beyond the strategic and operational; it needs a level of emotion. Rather than addressing this need, school leaders often develop coping mechanisms to ignore the impact and emotional drain that school leadership can have.

Although this may seem the easy way out, carrying on and ignoring the bad things, in the long term the impact on your wellbeing, and in turn that of your school, becomes a much bigger issue to address. This leads to getting caught in the ‘sacrifice syndrome’. This idea is taken from the work of Richard Boyatzis and Annie McKee in *Resonant Leadership: Renewing Yourself and Connecting with Others*.

The sacrifice syndrome occurs when senior leaders find ways to meet the demands of their role without paying due attention to what is happening to them emotionally. You always have to be reactive, with often minimal resources, and be available in an emergency or crisis.

Viv referred to her time as a headteacher and the experiences she had with self-doubt and adopting a façade that all was well, even outside of work.
This can lead to physical and mental health suffering and getting stuck in the cycle. You don't listen to your body and so may become withdrawn and more tired or irritable more often. You don't stop to realise that it isn't normal to constantly feel like this.

**Leading without sacrifice**

Leading without sacrificing yourself means paying attention to your physical and mental health, as well as your emotional and spiritual wellbeing. These are what make us all human. We need to pay attention to all these aspects to understand our values and what underpins us.

We need to:
- deepen self-understanding
- develop emotional resources to not sacrifice ourselves
- sustain a sense of vocation and purpose
- bring congruity to original ideals, and current realities and pressures of the job.

So how do school leaders achieve this? Boyatzis and McKee argue that it is by being proactive and developing a renewal cycle.

It is about actively seeking support and giving yourself space to talk about how you are feeling and what you are going through. It’s about allowing yourself time to prioritise your response to the needs of others in order to practice sustainable leadership.

**Governing body relationship**

The governing body play a role in developing sustainable leadership. They need to develop an accurate understanding of the support needs of headteachers. Their duty of care has as much to do with caring for the person in the role as it does with securing high standards.

They should analyse the school's sickness and absence data to identify any trends and establish what’s good and what needs improving. This process should be aligned with developing a wellbeing policy and sustainable practices to support its implementation.

Crucially they need to understand that if they wish their school to continue to grow, they need to invest in the personal and professional growth of the headteacher.

**Minimise stress and maximise efficiency:**

Viv finished the webinar by providing these five ideas we could all implement.

1. Develop reflective practice: think about what has gone right, what hasn't and what you can learn from both.
2. Build supportive networks: ensure you have relationships which affirm your self-worth, provide you with constructive challenge, allow you to be yourself and create a space for you to be listened to, taken care of and have your needs met.
3. Capture the golden moments: they are the parts of your school life, which make you proud at the end of a day, week or term and cause you to say: 'That’s the reason I am here in this school, serving this community.'
4. Get a coach, or some support or private time and space that is yours alone, where you can discuss what is important and what is happening to you.
5. Put yourself first: this isn’t a selfish act. All too often school leaders put the needs of themselves last and if you do, the consequence may be that you’re not leading your school from the best position emotionally, spiritually, mentally or physically.

Find our template for a wellbeing policy to adapt for your setting at my.optimus-education.com/wellbeing-model-policy

"The impact of living an unconscious life vs the impact of living a conscious life"
Joining a MAT: questions a school leader should ask

School leaders and governors must be convinced that joining a MAT is the right step for them. PAUL AINSWORTH outlines key questions to ask and areas to consider.

Since the publication of the white paper, one of the main discussion points for leaders of maintained schools is academisation. At one end of the spectrum is the option of joining with another academy to form a MAT and at the other end is approaching an existing MAT about joining.

What is the vision of the MAT?
Just as all schools have a vision, so do MATs. Is the vision in line with your own view of education? In many ways this is the same type of question you would have asked when you were appointed to your leadership role. Did the school vision match your own as a leader?

A very simplistic example is if your school is firmly committed to a very pupil centred approach, a MAT with a reputation for rigid systems and discipline may not be right for your school.

If you find the vision difficult to interpret, look at the aims and objectives of the MAT and compare them with your own. Do they feel complimentary or are they quite different?

Talk to other school leaders in the trust and ask them how the trust’s vision, aims and objectives impact them on a daily and annual basis.

What does the scheme of delegation look like?
When you join a MAT, your own governing body will become subservient to the trust. You need to be very clear on the governance structure of the MAT.

Many governance experts say that the term ‘local governing body’ is incorrect and they should be referred to as councils or committees.

If forming a MAT with one other school, there will be discussion as to how many governors from each school sit on the board. If you are joining a well-established MAT, there will be an existing trust board and the larger the MAT the less likely that any of your current governors will join this group initially.

You also need to look at the local governing body arrangements: there may be one body across two academies.

Some MATs operate systems of earned autonomy, so those schools which are graded as outstanding will have independence at governor level.

What does the geographical spread look like?
If you are working with one other school, it is much easier if you are within a very short distance of each other. This allows you to share staff and common opportunities for pupils without the need for complicated travel or timetabling arrangements.

If you are joining a larger MAT, this becomes simpler if there are local academies that you can work with. How close are you to the MATs administrative centre? If meetings are held there, this becomes more challenging with a two-hour drive.

Larger MATs may have a regional structure which can help with such issues. Some leaders can take the attitude that it is better to be a geographical outlier as they can get on with their own things.

However, in a MAT it’s beneficial to be at the centre of things so that you make the best use of the support available.

How large is the MAT?
Large MATs are likely to have greater resources to support you but you will be a smaller cog in the machine.

What are the plans for expansion? When MATs increase in size there are inevitably growing pains, especially if the change occurs rapidly. Key functions within the MAT will need to expand and this may require different ways of working.

Additional personnel may be brought into the MAT who you don’t know, or they may be recruited from the academies within the MAT. You may lose some of your own staff to work in central services.

How much individuality are academies permitted?
A big area of consideration is around...
consistency vs individuality. Most trusts will have standard measures of Key Performance Indicators (KPIs) and will expect this to be communicated at set times.

Some MATs may expect complete consistency: from the same uniforms for all pupils and standard academy names to quality assurance processes and agreed schemes of work in key subject areas.

Many MATs have implemented one consistent approach to assessment without levels. If your school is trying to quickly improve its performance, being able to implement such tried and tested approaches can be a considerable benefit.

However if you have developed your own system, which is working well, you may find it difficult to move over to something new.

What mechanism does the trust have for driving school improvement or in supporting schools with capacity to improve?

Does the MAT have a teaching school alliance? There has been considerable encouragement for TSA’s to form their own MAT if they do not already have one.

If you are leading a successful school with a strong Ofsted judgement you may not need too much support and be happy in a smaller MAT. You may also consider forming your own MAT.

Those in more challenging circumstances who are finding local authority services reducing may feel that strong support is crucial to improvement.

What back office support does the MAT provide?

These may be services that you would have bought into from the LA such as HR or governance.

There may be a pooling of services such as a common finance or estates team, ICT strategy or catering. Small MATs may not benefit from great savings or much additional expertise.

You may feel that large MATs offer services which are more helpful than those from an LA because they are more specialist and not spread over such a disparate group of schools.

What happens to the MAT budget?

A question you may wish to ask in this area is how much ‘top slice’ will be given to the trust.

The top slice refers to a percentage of income taken from the budgets of the schools in the MAT to fund their operational costs. This includes paying central staff and providing central services such as human resources and financial services.

Most academy trusts top-slice between 3 and 5 per cent from their schools, which is important to know but of more importance are the services you will receive from the trust.

Some trusts may take a larger top slice but this is then used to help leverage improvements in estates across the whole trust.

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Are you thinking of establishing or joining a MAT?

Our Establishing or Joining Multi-Academy Trusts conference is your essential opportunity to gain the support and guidance you need when considering whether to join or form a MAT.

- The MATs debate: a factual, balanced debate on the pros and cons of joining or creating a MAT and how to unlock the benefits.
- Retaining identity: gain workable strategies from those who have achieved it to ensure you retain your ethos and individual school identity.
- Legislation: understand the legal process of setting up a MAT or converting to academy status and ask our lawyers your most pressing questions.

Leave with the practical strategies and guidance needed to make the right decision for the future of your school or academy.

Secure your place before the 30th of September to take advantage of our early bird offer! www.oecfonferences.com/MAT-formation
Executive headship can be the next leadership step for headteachers. JOHN GREENWOOD discusses the skills needed when responsible for leading multiple schools.

The needs of the schools may well be different and the urgency of addressing issues will not be the same in each school. Therefore making decisions regarding your priorities are paramount, as this will affect how you spend your time.

On a personal level, for those new to post, this can cause real feelings of guilt since the natural desire to be ‘fair’ to all your schools is strong. However, the allocation of your time must be on a needs-basis determined by the data and information that you collect regarding each individual school or academy.

The executive headteacher model does not allow for that to happen and consequently the role demands a well organised approach, where your time may have to be divided unequally, dependent upon how many schools you are running.

Distributed leadership
Coaching and training senior staff are vital to effect improvement in your schools. The way the executive headteacher role is organised has a major bearing on this.

Aurora Academies trust has chosen and implemented a model with heads of school operating the day-to-day management of our schools, reporting to the executive headteacher, who in turn reports to the CEO.

This has proven to be very successful and has given staff opportunities of headship while being safe in the knowledge that the ultimate responsibility lies with the executive headteacher.

Some of our school leaders say that this model provides them with an assurance of support when it is needed and it means that responsibility is shared and not solely theirs, as it would have been in the traditional headteacher model.

This way of working develops future leaders with a measure of security that they are not wholly responsible for the school.

It is also a very rewarding system for an executive headteacher, who will previously have been a headteacher, but who wants a further challenge without having to contemplate other careers (such as moving into a local authority position as an adviser or independently setting up as a consultant).

The day-to-day hands on work with schools is still very evident with this model. Coaching and supporting several heads of school brings a different dimension to the job and allows you to develop your own skills while affecting many more children and staff.

Leadership structure
Aurora Academies trust has a very flat management organisation consisting of the CEO, two executive headteachers, a legal adviser and company secretary, and a financial director. Some non-negotiables have been set up to ensure collaboration and excellent communication:
• our heads of school meet every two weeks
• data is collected six times per year
• a school improvement plan calendar is completed termly
• there is a CEO checklist meeting held termly in each academy.

The executive headteachers attend the CEO checklist meeting along with the chair of the local academy board (LAB). The LAB is the equivalent of a board of governors but has some differences in legal responsibility. Their main functions are:

- to concentrate on improving the standard of teaching and learning
- holding the senior leadership team of each academy to account in order to ensure accelerated progress
- taking a very supportive and prominent role in the development of each academy in its community.

‘Letting go of the apron strings’ can be a challenge for an executive headteacher as you have to allow the head of school and the senior team to take responsibility. It’s no good coming in to one of the schools and changing decisions that they have made as this may undermine leaders’ confidence.

It is far better to coach and mentor the team to reach the right conclusions themselves, although the greater the number of schools you are responsible for the more you have to accept that this may be done differently from the way that you would have done it as a headteacher!

System leadership
There are many very positive attractions to executive headship. Positively affecting a far greater number of staff and children is an exciting challenge.

Creating system leadership and watching staff grow in capability is hugely rewarding. The capacity to move staff between schools and/or work across more than one school creates real collaboration, which benefits the professional development of staff and consequently makes a positive impact on the children.

Doing things differently becomes a real possibility as you are not restricted to the confines of one school or academy. Organising and leading joint training is again very rewarding for someone who may have reached a point in their career where running one school has started to lose its challenge.

The tangible reward of pay is not insignificant either, as executive headship opens up opportunities that are just not possible as the headteacher of one school.

I believe the executive headship model is particularly important in areas where it is difficult to appoint headteachers. I would urge local authorities, governors and MATs to consider using the model as a way of spotting and rewarding talent, which will ensure high quality leadership for schools and academies at a time when recruitment to headship is problematic.

Podcast and presentation
If you missed our webinar on CPD for headteachers - 4 dimensions for growth, you can download the podcast and presentation slides online at my.optimus-education.com/webinar-cpd-headteachers-4-dimensions-growth
Helen Morgan, executive director at HM Education Consultancy Ltd and former headteacher, discussed professional development for headteachers and explored areas including:
• the importance of ‘sharpening the saw’ and focusing on personal development
• what the four dimensions are and how they enable you to drive change
• strategies and approaches for sharpening the saw successfully
• how the process of renewal leads to high levels of effectiveness and continuous improvement.

Hear from John at our Establishing or Joining Multi-Academy Trust conference on 15th November my.optimus-education.com/conferences/mat-formation
Webinars to watch out for

Webinars are a great way to get training and new ideas without having to leave school. LISA GRIFFIN looks ahead at topics for the autumn term

Our webinars are hosted by a range of speakers, including practitioners, experts, consultants and lawyers. Designed to provide clear and concise information on current hot topics and areas of concern, we have a host of webinars planned this term for your whole leadership team.

As well as being able to download the slides on the day of a webinar, as an Optimus member you can access the live recording afterwards to keep and refer back to. Don’t forget, if you’ve missed a webinar, you’re also able to access all our previous ones at any time too.

Below are just a taster of the webinars coming up over the next few months - so keep an eye on our website for the rest.

Aspiring to senior leadership: preparing for interviews
Thursday 29th September 4-4.30pm

Are you ready to progress to deputy or assistant head? In this webinar, Marva Rollins, headteacher of Raynham Primary School and qualified mentor and coach explores how to prepare for a senior leader role and take steps to ensure you’re equipped for the interview.

An interview for senior leadership will seek to identify why you would like to progress to a more senior position and your ability to do so.

The process is extremely thorough and will include task-based activities, mini panel interviews, a presentation and panel interview. How do you ensure you are fully prepared?

This webinar will provide strategies for reflecting on the skills and abilities that enable you to be successful in a senior leadership role and offer coaching questions to self-assess.

Senior leaders are on the career path to becoming the next generation of school leaders and with a national shortage of headteachers, displaying your leadership capabilities in an interview is vital to progress.

In this 30-minute webinar, we will explore:

• how to develop leadership abilities through identifying strengths and weaknesses
• how to prepare for senior leadership interviews by self-assessing your skills
• coaching methods to use when preparing for an interview
• the qualities that make a good leader and how to show them in an interview.

You’ll be able to download the presentation slides on the day of the webinar and put questions to Marva during the event.

Find out more and register for the webinar at http://bit.ly/AspireLead

Brave leadership: taking risks in education
Tuesday 18th October 4-4.30pm

Risk-taking can be a scary prospect, especially for school leaders with so much at stake. Steve Taylor, executive headteacher of Robin Hood multi academy trust, explores how to be a brave leader and embrace opportunities for change in this webinar.

School leaders are under never-ending pressure for results and increasing levels of accountability from all stakeholders. Taking a risk and trying something new is daunting – even worse is the fear of failing.

The pace of change is constant and nothing stands still so it’s vital that you and your school are able to cope and adapt to new opportunities and challenges.

To be a brave leader, you have to be able to respond to possible failure, learn from it and move on. This isn’t always easy, though.

This webinar will provide strategies on how to think innovatively, strengthen resilience in the face of adversity and offer guidance on how to take risks and embrace change.

In this 30-minute webinar, we will explore:

• reasons for shying away from risk taking
• how to see failure as something to learn from
• how to embrace innovation and cope positively with change
• the positives of being a brave leader in a climate of increasing accountability.

You’ll be able to download the presentation slides on the day of the webinar and put questions to Steve during the event.

Find out more and register for the webinar at http://bit.ly/braveRisk

To search for a webinar you may have missed and want to catch up on, head to my.optimus-education.com

Have a suggestion for a webinar? Let us know by emailing customer.services@optimus-education.com
Nine tips to get positive publicity for your school

Working with the local media can be a way of enhancing your school’s reputation. **PAUL SAMPLE** provides nine tips for gaining positive publicity

1. **IT’S WHO YOU KNOW...**
   - Have a good contacts list of local media, including email addresses and telephone numbers, which you can use to report on stories

2. **USE A VISUAL**
   - Send stories little and often and include good photos to increase the chances of being covered or re-tweeted

3. **HIGHLIGHT THE POSITIVES**
   - Copy the best bits from your weekly newsletter, blog, tweet, or social media posts to the media

4. **BE SOCIAL**
   - Use events in your school calendar to source good media stories

5. **KNOW WHAT’S HAPPENING**
   - Be aware of annual recurring themes in school such as sports day, nativity, World Book Day or the release of exam results

6. **ADD A PERSONAL TOUCH**
   - Look out for human stories that will attract interest – twins or triplets at the school, new staff, retiring staff etc

7. **USE WHAT’S IN THE NEWS**
   - Plan events around topical issues like Brexit, general elections, exam results and Olympics to mirror current news

8. **FUNDRAISING FUN**
   - Be aware of events such as Comic Relief, Sport Relief or Children in Need and tell TV and local radio how your school is getting involved and raising money

9. **WORK TOGETHER**
   - Visits, performances, school plays and concerts always produce good pictures and newsworthy copy

Catch up on our ‘Managing school publicity – the good and the bad’ webinar for more advice
my.optimus-education.com/webinar-managing-school-publicity-good-and-bad
Crisis management contact list

Good contacts lists are essential in developing and maintaining your reputation. PAUL SAMPLE offers a contact list to ensure you’re prepared for a crisis or emergency.

When a crisis develops, having a comprehensive database to hand, including telephone numbers and email addresses, is essential in maintaining the reputation of the school.

More serious or protracted incidents
Most schools will have a senior leadership team capable of responding to low level reputation issues. However, in a major crisis (perhaps when there has been a serious sexual offence or fatality) you may consider forming a defined crisis team to share the workload over a period of days, weeks or months.

If the crisis is going to be protracted it makes sense for a team to be formed and for meetings to be held regularly to track progress. At times like this, all members of staff who meet visitors and answer the phone are an important part of the school’s PR team. It is important therefore to ensure that they are kept ‘in the loop’ (and that they are people-friendly). There should be clarity over roles and responsibilities.

From a PR management perspective, the key players in a crisis team will include a crisis team leader, spokesperson, press officer, social media editor and secretary or admin assistant.

For the most serious incidents you might also consider including a PR crisis consultant, solicitors/legal advisor, stress counsellors or a victims visitor.

Do we need any resources?
Consider well in advance what you may need if the worst happens.

- What are our training needs?
- When will we practise our crisis procedures (dummy runs)?
- Does our spokesperson need media training?
- Do we have access to stress counselling (for prolonged or serious crises)?
- What do front-line staff need in a crisis?
- Will our reception staff know what to do with press calls/visitors?

Crisis management contact list

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What’s in this month’s School Business Management section?

Welcome to the new school term! To help ease you into the academic year, we have a range of resources and expert advice that you can access and download on our website. We also have some brilliant tips from SBM consultant Nickii Messer on how to delegate effectively – something that many SBMs feel reluctant to do. When faced with day-to-day challenges, it can be easy to lose sight of the bigger picture: SBM Sue Birchall looks at the changing landscape and the career opportunities for SBMs. Meanwhile, strategic business manager Matthew Clements-Wheeler has undertaken exhaustive research to find out what different regions are saying about the SBM profession (the findings are fascinating). We also have detailed advice on national insurance and pensions and how to prepare if your school is about to become an academy. Here’s to an excellent start to the new school year!

Alex Masters, Content Lead

Contributors in this issue

Sue Birchall is an experienced business manager with knowledge of both maintained schools and academies. She is a specialist leader in education and is registered as an associate trainer for NASBM.

Nickii Messer was a school business manager for many years in three school phases. She now works as a consultant and is Anglia Ruskin’s operational lead for their SBM programmes.

Matthew Clements-Wheeler is a business manager and deputy head at Bordesley Green Girls’ School. He is a fellow and trustee of the National Association of School Business Management.

Alex Masters is content lead at Optimus Education, focusing on school business management. She previously taught English at an academy in Kent.

Top tweets from @BusinessOE

Many words of wisdom at last week’s SBM conference in London http://owl.li/tm8o302qJpr

Considering rejecting technology in the classroom? You might be missing a trick http://owl.li/DEge302AkKc

Calling all SBMs: What’s your relationship like with your headteacher?

Forgotten your log-in details or want to add more members from your school or organisation?

Email our customer services team at customer.services@optimus-education.com or call us on 0845 450 6404.

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Ask the Experts
Got a specific question? Get in touch with our expert panel by submitting your query via the blue speech bubble at optimus-education.com

Twitter
Want to get engaged in discussion and connect with your peers? Follow us on Twitter @BusinessOE

Download a digital version of your Optimus Education Insight magazine by logging into your My Account area on optimus-education.com
Becoming an academy: how SBMs need to prepare

Is your school about to convert to an academy? As a school business manager, it is likely you will be concerned about the changes ahead. CATE HART explains what to expect and how to prepare.

Back in March we were told that all schools were going to be converted to academies by 2022. Despite the government U-turn the feeling is that schools will have to convert over the years.

So what issues will you be facing? What will be your new responsibilities and what are the best ways to prepare for them?

Converting to an academy means you will be responsible for:

- **HR** (including safeguarding, pension payments, appointments and dismissals)
- **finance** (monitoring, reporting, procuring and assisting)
- **health and safety** (you will be responsible for this completely)
- **premises** (including upkeep of properties and capital investment)
- **planning** (consider what the school’s development plan is and who will monitor it).

'It’s really important that everybody knows what’s going to happen, when it’s going to happen and how’

It's quite likely that you're carrying out a lot of these functions already.

**HR**
We know how important it is when appointing staff (whether it’s teachers or admin staff) to carry out suitability checks. That will all have to be done by the school or, of course, you could buy into an HR company.

Look at staffing levels and their budget in advance: work out what your staffing needs are going to be and, if necessary, make the adjustments in advance. Remember: once you’re an academy you have to foot the bill for redundancy payments.

Remember also that you will be reporting to governing bodies, the appointing body for teachers, and the terminating body of any person if they are deemed not suitable to work there.

Should there be an issue with a member of staff, you would also have to decide for yourselves whether it’s appropriate to provide information to the secretary of state for misconduct.

You’ll have to pay the employers’ contributions to the appropriate pension fund and the teachers’ contributions to the secretary of state. It’s likely that the pensions fund contributions for teaching staff will go up 8%.

**Procurement**
Procurement will be carried out by your school. Consider inviting a group of local schools together who are also looking at taking out new SLAs (for HR, finance, services management, for example). Get people from those companies to come and give presentations so you can make a collective decision and possibly get the cost down as well.

**Finance**
In terms of finance, rather than reporting to the LA, you will report to the secretary of state under the academies financial scheme. Under current arrangements, you probably have an internal audit from the LA. As an academy, you’ll be expected to appoint external auditors to have a look at your accounts and make sure that all is in order.

Redundancy costs become the responsibility of the school and you need to think very carefully about the shape of your staffing complement because redundancy costs can be very high.

**Health and safety**
You will now be responsible for your own health and safety and you will have to have your policy which is tailored to your school.

**Policies**
You will have to ensure that the policies are relevant to your new responsibilities. Research new policies (use Optimus Education’s templates) and adapt old ones. However, most of them will probably be very much unchanged.

**Safeguarding**
Although the LA still have overall responsibility for ensuring pupils are safe, you must have a really robust system in place to explain to any inspector, or any other relevant person who comes...
into the school, how you manage your safeguarding. This runs right through from when you’re appointing staff, to the day-to-day running of the site and to the regular training that must be given to all staff.

You will now have to ensure that the attendance is monitored, chased up, and reported on and school registers will need to be inspected.

**Premises**

When you become an academy the premises ownership is transferred and taking on an existing building with all its faults is not easy. Gone are the days when converting to an academy meant that you got a new building straightaway – that’s not what conversion is all about. So you have to make sure under the regulations that there are appropriate facilities and that it’s safe.

There are a lot of problems with some of the 1960s schools where they were built for smaller numbers and maybe larger numbers are coming in now.

Also, at the moment, the LA is managing the risk from asbestos in community schools – this is going to change.

**Planning for change**

With all of these concerns the future can seem daunting. So what can you do to ensure a smooth transition?

It’s critical that you get a clear, strategic plan in place which focuses on how you are going to take on these new responsibilities from the LA. Consider writing a list of the things you do now that are monitored by the LA. Then look at the areas which need a little more thought – whether it’s for training, finance, or looking at HR providers, for example. Try not to do it during holidays – not only do you deserve some time off to recuperate but also key people may not be around at that time.

A major priority is ensuring that each staff member is clearly informed about your plans, knows when and how they will be implemented, and feels prepared for the changes. Being aware of your staffing needs is critical – I can’t stress this enough – especially in view of the costs surrounding redundancies and pensions.

When it comes to taking on new responsibilities to meet the planned changes, support staff often come very high on the list: they are most frequently expected to change, adapt and train to meet these new needs. Ensure that all staff members have the relevant skills to take on their new challenges, including non-teaching staff, and find out what training is available.

You also need to inform the governors and the head well in advance what the plans are and what your workload is going to be. You may need to get more capacity in place – even if it’s only for a six-month period while you actually move from operating in one way to another.

It’s also good to be aware that, when we talk about academy conversions with stakeholders of schools, parents are often seen to be the most challenging.

**Contracts**

I would also recommend that you contact schools who have already converted and see which contractors they’re using and how much they are – there’s no point reinventing the wheel. Get these contracts ready in advance, rather than waiting until after you have converted which could provoke a meltdown!

It’s also a good idea to get a list of your current contracts together – especially if they are local authority ones – and have a look at what alternatives are available.

**SWOT**

Think about carrying out a SWOT analysis to identify your strengths and opportunities. For example, one of the main weaknesses might be the fact that you’ll have an increased workload for a period of time and staff may struggle to take on their new responsibilities.

Carrying out a SWOT will then enable you to say to admin staff, governors and parents: ‘Well, although it might be painful at the time, these are going to be our opportunities.’
Business manager or business leader?

In these ever-changing times, it is inevitable that we will need to be more dynamic and open to new challenges. **SUE BIRCHALL** explores the professional growth opportunities for school business managers.

'We are fortunate to have many specialists guiding us and offering support and advice: the National Association of School Business Management (NASBM) with their work on revising the SBM professional standards, the unions such as ACSL with their advice and guidance, as well as publishers such as Optimus Education with their wealth of support and advice.

However, there comes a point when we as professionals have to take a bit of a step back and look at the direction of travel. It should be clear to us all that our environment is changing and the traditional guise under which we have carried out our profession may now no longer be a true fit for all of us. Is this an opportunity to take an in-depth view of where we are heading and in fact which direction each of us wishes to take?

The evolution of the academy system and now multi-academy trusts, with all of the extra work levels and responsibilities that come with it, makes change inevitable. When I joined the profession, an SBM was a many-faceted title with responsibility over the five core business aspects of running a school. The onset of the move towards a true business approach has meant that one person no longer has the ability to manage and lead these areas on their own. Devolved responsibility and a need to have operational support within each of the key areas means things must inevitably change.

As a species, the human being is not overly receptive to change especially when it involves a fundamental shift from their comfort zone. As Tolstoy said: ‘Everyone thinks of changing the world, but no one thinks of changing himself.’

I find myself now inhabiting and I am sure many of you feel the same. During my 15 years in the role I had an idea of the ‘true purpose’ of school business management and naïvely saw reasons to change the role constantly. Initially, the rationale was that one person (the headteacher) could not possibly have all of the knowledge and expertise, let alone the time, to run all aspects of a school. The pressing need for the government to start showing value for money in public spending and the desire of the then labour government to run all social changes through education made this an impossible task. The idea of a business manager who could hold the knowledge and expertise to run the business side of education made sense and certainly appealed to me. I willingly engaged in all of the training programmes and learnt on the job. My thirst for knowledge was constantly fed with new and often quite exciting themes and directions.

However, what the government did not take into account was how slowly the education system takes to new ideas and changes. Each school is individual and takes the idea of the SBM in a variety of ways. I was fortunate that I was able to secure a role in a very forward-thinking school where the headteacher took full advantage of my skills to support and enhance the core purpose of teaching and learning. I know this was not the case for everyone and, in a way, is one of the reasons why we are in the situation that we are in today. This staggered approach towards a working business model created a move to instil a business mindset in our education system which was advanced by the current government’s academisation programme.

Clarity

Through this the ‘management’ part of school business management has become more operational and far less strategic.
than was originally intended. Our various roles have become so diverse that they are near-on impossible to compare or to benchmark – and it is no surprise that there has been no agreement on a national pay range for SBMs.

The new NASBM professional standards are designed to support and bring some clarity to the situation and it’s well worth setting aside some time to study these. The comprehensive standards can also be used as a benchmarking tool for both ability and pay.

However, agreement is still not forthcoming. So maybe we should do our bit!

There is a growing view that there is now such a range of ability and responsibility within the role of the SBM that we should consider the argument to tier the role. A question that appears to raise its head on a regular basis is where does the business management end and the business leadership begin: are they still part of the same thing?

What is the difference between management and leadership? Management is the act of managing, having direction or charge of and leadership is about guiding and leading achievement of an idea or ideal. In SBM terms, the same thing that we have all been striving for: an input and influence into the strategic direction of our schools. There are many reasons why in so many cases this has not been achieved.

**Perception**

The role of SBM has never fully integrated with senior management in all schools and academies, and is often not seen as a core role in teaching and learning. It is clear to us within the profession that what we do clearly has an impact on every area of teaching and learning and the outcomes that are achieved for our pupils. This perception creates a huge difficulty when moving from the operational side of business management to the strategic ways of school leadership. If you cannot access the highest levels of leadership you cannot possibly operate at this level.

Certainly many of us have willingly moved to some degree along the qualification path. There is a huge disparity in qualifications and ability within the sector and this will inevitably have some bearing on the levels that we are able to work at. With the demise of the NCTL and the cost now of accessing the SBM training programmes, along with increased workloads and pressures in the work place, many have not progressed in their training, along with those who have chosen not to. This would indicate that we may already have decided that we have reached the level at which we wish to work. But the industry demands more.

It is also about drive and ability. There are many in post who joined their schools and academies long before the onset of all of the development and changes. The role has changed to such a degree that, whilst titles and job descriptions may have changed with it, actual working practices haven’t. There is definitely not a ‘one size fits all’ but we as a profession need to discuss how to bring about the organisational change that it appears to demand.

In conclusion, in order to survive and thrive the SBM profession has to take a directional change. One thing that is very clear is that, in order to achieve a successful change towards business leadership, we must all take responsibility for our part in the process. By this I mean as individuals recognising yourself and your ambitions and desires by actively seeking out those roles which fit your needs and wants. As a profession, being prepared to regroup, rebrand and step up.
**Invest time in delegation**

Many school business managers are reluctant to delegate work to their team but it is in fact essential for organisational success, as consultant NICKII MESSER explains.

- **They say:** ‘If you want something done, ask a busy person’ (Benjamin Franklin), but when I was a school business manager, asking a busy person to do even more proved a real challenge for me. How could I, in all conscience, add to the already over burdensome workload of the very people I was responsible for? However difficult it may be for you, delegation is unquestionably the key to organisational success. Overreliance on any individual who keeps everything to themselves is an unacceptably risky practice. If you were not around (whether your absence were planned or not) who would do those tasks if only you understood them? Just as risky is the leader who expends unnecessary time and energy on tasks better delegated to others. That leader will have less time to spend on important leadership tasks and risks burning out trying to do everything.

  The ‘Educational Excellence Everywhere’ white paper (DfE: 2016) sets out the government’s intention to move every school into system-led, multi-academy trust formations. Nicky Morgan’s rather diluted back-pedalling on this matter did little to reassure schools that they will have any choice. Increasingly reduced funding is likely to force the issue as schools will not be able to afford to work alone. SBMs need to carefully consider their position within this landscape, where the disappearance of LA support will mean more time being spent ensuring compliance, and the SBM role itself will necessarily become one of a more strategic nature across several schools and business management teams. Sustainability for the SBM role will be reliant on effective working practice, with delegation an intrinsic aspect.

- **'However difficult it may be for you, delegation is unquestionably the key to organisational success'**

  True, it can appear quicker to do the job yourself rather than spend time explaining it to someone else (who you are sure will never do it quite as well as you!). But rather than viewing it as spending time, regard it as investing time and effort in your team – which any good SBM should be doing as a matter of course. With that in mind, I have used the acronym INVEST as a framework for successful delegation.

  **Identify**

  Before handing over the task, be clear about the non-negotiables. What has to be done; when does it have to be done by and the minimum requirements to get the job done to an acceptable standard. I find that many school support staff are perfectionists and, of course, some jobs need to be done to an exact standard (financial returns, exam management etc). However, for many tasks, good enough has to be good enough. Schools can no longer afford to pay staff for ‘over
production’. So an important but, for some, difficult non-negotiable will be the determining what is acceptable then leaving it at that. Delegation so often stalls because the delegator cannot bear to see someone doing a job at less than the very high standard that they would do themselves, so this may be a skill you need to develop.

Value
An important lesson I learnt as an SBM was to value myself and my role. I quickly found that my week could be completely taken up by interruptions and ‘could you justs’ if I allowed it. Valuing the job that I was paid to do made it easier for me to be objective about prioritising and delegating tasks. This was not personal, it was about being the effective, quality SBM that my school needed me to be. Time spent on more administrative tasks takes you away from the strategic planning and systems and processes that you are paid to develop. Delegating becomes easier once you understand this.

You must also value your teams and the individuals within the teams. This means investing in them by delegating responsibility for the task, rather than just the operational aspects of the task. Don’t worry, you can – normally should – retain accountability, but hand over the responsibility.

Entrust
This brings us nicely to ‘entrust’. The definition of delegation requires that you entrust the person you are delegating to. When you delegate, share with your colleague the non-negotiables only. You should not tell your colleague how to do the job or other superfluous information. If they are to grow and develop they will need to be entrusted with responsibility for how they get the task done. Until you feel more confident in them, give them sufficient time to be able to learn and if there are specific technical skills that you can share with them, that’s fine. An effective delegator asks how the colleague will do the job, and might also ask them to outline what they understand as the most important task elements to ensure that they really have understood them. But avoid, at all costs, standing over your colleague dictating how to do the task.

Sshh
Ok, I know, I keep repeating it, but once you have delegated the task and the responsibility, you need to sshh! Leave your colleague alone and refrain from checking up on them. As long as you have an open door policy, and have built a culture of mutual trust, they should soon seek you out if they need help with anything.

Timescale
It is important that you agree with your colleague the timescale for the task. The obvious point here is agreeing when the task needs to be done by, but there should be other elements of time built in, especially with colleagues being asked to do something new to them. You might agree, for example, to meet in a few days’ time so that you can both see how things are going and provide any extra support (with the task or prioritising other workload if that has become burdensome). This is a scheduled meeting rather than you just popping by to see how they are. It might also be wise to agree a deadline somewhat ahead of when completion is needed, so that any last minute hitches don’t create a panic or impact on other stakeholders. For your colleague, missing a key deadline might be bad enough but if they feel that others have been impacted because of a mistake on their part, it can cause a real crisis of confidence. So a bit of leeway is good practice, and benefits everyone.

Summary
When done properly, investing in delegation becomes empowering. Delegating tasks allows you to focus on the important, strategic, planning elements of your job that might otherwise take second place. As you are empowered to work more effectively, so the school and your colleagues benefit from the enhanced management and leadership you can devote more time to.

As with any skill, delegation is something that you can always continue to improve on. It is, therefore, worth investing time after the task has been completed to review how well you did, and how you can improve next time. Be brave and ask for 360 feedback too.

Delegation empowers colleagues to stretch out of their comfort zones, gaining confidence in new skills and experience. This supports sustainability within the organisation as it becomes less reliant on one or two individuals, with more opportunities for succession planning. Win, win!

Nicoll Messer will be hosting a webinar on the art of delegation as part of our new SBM training series. To register, go to my.optimus-education.com and head to the webinars section.
National Insurance and pensions: what you need to know

MICON METCALFE offers an update on the latest changes to National Insurance and pensions and the impact this will have on school business managers.

From looking at our pay slips in April, most of us will have noticed there has been a change to National Insurance on the employee side. Most school business managers will also know that something has changed on the employer side too.

Contributions have gone up which makes school budgets even tighter and employees in the pension schemes will have felt the pinch in their take home pay.

So what’s it all about?
The changes are linked to the new state pension (www.gov.uk/new-state-pension/overview) and the consequent abolition of the state second pension (www.gov.uk/additional-state-pension/overview).

Most of our employees in schools are in either the Teachers’ Pension or the Local Government Pension Schemes and before April 2016 both employee and employer paid a discounted rate of National Insurance. This was called contracting out. Those without a pension scheme had higher National Insurance contributions to add towards their second state pension which would top up their basic pension on retirement. Now the same National Insurance contributions are paid for all employees at the higher rate to build towards the new state pension.

There have been some other changes that affect employees. In the past, 30 qualifying years of National Insurance were needed to get the full basic pension of £119.30 a week. To get the new state pension, 35 qualifying years will be needed to get £155.65 per week. When a person comes to retire, the government will work out a starting amount (www.gov.uk/new-state-pension/how-its-calculated) which values the National Insurance contributions made before 1 April 2016.

So what is clear is that to get a state pension people will have to work longer and pay more in.

Pension auto-enrolment

Employers must make a minimum contribution towards their employees’ pensions and they must automatically enrol most employees into the scheme.

The pensions offered by schools are suitable schemes for auto-enrolment but academies and local authorities as employers still have to register with the Pensions Regulator and meet the auto-enrolment obligations. It is important, therefore, that all eligible employees are enrolled into the correct pension scheme and it is good practice to let prospective employees know about the schemes.

Employees can opt out of the pension scheme, but they should opt out after their employment or staging date. If they opt out within three months they will get a refund of their contributions.

Public sector pension schemes have also been subject to change over recent years – in the main to make them affordable and sustainable. There are few final salary or defined benefit pension schemes left in the private sector now and public sector pensions are often painted as ‘gold platted’ in the media. Neither scheme is a final salary scheme any more although both are defined benefit schemes which means that the final pension amount is guaranteed and not reliant on investment performance.

Teachers’ Pensions

Teachers’ Pensions is an unfunded scheme and contributions are credited to the exchequer. Retirement and other pension
benefits are paid by public funds provided by parliament. This is why academies do not report a pension surplus or deficit for this scheme.

The employer contribution increased to 16.48% on 1 September 2016 – from 14.1%. This added a large chunk to salary costs at a time of flat cash funding. Employees contribute based on their salary and the rates vary between 7.4% and 11.7%. Prior to 2010 the contribution rate for teachers was 6.5% so there has been a significant increase. The scheme changed on 1st April 2015 to a Career Average Revalued Earnings Scheme rather than final salary. Benefits accrued up to this date are protected and will be paid on a final salary basis at the point of retirement or leaving the scheme. The normal pension age (NPA) increased to 65 as well. There are protections for some teachers and tapered arrangements for others.

The Teachers’ Pensions website has lots of information for employees and employers. Academies can access the employer area; maintained schools will need to access information via their local authority pensions team. Teachers’ Pensions is actively encouraging members to create an online account so they can see their benefit statement and see how their career average benefit is calculated for each year.

**Local Government Pension Scheme**

This is a funded defined-benefit scheme, with the assets held in separate administered funds. This may be your local authority or it may be another administered fund, for example the London Pensions Fund Authority.

As it is funded, academies and local authorities have to report on the performance of the fund their employees are a member of and carry any deficit or balance in their accounts. Parliament agreed to guarantee that in the event of an academy closure, outstanding Local Government Pension Scheme liabilities would be met by the Department for Education.

Employer contributions can vary. During my time at Dunraven School we have seen contributions as low as 12% and as high as 19%. There is a triennial valuation which is carried out by actuaries for the pension fund.

Multi-academy trusts are likely to have employees in a range of administered funds with different contribution rates. Although administered by different organisations, the employee contributions and benefits are the same for all members. Employees contribute based on their salary and the rates vary between 5.5% and 12.5%. There is also a 50/50 scheme where employee and employer pay 50% of the contributions for 50% of the benefits. The NPA is now the same as the employees state retirement age. The scheme changed from final salary to career average on 1 April 2014. Each Fund will have its own website and employer/employee access but general information can be found on the Local Government Pension Scheme website.

**Administration**

The pension arrangements for both schemes have become more complicated from an administrative point of view. Whole earnings rather than salary scales are now used for calculating employee contributions. This means that people with regular overtime may actually move between bands month to month. The pensions regulator requires information from the schemes so schools have to provide detailed annual returns as well as monthly statements. This has certainly been a challenge in our school and it has added to workload.

Finally, as business managers, we are often asked about the pension schemes. We are not pension advisors. The schemes provide a lot of factsheets and guidance for members and prospective members and I always point colleagues to this information. If they want more detailed advice they should seek independent financial advice.
Across the country: how are SBMs really feeling?

From funding and academisation to recruitment and pensions, what do SBMs really feel about today’s pressing issues? MATTHEW CLEMENTS-WHEELER investigates

My role with the National Association of School Business Management (NASBM) means that I often travel the country meeting school leaders and SBMs and talking to them about their challenges and how national issues are playing out in their regions.

A survey of school business leaders that I carried out in July gives a good view of the national picture (see chart on the right). Whatever the age range, type or location of their schools, it seems there are a number of issues that are keeping school business leaders awake at night. Funding (including the long-awaited national funding formula), academisation and the rise in importance of multi-academy trusts are big concerns.

These issues are played out over and over in the national press. But how representative are these national debates? Do they accurately portray local reality for schools as far apart as Newquay and Carlisle, Maidstone and Durham?

Concern

At a national level, only one in four school leaders describes themselves as optimistic about the financial position of their school. The remaining 75% are concerned.

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In Hertfordshire, SBM Sharon Carlyon summed up the situation: ‘I am concerned about long-term school funding. I wonder how changes to the national funding formula will affect my school in the long-term. For the first time in eight years, I have been unable to balance a three-year forecast.’

Others in the South East tell the same story and say reduced funding is having an impact on school resources. Jo Marchant, a special school SBM in Kent with nearly 200 staff, told me the increases in teachers’ pension contributions and, in particular, increases in National Insurance have had a significant impact on their budget this year. With no extra funding to cover these increases and no additional funding for pay rises, Jo reports drastic cuts to her schools’ resources budgets to avoid redundancies.

Crystal balls

The situation is the same in the North East where one exasperated SBM noted that ‘setting a five-year budget is no better than crystal ball gazing’. Martin Owen, a practising SBM and qualified accountant working in the region, explained to me that there are tensions in the system and ensuring a balance between the direct teaching and learning functions and support functions is crucial. Additionally, some SBMs in the region are worried that support staff can all too easily be seen as targets for both criticism and reductions in funding under the veil of ‘efficiency’.

In Yorkshire and Humber, Michael Horrocks talked to me about funding decreasing whilst costs increase, and Rutland’s Jen Iden referred to the challenge of affording outstanding teachers in a small school setting with only 116 children on roll. Nottinghamshire’s SBMs reported that health and safety issues are harder to address in a reduced funding climate.

Optimism

However, while the majority of schools and SBMs are worried about the future, Josh Greaves, business and operations director at the Wellspring Academy Trust (which works with schools and SBMs in Barnsley, Kirklees, Leeds and Lincolnshire), was much more positive. Josh said that he was very optimistic about the future and, like some other SBMs, thinks that inter-academy collaboration within a multi-academy trust will allow schools to weather
the financial storms ahead.
Another positive financial outlook turned up in Shropshire where Hayley Dunn, regular tweeter @ShropshireSBM, said that her school is financially secure and well-resourced. She said her challenge comes from ensuring that children make good progress.

**Collaboration and MATs**
The furthest south I have been in the last year is to Newquay and the Cornwall Association of School Business Management. Andrew Dodd, their chairman, told me that in some schools the deficits are so large that the only solution has been to bring them into a MAT and restructure staff. His multi-academy trust lead school, Camborne Science Academy, has opened a new ‘NEXUS’ STEM centre for the gifted and talented in a school that became unviable and was closed and merged with Camborne under a MAT banner.

I found more evidence of collaborative projects in the South West. One school told me they'd started sharing a managed ICT service with a neighbouring secondary which made considerable savings over the LA option and provided a much better service. Other examples included a school working in a joined up way with the local agricultural college and the work at Cordwalles Junior School which Sarah Jones told me will 'operate as primary science lab in conjunction with two other schools in the MAT’.

Sam John pointed to the Bishop Anthony Educational Trust (Herefordshire Diocese) which covers Herefordshire and parts of Shropshire. The trust is involved in some great collaboration work, both formal and informal, across the diocese with a mix of church and non-church schools. Sam said they are now being approached by non-church schools looking to join the MAT because they are worried they will not be able to continue in their existing clusters if all of the church schools leave to join the MAT as it grows.

**'For the first time in eight years, I have been unable to balance a three-year forecast’**

Back up in Yorkshire and the Humber, Josh Greaves remained positive about collaboration. He cited schools working in collaboration to employ educational psychologists and towards multi-site collaboration across facilities management, cleaning and catering. This is an increasing trend and one I encountered elsewhere in Gloucestershire, Lancashire and Liverpool amongst many others.

In Bristol, Eva Gossan told me that working in a school rated outstanding by Ofsted and operating as a national teaching school allowed her and her colleagues to monetise their expertise and generate traded income to support their budget.

**Barriers**
Of course, collaboration is not always easy. Jenifer Iden told me that, although her school, the English Martyrs Voluntary Catholic Academy, is part of the St Gilbert of Sempringham MAT, geography remains a challenge to working collaboratively for schools in rural areas such as the East Midlands.

That's not to say that urban schools have it easy. Committee members working on behalf of the 400+ member Birmingham Association of School Business Management have been examining some of the barriers to collaboration and the hurdles to be overcome. Their list has over 40 issues to be addressed including competing agendas, capacity, appetite for collaboration and willingness of schools to surrender some of their autonomy.

However, BASBM chair and vice chair, Jane Taylor and Mike White, remain optimistic. 'School-to-school support is the right way forward for issues around procurement and operational efficiency,' Mike said.

Elsewhere in the West Midlands, the mood remains optimistic with SBMs I have met talking about moving procurement away from local authority provision, balancing the EFA’s RPA scheme versus commercial insurance, collaboration projects such as sharing foreign language assistants and co-ordination of sports provision and PE lessons across primary schools. I was also very interested to hear from Hayley Dunn about the increasing use of collaborative moderation groups in Shropshire.

**Recruitment**
Around the country, recruitment is also a recurring concern in both urban and rural schools.

London SBMs talked to me of issues with recruiting science, humanities and maths staff and other London and South East schools mentioned a general lack of candidates and poor quality applicants, especially for leadership posts.

Retaining skilled support staff in the face of rising living costs in London also appears to be a real challenge at the moment.

Where pupil numbers are increasing in some of the Northern education authorities, SBMs told me that they and their headteachers are worried about their ability to grow capacity in advance of demand in order to deliver the curriculum and, crucially, maintain standards during a period of expansion. SBMs in schools without effective engagement with/by their local teaching school report that it is becoming harder to be certain of recruiting the best quality NQTs. I suppose this is the consequence of collaboration – those outside the arrangements suffer.

Information in this article is based on Matthew’s own conversations with school leaders and feedback from 178 schools across the country who completed a short survey in July 2016. Some of these were targeted to ensure an even geographic spread, others responded to an open invitation promoted via Twitter and LinkedIn.
A range of support for you this autumn

The autumn term will no doubt be hectic and full of new challenges. Check out our range of resources and expert advice that you will be needing in the coming weeks.

From checklists and templates to expert advice, we have a wide range of support for Optimus members. Simply log into my.optimus-education.com and type the key words from each title below into the search box for a raft of downloadable tools and step-by-step advice that you can implement today or share with colleagues in your school.

<table>
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<th>Resources and templates</th>
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| Back to school: the SBM September checklist | New CPD webinar series!  
Our monthly checklists are proving hugely popular. Simply download and work through to make sure you haven’t forgotten anything! |
| Support staff CPD toolkit | MATs Summit 2016 – pre-event dinner  
An exclusive evening for SBMs and finance directors hosted by NASBM and Optimus on 12 October 2016. Includes presentations and discussions on: “What does the road ahead look like?” and “What is the right structure for central services in your MAT?”  
Register at: www.matsummit.co.uk/exhibitors/pre-event-dinner |
| SBMs working with governors toolkit | Inductions: preparing for NQTs  
The quality of an NQT’s induction can shape their entire school career. How can you ensure NQTs have the best introduction to your school? |
| Induction checklist for new members of staff | Professional learning for support staff  
It’s time to start planning support staff training. Check out this expert advice on how to create optimal professional learning opportunities. |
| Example of income and expenditure statement notes | Creating support staff development plans  
Our expert Ruth Bradbury explains why it’s vital to create development plans for support staff in schools. Includes a range of practical measures to make the process more manageable. |
| The SBM October checklist | Webinar: marketing your school  
In this 30-minute webinar, Paul Sample, leading consultant on school marketing and reputation management, gives you the benefit of his experience when it comes to marketing schools. |
| Checklist: ICT and technology – saving time and money | Managing statutory reporting to governors  
As a school business manager, it is vital that you provide your governors with the legally required information they need to carry out their job of holding your school to account. Find out where statutory obligations lie and the best ways to provide information to your governors. |
What’s in this month’s Teaching and Learning section?

Autumn is always a busy time for training and CPD, as schools launch new initiatives and find new ways to keep improving teaching. One of our main priorities is to help you improve outcomes and make you more confident and happy in your role. So do turn to page 36 where we summarise some of the training routes available to you as an Optimus member this term. In this issue there are also the useful resources and articles you’ll be used to, including advice on the research evidence behind marking, increasing challenge through the EPQ, effective (and cheap) CPD and much more. If your more able coordinator is new to their post, make sure to share the skills audit in this issue on page 48 and look at Princethorpe College’s approach to their provision (page 44). Any feedback, thoughts or content suggestions? Drop me a tweet at @TeachingOE.

Owen Carter, Content Lead

Contributors in this issue

Helen Pascoe-Williams is da Vinci Coordinator & Scholars’ Mentor at Princethorpe College. She has been instrumental in transforming provision for the more able at her school.

Owen Carter is content lead for teaching and learning at Optimus Education. Previously he worked at SAGE and Pearson Publishing, where he helped develop educational apps.

Ruth Powley has been teaching for 22 years in a number of roles from head of history to deputy headteacher. She is a regular contributor for Optimus Education, both as a writer and speaker.

Joanne Miles has spent over twenty years in teaching, training and professional development roles in education. She is a full time trainer and coach, helping schools develop their approaches to teaching and learning.

Top tweets from @TeachingOE

The average cost of teacher training is £23,000, but 40% of trainees aren’t working in state schools five years later retention

Plenty of evidence to suggest that when it comes to interventions, one-off just doesn’t cut it.

It’s the quality of teaching that matters - let’s draw the right lessons from Shanghai’s educational success.

A concrete approach that’s working.

Be part of the Optimus Teaching and Learning network

Live Chat
Can’t find what you’re looking for on my.optimus-education.com? Click on the speech bubble and connect with our customer services team.

Ask the Experts
Got a specific question? Get in touch with our expert panel by submitting your query via the blue speech bubble at optimus-education.com

Twitter
Want to get engaged in discussion and connect with your peers? Follow us on Twitter @TeachingOE

Forgotten your log-in details or want to add more members from your school or organisation?
Email our customer services team at customer.services@optimus-education.com or call us on 0845 450 6404.
What’s coming up in the autumn term for you?

As an Optimus member you have access to a range of exclusive events and resources. But it’s important that you plan your CPD to ensure it has an impact – this is what you can expect.

**The professional development**

In the last days of the summer term, a professional development standard for teachers was released. It emphasized the importance of sustained CPD, which forms a coherent programme.

For training to be successful, it has to be more than just occasional Insets or an article read from time to time. It has to change practice and involve teachers deeply engaging with a particular issue or aspect of their teaching.

That’s why we’ve planned all our training around coherent topics, making up a long-term package of support – not just one-off interventions. Whether you’re coming to one of our events, delivering training within your own school, or just reading Insight, here are three of the main focuses in teaching and learning over the autumn term that will help you to plan your own CPD programme.

### Stretch and challenge

- **Network and hear from world-class speakers at our annual More Able conference.**
  - **Supporting the More Able**
  - **Manchester 27th Sept**
  - **London 4th Oct**

  Use our [more able coordinator skills audit](#) to identify what you need to focus on and how to get the most out of training.

  New to the role in September? Use the G&T coordinator’s toolkit on the Knowledge Centre to cover some of the key areas you’ll need to succeed.

  Attended the more able conference but want to help train colleagues too? Use our [In-House Training units on assessing mastery](#) to help share your training more widely.

  Learn how to adopt a focus on growth and continually raising the ceiling with Chris Hildrew’s webinar on [embedding growth mindset](#).

### Differentiation

- **Get skilled up on practical differentiation strategies in the classroom that don’t just feel like an extra burden.** Free for all Optimus members – which means you!
  - **Challenge and Differentiation in the Classroom**
  - **Manchester 27th Sept**
  - **Grimsby 5th Oct**
  - **London 18th Oct**

  Check out our new and updated [Differentiation in Practice](#) In-House Training course – aligned with the content of the training days to help you get the most out of your CPD.

  Watch our webinar on [time-saving differentiation strategies](#): Amjad Ali outlines ways you can set up your classroom for differentiation which don’t always require the monitoring of a teacher.

  Do you want to train NQTs in differentiation? Look at [Unit 3 of the Teacher Development Programme](#) – available in download and deliver and self-study formats.

### CPD leadership

- **Join Dr Matt O’Leary and Joanne Miles to reimagine your approach to lesson observation, and move from a judgemental to a developmental approach.**
  - **Rethinking Lesson Observations**
  - **Birmingham 15th Nov**

  Are you responsible for leading professional development activities? Whether you’re new to this responsibility or looking for something more advanced, our [CPD leadership self-study training](#) should meet your needs – head to the In-House Training area to find it.

  If you’re looking to focus on the processes and systems of CPD planning, download the [CPD leadership toolkit](#) from the Knowledge Centre, featuring lots of resources to refine your approach.

  Use our [skills audit templates](#) to self-assess and encourage staff to reflect on their practice. (These can be great to use for appraisal meetings too).
Effective marking: what do we really know?

Teachers spend much of their time marking, but do we really know what makes an impact on pupil progress? OWEN CARTER summarises the research evidence.

Marking: it consumes enormous amounts of teachers’ time, but we know surprisingly little about what makes it effective. That at least was the conclusion of the Education Endowment Foundation’s review on written marking.

Tread carefully
The researchers behind the report have said ‘we would be very happy if people took the current lack of evidence on marking as the key finding.’

While it’s commonly assumed that forms of marking like DIRT, triple impact, red pen/green pen are effective, there are as yet no specific studies to support this.

Though the EEF has dedicated £2 million to research into specific marking approaches, it will take some time for the results of these trials to appear. In the meantime it would be wise not to assume that any given type of marking is inherently effective.

Not the same as feedback
We know from the EEF studies and others that feedback to learners about their performance and how to improve it is hugely important, adding an average of eight months’ progress.

But marking is only one aspect of feedback, and one of the most under-studied parts. As the EEF review notes, there are many cases where verbal feedback to pupils will do the same thing as marking, but much more quickly and much more efficiently.

The DfE marking policy review group recommended that schools avoid privileging marking over other forms of feedback by making it part of an assessment policy alongside other practices.

The takeaway: feedback is definitely important, but written marking is only one aspect of this. Think of marking as one strand of assessment and feedback.

Just grading probably isn’t worth it
No evidence was found that awarding a grade without comments had a positive impact on pupil progress: it may in fact have a negative effect.

The evidence on awarding grades alongside comments is a bit more mixed: the majority of studies suggest this takes away from the impact of the comments, but one study did find a different outcome, and there is evidence to indicate that grades alongside comments may affect groups of pupils differently.

The takeaway: if you want the effect of marking a piece of work to be purely formative, consider leaving out or minimising the use of grades.

Meaningful, manageable and motivating
The DfE workload review suggests three principles for effective marking.

Meaningful: marking should serve a single purpose, advancing pupil progress and outcomes. Different forms of feedback will be appropriate in different situations, and the teacher can judge this.

Manageable: the time taken to mark is not the same as effective marking. Don't adopt particular practices for Ofsted: they don't expect to see any specific type or volume of marking, provided it is consistent with the school assessment policy and promotes pupil progress.

Motivating: marking should help motivate pupils to progress. This doesn’t mean always writing in-depth comments or being universally positive. Pupils should be expected to check their work before they hand it in, and should be taught to understand the success criteria for a task (in an age appropriate way).

The takeaway: marking needs to be meaningful, manageable and motivating. Your school should come to an agreement about what reasonable marking constitutes, and where you could make efficiencies.

Frequent marking isn’t the same as effective marking
There are no studies focusing on the impact of acknowledgement marking i.e. ‘tick and flick’ marking to show that work has been seen. Marking studies from EFL and higher education suggest that in general more focused marking, concentrating on a particular type of error or theme, can be effective in addressing errors. ‘Acknowledgement’ marking is almost certainly not as effective.

Although the evidence base is still pretty thin, schools might want to consider ‘marking less, but better’ – especially given workload considerations.

The takeaway: make your measure of effectiveness how pupils learn as a result of marking, not the frequency with which marking is done.
If you’re experienced in leading professional development, there are fundamentals to effective training design that you perhaps don’t even think about any more. This can often prove a weakness when it comes to training up staff to deliver training themselves, or indeed in being able to critically self-evaluate your own training.

Here Joanne Miles shares some of the fundamentals behind planning a truly effective training session – head to the In-House Training area online and look for CPD Leadership: Essentials to see more.

Using your experience as a teacher
A lot of core concepts in teaching transfer very well into the role of the CPD leader. Planning to meet participants’ needs and interests has links with the way that teachers plan to differentiate for their pupils.

CPD leaders need to consider the composition and dynamics of the group, the differing levels of knowledge and experience in the session, during their planning and delivery. When you deliver CPD, you need to think about assessing learning and following up the training to see if it has had an impact, which resonates with our focus on checking learner progress over time.

However, delivering CPD sessions to adult colleagues has differences from planning learning activities for children.

• Engaging and motivating adult learners may involve a different range of approaches from those harnessed with children.

• Pitching to an adult audience and creating a professional, respectful learning environment can involve a different classroom management style and tone.

• Delivering CPD to colleagues can be nerve-wracking at the beginning, as you can feel suddenly visible to your colleagues in a new way.

Planning for your CPD session
For each session you deliver, it is important to consider the purpose and the desired outcome of the training. Is it intended to foster the sharing of practice on a specific theme? Is it designed to expose teachers to research or pedagogy that they may not be aware of? Will teachers create a practical resource by the end of the session? This end goal will help you to shape the session accordingly.

You also need to plan for the mindset and expertise of the target group of participants. Are they new to this topic or have they had previous training on it? What range of attitudes could there be within the group to attending training on this? Is it reasonable to expect that there is some expertise (or a lot!) in the group that you can draw on?

It can be very effective to ask teachers some questions before you actually plan the session, either in a team meeting slot or via a questionnaire. This will help you to focus the content on areas of relevance and hint at the levels of engagement and expertise you may see in the session.

It is also important to consider the duration and timing of the session within the working day. A half-day session allows for a wider range of activities and some longer, reflective tasks. A short bite-sized session will require a very clear and specific focus and the use of shorter activities such as speed dating or quick brainstorms or short written exercises, otherwise very little ground may be covered.

If the session is taking place at the end of the working day, it can be important to manage pace and energise people, so including some tasks that involve movement or speed can be effective.

Eight questions to support the planning of a CPD session

1. What will the purpose and outcome of the CPD session be?
2. What different needs are there in the group of participants?
3. How can I ensure it is engaging and relevant for them?
4. Which activities best serve that aim?
5. How will I prepare myself and the participants for the session?
6. What role might technology and other resources play in the session?
7. What follow-up activities and resources can I provide?
8. How can I support them with assessing the impact on themselves and their learners?
Classroom management in CPD sessions

- Grouping or pairing up participants: Will you give them free choice or specify who works with who at different points in the session? It can be well-received to share your rationale for the dynamics you are setting up, as they are all adult professionals in a collaborative learning environment.

- Pace management: Initially, it can be challenging to predict how long activities will take in CPD sessions, so it is a good idea to have a few contingency or extension tasks available. Use time limits and time warnings to keep the session on track, but be aware that sometimes you need to ask the groups if they want some extra time to really explore a meaty discussion or a challenging task.

- Plenary slots: Think about the purpose of these and make them focused and useful for extending learning. As you monitor group or pair tasks, spot people who have interesting points to make and nominate them in the plenary slot to share these with the wider group. Be careful not to have plenary slots that drag on, re-hashing everything they did in the tasks – make sure that learning gets extended.

- Applications to their context: Plenty of CPD research highlights the importance of teachers reflecting on links between theory and research and their own context, identifying ways to apply or adapt it successfully. Encourage open debate and critical thinking in your CPD sessions and avoid being prescriptive and didactic in your approach. Your role is to support the group in reflecting on their practice and developing it further, not to impose your own approaches on them as best practice.

<table>
<thead>
<tr>
<th>Trainer skills audit</th>
<th>Scale 1-4: 1= no skills 4=high level of skill</th>
<th>Tick 3 areas for development</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Diagnose needs and preferences before designing the training</td>
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<tr>
<td>2. Design the training materials to address differentiated needs and preferences</td>
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<tr>
<td>3. Engage participants before the training in pre-session tasks to encourage reflection</td>
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<tr>
<td>4. Plan the tasks to suit the group of participants (relevance to experience and subject)</td>
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<tr>
<td>5. Bring current theory and pedagogy into the session in an engaging, involving way</td>
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<tr>
<td>6. Harness the knowledge in the room through eliciting ideas and experiences of teachers</td>
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<tr>
<td>7. Use probing questions to deepen and broaden reflection in monitoring and plenary slots</td>
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<tr>
<td>8. Pitch tone and materials to an adult audience with professional respect – don’t patronise!</td>
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<tr>
<td>9. Model approaches and activities within the session through micro-teaching</td>
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<tr>
<td>10. Provide some time for teachers to draft a plan or design an activity within the session</td>
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<tr>
<td>11. Use technology to enhance learning before, in and after the session</td>
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<tr>
<td>12. Signpost resources and tasks for extension activities after training, including use of social media</td>
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<tr>
<td>13. Elicit ways to measure the impact on learners and teachers</td>
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<tr>
<td>14. Support teachers to identify specific action steps to take into their classroom practice</td>
<td></td>
<td></td>
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<tr>
<td>15. Be available for follow-up activities and signpost who else could support that process</td>
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</tbody>
</table>
The current economic and recruitment climate has meant that many schools are thinking more carefully about how to improve their professional development programmes.

Better training is one of the best ways to recruit and retain high quality staff, making it a real financial boon. The challenge is in knowing how to structure and sequence better CPD, and how to take advantage of in-house expertise to improve pupil outcomes. Here are six things to consider when planning cost-effective improvements to your CPD programme.

1. **Identify need**
Before you can really begin to think about how to better organise your professional learning, you should aim to be clear about what specific need or needs you are trying to address. This may sound obvious, but in practice it is easy to try and include everything in a CPD programme, some of which may be desirable but not necessarily essential.

A useful starting point is pupil need: if you weigh the impact of CPD against its effect on intended pupil outcomes, whether exam results or in a broader sense, you can’t really go too far wrong.

2. **Question everything**
As with many things in education, it is good to ask searching questions about proposed changes, in this case requests for further training. Obviously, the first question should be about the relationship between any proposed training and pupil need. If this is not established, then it is likely to be something desirable rather than crucial. If there is a definite need and/or the outcomes are clearly stated, the following questions may be useful.

- Is there anyone inside the school who can deliver the training?
- Are there colleagues in the local area/network/alliance who can deliver the training?
- Are there colleagues in the local area/network/alliance who might also benefit from the training and thus can share the costs of any external expertise?

3. **Create expertise**
When using external CPD, it’s generally worth your while to think about how this will lead to internal expertise. Long-term development of internal expertise will help ensure that you’re not dependent on expensive consultancy, for instance.

Depending on the requirements, it might be possible to buy a colleague the necessary books or research papers and give them some time off-timetable to get to grips with the required reading. Many schools have created additional posts to support their professional development programmes, such as research advocates or teacher coaches. Staff appointed to these roles are allocated time to gain expertise in certain areas. It is their job to develop their knowledge and understanding and then use it to plan high quality training, at a fraction of the cost of an external speaker.

The advantages of this model are that colleagues are given the opportunity for additional responsibility and that any expertise generated remains in the building long after a guest speaker has returned home.

4. **Use what’s out there**
Rather than always looking to make a purchase, see where you can make economies through existing spend or free alternatives. Other sources of external expertise can also be found online, such as through Optimus resources or digital courses like MOOCs, podcasts, or iTunes lectures. These are particularly valuable for developing subject-specific knowledge.

Many of the courses are free and those that do charge are relatively inexpensive given the quantity and quality of the material provided.

5. **Strategic planning**
There may well be occasions when, counter-intuitively, it is better to spend
more money rather than less to meet the costs of staff development needs, particularly with longer-term, more sustained outcomes in mind.

For instance, it can be worth investing in one or two structural changes that create time and space for teachers to plan and collaborate together, in order to better meet the needs of all future cohorts rather than just the pupils in the building at that time.

A large one-off investment may represent a sizeable initial outlay but could have a considerable impact on developing teachers over the next few years. Only by knowing what you are trying to change in the first place, can you be confident that you are investing your budget wisely.

6. Easy wins

Many schools are creating opportunities for CPD whenever they can find the time, aiming to provide lots of small training interactions that happen on a regular basis.

These relatively inexpensive and time-efficient approaches can be very good ways of creating a culture of grassroots CPD, where teachers take responsibility for their own professional learning and an ethos of continual improvement emerges from the bottom up.

There is the danger that this could turn into a scattergun approach, though with some careful thought and alignment with other, more strategically-planned professional development activities, some of the following ideas could help to considerably improve internal staff learning.

- **Journal or book club**: once or twice a term, teachers meet to discuss a journal article or an education book. The discussion can be planned to address key development areas and be led by a more experienced or research-literate colleague. Whole teams can benefit from this approach, often for the same price as an expensive external course.

- **15 minute forum**: some schools run regular forum sessions, where members of staff who have been working on particular areas of enquiry or development report back to staff on the insights they have picked up through their work. This is a great, cheap way of providing in-house CPD and building a culture of professional learning.

- **Weekly bulletin**: providing links to recommended blogs in a weekly school bulletin is a quick and easy way of drawing staff attention to key areas of development and creating the conditions for staff to become more engaged with social media as a form of professional development.

**Making the most of external CPD**

Using external training providers will sometimes be a necessity, either because the internal expertise does not exist or because of a precise specialism that is needed.

What is important is that there is a choice in how that external training is employed and shared for the benefit of the wider school community. The following checklist provides some key pointers for making the most of external CPD.

Improving your training programmes not only makes economic sense, but is also the best way for schools to improve pupil outcomes through establishing cultures of continual professional development and learning for all.

**Checklist for maximising impact of external CPD**

<table>
<thead>
<tr>
<th>Action</th>
<th>Taken?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Isolate the specific pupil needs and what the pupil outcomes will look like as a result of the training received.</td>
<td></td>
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<tr>
<td>2. Make sure the person or persons attending the training are clear about why they are going and how the information they pick up will help improve pupil outcomes.</td>
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<tr>
<td>3. Give time and space for the attendee to look back over their notes and organise them into a coherent document or presentation to other relevant stakeholders.</td>
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<tr>
<td>4. Provide an opportunity for the member of staff to share the insights from the course more widely across the school community.</td>
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<tr>
<td>5. Set aside time for colleagues to meet, discuss and plan as a result of the training received, perhaps to contextualise in relation to their own setting, or to adapt for different subjects or pupil profiles.</td>
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<tr>
<td>6. Build in some accountability for the relevant stakeholders to evaluate the impact of the CPD over time.</td>
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</tbody>
</table>

For more advice on making the most of external CPD, see Issue 9, page 12.
Medium term planning for optimal learning

We know that we need to plan more than just lessons – it’s about planning learning. Ruth Powley shows how you can use medium-term planning to ensure long-term, permanent learning.

There is increasing understanding amongst teachers that ‘the lesson is not the unit of learning’ and that permanent learning occurs across sequences of lessons.

The DfE acknowledged this in March 2016 with their advice on workload related to planning and teaching resources. Taken straight from the report, ‘Eliminating unnecessary workload around planning and teaching resources’:

‘Too often, planning refers to the production of daily written lesson plans which function as proxy evidence for an accountability paper trail rather than the process of effective planning for pupil progress and attainment.’

This article suggests strategies for constructing an optimal medium-term plan to deliver a linear curriculum.

Medium-term planning for a linear curriculum

Medium-term plans are an excellent tool for self-evaluating the quality of your own planning or that of your team.

The template I’ll cover here suggests medium-term planning headings intended to reinforce permanent learning that can be recalled weeks after, not just in the next lesson.

<table>
<thead>
<tr>
<th>Week beginning</th>
<th>Topic</th>
<th>Key concepts and skills</th>
<th>Lesson activities for this point in the learning sequence</th>
<th>Flipped learning</th>
<th>Subject assessment for this point in the assessment sequence</th>
<th>School assessment</th>
</tr>
</thead>
</table>

Here I’ll take you through the key parts of the template and what they are intended to cover.

Ensuring coverage

Medium term plans can be used to ensure that content is covered effectively and clearly. It is important that sufficient time is given to all aspects of content – both knowledge to be learned and skills to be developed. It is also important that contingency time is built in.

The first three headers of the template are intended to address the issue of coverage, and also ensure some consistency in terms of timings. Even if you deviate from them to better cover emerging gaps, this helps give you a framework to work against.

Optimising the point in the learning sequence

<table>
<thead>
<tr>
<th>Week beginning</th>
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</table>
A classic error in medium-term planning is an over-focus on delivery of content with insufficient time spent on practice, retrieval and feed forward.

Delivery should form just part of the learning sequence, with plenty of time for spaced practice built in. It is also important that practice is varied, incorporating what are described as ‘desirable difficulties’.

Over an entire learning sequence (not a lesson), you are likely to end up with perhaps six main points in which you’ll touch on a topic:


Medium-term planning should also take advantage of the ‘Testing Effect’ throughout – that the act of retrieving knowledge makes it more memorable. This could be as simple as quick, fun quizzes at the start of every lesson.

Finally, it is vital that this section of a medium-term plan contains sufficient opportunities for effective feed forward: opportunities to reflect and improve upon practice.

Optimising the time available

<table>
<thead>
<tr>
<th>Week beginning</th>
<th>Topic</th>
<th>Key concepts and skills</th>
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</table>

The activities that take place in lesson time should be those in which the role of the teacher is essential. There is a great deal that pupils can do as pre- and post-lesson work in order to free up more time in lessons. It can therefore be helpful to see the medium-term plan as a chain of learning incorporating both ‘in lesson’ and ‘out of lesson’ work.

Pre-lesson work  Lesson  Post-lesson work  Pre-lesson work  Lesson  Post-lesson work

The flipped learning heading is the place to put these pre and post activities.

Optimising assessment

<table>
<thead>
<tr>
<th>Week beginning</th>
<th>Topic</th>
<th>Key concepts and skills</th>
<th>Lesson activities for this point in the learning sequence</th>
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</table>

The process of knowledge being learned to permanency takes place in stages, each of which can be assessed in a different way. It might be helpful therefore to think in terms of an assessment sequence.

1. Assessment of initial understanding. Do the pupils ‘get it’ to start with?
2. Assessment of task fluency. Can the pupils do it? Rosenshine suggests in *Principles of Instruction* a success rate of 80% shows that pupils are learning material but still challenged.
3. Assessment of process fluency. Can the pupils do it differently? Pupils must be able to practise across different examples.
4. Assessment of permanent fluency. Can the pupils do it anywhere, any time? For secure understanding, pupils need to be able to apply learning in varied and unpredictable circumstances.

Every lesson should contain assessment matched to the stage of learning. It is also worth tracking medium term plans against whole school assessment.

Using the template

You can download the full template online, ready to use, at [my.optimus-education.com/node/16029](http://my.optimus-education.com/node/16029). This also comes with a worked example so you see can what a medium term plan might look like in action.
Reinventing gifted and talented: a school’s journey

What role is there for gifted and talented education now? HELEN PASCOE-WILLIAMS shares how her school has reinvented the concept to challenge all students.

Our desire to understand intelligence has a long history of thorough and enduring exploration, from the nature/nurture debate through to a more recent resolve for intense, purposeful practice.

There have been a number of national initiatives supporting gifted and talented (G&T) education since it was originally introduced by the then Department for Education and Skills, not least the previous policy for all schools in England to identify the top 5-10% of their students in terms of gifted and talented. This approach aimed to ensure that schools put in place some provision for their most able learners. In some ways it was a step forward but it was not without contention.

The problem with the gifted and talented programme is not just the elitist nature of it but the very words themselves, which suggest some sort of unique endowment or bestowal on an individual: a gift of genius, artistry or cleverness. Similarly, talent denotes flair, brilliance, something innate. Both words carry uncomfortable connotations of being given and of being select and exclusive. What they do not engender is a sense of independence, hard graft and personal responsibility.

The terms ‘gifted’ and ‘talented’ are inadequate in so many ways and because of them, provision for the more or most able in education has been awkward and uncomfortable. We need to think creatively and reinvent how we identify and acknowledge excellence in schools.

The complex roots of high performance

Nowadays the notion of practice is championed as the bedrock of excellence and achievement – but the issue is surely much more complicated than just clocking up 10,000 hours of practice, no matter how purposeful.

Over the years, Princethorpe College has come to believe that intelligence and high performance is actually a very complex set of variables which includes:

- genetics
- socio-economic factors
- cultural norms
- intrinsic motivation
- date of birth

'What the term gifted and talented carried was an uncomfortable connotation of being given, of being select and exclusive'

- creativity
- opportunity.

We also believe that environmental factors, character, mindset, pastoral issues, parenting, teaching and learning as well as commitment to practice and perhaps even serendipity, all have a significant part to play in the high performance of individuals.

In response to these concerns, Princethorpe College (an independent secondary school) sought to reinvent and rebrand our gifted and talented programme and in 2013 launched an exciting new initiative called the da Vinci Programme. Rather than running a G&T scheme that felt like a bolt on, we wanted provision to be an integral part of school life. We wanted all students to aspire to the best that lay within them and before them and to be cognisant of themselves as learners.

Why da Vinci?

The da Vinci initiative is so called because of Leonardo da Vinci’s iconic status as a Renaissance man and the fact that the scheme itself aspires to the Renaissance ideal. This ideal considers humanity as boundless in its capacities for development and champions the notion that people should try to embrace all knowledge and develop wide ranging capacities as fully as possible.

The exceptional men of the Renaissance sought to cultivate skills in all areas of knowledge, physical development, social accomplishments, and the arts. The ideal was most brilliantly epitomised by Leonardo da Vinci himself (1452–1519), whose aptitude was most evident in the fields of art, science, music, invention and writing. In the same way we want our students to aspire, through their personality, work, and breadth of...
learning, to pursue broad interests, profound knowledge and to achieve wide ranging accomplishments: in short, to be young Renaissance men and women.

Moving away from fixed ideas of giftedness
Professor Joseph Renzulli’s Three-Ring Conception of Giftedness (1978) is at the heart of our rebranding and reinvention of G&T provision at the school.

His research shows that giftedness is not due to one discrete factor. Rather, high achievers ‘possess a relatively well-defined set of three interlocking clusters of traits. These clusters consist of above average, though not necessarily superior, ability, task commitment, and creativity’. He proposes that ‘it is the interaction among the three clusters that research has shown to be the necessary ingredient for creative-productive accomplishment’ (Renzulli, 1978).

Another concept that was fundamental in the creation of our da Vinci Programme was Carol Dweck’s exploration of fixed and growth mindsets. In her book, Mindset: The New Psychology of Success (2006), she proposes that those of us with a fixed mindset believe intelligence and ability are set and there is nothing you can do to change them. Those with a growth mindset believe that, while we may be biologically predisposed to excel at certain things, we are able to change those skills and develop them as much as we wish to. The da Vinci Programme seeks to bind these two mindsets together and provide a platform from which students can really achieve their potential.

The growth and fixed mindsets are brought together powerfully in Renzulli’s trinity, where ‘above average ability’ can be seen to illustrate the fixed mindset (think genetic predisposition, nature) and ‘task commitment’ to illustrate the growth mindset (think purposeful practice, nurture, grit).

The final trait that Renzulli speaks of is creativity and this is certainly a fascinating topic, though difficult to define. The contribution of creative and innovative people who can think outside the box is clear in all walks of life, but it’s not exactly clear how one might become creative. Is that genetic too? Or is it the fruit of a certain amount of purposeful practice and combined multidisciplinary experience that sparks those eureka moments? Matthew Syed writes about such moments springing from previous deep immersion of thought in a particular area, or on a particular concept. In a TED 2014 lecture, Bran Ferren explains his belief that ‘the ingredients for the next Pantheons are all around us, just waiting for visionary people with the broad knowledge, multidisciplinary skills, and intense passion’ to make it happen.

How does the da Vinci Programme work in practice?
To start with, the da Vinci philosophy was carefully explained to everyone in the college community: staff, students and parents alike. It was introduced by means of a well-designed movie,
TEACHING AND LEARNING  
Leading G&T

'Excellence is surely more complicated than just purposeful practice: it comes from a very complex set of variables'

We display a roll of honour each term and showcase da Vinci work around the school and in our termly college magazine. We award the prestigious da Vinci shield to the person who achieves the most number of da Vinci merits across the whole school and who most embodies the Renaissance ideal each year at our school prize giving ceremony. There is a host of opportunities and new ideas are being generated all the time.

An all-round benefit

Our approach isn’t just inspiring students, but is helping to inspire staff too. When it comes to homework for instance, da Vinci homework tasks are often the most interesting and most creative, requiring sustained commitment and hard thoughts from the students involved. Parents are also supportive of the change and often cite the da Vinci Programme as a significant reason for choosing to send their children to Princethorpe College.

Our school inspection carried out by the Independent Schools Inspectorate (ISI) in 2014 stated: ‘Teaching makes highly effective use of the school’s recently introduced da Vinci programme to motivate pupils to learn independently’ and ‘to offer additional levels of challenge to all pupils’. The following comment was also made:

‘The school’s recently introduced, bespoke da Vinci programme aims to inspire all pupils to work hard, be original in their thinking and be fascinated, energised and motivated to engage in an activity primarily for its own sake. This provides outstanding opportunities for all pupils to be challenged, including those who are more able and/or have particular talents. In addition, pupils from Year 9 upwards have the opportunity to study for the EPQ in areas of their individual interests. In sport, the school’s top athletes are identified and supported through its elite sports programme.’

A new culture of mastery, creativity and task commitment is palpable in the college; it’s healthier, more inclusive and more exciting than previous schemes for the more able. The da Vinci programme is nurturing an ideal that all our students can aspire to: to pursue broad interests, profound knowledge, and to achieve wide ranging accomplishments with curiosity and resilience – to be a Renaissance Princethorpean!

We make sure to celebrate work of this level in various forms.

demonstrating in itself the interlocking clusters of traits.

All staff members are on the look-out for evidence of above average ability, task commitment, and creativity in the work their students produce. This work may be either in response to a standard task set or a specific da Vinci task designed to facilitate stretch and challenge. When the teachers do see it in evidence, they award a da Vinci merit (in the form of a Renaissance style sticker).

There are a number of different designs for the students to choose from and collect. Each one is the equivalent to three normal merits and this enables their currency to feed into our whole school rewards system.

As well as giving the students a special sticker, the teacher inputs the information into our computer database (quick tick boxes to confirm recipient, staff member and department awarding the da Vinci, date and reason for award). A message of receipt is sent to the awarding teacher, the student’s house tutor and to the da Vinci coordinator. We can immediately congratulate the students concerned when we see them around the college and heads of houses equally celebrate their tutees’ achievements in regular house assemblies, thus raising the profile further.

The database provides access to a great deal of information: students being awarded da Vinci merits across the spectrum of subjects; descriptions of tasks set and highest achieving responses; names of teachers making the awards; numbers of da Vinci merits awarded by each member of staff, by each department, over varying timescales. Comparisons can be made between classes, subjects, year groups, gender and cohorts. Differences and similarities can be noted between old G&T registers and new da Vinci data. Previously identified ‘G&T’ students are still appearing on the new da Vinci database, but new names are quickly joining the list: students we might previously have said are excellent, but not quite ‘G&T’.

We are now identifying students who demonstrate tremendous resilience, perseverance and creativity in order to perform at the highest level, as well as those exceptionally high performers who appear to have a natural predisposition for certain subjects. The data is inspiring quality debate.

Making best use of the data

A picture quickly builds up. Those students who are consistently performing at da Vinci level are offered rewards and further opportunities for stretch and challenge: a chance to undertake a Level 1, 2 or 3 Project Qualification; invitations to guest lectures; days out to learning centres; membership to IGGY (Warwick University’s International Gateway for Gifted and Talented Youth). Those achieving the most da Vinci merits over the course of each academic year are awarded high quality pin badges.

These have different designs each year (much like the stickers) and can be collected. When worn, they often initiate interesting conversations between the students and visitors to the College.

We make sure to celebrate work of this level in various forms.
Six tips for an EPQ teaching programme

The Extended Project Qualification can be a real step up to university level work. ANDREW K. SHENTON and ANDY SHERLAW explain how schools can help prepare students

The EPQ offers various attractions to students – and their schools. It gives students an early opportunity to sample the kind of independent learning tasks typically required in higher education.

As well as preparing a logbook chronicling their research processes and planning and delivering a presentation on their topic, EPQ candidates write what is usually a 5,000-word essay.

The leadership of Monkseaton High, a school which recently received an outstanding verdict, has long viewed the EPQ as crucial in giving a challenging education to the most able sixth formers.

Work for the EPQ at Monkseaton sees the students using facilities at two university libraries, so there is a strengthening of the relationship between school and higher education institutions.

Since the EPQ makes substantial demands on students, sixth form leaders shouldn’t assume that candidates are already equipped with the skills they need. Each EPQ student is allocated a supervisor, but at Monkseaton, a rigorous group teaching programme is also in place: this article summarises the six main principles behind it.

The principles

1. Use a variety of sources to design your programme

The teaching programme must be designed with the EPQ assessment criteria and the needs of students in mind. The former can quickly be ascertained from scrutiny of the specification but identifying the latter may prove a greater challenge. Key evidence can come from:

- analyses of the strengths and weaknesses of essays written by previous EPQ students
- the admissions they made in their logbooks and presentations in relation to challenges
- wider feedback from sixth form colleagues.

2. Design your own instructional guides

Often research manuals that can be accessed online and have been produced by universities for their own students are superficially attractive for EPQ teaching purposes. Two major problems emerge, however. Since they have not been prepared with EPQ candidates in mind, many will be insufficiently tailored to the requirements of the EPQ, and if some of their recommendations conflict with advice we give in lessons, their content may confuse rather than enlighten.

3. Promote reflection throughout

Ten of the fifty marks awarded in the final assessment of the EPQ are allocated to student reflection. Present opportunities for such thinking as early as possible. After an initial briefing the second session in our programme deals with the characteristics of an effective research question. Frequently, this material prompts the students to form their own tentative questions. At the end of the lesson, learners complete a pro forma in which they score these questions according to the criteria that have been proposed. In this way, the sixth formers reflect from the outset on the wisdom of their draft questions.

4. Relate teaching points clearly to the task at hand

For years, programmes that teach study skills in isolation have been condemned for presenting material too much in the abstract and divorced from reality. Every effort is taken at Monkseaton to relate the skills in question to the EPQ challenge that lies ahead.

5. Ensure that the teaching programme is responsive

Once a teaching programme has been developed, it is tempting to repeat it each year with little thought. This is especially unwise if the marking of EPQ submissions reveals that the work of several students suffers from problems that have gone unaddressed in the teaching programme. Where a note is made at the time, this can be used to inform the next programme. The addition may be as minor as the making of another PowerPoint slide or as significant as the introduction of another whole session.

6. Practise what you preach

Teachers serve as role models for young people, and their work must embody the characteristics we aim to instil in our students. If we urge our EPQ candidates to seek out high quality information, we are duty bound to draw on the best material ourselves when designing our sessions; if we demand that learners reference fully, accurately and conventionally, we must do likewise.
Skills audit template for more able coordinators

TORSTEN PAYNE provides a template for more able coordinators to help evaluate their skills in the role.

Use this template to provide examples of when you have demonstrated leadership skills in a variety of areas. Don’t feel you have to do everything. The template is designed for you to focus on the parts that are most relevant to your particular role.

<table>
<thead>
<tr>
<th>Proficiency</th>
<th>Criteria</th>
<th>0 = no proficiency or experience</th>
<th>5 = an average standard of proficiency for someone with your leadership experience</th>
<th>10 = area of considerable proficiency or experience in your opinion</th>
<th>Provide examples of when you have demonstrated this (in the past 12 months) using the following prompts</th>
<th>Measureable outcomes for the school as a result of your work/contribution</th>
<th>Any other comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leading pupil achievement</td>
<td>Secure outstanding results for pupils</td>
<td>• G&amp;T pupils you have taught. • Intervention sessions that you have led.</td>
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</tr>
<tr>
<td>Enable others to secure outstanding results for pupils</td>
<td>• Analyse performance of G&amp;T pupils across the whole school. • Oversight of mentoring programme for G&amp;T pupils.</td>
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</tr>
<tr>
<td>Analyse and interpret a range of information to judge effectiveness</td>
<td>• Data analysis of your G&amp;T achievement and progress across the whole school. • Data analysis of ‘vulnerable’ G&amp;T pupils – e.g. have pupils who are PP achieved as well as their non-PP peers?</td>
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<tr>
<td>Leading strategic change</td>
<td>Review</td>
<td>• Identify effective strategies (and how they were measurable) in G&amp;T provision over the last academic year. • Identify strategies which were less effective over the last academic year (and how they were measurable) and improvements.</td>
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<tr>
<td>Be innovative</td>
<td></td>
<td>• Develop and review policy for G&amp;T pupils.</td>
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<tr>
<td>Proactively take on new professional challenges</td>
<td></td>
<td>• Which whole school initiatives have you implemented? • What new developments have you led?</td>
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<tr>
<td>Have a clear vision for development</td>
<td></td>
<td>• How are the whole school aims for G&amp;T pupils practically embedded?</td>
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<tr>
<td>Clearly articulate the school vision</td>
<td></td>
<td>• Does your improvement plan have clear milestones? • Do the milestones have SMART targets attached?</td>
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<tr>
<td>Prioritise effectively</td>
<td></td>
<td>• Are you managing your time well and meeting targets?</td>
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<tr>
<td>Generate commitment in others to change</td>
<td></td>
<td>• Does the whole school understand your improvement plan? • Are they aware of which parts apply to them?</td>
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<tr>
<td>Leading practical implementation</td>
<td>Realise a vision</td>
<td>• Consider a strand of your improvement plan: how does this link to the whole school development plan?</td>
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<tr>
<td>Meet deadlines</td>
<td>• Keep to whole school deadlines (e.g. reports) over the year. • Strategically place G&amp;T tasks onto the school calendar avoiding deadline bottlenecks.</td>
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<tr>
<td>Manage change promptly</td>
<td>• Ensure records are kept of G&amp;T projects that have led to improvement from all departments.</td>
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<tr>
<td>Manage change effectively</td>
<td>• How well are you deploying your resources? • Do you manage your budget effectively?</td>
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<tr>
<td>Strike the right balance between strategic and practical leadership</td>
<td>• Are you delegating tasks? • How much of the project are you leading yourself? • How does it impact on other classrooms beyond your own?</td>
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<tr>
<td>Develop 'expert' knowledge in (a) relevant area(s)</td>
<td>• What reading or research have you undertaken to keep abreast of current research and best practice? • Is there evidence of positive impact in other schools? • Have you trained other colleagues on this area?</td>
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<thead>
<tr>
<th>Leading development of self and others</th>
<th>Have high expectations of yourself, staff and pupils</th>
<th>• Have any performance management targets you have set been deemed suitable by the head? • Are your class targets in line with whole school targets? • Identify which departments are and are not achieving expected progress for G&amp;T pupils. • Train new staff on policy and expectations of school for G&amp;T pupils.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show commitment to your own CPD</td>
<td></td>
<td>• What CPD have you engaged with this year? How have you evaluated it?</td>
</tr>
<tr>
<td>Recognise others’ skills, develop and utilise them</td>
<td></td>
<td>• What skills do members of your team and whole staff have? • Have these skills been utilised effectively?</td>
</tr>
<tr>
<td>Engage in a range of CPD opportunities</td>
<td></td>
<td>• How have you used department time for CPD? • Have you led CPD activities for wider groups of staff?</td>
</tr>
<tr>
<td>Develop parental engagement in their child’s learning</td>
<td></td>
<td>• Have you led any sessions for parents? • How are parents informed if their child is recognised as more able? • Have you written materials or resources for parents that enable them to support their children?</td>
</tr>
<tr>
<td>Celebrate pupil and staff’s achievements</td>
<td></td>
<td>• How do you support school reward systems? • How do you know that they are used appropriately within your department? • Would it benefit the school to have G&amp;T rewards?</td>
</tr>
<tr>
<td>Leading collaboratively</td>
<td>Lead team development</td>
<td>• Have you been involved in appointment processes for relevant positions? • What new skills have colleagues developed?</td>
</tr>
<tr>
<td>Create the conditions, organisation and climate for teamwork</td>
<td></td>
<td>• Ascertain where staff would like to develop skills. • How do staff across the school support and challenge each other? • How is good practice disseminated?</td>
</tr>
<tr>
<td>Positively influence and motivate others</td>
<td></td>
<td>• Do you coach or mentor other colleagues? • Have you invited colleagues to observe exemplary lessons? • Do you manage or chair a cross-curricular teacher learning group?</td>
</tr>
<tr>
<td>Leading with courage</td>
<td>Leading with sensitivity</td>
<td>Leading with integrity and by example</td>
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</tr>
<tr>
<td>Have you invited your link governor to participate in reviewing the effectiveness of G&amp;T provision?</td>
<td>Have you supported staff in your department to raise aspirations?</td>
<td>Is attendance consistently high?</td>
</tr>
<tr>
<td>Have you written a report for the governors?</td>
<td>Have you advised colleagues on how to make improvements?</td>
<td>Demonstrate determination</td>
</tr>
<tr>
<td>Have you submitted a bid to the governors’ development fund?</td>
<td></td>
<td>When have you needed to stay positive during a difficult time?</td>
</tr>
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</table>

### Leading with courage

#### Work effectively with the governing body

- Have you invited your link governor to participate in reviewing the effectiveness of G&T provision?
- Have you written a report for the governors?
- Have you submitted a bid to the governors’ development fund?

#### In challenging situations

- What have been your biggest challenges this year?
- How have you overcome these challenges?

#### Sustain good performance but strive for outstanding

- If your school grades lessons:
  - is your teaching continually graded as good or better?
  - do you know what is needed for a lesson to be outstanding?
  - do members of your team understand the difference between good and outstanding teaching for G&T?

#### Challenging and holding others accountable

- How do you assess the work of the whole school with regard to G&T pupils?

#### Create a culture of aspiration

- What are pupil aspirations like across the school?
- What additional opportunities are available for G&T pupils (both in and out of lessons)?

#### Have challenging conversations

- What challenging conversations have you had with staff?
- What challenging conversations have you had with parents?

#### Show emotional resilience

- Have you remained positive in the face of difficulties?

### Leading with sensitivity

#### Support others

- Have you supported staff in your department to raise aspirations?
- Have you advised colleagues on how to make improvements?

#### Make the right decisions at the right time

- Have you been told by senior leaders when to intervene?
- What interventions have you chosen to make?
- How effective were your interventions?

#### Demonstrate emotional intelligence and a genuine interest in other people’s success and well being

- How do you help staff and pupils stay positive?
- Do you understand the difficulties staff may be having?
- Do you know what the aspirations of staff are with regards to their teaching and their career?

### Leading with integrity and by example

#### High level of attendance

- Is attendance consistently high?
Welcome back! There’s so much to look forward to this term that, to make it easier, we’ve laid it all out in a termly plan. SENCOs can find theirs on page 54 and it’s on page 60 for DSLs and pastoral leads. For SENCOs, paperwork can be the bane of life, so we recently launched an event to help you reduce and declutter your in-tray. Anita Devi looks back at how it went and why SENCOs will benefit from attending the next one. With safeguarding it’s just as important to think about holidays at the end of the term as at the beginning. Our helpful checklist will remind you to look out for as pupils return to school. We’ve also got a fantastic blog post from Andrew Moffat about how images can be a great tool for teaching about LGBT.

Evie Pryor-Jones, Content Lead

Contributors in this issue

Andrew Moffat is assistant head teacher at Parkfield Community School. He is the author of ‘No Outsiders in Our School: Teaching the Equality Act in Primary Schools’.

Anita Devi is a special educational needs consultant, policy developer, strategist and trainer with experience from early years to postgraduate provision in the UK and overseas.

Christopher Robertson recently retired from being a lecturer in inclusive and special education at The University of Birmingham. His interests are in the areas of education policy and the coordination of provision.

Debs Ward is an assistant headteacher at Cottingley Village Primary School in Yorkshire. She is also the DSL and has responsibility for the looked-after children in the school.

Top tweets from @OptimusSEND

Anxiety in schools: 8 tips for teachers from @MHFAEngland http://buff.ly/2a3LUI5
I got: 13 Right! - How much do you know about sex education? Shocked by some of those statistics! http://buff.ly/2a0SEGy via @play_buzz
Sport is about playing to your strengths. Could you get creative with your sports day? http://buff.ly/29Peahp

Be part of the Optimus SEN and Safeguarding network

Live Chat
Can’t find what you’re looking for on my.optimus-education.com? Click on the speech bubble and connect with our customer services team.

Ask the Experts
Got a specific question? Get in touch with our expert panel by submitting your query via the blue speech bubble at optimus-education.com

Twitter
Want to get engaged in discussion and connect with your peers? Follow us on Twitter @OptimusSEND

Download a digital version of your Optimus Education Insight magazine by logging into your My Account area on optimus-education.com
At the beginning of the year the Department for Education (DfE) announced it was making additional funding available to support the implementation of the SEND reforms in England in 2016-2017.

New funding to support the SEND reforms was announced in two stages at the beginning of the year. First, at the end of January, Children’s Minister Edward Timpson made an £80 million pledge and set out details of grant allocations being made to support transition – post-2014 – from the old to new SEND system, one that prioritises the needs and rights of families.

In February, the DfE also announced a £3.4 million special SEND support grant scheme focusing on workforce development, better support for young offenders and provision to encourage the participation of children and young people.

Details of both funding packages are set out below.

SEND implementation: establishing a more effective family-centred system

The following grant allocations have been made for 2016-2017.

- The Family Fund Trust has been awarded £27.3 million to support low income families with disabled children – providing small scale grants, enabling families to make specific purchases and offering short respite breaks.
- The Independent Supporter Programme, run by the Council for Disabled Children, has been awarded £15 million (a follow-on grant) to help families and young people navigate the SEND system and create positive experiences for them (particularly when they are involved in decision-making related to education and health care assessment and planning procedures).
- Parent Carer Forums – working in all local areas – have been awarded £2.3 million to continue with activities focusing on bringing parents together to provide support and advice for families, and to engage with local authorities on the development and refinement of their SEND local offers.

The impact of these grants is already evident. For example, the Independent Support Programme in a number of local authority areas has been formally extended with extensions to staff contracts and the appointment of new support workers.

£35.8 million, an increase of £4 million from 2015-2016, has also been allocated to local authorities. This is in recognition of the additional duties placed on them as a result of the transition from Statements to Education and Health Care plans following the implementation of the Children and Families Act 2014. Individual local authority grant awards reflect area demographics and although funding is targeted at ‘system transition’ in relation to statutory assessment it is not ring-fenced.

The DfE anticipates that transition from old to new statutory assessment will be complete by April 2018. To ensure that this target date can be met, it has committed to continuing to fund the work outlined above through 2017-2018. Details of funding amounts and specific allocations will be announced nearer the time and presumably reflect any changing of priorities.

SEND implementation: specialist support grants

Opportunities to bid for specialist grants were announced in February, and grant awards were finalised in April. All of the funded projects – with grant awards ranging from £150,000 to £850,000 – are now up and running and due to be completed by April 2017. Project resources, professional development materials and activities designed and tested during 2016-2017 will then be made available for use by professionals and the children and young people that they work with. Projects will focus on developing better support in relation to:

- young offenders with SEND
- the participation of children and young people
- the school workforce
- the further education workforce
- children and young people with autism spectrum needs
- children and young people with dyslexia
- children and young people needing
sensory impairment specialist support

- children and young people with speech, language and communication needs
- the training of special educational needs coordinators (SENCOs).

Further information about specific projects is set out below.

**Young offenders with SEND**
Achievement for All are working together with the Association of Youth Offending Team Managers and Manchester Metropolitan University (MMU) to support professionals working with or for the youth justice system to bring about a culture and behaviour change around effective joint working.

The project team will work with stakeholders to build connections between professionals within and beyond the secure estate and run a series of regional and online training events aimed at improving the knowledge, skills and confidence of practitioners working with young offenders with SEND.

**Supporting the participation of children and young people**
The Council for Disabled Children and KIDS are working together to deliver a programme of activity focused on helping disabled children and young people understand the changes in the law and helping practitioners improve the way they participate with them at both the strategic level and in practice.

**Supporting schools**
The London Leadership Strategy aim to build their SEND Review principles – used to support schools in different parts of the country – into the wider school-led school improvement agenda. This will involve working with Regional School Commissioners and the Teaching School Council. It will also specifically look at three areas raised by schools as key issues during the last two years of the London Leadership Strategy’s SEND work. These include:

- developing a dedicated SEND programme for classroom teachers
- support on how to make effective use of teaching assistants
- helping pupils with SEND prepare for adulthood.

**Supporting further education**
The Education and Training Foundation are developing training to support teaching staff as well as practical sessions for other learning support staff, leaders and governors. They also host an online resource bank with information and advice about dyslexia and will disseminate more information about this resource.

Throughout the project they will be examining the implications and impact of the SEND reforms on further education practitioners and leaders, and report on the impact and effectiveness of the training provision.

**Supporting autism**
The Autism Education Trust has extended its programme of support this year and will be creating four additional ‘training hubs’ with a particular focus on post-16 support. They will also:

- launch five new regional networks focusing on a special school and special unit network and a regional local authority strategic network
- deliver a project to help prevent young people with autism from being excluded from school.

**Supporting dyslexia**
The British Dyslexia Association in partnership with Dyslexia Action, Dyspraxia Foundation, Helen Arkell Dyslexia Centre, Patoss and Manchester Metropolitan University will be working together to promote best practice for those delivering dyslexia support.

**Supporting Sensory Impairment**
The National Sensory Impairment Partnership (NatSIP) will be promoting effective practice and helping improve specialist advice on sensory impairment in EHC assessments and plans.

**Supporting speech, language and communication needs**
The Communication Trust will be focusing on increasing awareness and understanding of Speech, Language and Communication Needs (SLCN) across the workforce with national and local policymakers.

**Supporting SENCOs**
Achievement for All is working in partnership with Plymouth University to support the evaluation and development of the National Award for SEN Co-ordination. This project will also review the SEN co-ordination (SENCO) role in the Early Years and post-16 sectors. SENCOs, teacher and schools leaders have recently been contacted by the University of Plymouth to ask for their views on the impact of the National Award via a survey.

The questionnaire takes about 10 minutes to complete. At the start of the questionnaire respondents are asked to type in their school’s six-digit URN so that data comparisons can be made from different kinds of schools in different contexts.

**Comment**
The funding of new specialist SEND support projects will be welcomed by SENCOs and a range of SEND professionals. It is good too, that specific development work is focusing Early Years and Post-16 sector needs – this is long overdue. Finally, the focus on support for young offenders with SEND and on helping children and young people to participate as fully as possible in decision-making that affects their education and preparation for adulthood is excellent news.
What's coming up for SENCOs this term?

Plan your CPD and identify the resources that you'll need over the next few months with our handy term plan.

At Optimus HQ, we’re committed to providing SENCOs with everything you need to meet your legal duties, deliver high-impact staff training and improve outcomes for pupils with SEND.

Coming up this autumn term, we’ve got a jam-packed schedule of practical resources, training ideas and live events to help you manage your key challenges and concerns.

**Mental health difficulties**
We’re all concerned about the increasing number of pupils with mental health difficulties, so this term we’ve made sure there are plenty of opportunities to come together to network and solve challenges with peers.

**Mental Health Roadshow**
In September and October, we’re excited to be running our first ever Mental Health Roadshow member events. Free for all members and taking place in Oldham, Northumberland and Wakefield, these are focused around how you can build resilience among pupils in your local area. Register for one of the roadshow events by visiting [my.optimus-education.com/conferences](http://my.optimus-education.com/conferences)

**Mental Health & Wellbeing national conference**
We hope to see you at this year’s Mental Health & Wellbeing national conference on the 10th November. This is where you can collaborate with peers, be challenged by over 20 of the country’s leading mental health experts and tailor your day by choosing from over 15 targeted and practical sessions.

To register for the conference, visit [www.healthinschoolsuk.com](http://www.healthinschoolsuk.com)

**A whole-school approach**
Alongside these events, we’re adding two mental health units to our In-House Training service. These training units will focus on how to promote emotional wellbeing and resilience across the school and how to safely teach about mental health in the classroom.

**Webinar: Supporting pupils with anxiety - therapeutic techniques**
Dr Tina Rae’s webinar on Monday 26th September at 4pm will take you through how to support pupils with anxiety. Register your place now at: [http://bit.ly/anxietyWeb](http://bit.ly/anxietyWeb)

**Working with your SEN governor and reporting to full governing body**
As a SENCO, knowing how to make your reports meaningful and what data to provide can be daunting. Throughout this autumn term we are working with SEN consultant Anita Devi to bring you monthly resources to help you work with your SEN governor.

- **September** is time get tips and examples of how to collaborate with your SEN governor.
- **October** brings advice on holding meetings with governors: what you need to put on your agenda and the best ways of translating information.
- **November** is all about reporting. Understand how you can organise your termly reports, the key information to include and how best to lay it out.
- **December** focuses on resources that explain how your SEN policy and information report can be useful tools when actually creating your report.

**Staff training**
It’s a new term, so you’ll be looking at refreshing your staff training programme. The tricky thing about training is that everyone has different requirements, so what you need is a range of training materials on a variety of subjects.

On our website you can access a growing bank of ready-to-deliver, customisable training courses, devised by teaching experts and tested in schools. Try one this term to help save you time and money when delivering staff training.

**SEND Inclusive Teaching**
Use these practical self study and training courses with staff to ensure they know how to support pupils with specific needs in the mainstream classroom. Autism, ADHD, dyslexia, SLCN and more are covered!
[my.optimus-education.com/training/send-inclusive-teaching-programme](http://my.optimus-education.com/training/send-inclusive-teaching-programme)

**Teaching Assistants: Successful Classroom Partnerships**
This course helps school staff to develop their partnership working in order to provide outstanding opportunities for all learners, deliver pupil progress and narrow gaps in performance.
[my.optimus-education.com/training/teaching-assistants-successful-classroom-partnerships](http://my.optimus-education.com/training/teaching-assistants-successful-classroom-partnerships)
Interview checklist: Recruiting TAs

Priestnall School’s HR director GRACE STEPHENS created this checklist to ensure all the steps necessary for effective recruitment are covered prior to a new teaching assistant starting their role.

**Week 6**
- Look at your structure and confirm that the vacancy still needs filling.
- Check job description is still accurate.
- Discuss dates for advert and interviews, checking other events and potential clashes.
- Check recruitment policy and processes, hold discussions with HR and develop a plan.

**Week 5**
- Finalise advertisement and associated documentation and confirm dates for closing and interview – publish interview date in advert.
- Prepare a candidate pack with information about the school.
- Look at appropriate media to advertise.
- Ensure actual terms and conditions, payable salary and so on are explicit in the advert and make sure nothing is ambiguous.
- Ensure advertisement has a clear statement about commitment to safeguarding children.
- Confirm which people are involved in the processes of shortlisting and interviews and update your plan.

**Week 4**
- Be proactive in advertising (use local universities, shops, ask governors) and ensure advertisement is placed in reception.
- Use Twitter and other social media outlets as much as possible. Think about wording to attract the right candidates: what can you offer? How can you get people to click and look at the details?

**Week 3**
- Finalise the interview day and tasks or materials needed. Make sure pupils are involved in the selection process.
- Perhaps include a requirement of:
  - preparing two short written tasks
  - completing a practical exercise with pupils
  - meeting with a pupil panel
  - a tour of the school
  - a final interview for those who are successful.
- Tasks should measure the abilities included in the job specification.

**Week 2**
- Shortlist candidates and ensure they know what to bring on the day with regard to appropriate documentation. Clarify what is expected, including timings and activities. Ensure you ask if the candidates have any specific access or dietary requirements.

**Week 1**
- Interviews – ensure they are a clear and open two-way process.
- Put candidates at ease and ensure they have plenty of opportunities to ask questions and check you are right for them. The process is for seeing if they match you as much as if you match them!
- Ask agreed questions, noting and scoring the answers, and ask at least one safeguarding question.
- Ask candidates about any gaps in employment and record these.
- Ask candidate if they have the right to work in UK and have supporting documentation.

**Hiring week**
- Offer preferred candidate the role subject to final vetting checks (DBS, medical, references, qualifications etc.).
- Feedback to unsuccessful candidates.
- Prepare induction for new employee.

Our inaugural Efficient Partnership Working to Improve SEND Outcomes conference takes place on Thursday 24th November in London. It will provide you with practical strategies and expert guidance to know how to work effectively with all agencies, parents and your pupils.

For more information and the full programme head to my.optimus-education.com/conferences/SEND16
SEND has to be more than just paperwork

ANITA DEVI shares her views on how SEND paperwork could be reduced and gives feedback on a recent event on this topic

I was appointed as a SENCO 12 years ago. It was a difficult time for the school and I had just moved to the area. I started in the middle of the year and was a senior leader, teaching Year 6, and my partner teacher was on long-term sick leave. In addition, we had Ofsted (the long four day inspections) arriving within six weeks of my arrival. A true baptism of fire! My predecessor had been at the school and in post for a long time and there were established and historical systems in place. However, as a new starter, I was able to cast a fresh pair of eyes on what was happening and how effective it was. Individual Educational Plans (IEPs) were the norm, but these left me with more questions than answers and so began my mission to reduce the paperwork and make it purposeful. For me, purposeful SEND paperwork has impact at the point of planning and delivery and is not about having information stored in files.

Making changes
To make the changes I wanted, I started reflecting on a number of questions and many of these were shared with my team for their input.

• How does the paperwork we do (whatever shape or form that is) impact on teaching and learning?
• How does it improve outcomes for children and young people and engage support from parents and carers?
• Is there repetition in the system?
• What could be done better or differently?
• Do we have a progressive data/information/paperwork flow system that enables us to build up our knowledge of children’s needs year-on-year?
• How do we share information with external agencies, so their input builds on what we have done, or are already doing?

These six questions are good starting points for any school to authentically reflect on what they do, how and why.

A sustainable model of change
Change did not happen overnight and I had to think about the sequence of development events to ensure overall sustainability for my model of change, as well as ensuring buy-in from the staff. My starting point was reviewing the records teaching assistants kept for in-class support and out-of-class interventions.

We started by exploring what is useful information, to whom, why and in what format. The outcome was creating targeted feedback for teachers to inform planning, and specific information to measure the impact of interventions. This work predates the DISS and MAST Reports as well as the work on Maximising the Impact of Teaching Assistants (MITA). My teaching assistants became more focused and saw themselves as contributors to learning, rather than there to support behaviour or task completion.

The approach also supported my vision to increase the independence of children.

How to evaluate paperwork
Since moving on from my SENCO role I have supported many schools across the country in examining what they do to support pupils with SEND effectively. My work has been both strategic and operational (i.e. casework based). The process starts with a clear model of provision i.e. what is on offer whole-school, for specific groups and individuals with specific needs? This naturally lends itself to evaluating the paperwork in terms of the three points below.

Reducing the paperwork in SEND and making it meaningful and purposeful is still a work in progress. Over the years I have picked up individual cases where one piece of vital information about a child has been missed out resulting in the wrong diagnosis and provision. SEND is complex. However, I do feel we are travelling in the right direction.
Time to take action
In 2015-16, the two most common issues raised by SENCOs (on the SENCO forum and in other local and national discussions) was time and paperwork. In order to address both of these, we set up two projects.

Take Time
This is an ebook to help SENCOs manage their time. It is a method I have shared with SENCOs through a number of providers who deliver the National SENCO Award, my assurance being, ‘You will be ahead of yourself within six weeks, provided you follow through’. Most walk away in disbelief and then six weeks later I get the message saying ‘It works!’ The ebook contains five principles and activities for SENCOs to work through and adapt to their own personalities, lifestyles and work situations.

The ebook was launched on 8th March 2016 and that evening we received the following feedback.
‘After an incredibly difficult day where I came home full of anxiety and feeling overwhelmed by my enormous workload, I sat down to trawl through my never ending trail of emails only to find the one below.
‘I admit I normally delete such emails as I “don’t have time” however the title of the ebook seemed too good to be true after the day I have had! I initially thought “this seems like what I need - I will read it after I’ve done XYZ” however (thankfully!) something made me read the ebook. I am so glad that I did. Not only was I totally overwhelmed by my workload I was emotionally and physically tired thinking of the challenges in front of me. Reading this book has energised me and given me practical strategies, that seem simple but so useful and I am eager to try them.
Tomorrow I am pressing pause at work and sorting out my diary, office space and draws full of ‘to do lists’ and I’m taking control of my time. Thank you! Thank you! Thank you!’

Other SENCOs around the country have shared how implementing the strategies proposed in the ebook has prevented them from resigning from a job they love!

Reducing SEND paperwork training day
At the beginning of July, we held for the first time a SEND training day on ‘Reducing SEND Paperwork’. More than 20 practitioners (primary and secondary) attended, including one from Bucharest and another from the Isle of Man. The day was structured to help participants define what a good system looks like, evaluate their own practice and formulate a plan for change.

We briefly touched on retention policies and the DPA/FOIA in light of the SEND reforms. In effect, SENCOs and SEND leaders left with a clearer vision on how to make the paperwork meaningful and how to develop accountable outcomes for children and young people.

Also launched on the day on the Optimus Knowledge Centre was a new template to help SENCOs translate completed EHCPs into meaningful classroom practice. Too often we focus on the paperwork up to and during assessment, but not what happens after.

How do we support teachers in taking responsibility for the graduated approach with EHCPs? You can access ‘Translating an EHC plan into active, provisional outcomes’ at my.optimus-education.com/node/15952

The approach we adopted throughout the day aligns very much with the current national agenda of reducing the workload of teachers.

The next CPD conference on Reducing Paperwork is on 8th November. Look out for further details!
According to I CAN, a children’s communication charity, one in 10 children have SLCN that require long-term support. That means that between two and three pupils in every classroom have some kind of communication difficulty that affects how they learn and participate in learning. With the responsibility for supporting all SEND pupils now falling on teachers, it is crucial that your colleagues know how best to support pupils with SLCN.

This 50-minute training session aims to give all staff the confidence to provide in-classroom support for pupils with SLCN, and ensure that all pupils make the best progress possible. Read the sample below of steps one to four to understand the skills staff will learn from this unit.

### Aims and outcomes

This unit will enable participants to be aware of how both receptive and expressive language skills affect pupils in the classroom. They will understand what it feels like to have a speech, language or communication need and gain a toolkit of practical ideas for supporting pupils with SLCN.

### Who should present?

This may vary from school to school, but usually it will be the SENCO who already has the knowledge and understanding to deliver this training to other staff members.

### Who should attend?

All classroom teachers and teaching assistants who need to educate and support pupils with SLCN will benefit from this training, but it could also be useful for other members of staff in order to raise their awareness and understanding of this type of SEN.

### What do I need to run this training?

Pens and paper, and print off some copies of the beach image (see right).

### How long will this training take?

Each step takes about 15 to 20 minutes but rolling them all together can take 50 minutes.

#### Step 1: What is receptive language?

Start by asking participants to work in pairs to discuss what they feel are barriers to learning language and how language at home is different from language at school. Some of the suggestions could include that children spend more time alone on video games and less time having conversations or playing games with their family. Other options are aspects like modern prams facing away from parents so children have less interaction with them, or that texting has an influence on how spoken and written language develop. When thinking about the differences between language at home and school, options include language being more formal at school, or that families might have short-hand ways of saying things.

There are certain signs that education professionals can learn to look out for that may indicate problems with receptive abilities. Some of these are listed in the box on the right.

### Difficulties with receptive abilities can lead to further problems such as not being able to understand verbal or written instructions given by the teacher, or not being able to follow group instructions to themselves. Also, pupils are not able to focus on the main idea or topic in class. All in all, these difficulties tend to mean pupils find it hard to work in a group and to follow the lesson.

#### Step 2: Expressive language

When pupils don’t have sufficient expressive language skills, they may struggle to sequence words correctly in a
sentence, or make frequent grammatical errors. Using simple sentence structures or shying away from grammatical structure are also signs of poor expressive language skills.

There are other difficulties such as word finding, or poor organisation, communication and rigidity of thought.

Remind participants that receptive and expressive difficulties often occur together although a pupil may be stronger in one or the other.

**Step 3: Having a go**

Ask participants to think of a pupil and write down all the factors that they think signify receptive and or expressive difficulties. Then ask them to discuss with a colleague.

Premium members can access a checklist as part of this training course to make this step a bit easier.

Other needs to think about as part of this activity are speech and language delay, and speech and language disorder. Ask participants to think about whether they know any pupils who may have these needs.

**Indicators of difficulties with comprehension**

- Short sentence structures
- Complex sentences are not developing as expected
- Hesitation - uses words like thing or lots of gestures
- Sentences are grammatically immature
- Odd answers to questions
- Difficulty recounting a story/what was in the text
- Inconsistent responses to instructions
- Instructions need to be simplified or repeated
- Difficulty sequencing events
- Unable to describe own feelings or those of others

**Step 4: What's it like to have SLCN?**

Show participants the picture below, then ask them to write four sentences about it. They need to use four adjectives of colour, and describe what the woman is doing. However, they can only use words that are four letters long, they can't use 'the', 'a' or 'an', and they can only write sentences of four words.

Ask the participants what they notice about the restrictions. Some hints are that it means there is a lack of detail, or lack of development of written work. Vocabulary is an issue and not being able to say more leads to feelings of frustration.

Next ask how they might support a pupil who has limited vocabulary and poor sentence structure. Possible answers include creating a word or vocab bank, collecting together some sentence starters or using writing frames and labelled pictures.

It’s important to keep in mind through all of this why developing speech and language skills is so important. Pupils with SLCN are more likely to develop social, emotional and mental health needs and have low educational achievement. This could make them a victim of bullying so they have limited friendships and social opportunities.

Post school, this could lead to low employment, limited independence and academic underachievement.

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**Speech and language delay - definition**

The pupil’s skills are at a developmentally earlier stage than would be expected.

They sound like a much younger child in terms of vocabulary use.

There can be a mild or severe delay but once language appears it develops normally.

**Speech and language disorder - definition**

The pupil’s language development is not only severely delayed but also developing in an unusual way. Some aspects of language may be age appropriate while others are not following normal patterns or are behind in development.

There may be unusual word order in spoken and written language.
What can DSLs expect from membership this term?

Use our helpful term plan to identify the resources and support that you’ll need over the next few months

Being the Designated Safeguarding Lead is a complex and time consuming job. You need to keep compliant with your legal duties, make sure policies and procedures are watertight, as well as ensuring that you and your staff are well trained in safeguarding protocol.

Coming up this autumn term, we’ve got a packed schedule of practical resources, training ideas and live events to help you manage your key challenges and concerns.

Keeping children safe in education 2016: updated guidance

While the changes in the guidance aren’t huge, there are still factors to be aware of.

Summary of the updated guidance

We’ve gathered summaries of the impact of the changes from both education lawyer, Dai Durbridge, and primary school DSL, Debs Ward. Find Dai’s summary online in the Knowledge Centre and Debs’ on page 61 of this magazine.

At the Child Protection in Education conference, Yvonne Spencer from lawyers Veale Wasbrough Vizards will present a keynote on the impact of the latest guidance and ensure all delegates are aware of the latest statutory obligations and what policy changes you must now implement.

Pornography

SRE has been a much debated subject this year with the range of topics that need to be discussed constantly being added to.

Relationships & Sex Education conference

Pornography: One of the keynotes at this conference is led by Kate Daniels, a consultant and teacher at PSHEducation. Kate will be exploring new approaches to use when talking to children and young people about porn, and how to challenge their perceptions of what is normal.

Also on the day is a dedicated session from Donald Hawkley, a former head of PSHE. Accompanying this session is a toolkit created by theCHAT, a company that provides up to date relationship and sex education, staff training, resource writing and curriculum development.

Online safety

Online safety used to be e-safety, and now perhaps it should just be 'safety', as many argue that thinking about any element of safeguarding without considering online factors is out-dated. Even if that is the way the tide is turning, there is now a requirement on schools to effectively monitor online activity.

At both the London and Manchester Child Protection in Education conferences Mark Donkersley, Managing Director at e-Safe, will be explaining how schools can monitor online activity and identify early warning signs of safeguarding risk. Register for the event by visiting my.optimus-education.com/conferences/CPLondon16

Staff training

It's a new term, so you'll be looking at refreshing your staff training programme. Everyone has different requirements, so you need a range of training materials on a variety of subjects.

At optimus-education.com, you can access a growing bank of ready-to-deliver, customisable training courses. Devised by teaching experts and tested in schools, try one this term to help save you time and money when delivering staff training.

Managing Self-Harm

Download and use these practical training courses with staff to ensure you can raise the whole school’s awareness of self-harm and provide targeted pastoral support for pupils. my.optimus-education.com/training/managing-self-harm

Safeguarding Whole-School Programme

This course helps all school staff engage with safeguarding and is broken down into five units so you can pick and choose when to deliver each unit.

1. Definitions and indicators of abuse.
2. Taking action - watching, listening and responding.
3. Reporting, recording and sharing.
4. Serious case reviews.
5. Safe staff.

my.optimus-education.com/training/safeguarding-whole-school-programme

Autumn term specials

September: managing budgets and how to run a smooth staff induction on safeguarding.
October: Staff appraisals and analysing your personal CPD needs.
November: Residential trips and school to school support.
December: reporting to governors and safeguarding over the holidays.
How to talk to parents about Prevent

When you have cause to make a referral about a pupil, communicating your reasons to the pupil’s parents can be extremely challenging. ABI CLAY offers advice on what to bear in mind.

**Three points to think through**

The points below shouldn’t be taken as ideas to put away only to use when you need to talk to parents. Before you make any referral, or want to have a conversation regarding the Prevent duty, these should be the points you think through.

1. **You are concerned for a reason, and it is a safeguarding concern.** There are particular changes and signs you have picked up on that have led you to be concerned about this pupil. Make sure you are clear of what they are, what they indicate and that you have examples, evidence if possible, of your concerns.

2. **Don’t immediately jump to the Prevent duty.** In all aspects of safeguarding it’s important to remember that there could be a number of reasons a pupil is demonstrating certain behaviour. There is no need to use words like ‘terrorism’, ‘radicalisation’ or ‘extremism’ unless you’re positive that this is the case as these words are very inflammatory and not particularly helpful.

3. **Be mindful of the sensitivities surrounding any concerns of radicalisation and violent extremism.** Make sure you are confident in your ability to hold the conversation without confusing issues of faith, ideology and hate. Question your own judgement: if this pupil had a different ethnicity would you act the same way? Have you overlooked similar issues with other pupils because of their community? Extremism comes in many forms and radicalisation is not dissimilar to the process of grooming, so compare what your instinct tells you and what you can prove you know.

**Talking to parents**

You may need to talk to parents in a couple of instances. Either, you’ve made the referral and now the pupil and family are going to be informed, or you have concerns but want to discuss with the family before taking it further. This is a very sensitive area. It’s extremely important that no community in your school feels alienated or picked on. This will be an emotional and frightening time so you need to be able to justify your actions and suggest ways you can continue to work together.

1. **Be clear on why**

   ‘This is a conversation about a safeguarding concern. I have concerns about (behaviour, conversations, written work etc.) that indicate a potential Prevent concern, and I think this is something we need some help with.’

2. **Be clear on the law**

   ‘The Counter Terrorism and Security Act (2015) places a duty on specified authorities including schools, Further and Higher Education, to have due regard to the need to prevent people from being drawn into terrorism (the Prevent duty).’

   ‘Our school is a safe space where pupils can understand and discuss sensitive topics and learn how to challenge these ideas. The Prevent duty is not intended to limit discussion of these issues. We do need, however, to be mindful of our existing duties to forbid political indoctrination and secure a balanced presentation of political issues. These duties are imposed on maintained schools by sections 406 and 407 of the Education Act 1996.’

3. **Be clear on what will happen next**

   ‘The only reason we take any action is due to a safeguarding concern. It may be that this means it is necessary to gather further information from external agencies such as social care, the police or the Local Authority Counter Terrorism Unit. All of these agencies have safeguarding as a priority.

   ‘We will only make a formal referral by following a clear process which will include (pupil’s name), you, teachers, and anyone else who may have knowledge of the child’s circumstances.

   ‘We’d like you to contribute to any conversations at the earliest opportunity to build a full picture of what’s been going on.’

**A final point to remember**

This is never going to be an easy situation to handle, and we’ve seen a lot of stories about how the Prevent duty has been used the wrong way and communities have felt prejudiced against. The most important thing is not to think about what you think you’re supposed to do, but to concentrate on your pupils and their safety, health and happiness.

‘Don’t think ‘what if I’m wrong?’ think ‘what if I’m right?’”

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*ABI CLAY offers advice on what to bear in mind.*

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*The Counter Terrorism and Security Act (2015) places a duty on specified authorities including schools, Further and Higher Education, to have due regard to the need to prevent people from being drawn into terrorism (the Prevent duty).*

*Our school is a safe space where pupils can understand and discuss sensitive topics and learn how to challenge these ideas. The Prevent duty is not intended to limit discussion of these issues. We do need, however, to be mindful of our existing duties to forbid political indoctrination and secure a balanced presentation of political issues. These duties are imposed on maintained schools by sections 406 and 407 of the Education Act 1996.*
Assemblies are a great tool to use when creating the school ethos around equality. The assembly is a place where the code of conduct for the school is delivered clearly and consistently to everyone; there is no better place to promote and celebrate confident messages of difference, diversity and acceptance.

At my school we talk about a culture of 'No Outsiders' because everyone is an 'insider'. We use the Equality Act 2010 and celebrate the protected characteristics; we teach respect for race, religion, gender, gender identity, sexual orientation, disability and age and everyone is welcome.

I work in a large primary school in central Birmingham where 98% of our children practice the Islamic faith so, in reality, examples of diversity within the school walls can be difficult to identify. Therefore we have to bring the diverse outside world into school at every opportunity and we do this every day at the start of assembly using pictures.

The power of a picture
I spend my Saturday mornings searching the internet for images to use the following week in assembly that demonstrate our No Outsiders ethos in practice around the world. My aim is to show our children that it is not only us believing in No Outsiders, people across the globe agree with us. This is particularly important at a time when our children are hearing messages on the news about terrorism, refugees and hate. The message I give to our children is that while we know not everyone agrees with us or No Outsiders, I can show you lots of things that happened this week in different parts of the world that show we are not alone in our belief.

When teaching LGBT equality, assembly pictures are a fantastic resource. There may not be LGBT role models in school so the pictures give us an opportunity to demonstrate the diversity that exists outside the school gates. The following are examples of assembly pictures I have used in KS2 assemblies over the last six months and they could also be used as effectively in secondary schools.

Bryan Adams
In April 2016 singer Bryan Adams cancelled a show in Mississippi, North Carolina, because the state passed a law which allows discrimination against LGBT people. The law said businesses or churches can refuse to serve LGBT people and also discriminated against people who are transgender.

Bryan Adams made a statement, saying he, 'could not, in good conscience, perform in a state where certain people are being denied their rights due to their sexual orientation'. He says he found it 'incomprehensible that LGBT citizens are being discriminated against... hopefully Mississippi will right itself and I can come back and perform to all of my many fans'.

Bruce Springsteen also cancelled a concert. Cyndi Lauper released a statement saying she would play in Mississippi because she wanted to use her concert to spread a different message.
and would donate all proceeds to LGBT charities in the state.

The discussion we had in the assembly about the picture focused on two things. Firstly, was Bryan right to cancel or was Cyndi right to play and encourage dialogue? Who would have more effect?

There is, of course, no right or wrong answer but I am encouraging our children to develop their own opinions and responses.

Secondly, how has a law like that been passed in Mississippi? What do we think about that law? If the law allowed discrimination against different races, genders or faith, would it be acceptable? What law do we have in the UK today that means this could not happen here? Why is our No Outsiders message so important?

If you could speak to the governor of Mississippi, what would you say?

**Utrecht’s traffic light**

In March 2016 Dutch city, Utrecht, installed traffic lights that showed two men and two women holding hands to cross the road. Councillor Kees Geldofr says, ‘They show Utrecht as a many-sided city, and they do give cause for reflection as you are waiting for the lights to change.’

A number of cities in Austria also have traffic lights showing gay couples. When they were installed in 2014 some people were unhappy and tried to have the lights changed but the council decided to keep them.

Questions to discuss: Why do you think the council in Utrecht has installed lights showing gay couples? What is the message to the people in the city? Some people complained when these lights were installed in Austria but the council kept them. This shows us that although not everyone agrees with us and No Outsiders, there are more people that do agree. This is why it’s so important that we talk about No Outsiders to help change minds when there is discrimination.

**Wake up Italy**

In January 2016 the Italian government debated same sex civil unions. Italy is the last Western European country to allow same sex unions and the weekend before the debate there were demonstrations across the country where people held up alarm clocks to say, ‘Wake up Italy!’

Questions to discuss: What do the two men in the picture want to do? Why can’t they get married? Can two men or two women get married in the UK? What law in the UK means LGBT people cannot face discrimination? Why are the men holding an alarm clock? We know not everyone agrees with us and No Outsiders, so what would you say to the prime minister of Italy about No Outsiders?

To hear Andrew explain more about how to discuss sexuality and diverse identity confidently in SRE, register your place at the Relationships & Sex Education conference 2016 on 18th October 2016, London my.optimus-education.com/conferences/SRE16
Keep up-to-date with safeguarding guidance

While there aren’t big changes to get your head around, **DEBS WARD** explains the bits and pieces from the new guidance that you can implement straight away.

**The government has** published their new ‘Keeping children safe in education’ document. This statutory guidance came into force on the 5th September 2016. Not everything has changed and the changes are not huge but, nevertheless, there are clear actions that need to be taken to ensure that your policies, procedures and practices are in line with the updated expectations.

I have outlined the key changes for you here but a table of all the changes can be found at the back of the new guidance under Annex H: Table of Changes.

**Part One of the guidance**

Originally schools had to ensure that all staff had read and understood Part One of KCSIE. However, the 2016 version now states that schools should ensure that ‘mechanisms are in place to assist staff to understand and discharge their role and responsibilities’.

What mechanisms does your school have in place to assist staff to understand? Can you refer to these mechanisms? Can you identify them in your policies, procedures and practices? Where is your evidence?

**Training**

It is important that you review your safeguarding CPD, training packages and cycle in order to ensure you are meeting the new requirements set out below.

For Designated Safeguarding Leads (DSLs) the requirement remains that you undertake training every two years but the 2016 guidance states that in addition to the formal training DSLs must receive an update ‘at least annually’.

The 2016 version refers to some safeguarding areas which were not clearly identified in past guidance.

**Newly identified areas**

- Peer on peer abuse – your child protection policy should include ‘procedures to minimise this risk’ and set out how these allegations are dealt with and investigated. Your policy needs to outline how victims of this type of abuse are supported and should ‘reflect the different forms peer on peer abuse can take’. Your policy must also make it clear that ‘abuse is abuse and should never be tolerated or passed off as “banter” or “part of growing up”’.
  - The additional challenges faced by safeguarding children and young people with SEND – your child protection policy must make reference to the fact that ‘additional barriers can exist when recognising abuse and neglect in this group of children.’
  - So-called honour-based violence.

**Early Help**

The 2016 guidance makes reference to ‘Early Help’ and staff need to be able to identify children who are in need of this. If you haven’t already done this then it is important for DSLs to ensure that all staff know:

- how to identify these children
- what procedures there are in place for identification
- how these children are monitored.

Within the aspect of identifying vulnerable children who need early help you need to make it clear to all staff the difference between a ‘concern’ about a child and ‘immediate danger or risk of harm’. This, in my view, is particularly relevant for new staff such as NQTs as they may not have a clear understanding of what each term means and what actions should be taken for each.

**Designated Safeguarding Leads**

The 2016 KCSIE guidance makes it clear that the DSL holds the ultimate ‘lead responsibility’ for safeguarding and the responsibility ‘should not be delegated’. This is particularly relevant for those schools whose DSLs do not carry out the everyday role of safeguarding and child protection. If you are the DSL, and you do not carry out the day-to-day work of protecting children, the new guidance makes it explicit that you cannot delegate this responsibility.

Furthermore, how many DSLs have a job description? The guidance highlights that DSLs should have a job description that ‘describes the broad areas of responsibility and activities related to the role’. The job description should also make it clear about
the role-holder taking ‘lead responsibility’.

In addition to this, does your school have a clearly identified system for cover requirements for the role if the DSL or deputy DSL were absent from school?

**Safer recruitment**

- The prohibition from teaching check must be made on anyone who is engaged in 'teaching work' regardless of their qualifications and this must be recorded on the single central register.
- If you have supply staff from an agency your school must now check that the person appearing at the school is the same person that the agency has provided the checks for.
- All governors must now have an enhanced DBS check.
- Concerns about the proprietors of independent schools must go to the Local Authority Designated Officer, or LADO as they are often known.

There is further clarification about the changes in safer recruitment found in Annex H: Table of changes. This includes the latest update to reflect the EEA checks.

**Online safety and teaching safeguarding**

KCSIE 2016 has included the new subheading of ‘Online safety’ thus highlighting the importance of ensuring that there are appropriate online safety measures. The wording has changed from 'should consider' to 'should ensure' that children and young people are taught about safeguarding, including online safety.

The guidance also includes a new paragraph for governing bodies to be careful that 'over blocking' does not cause 'unreasonable restrictions' to the teaching of safeguarding and online teaching.

**Practical Strategies for Safeguarding in Education**

Attend this practical child protection national event as part of your regular safeguarding updates and gain essential skills to protect pupils in your care and the tools to share what you've learned across your whole school.

- Mental health: get proven strategies and hear best-practice from across the country to support and protect children suffering from mental health issues.
- Online safety: sexting, cyber-bullying and social media – learn how to protect children online, educate parents and empower children to understand and protect themselves.
- Supporting resources: gain access to a wealth of training resources before, during and after the event to lead training for staff back at school.

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Find out more and secure your place at www.oeconferences.com/practicalsafeguarding
Holiday safeguarding checklist

CAROLE COOPER recommends this checklist for safeguarding pupils before and after the holidays

At the beginning of the new school term there are a million and one things to do and sometimes it feels like you’re holding your breath until October. Yet those first few days back can be a key time for identifying safeguarding concerns in new and returning pupils.

It is also useful to think about what staff and pupil safeguarding training may be necessary around issues that are particularly prominent at this time of year. For example, do you need any focussed training for those working in the EYFS setting?

A regular look at issues will help you:

- keep on top of the workload
- focus on any task/documents that need updating
- remember to liaise with specific people before and after holiday periods.

### Before holidays

<table>
<thead>
<tr>
<th>Designated Safeguarding Lead</th>
<th>Class teachers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any new staff starting after holidays that require training or key documents?</td>
<td>Could this training be part of an induction day before they start? Do you need to replenish your stock of key documents?</td>
</tr>
<tr>
<td>Are your training presentations up-to-date with recent regulatory changes?</td>
<td>Regular termly checks will help you keep your training up-to-date, rather than overhauling annually.</td>
</tr>
<tr>
<td>Any vulnerable children that are dreading going home for the holiday period?</td>
<td>Liaise with their form teacher. Give reassurance and suggest coping strategies, depending on circumstances. Contact parents/guardians if necessary</td>
</tr>
<tr>
<td>Any residential school trips planned for the holiday period? Any vulnerable children going on these?</td>
<td>Liaise with their form teacher. Give accompanying teachers information to help support pupils. Contact parents/guardians if necessary.</td>
</tr>
<tr>
<td>Children already on safeguarding list.</td>
<td>Update the records of any children on a ‘watching brief’ of how this term has gone.</td>
</tr>
<tr>
<td>Any pupil records that need to be passed on to a new school if child leaving?</td>
<td>Check who these need to be passed onto and mark as confidential.</td>
</tr>
</tbody>
</table>

### After holidays

<table>
<thead>
<tr>
<th>Designated Safeguarding Lead</th>
<th>Class teachers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check on those children that have gone home to difficult circumstances.</td>
<td>Update records with holiday accounts if appropriate. Liaise with DSL about individual pupils</td>
</tr>
<tr>
<td>Any changes to children’s circumstances? For example: • children are leaving • parental difficulties • bereavements.</td>
<td>Update or start records. Liaise with form teachers.</td>
</tr>
<tr>
<td>Remind children about friendship groups if difficulties arose last term.</td>
<td>Certain children may need reminders about behaviour but a new term (or half term) can be seen as a fresh start.</td>
</tr>
<tr>
<td>Liaise with the PSHE coordinator about upcoming topics and book visiting speakers if relevant.</td>
<td></td>
</tr>
<tr>
<td>Any children showing signs of neglect or change in demeanour since they came back?</td>
<td>Update or start records. Liaise with DSL about individual pupils.</td>
</tr>
</tbody>
</table>
TAKE AWAY NEW IDEAS TO ENGAGE STUDENTS AND SUPPORT HEALTHY, ACTIVE LIFESTYLES ACROSS YOUR SCHOOL

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18th November 2016
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