Updates, guidance and resources for your whole leadership team

LEADERSHIP AND GOVERNANCE
Coaching for school leaders
Page 10

SCHOOL BUSINESS MANAGEMENT
Get ready for tighter budgets
Page 34

SEN AND SAFEGUARDING
Co-production and collaboration
Page 52

TEACHING AND LEARNING
Developing working memory
Page 44
The way you manage CPD is changing

Unlimited CPD

CREATE PERSONALISED PROFESSIONAL DEVELOPMENT PLANS FOR ALL YOUR STAFF... FOR ONE PRICE

my.optimus-education.com/changing
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SEND Assessment: Evidencing Outstanding Progress

For more information, visit www.oeconferences.com/sendassessment2016

Expert speakers include:

Dr Penny Barratt
Executive Headteacher of The Bridge School
and The Bridge Integrated Learning Space

Simon Knight
Deputy Headteacher at Frank Wise School
*Assessment Innovation Fund Winners*

Jan Martin
Independent School Improvement Adviser

Jean Gross OBE
SEND Consultant

Tracy Edwards
Curriculum and Assessment Lead,
Swiss Cottage School
*Assessment Innovation Fund Winners*

FREE
Unlimited CPD members attend this event for free*

KEY BENEFITS

OFSTED
Evidencing impact of your SEND provision

ASSESSMENT MODELS
Bridging P scales and age-related expectations

TRACK & EVALUATE
Demonstrating pupil progress over time

*Unlimited CPD members are entitled to book a place for one delegate per conference. Additional delegate places can be purchased at a discount of 50% off the standard price. All conference places are subject to availability and bookings are taken at a first come, first served basis.
Welcome to Optimus Education Insight

Dear Reader

Happy New Year! The January start can be a tough one, with dark days and the prospect of a hard slog until Easter. Of course, it can also be a time of fresh starts and new resolutions. If you’re having difficulty moving from ‘challenges’ to ‘opportunities’ mode, a coaching conversation with a trusted colleague could help. And the ‘balance wheel’ coaching tool (see page 12) is a great place to start.

A new term also gives an opportunity for taking a fresh look at working relationships. The SEND Code of Practice has highlighted the importance of collaboration between parents, schools and learners. In this issue, we explore how to ensure these relationships develop positively and to the benefit of the children and young people involved.

How much do you know about how we actually learn? I’ve particularly enjoyed reading about how the brain functions best for learning (see pages 43-47) and am considering how I can improve my working memory – apparently reducing distractions would help!

Finally, remember that we have a new homepage at www.optimus-education.com, but you can also get straight to your favourite resources and topics at my.optimus-education.com

Liz Worthen
Head of Content
Optimus Education

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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

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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, Chris or Alex on 020 7265 4173.

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

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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.

January

SEND Assessment: Evidencing Outstanding Progress
TUESDAY, 19 JANUARY, LONDON
Assessment models for lower attaining pupils, benchmarking progress, evidencing impact, formative assessment and Ofsted – get your key concerns around SEND assessment addressed at this event.

Effective Secondary Data Use
WEDNESDAY, 27 JANUARY, LONDON
Set robust targets, accurately assess without levels, manage the new grading system and maximise your Progress 8 score.

February

Embedding SMSC & British Values
TUESDAY, 23 FEBRUARY, LONDON
Get your SMSC provision right across your whole school and provide the best environment for your pupils to grow and develop in preparation for life in modern Britain.

Admissions and Appeals 2016
WEDNESDAY, 24 FEBRUARY, LONDON
Admissions code, appeals, parents, fraudulent applications, in-year admissions – your key compliance concerns around admissions and appeals addressed within a yearlong package of legal support.

Protecting Children Update 2016
THURSDAY, 25 FEBRUARY, LONDON
Radicalisation, exploitation, sexting, FGM, self-harm – safeguarding can be a daily challenge for schools and colleges. Attend this event to get the expert support you need to safeguard your pupils.

March

Closing the Gap for Disadvantaged Pupils
THURSDAY, 3 MARCH, MANCHESTER
Closing the gap is a national priority. Not just to meet Ofsted requirements, but to ensure all pupils have equal opportunity to succeed. Get ideas, inspiration and solutions as to what really works to narrow gaps.

April

Rethinking Lesson Observations
TUESDAY, 26 APRIL, LONDON
Attend this training day for research updates on sustainable teacher development through observation and gain strategies to lead an effective transition to ungraded, developmental observation.

May & June

Employment Law in Education 2016
THURSDAY, 5 MAY, LONDON & WEDNESDAY, 8 JUNE, MANCHESTER
Get vital legal guidance to support you through the employment law challenges you could face in the coming year, such as staffing structures in the face of shrinking budgets or managing staff absence.

Unlimited CPD is here
Now you can attend all our conferences for one annual cost... as well as having full access to our Knowledge Centre and over 40 download-and-deliver professional training courses.

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 265 4121.
What’s in this month’s Leadership and Governance section?

It’s a new year and for many of us those well-meaning resolutions we made have already been broken! Something we should all pay attention to is our own development and so we’re very excited to introduce our new coaching for school leaders service. I spoke to our director of coaching to find out more. We also have a great training activity designed to introduce ways to improve the quality of a coaching session. High on the Ofsted agenda is the Prevent duty and governors have a vital role to play. Read our feature on what governors need to be aware of. Business leaders give us their thoughts on the essentials of leadership and there’s more on leadership skills in our leadership vs management webinar summary. Finally, with the number of MATs increasing, I visited a school to hear their experience of forming a MAT and report back from our MATs summit on the future of school collaboration.

Lisa Griffin, Content Lead

Contributors in this issue

Suzanne O’Connell has more than 25 years’ teaching experience, 11 years of which were as a junior school headteacher. She is currently a writer, editor and trainer.

Matt Miller is a National Leader of Governance and chair of governors at an outstanding secondary school. He mentors chairs as part of a training programme run by the NCTL.

Asma Mansuri is director of coaching at Optimus Education. She has worked in education for over 25 years. A former headteacher, Asma is now an executive leadership coach.

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

Lisa Griffin, Content Lead

Top tweets from @LeadershipOE

There is no such thing as the ‘right leadership structure’ in a MAT - it’s what’s right for you #oeMATs

‘Mental health is relevant to everyone with a brain’ @NatashaDevonMBE on championing #wellbeing http://owl.li/U1XVT

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

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

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What data do Ofsted inspect in secondary schools?

From the quality of teaching, learning and assessment to attendance and outcomes for pupils, **PAUL K. AINSWORTH** outlines key data and questions to ask to ensure you are Ofsted ready.

**The documentation that** Ofsted will have prior to visiting the school will be last year’s RAISEonline, your school website and SEF. Inspectors will ask you for data on your current pupils.

They are likely to wish to see more detail in areas where there are historical weaknesses. It is your due diligence that will mean that you are best prepared for an inspection.

During inspections, you may be asked for data that you haven’t prepared in advance. This is when a live data system and highly skilled data manager will come into their own.

You need to be aware this is not about collecting data, it is about how the data is used to drive school improvement.

**Quality of teaching, learning and assessment**

You will wish to show inspectors your self-evaluation of the quality of teaching, learning and assessment in your school.

Many schools are following Ofsted and moving away from sharing grades for individual lessons but instead grading on typicality, which is an amalgam of the progress pupils are making, the teaching that is delivered and the quality of assessment given.

If you wish to show the improvement that your school is making, you may decide to share data records for previous terms or the previous year. This can be powerful if you’ve had a dip in outcomes which has been followed by a change in personnel.

**Key questions:**

- What does the data say about the quality of last year’s teaching, learning and assessment?
- What school improvement actions have you taken as a result of changes in personnel or CPD programmes?
- What has been the impact of these actions on the quality of teaching, learning and assessment for this year?

**Personal development, behaviour and welfare**

The two main sets of data to share will be on attendance and behaviour, showing both historical data and the current picture. The main external measure of behaviour data is exclusions and a similar table to the attendance one can be easily constructed. You may also show data on internal processes for exclusions or detentions, particularly if these strategies are reducing either.

**Attendance data**

| Year | Attendance %
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>All pupils</td>
<td></td>
</tr>
<tr>
<td>Boys</td>
<td></td>
</tr>
<tr>
<td>Girls</td>
<td></td>
</tr>
<tr>
<td>Pupil premium</td>
<td></td>
</tr>
<tr>
<td>SEN pupils</td>
<td></td>
</tr>
<tr>
<td>EAL pupils</td>
<td></td>
</tr>
<tr>
<td>Any other key pupil groups</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Key questions:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>• What are the strengths and weaknesses in last year’s attendance data?</td>
<td></td>
</tr>
<tr>
<td>• What actions have been taken to improve attendance?</td>
<td></td>
</tr>
<tr>
<td>• What has been the impact of the actions on current attendance?</td>
<td></td>
</tr>
</tbody>
</table>

**Outcomes for pupils**

The following tables provide information that you could be asked for on the core subjects. There is a focus on attainment and progress in English and maths.

You may ask is there still a need to consider levels of progress? You may have devised your own method for measuring progress in which case this is what you will share with inspectors.

However, within this you should have created your measure of expected progress and more than expected progress.

You could produce similar tables to those below for pertinent pupils groups within your school (boys/girls; PP/non PP; EAL, SEN, more able etc).
What data do Ofsted inspect in secondary schools?

- Be flexible
  Every inspection team will take a different approach at an inspection. In addition to having your own pre-prepared data set, it is important to have the flexibility to collect different data sets.

- It is vital to remember it is not the data that is critical, it is the actions that you have taken as a result and the improvements that have already been made.

Starting points for different years

<table>
<thead>
<tr>
<th>Year</th>
<th>L6*</th>
<th>L5</th>
<th>L4</th>
<th>L3</th>
<th>L2</th>
<th>No data</th>
<th>L4+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yr 7</td>
<td>English</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Maths</td>
<td></td>
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<tr>
<td>Yr 8</td>
<td>English</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>Maths</td>
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<tr>
<td>Yr 9</td>
<td>English</td>
<td></td>
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<td>Maths</td>
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<tr>
<td>Yr 10</td>
<td>English</td>
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<td>Maths</td>
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<tr>
<td>Yr 11</td>
<td>English</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

* If you are using a different way of measuring or recording starting points, amend this row accordingly.

Starting points for different groups

<table>
<thead>
<tr>
<th>Year</th>
<th>All</th>
<th>PP</th>
<th>Boys</th>
<th>Girls</th>
<th>EAL</th>
<th>SEN</th>
<th>Non SEN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yr 7</td>
<td>English</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Maths</td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Yr 8</td>
<td>English</td>
<td></td>
<td></td>
<td></td>
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<td></td>
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<td></td>
<td>Maths</td>
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<tr>
<td>Yr 9</td>
<td>English</td>
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<td>Yr 10</td>
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<td>Maths</td>
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<tr>
<td>Yr 11</td>
<td>English</td>
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</tbody>
</table>

Key questions:
- Are there any particular circumstances to historical data?
- What behaviour strategies or programmes have you introduced to make improvement?
- Are these showing an impact on the data for this year?

Achievement based on pupil predictions

<table>
<thead>
<tr>
<th>A*-C</th>
<th>English</th>
<th>Maths</th>
<th>A*-C</th>
<th>English</th>
<th>Maths</th>
<th>Progress 8</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>more than expected progress</td>
<td></td>
<td></td>
<td>expected progress</td>
<td></td>
<td></td>
</tr>
<tr>
<td>National average</td>
<td>55%*</td>
<td>70%</td>
<td>65%</td>
<td>32%</td>
<td>29%</td>
<td>0</td>
</tr>
<tr>
<td>Last year</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Year 11</td>
<td></td>
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<td>Year 10</td>
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</tbody>
</table>

*Data taken from RAISEonline

‘You need to be aware this is not about collecting data, it is about how the data is used to drive school improvement’

Key questions:
- What do you notice about last year’s data?
- What school improvement actions have you taken as a result?
- What has been the impact of these actions on current outcomes?

Be flexible
Every inspection team will take a different approach at an inspection. In addition to having your own pre-prepared data set, it is important to have the flexibility to collect different data sets. It is vital to remember it is not the data that is critical, it is the actions that you have taken as a result and the improvements that have already been made.

Effective Secondary Data Use conference, 27th January 2016

- Do all staff understand how they should be using data moving forward?
- Can you set accurate targets and measure progress through KS3 and 4?
- Are you ready for new exam structures and grading systems?

Following the removal of levels, new Progress 8 measures and the 1-9 grading system, attend our conference for a chance to hear how other schools are managing the changes to data and assessment. With many schools in a transition period between old and new assessment systems, effective and adaptable data use is essential to ensure the progress of pupils.

Hear from experts and practitioners on a range of issues, including:
- target setting at KS3: how to interpret and translate new KS2 data into meaningful targets and accurately measure progress throughout KS3
- methods to engage staff and ensure they use and interpret data in their classrooms as a tool to drive progress
- life after levels at KS3: hear how two schools have designed effective assessment models and data systems to track, monitor and support pupil progress following the removal of levels.

To find out more, go to my.optimus-education.com/conferences/data16
Executive coaching for school leaders

Following the launch of our executive coaching for school leaders service, Lisa Griffin spoke to director of coaching, ASMA MANSURI, about the service and the benefits of coaching.

Former headteacher Asma Mansuri has worked in the education profession for over 25 years. After leaving headship in 2010, she decided to pursue her passion for helping others in developing their personal and professional leadership and communication skills. To achieve this, she qualified as an executive leadership coach.

Asma has now been coaching for five years and has joined Optimus to run an executive coaching network for school leadership teams. As the service launched, I spoke to her about the work she does and why coaching is vital for professional development.

What makes a great leader and how can coaching help?
I’ve coached many leaders and they’ve all been different and wanted coaching for various reasons, such as transitioning into a new role and facing challenges greater than they thought, or wanting to improve presentation or impact skills.

When I became a school leader, I wanted to have a coach, because I wanted to talk to someone outside school who was objective and didn’t have a vested interest in the school. I was lucky enough to work with a fantastic coach! As a school leader you’re very visible; people are aware of you all the time. When things are going well your successes can go unnoticed; however, if things go badly, the impact can be very public.

I’ve had the privilege of working with people who I thought were great leaders. They possessed clarity of vision and a strong idea and belief in what they want for the future of their pupils and the wider community they serve. A leader needs to be courageous, a good listener and remain true to the values and principles they hold.

A great leader is passionate; they love their work and want to improve continually. They need to be resilient, confident and inspirational. Coaching develops the confidence to deal with difficult situations and helps the coachee have the impact they desire. They also need to be able to admit mistakes and take feedback graciously – coaching helps with all this.

Successful school leaders need very high levels of self-awareness, self-management and interpersonal skills. Schools are complex environments with many different stakeholders. The ability to adapt to and reflect on the needs of different audiences is imperative.

Leadership can be lonely and coaching provides someone to talk to. The external coaching that we will be offering provides a safe space to share, reflect and talk openly. The coach has no vested interest other than in you. They are there to listen to you and provide insights to enable you to find answers yourself.

Coaching varies hugely in schools for many reasons such as budget and time. Why should coaching be part of a whole-school ethos?
As a head, I developed a strong coaching culture with a variety of coaching opportunities available for staff, pupils and groups, as well as the option of external coaching. Coaching is for everyone and having it available in different formats means it can be tailored to individual needs.

If a school has a coaching culture, it changes the purpose and value of the everyday conversations. In coaching-style conversations, greater attention is paid to developing coachees. People are supported on an individual basis to identify strengths and areas for development, enabling them to feel both a greater personal connection to, and alignment with, the vision of the school.

Staff take stronger ownership of what they’re doing and therefore feel more accountable. Schools with a coaching culture are more solution-focused and believe in putting the time and effort into sustaining that culture of self and whole-school improvement.

A coaching culture results in greater job satisfaction and, in turn, greater staff retention. Coaching promotes a reflective and collaborative culture and increases positive attitude and energy. Staff feel valued and happier in both their personal and professional lives.

What impact can coaching have on CPD?
If someone has the benefit of a coach they become more self-aware, more aware of their strengths and how to adapt to
different situations. They also become more aware of the areas they need to develop making them more thoughtful about the direction of their professional development.

Coaching helps you to be more creative about your choices of development, and more courageous and committed to it as a whole. A school which values coaching creates a culture from the top down, embodying a commitment from the governors and the SLT to give staff more confidence in themselves and a drive to self-improve.

Everyone can benefit from someone spending time with them, listening to them, being interested in them and valuing them. It is a very special feeling to know that someone is there entirely for you.

Tell us about the new coaching service you’re running for Optimus Education

Coaching is offered in schools, particularly at a senior level, and a lot of this is delivered in-house. The Optimus Education coaching service, however, is a package of six sessions initially, which can be extended, and will target transitions to and through leadership. Often, there may be limited capacity internally or a deliberate desire for an independent option.

The transitions through leadership bring new challenges. These are often emotional as well as technical. As a new leader, there are often personal perceptions around vulnerability which may be misconstrued as a sign of weakness. Coaching aims to provide a safe space to address both personal and professional issues.

Each coaching session will last 90 minutes with a fully trained, accredited, experienced coach. Our group of coaches are a mix of those who have worked at senior levels within the education and corporate sectors. It can help to have a working knowledge of the industry, but equally, it is sometimes useful not to. A coaching session discussion will be facilitated by the coach asking questions which allow the coachee to reflect on their practice and set the agenda for their personal and professional development, which may be life-changing.

The first coaching session will identify areas for development and build rapport. Beyond that, it’s very tricky to say what each session will be about, because they will be completely different for every person and very much tailored to the individual. The coachee may have a very specific goal, something they want to work on in order to change or improve. Part of the coaching experience, however, is that the dialogue between coach and coachee may reveal underlying issues which may also need addressing.

Through the initial six sessions, the coach and coachee will build trust – if you don’t have that then the quality of your coaching experience will not be beneficial. The shape of the coaching sessions is entirely down to the individual and their coach, it’s a very co-creative experience. The regularity and the frequency, weekly for six weeks or monthly for six months, is entirely up to the coachee and what they want to discuss. It’s very much about the coachee’s agenda and making it personal to them.

Leadership can be lonely and coaching provides a listening ear

For more information about accessing coaching with Asma or any of the OE associates, go to try.optimus-education.com/coaching-for-success
Coaching plays a vital role in developing staff, pupils and driving whole-school improvements. Yet every coaching conversation is different, so developing an armory of tools and techniques is a great way of ensuring a better quality of conversation between coach and coachee.

As our new coaching network has launched, why not use this short training activity? Taken from our 'Coaching for Change' course in our In-House Training service, this activity aims to introduce your staff to new ways of supporting coaching conversations.

What will you need?
Copies of diagram 1 printed out and copies of diagrams 2 and 3 to display.

Timing
This activity will take between 15 and 20 minutes.

Run the training activity
Introduce diagram 1 – the balance wheel.
The balance wheel is powerful because it can provide a vivid visual representation of the way a person's overall life or a particular area of their life is currently. They can then easily see how things are and how they would like them to be.

The balance wheel gives a 'helicopter view' of a situation and is used extensively by coaches around the world. Like so many coaching tools, on the face of it, it's incredibly simple, but the impact it can have on the coachee is significant.

The eight sections represent a complete balance wheel. There can be any number of sections, but eight works well in most cases. The balance wheel can be about any aspect of a person's life. The number of topics that it can be used for is unlimited. Examples are shown in the table on the right.

If you were the coachee working with your coach you would:
1. decide on the issue to be addressed
2. take the centre, or hub, of the wheel as 0 (totally dissatisfied) and the outer edge as 10 (totally satisfied)
3. label the eight points on the circle with critical elements of the issue you are looking at
4. rank your level of satisfaction with each area of the balance wheel by putting a cross on the relevant spoke
5. draw a line to join the crosses.

A balance wheel can therefore be used by a person to look, for example, at:
- the most important aspects of their whole life (this is then called a 'Life balance wheel')
- a particular aspect of their life in detail.

Show the example of the 'life balance wheel' in diagram 2.
A particular individual may draw a balance wheel that ends up looking like this. Ask participants what this would tell them about areas of their life that they might gain most immediate coaching benefit from.

Some people might say that a life balance wheel has no use in school. There is no absolute truth in this since it involves opinions and beliefs. However, there is little doubt that what happens in an individual's life beyond school affects their performance in school and vice versa. Using a life balance wheel for a member of staff may therefore be appropriate in certain situations.

The balance wheel can also be used with learners. Diagram 3
shows a balance wheel with eight particular subjects, which the learner would themselves determine through working with their coach. This learner may be struggling with school work at the moment and just not know where to begin to rectify this. The balance wheel the pupil draws can be a real catalyst for discussion and coaching. Here we can see that the pupil is happy with their progress in art but not with maths, for example.

Now let the group practice using a balance wheel.

- Give each participant a copy of diagram 1 – the blank balance wheel.
- Ask them to look at key aspects of their life.
- Ask them to start by brainstorming the eight dimensions of their life that are important to them. These may include:
  a. roles they play in life (for example: husband/wife, father/mother, manager, colleague, team member, sports player, community leader or friend)
  b. areas of life that are important to them (for example: artistic expression, positive attitude, career, education, family, friends, financial freedom, physical challenge, pleasure or public service)
  c. their own combination of things, that reflect the things that are their priorities in life, such as in diagram 2
d. key roles and responsibilities in school and their level of satisfaction with these. Or it might be a ‘relationships in school’ balance wheel. These are just examples for people to use to practise using the balance wheel.
- Instruct them to take the centre, or hub, of the wheel as 0 (totally dissatisfied) and the outer edge as 10 (totally satisfied).
- They should rank their level of satisfaction with each area of the balance wheel by putting a cross on the relevant spoke.
- They then draw a line to join the crosses.

Get participants to ask themselves how balanced the perimeter of their wheel looks. From this they might decide on the best place to start being coached. This may be the dimension that has received the lowest score. Or they may decide to start elsewhere because this dimension might represent an easier win that can then kick-start a positive impact on other dimensions.

Different areas of our lives will need different levels of attention at different times. It is almost always the case that, where a person’s satisfaction level is low, this is the result of them not committing enough effort in this area of their life. Emphasise that the action, as with all coaching, has to come from them. Excuses will never move a coachee towards their goal.

Ask participants to now discuss in pairs or threes how the balance wheel could be used in school in a whole range of ways.
Prevent: duty of governors

Under Prevent legislation, schools are obliged to safeguard pupils from extremism and radicalisation. MATT MILLER outlines the governor role in challenging and supporting schools to do this.

As a school governor I consider my duty to help shape young lives has been heightened with the introduction of the Prevent duty. How many governors volunteered their services knowing that one day they would be expected to pick up on signs of radicalisation in schools? As someone trained to deliver the Home Office ‘Workshop to Raise Awareness of Prevent’ (WRAP) sessions, I get to ask this question regularly. As you might expect, when I ask for a show of hands there is very little extended arm movement, if any.

Duty of regard
The fact that we recognise our ‘duty of regard’ and dutifully follow its precepts through the shifting educational landscape is testimony to the resilience we have as adults, a quality we seek to develop in our children.

The premium on keeping children safe has never been higher - if safeguarding is not what it should be, the school will have no right to be judged good.

‘As governors we must exercise vigilance as never before; we must support, challenge and deliver’

How then can we ensure our children are kept out of harm’s reach? How can we repel the threat of extremism being peddled through cyberspace to the fingertips of enquiring and curious young minds? The straight answer is we can’t, and yet somehow we must. As governors we must exercise vigilance as never before; we must support, challenge and deliver.

There can be no excuses for substandard safeguarding protocols. Out with the old policy tick, training tick, DBS tick culture and in with the new gold standard. The trouble is we aren’t yet quite sure what that looks like.

So what do we know?
As governors we need to make sure that all staff are fully aware of the very real threat that radicalisation poses to vulnerable children in our schools. Accepting that risk exists is vital because it gives us the chance to recognise signs that may otherwise go unnoticed.

A child acting out of character, behaving differently, changing his or her appearance, reciting extremist narratives: these would all be legitimate causes for concern. Of course, this may amount to nothing more sinister than curiosity, mood swings or adolescence, but given the potential seriousness for the individual and the community of ignoring what may be the first signs of alienation from mainstream society, we have to follow up on our concerns, just as we would on suspicion of any other serious safeguarding issue.

If there is cause to wonder then ‘find out’ is the message: ‘notice, check, share,’ the three key words reinforced through WRAP. The Prevent guidance suggests that this heightened culture of awareness need not be burdensome; it is after all an extension of what is accepted as effective safeguarding.

British values
That said there is now a call to arms around challenging behaviours in school which breach British values. It is no longer acceptable to look the other way for fear of treading on ill thought through sensitivities. ‘Yes’ to respect for diversity and tolerance and acceptance of other peoples’ viewpoints, religions and faiths, but a resounding ‘no’ if a certain line is crossed.

That line isn’t always clearly defined and we expect professional judgement.
and common sense to prevail but passive acquiescence in extremist fuelled language or behaviour is not an option. Challenge and consequences must follow, and in many cases this will take the form of supportive educational strategies.

Where concerns are deeper rooted it will be for the DSP in school to ensure the matter is reported to the appropriate LA contact, where a decision may be made to refer the matter to their Channel panel. This multi-agency group will assess the nature of the referral and then signpost appropriate support. Given that no crimes have been committed, they will work hard to ensure that the child is able to clamber back on track, more self-aware, self-confident and able to resist the call of the radicalisers.

A broad and balanced curriculum
Governors need to investigate with senior leaders how broad and balanced the curriculum is and, crucially, whether children and young people have the opportunity to debate the controversial, moral and political issues of the day in a safe environment. Burying the bad stuff is neither helpful nor wise if we are to cultivate well rounded souls who are able to discern right from wrong, based on values which they have explored and to which they have actively assented.

They need to be able to ask why refugees are lining the border fences at Calais; why young girls are leaving their homes with the intent of becoming Jihadi brides and why it is the norm in Britain to wear a poppy in November and exchange Christmas cards. But, they also need to hear reasoned arguments so that they can acknowledge and tolerate conflicting viewpoints.

Having sat through a citizenship lesson recently as part of a governor visit, I was inspired by the intellectual debating skills of children, some as young as 12, who were indeed on the right tracks to embrace the challenges and opportunities of ‘modern Britain.’

‘Burying the bad stuff is neither helpful nor wise if we are to cultivate well rounded souls’

Volunteer does not mean amateur
As governors we must be open and transparent - governance arrangements and the identities of all governors, along with any financial interests must be publicly available to parents and wider communities. They must declare if they hold office elsewhere in schools or whether they have any material relationships with either staff or other governors in school.

No longer will governors be able to ‘collect’ governing bodies and save for ‘exceptional circumstances’ will not serve on more than two at the same time. The stark underlying rationale is to deter ‘entryism’, where it is possible to peddle extremism through a position of influence.

The Schools Minister Lord Nash rightly pronounced, ‘volunteer does not mean amateur.’ Ultimately it is our job to ensure that our schools are placing safeguarding at the heart of all they do. This requires knowledge, awareness and vigilance.

Embedding SMSC and British values conference
Taking place on 23rd February 2016 in London, this conference will help to ensure spiritual, moral, social and cultural development is at the core of your school ethos and pupils grow into resilient young people.

Effective SMSC provision is key to keeping children safe in education, supporting pupils’ personal development and welfare, and promoting British values.

This is a great opportunity to network with school leaders from across the country and attend a range of in-depth keynotes and expert-led seminars.

To register or find out more, go to my.optimus-education.com/conferences/SMSC2016
Multi-academy trusts: working together for school improvement

LISA GRIFFIN spoke to headteacher of Sir John Lawes School, Claire Robins, about the challenges and opportunities in becoming a MAT

We’d dabbled in school-to-school support and informal partnerships with local schools. In 2011 the local authority approached us about a school in difficulty in the area, and asked whether we could work with them as they became the Samuel Ryder Academy, an all-through academy. After supporting them for a while, we were asked to make the relationship more formal by establishing a MAT.

As we researched we found there wasn’t a lot of guidance available in becoming a MAT. It meant we had quite a lot of flexibility in how we set things up, as long as we remained clear in what we wanted to achieve. We also support two primary schools who are clients rather than members of the trust.

We had a big job to do in talking to our governors about becoming a MAT. The reason the LA asks you to support another school is because you’re successful and we had to put a lot of time and effort into ensuring our governors were confident that we would continue to be successful while doing so. They will want to be confident there is no negative effect on their school.

When you become an academy and then a MAT, the pupils and staff shouldn’t feel any different – certainly not worse!

The heads in the trust have regular meetings and phone calls to catch up. You have to be able to discuss issues and concerns openly with however many heads you work with.

When we first started working with Samuel Ryder the school was struggling and they needed a lot of support and a close level of contact, almost daily. Matt Gauthier, the head of Samuel Ryder, was originally deputy head here and went to Samuel Ryder to offer support.

Their head at the time left and Matt became acting head and then got the job permanently. Initially, I was very hands on and visiting the school a lot to discuss what we needed to do and what resources we could bring across from SJL.

That was nearly three years ago and I don’t need to know the ins and outs of how the school is running now, I can see how much it’s improved. Our conversations are much more ‘trust level’.

We’d taken part in school partnerships before formal sponsorship so we’ve been doing this a while but it doesn’t stop me getting a bit stressed occasionally and worrying that I should be spending more time in my own school. The initial stages of taking on a new school are so busy but we know that things calm down and a school begins to require less support.

Being out of school and leaving the SLT in charge is a great opportunity for them to flourish. My absence enables really good staff in the trust to display their skills and expertise to gain
opportunities for promotion. Samuel Ryder now has a great SLT who have been working with Matt for nearly three years and he has been able to develop them.

They are probably now ready to take the next leadership step and us taking on a new school in some difficulty allows us to keep them in the trust and increase their experience in leadership support at the same time. They’re excited about a new challenge and we’re pleased because it means they stay in the ‘trust family’ - that probably sounds a bit cheesy but it’s true!

Our middle leaders across the trust are linking up their work too. They take part in joint training to discuss ideas and bounce suggestions off each other. Our staff contracts now say that individuals are employed by the trust, rather than the specific school, although we don’t currently have plans for staff to teach across the trust. Our support staff do though. For example, the head of IT services at Samuel Ryder has recently gone on shared parental leave and so I’ve moved our deputy head of IT to Samuel Ryder to lead the department and progress to the next level.

A key area of discussion with the new school is the advantages of being in a MAT. If you’re supporting a school in an informal partnership and they have someone suddenly leave, I’m obviously sympathetic and want to talk through strategies to find a solution. I’m not accountable for the strategies that do or don’t work in the same way as I would be if they were in the trust though.

If a middle leader at Samuel Ryder is signed off sick or leaves suddenly, then I might need to look at my staff and identify someone who would be able to step up to the middle leader role and take up the job. This safety net is a huge benefit of being in a MAT and has definitely helped with staff retention.

I honestly don’t think there has been anything negative about becoming a MAT. It takes a lot of careful planning and the ability to be flexible – it’s about not doing what you’ve always done. What you’ve always done worked when you were a single school but you’re working with another school now. It’s an opportunity.

Centralised services isn’t necessarily the best way of managing things but it’s the right way for us. Other trusts may find that having their own teams in their own schools works better for them. There is flexibility in finding what works for you. Centralising some of our services has saved us a lot of money; we’re not a big MAT with benefactors pumping money in. We need to cover our costs and generate enough money to make it worth doing for everyone.

As an individual academy we bought attendance support from the LA as we couldn’t afford to do anything else. We were low priority according to the LA as we had higher than average attendance figures so we only had someone coming in for one morning every month.

We still wanted to improve our figures though. Since becoming a trust and taking on an outreach support role with the primary schools, we’ve appointed our own full-time attendance officer who works across the trust in both schools and in both the primaries and who gives us a day a week. We’ve covered our costs by selling her ‘free’ time to other schools and we’ve improved our attendance record to 97% which I’m so pleased about!

It’s vital to look ahead, plan and be confident enough to do things differently where necessary. As an academy and then a trust member we obviously have to buy resources in so we have to make sure that what we’re buying is good enough.

Now we’re in a good position to add another school in the trust and ready for the challenge of it. We have two successful schools, with two great SLTs who can provide support to the next school that we’ll be taking on. The SLT support for the new school has largely come from Samuel Ryder this time. I have some new members in my SLT so the team at Samuel Ryder are in a better position to provide support.

We don’t want to be too big a MAT. It’s important not to run before you can walk and to make sure that you are doing a good job for the schools you have before you take on a new project. It’s also important that any new joiner is completely happy and wants to join the MAT because it’s the best thing for them and us.

It’s an exciting time for MATs. As the number of MATs increases, it’s so helpful to learn about what other trusts are doing. Last year I went on a Future Leaders course with other MATs leaders. We looked at different structures and what was glaringly obvious was that there is no ‘one size fits all’. It’s about doing things the way you need to for the schools in your trust to achieve the highest standards. ■
To kick off a jam-packed two days of strategic masterclasses, round table discussions and presentations at our MATs summit, we held a panel discussion on the future of school improvement and collaboration.

The esteemed panel members included Dame Dana Ross-Wawrzynski, CEO Bright Futures, Maura Regan OBE, CEO Carmel Education Trust and Alan Yellup, CEO Wakefield Academies Trust.

Dana was up first to talk about the importance of collaboration in helping schools to improve. As she rightly said, even those schools in difficult circumstances have their strong points. When schools share best practice they are learning together and providing each other with support and resources. This is particularly vital for smaller MATS, those with up to nine schools, who are still building their trust.

A changing landscape

Education is a continually changing landscape and the increase in MATs has played a huge part in recent changes. To sustain improvement and be able to self-manage, MATs have to run as a business. With budgets cut by 12% in real terms over the next five years, this will be even more important.

Commenting on the future, Dana suggested there would be a cap on the size of a MAT at around 16-20 schools. She also predicted those in MATs consisting of less than five schools will increasingly join up with another small MAT.

Maura followed and discussed accountability in a MAT. It is the trust that holds responsibility for the children in their schools: they are ultimately accountable for every pupil.

Looking ahead, collaboration is key. In agreement with Dana, Maura discussed a growing need to forge a network of MATs to share policies and strategies. She acknowledged that some schools will never be part of a MAT and will perhaps look towards associate membership to gain support.

Last to speak was Alan, who summed up the thoughts of everyone attending the summit when he said: ‘School improvement and collaboration go hand in hand. Collaboration is just essential.’

Like Dana and Maura, Alan focused on the benefit of being able to more easily share best practice between schools in what teaching and learning looks like.

He posed an interesting question about the current education system. Citing the numerous types of schools we have, including free, independent, maintained and academies, and the different forms of group collaboration such as MATs and umbrella trusts, he asked whether this gives us rich educational provision or whether it is all too much and a bit of a mess?

There is no one size fits all model though and options for schools in different areas and different circumstances are crucial. As a group, it’s about what you can do better together than what you could do on your own.

Characteristics of a successful MAT

The opening address on day two came from National Schools Commissioner Frank Green, CBE. Frank outlined characteristics of a successful MAT, including a well-communicated vision that moves seamlessly from implementation into impact.

Clear accountability and delegated governance frameworks are crucial, as are clear quality assurance systems and a trust-wide school improvement strategy.

He went on to outline the importance of a systematic programme of school-to-school support, risk management strategies, a clear succession plan for key posts and a trust-wide commitment to making a contribution to the community.

Looking at the future of MATs, Frank predicted ‘in five years’ time there will be 1,000 MATs with a maximum of 20 schools in them.’

Frank echoed the thoughts of Dana and Maura in how fundamental trust-to-trust support will become even more important with the growth of MATs that he envisages. Coining the term ‘co-opetition’ (collaborative competition), he encouraged the room to work closely with other trusts in their area to continually improve.

Consensus over the two days was that there is no such thing as the right MATs model. MATs need regular review as things constantly change: new schools are added which may bring geographic challenges, or introduce a new element if they are the first primary or secondary in the trust.

With change also comes exciting prospects and it was clear that the priority for everyone at the summit is the children, even if, as Dana said: ‘We don’t have all the answers now.’
Essentials of leadership: learning from business

Schools, like any organisation, need strong leadership to be successful. LISA GRIFFIN speaks to leaders outside of education to explore the similarities and differences between schools and businesses.

To what extent should schools be run like businesses?
Running a school like a business is probably not the right question; rather, can business techniques be used to help manage schools better? The answer to that is yes!

Businesses generally have clear measures of success, such as the improvement in shareholder value, so targets and objectives are clear. Schools have different and sometimes conflicting objectives so measuring performance and identifying priorities can be difficult.

Good business practices such as financial management, identifying priorities and establishing clear goals and objectives can assist in both overall performance and in helping to make the process easier. The classic example is of course the ethereal leadership team focused heavily on pupils’ attainment and ignoring the financial and administrative activities of the school.

What makes a successful leader?
A good business leader will ensure a good structure is in place, managing processes and particularly finances – and keeping them under control. This releases time and resources to focus on achieving the overall objectives.

A successful leader builds a good team that uses all the individual parts of that team to their best effect and has them focused on the common objectives. The leader knows when to get in and assist and when to stand back and guide (no easy task!) and, most importantly, how to recognise and reward to motivate.

How do you effectively create a shared vision?
The key word here is ‘shared’ and to do this the leader has to engage with everyone in the team and let them input to the vision.

Sharing objectives also means sharing

A successful leader builds a good team that uses all the individual parts of that team to their best effect’
What makes a successful leader?

As co-founder and joint MD of PA Business Support Ltd, my leadership skills are something that I have had to hone and develop over the last five years. My background in recruitment gave me the drive to succeed and find the right people for my business and learn to manage, support and develop them.

When I started out as a sole-trader I had a vision of growing a team and building a small empire. This was all possible but my personal development focused on my confidence and learning to listen to my intuition.

A successful leader is always learning, and moving from a small sole-trader business to becoming a joint MD managing a larger team is the perfect learning curve.

My business partner and I have ‘strategy days’ where we share ideas, feed off each other’s strengths and support each other’s weaknesses. As a woman in business I am passionate about supporting individuals to ensure they are performing at their best and that’s our aim with the PA Business Support team. We celebrate their successes and encourage them to share their ideas – they are our best asset and a strong leader should be able to identify that.

What can school leaders learn from the business world?

I was never an academic in school but I thrived on the creativity of drama and English. I have fond memories of specific teachers who encouraged me to build on my strengths and work on my weaknesses.

Schools are academically led, yet emotional intelligence is a key area for schools too. Learning how to understand and recognise different feelings and relate to people from all aspects of life is invaluable in any business or personal environment.

How do you effectively create a shared vision?

A shared vision for us as a business reflects our beliefs and values; however as a business we are constantly evolving. We are always looking out for new and innovative ways to push to the next level and the beauty is that we both thrive on the passion we have for our roles. We are lucky that our team visualise where we want to stand in the market and they continually deliver the highest standard of work to our clients.

We have weekly check-ins with our team members to ensure they’re happy and comfortable managing the clients. We operate an ‘open-door’ policy and encourage the team to pick up the phone for a chat or meet for a coffee to discuss any problems.

What does visionary leadership mean to you?

For us as a business it’s about moving forward together and ensuring our team are on-board with our goals.

We feel excited about what the future for PA Business Support Ltd holds and we continually want to inspire our team by sharing our ideas to ensure they feel part of that too.

As businesswomen and leaders we are strategic risk-takers, yet we are responsible for working together and looking for solutions to achieve our goals.
What makes a successful leader?
Having a clear vision about where they want their organisation to be and the ability to communicate that vision effectively.

The best leaders also need to be introspective from time to time and allow themselves to be critical about their own performance and capable of some serious self-analysis. This requires a mixture of bravery and self-confidence.

Good leaders need to be able to understand where they are strong and the skills that they can deploy to achieve their vision, but they also understand where they need the help and support of others to fill in the gaps.

I attended the Warwick Business School a few years ago as part of a local government leadership programme. We were put through a number of exercises, including the Belbin Team Inventory and a Myers-Briggs assessment, to identify our individual personality types.

I was able to understand what sort of personality I had, the consequences for those around me, and the changes I needed to make to be more effective in my role as a leader. This kind of 360 degree personality assessment commands a premium, but it is worth it and I urge every new leader to take a personality test!

How do you effectively create a shared vision?
A shared vision can only come from a shared understanding. If we use effective consultation as a genuine part of the process it can be a very powerful force for making good decisions.

Shared visions can only be created through the process of genuinely involving people from the very earliest stages. That includes identifying the problems, clarifying our objectives and mapping out the route together.

This is particularly important in my area of school branding, marketing and pupil recruitment. If we involve parents, staff, governors, pupils and the wider community in the consultation at an early stage, we can make our school marketing messages much more powerful. Brands will be true reflections of the school’s strengths and imagery, photographs, and videos will reflect these truths.

How do you motivate staff to get the best out of your team?
All of us spend far too much time nagging and berating those below us. Sometimes it seems like we haven’t got anything positive to say at all, which is fatal.

Be very clear about what it is that you want your team to do. Be positive and enthusiastic. Recognise that most staff will be ‘doing their jobs right’ a lot of the time. Try to catch them in the act of doing it right!

Set objectives and find opportunities to congratulate them on their achievements and performance. Explain why you are proud of what they have achieved, tell them that’s what you expect and it will become a self-fulfilling prophecy.

When they fail, as we all do, use the same technique: what was it that we expected from them? What actually happened? What can we do better next time? Re-assure them that we know they can do better than this – and send them on their way knowing that their failure doesn’t make them a bad person!

What does visionary leadership mean to you?
I’ve known one or two visionary school leaders. They have the ability to set clear objectives and a talent for communicating with those around them. They possess an understanding of their own strengths and weaknesses and the ability to find team members to ‘fill in the gaps’.

Visionary leaders have an enthusiasm for identifying and mentoring new leaders, relentless positivism and the ability to take the right route, rather than choosing the easiest thing.

To me a visionary school leader is someone who can answer the question ‘why should I bring my child here?’ in 30 seconds, without using educational jargon, and leaving me with the ‘wow!’ factor.

‘Visionary leaders have an enthusiasm for identifying and mentoring new leaders’

Paul Sample
Managing Director, The Mustard Agency and specialist in school marketing

Look out for more on business leadership essentials in the next issue of Insight. Until then, head online and log into my.optimus-education.com/topic/leadership-skills for more resources, articles and webinars focusing on leadership skills.

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Leadership vs management

When do you lead and when do you manage? LISA GRIFFIN reports back on our webinar

School leadership and management require different acts, qualities and behaviours. You don’t have to be a manager to be a leader but understanding how they are linked and must exist in tandem is crucial to drive whole-school improvement.

Our recent webinar with Helen Morgan, executive director at HM Education Consultancy, explored the differences between leading and managing in a school and how leadership and management skills should work together to motivate people and achieve a vision.

Helen opened with a quote from Nelson Mandela: ‘Action without vision is only passing time, vision without action is merely day dreaming. But vision with action can change the world.’ She discussed how, as a leader, you need a vision and an action plan to achieve the vision – these are fairly obvious. You also need the skills, confidence and competence to complete everyday tasks; some quick wins to gain confidence; the right tools and resources to make a vision a reality.

Transformational and transactional

Words associated with leadership, such as inspirational, motivational and dynamic, are very powerful and very positive compared to language often used for management, such as competent, stable or operational.

Leadership is often described as transformational – leaders create and drive change – and management as transactional and maintaining the status quo. Helen challenged this view by discussing how those traits deemed transactional can be very complex and challenging and ensure goals and objectives are met.

Leadership vs management

Thinking of them versus each other encourages the idea that some people only do ‘leadership work’ and others only ‘management work’, but it is not always this simple. One cannot work effectively without the other. A leader’s vision will not be achieved without managerial implementation. To effectively and efficiently drive and sustain improvement they have to work in tandem. To move away from pitting them against each other, we need to think of how they’re connected.

Leadership and management

Effective leaders are ambitious in terms of vision and seizing new opportunities but they are also meticulous in terms of their planning and execution.

The best leaders ensure that they manage their teams effectively, playing to individual strengths and making sure that everyone understands that they have an important part to play.

Helen posed some questions that both leaders and managers should regularly ponder and reflect on. How do you maintain a focus on the big picture and take responsibility for getting the whole job done, while also stepping outside where necessary? When do you do it yourself and when do you delegate? How do you motivate and inspire others?

Helen delved into some of these questions and discussed how to apply thinking around them to leading change in a school. She referred to John Kotter’s model of 8-step process for leading change. There are three key phases of the model which require both leadership and management skills: creating a climate for change; engaging and enabling the organisation; implementing and sustaining the change. From these three phases, Kotter created his 8 steps. When implementing change in school, leadership is most effective when the steps are very clear.

Creating a climate for change

Step 1: Increase urgency. Kotter outlines the importance of communicating the urgency effectively but for it to be done in a calm way without creating panic.

Step 2: Build guiding teams. Identify the people you need, the strengths they bring and the skills to improve.

Step 3: Get the vision right. It needs to be ambitious and underpinned by the school values and ethos.

Engaging and enabling the organisation

Step 4: Communication for buy-in. This comes from the school leader, SLT and middle leaders.

Step 5: Enable action. Identify and remove any barriers.

Step 6: Create short term wins. Celebrate them too! This helps to create positivity around change.

Implementing and sustaining the change

Step 7: Don’t let up. Reflect on progress and involve everyone.

Step 8: Make it stick. Foster a culture of continuous improvement.

The 8 steps do not necessarily have to be completed in this order to create success, but what is important is that all of the steps are undertaken by both leadership and management working together successfully.
What’s in this month’s School Business Management section?

The year 2015 was certainly a challenging one for SBMs but they have shown us how resilience and collaboration are the keys to success. Find out how SBMs across the world met up to share best practice for effective budgeting and driving whole school improvement and learn first-hand from those who have recently joined a MAT. As we look to 2016 and beyond, there’s no doubt that budgeting will be a key focus: check out our expert advice from David Gordon and learn how to evidence the impact of pupil premium funding. Meanwhile, expert Micon Metcalfe explains the new NASBM professional standards and, of course, we have our January checklist to ensure you have everything prepared for the weeks ahead. Here’s to another exciting new year!

Alex Masters, Content Lead

Contributors in this issue

Micon Metcalfe is the director of finance and business at Dunraven School and a specialist leader of education. She is also experienced in change management.

David Gordon has been writing about education issues since 2000 as editor of School Governor Update. He was previously the editor of School Financial Management.

Nickii Messer was an SBM for many years, including seven years in the SLT. She now works as a consultant and is Anglia Ruskin’s operational lead for Teaching and Leadership SBM programmes.

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

"SBMs are the unsung heroes. You make the impossible possible!" #COBIS

Deficits, higher costs, frozen incomes...feeling the school budgeting fear? Useful tips http://owl.li/UK9Bu

Exciting: @katiecpd book ‘maximise your income’ now available to pre-order http://owl.li/UhAF8

Is your school recruiting? Some excellent cost-saving, time-efficient techniques from Cate Hart #oeRMR @OptimusEd

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

It’s a new year with new challenges. Do you have everything prepared for the weeks ahead? ALEX MASTERS has compiled a checklist to ensure you haven’t forgotten anything as well as expert advice.

Maintained schools and academies

Budget monitoring

Predicting budgets is arguably one of the hardest parts of budgeting: SBMs are expected to ‘predict the future’ when multi-year forecasting. For this reason, we’ve commissioned a range of expert advice to help guide you through the process. Our expert, Sue Birchall, gave a brilliant webinar on this topic (if you missed it you can listen to the recording online at my.optimus-education.com/SBM). Her advice includes: when working with limited resources, make sure you determine known expenditure and non-negotiables, staffing structure and your school improvement plan. Don’t forget that the responsibility of budget-monitoring lies with you: you, the budget-holder, the headteacher, governors and LA/Education Funding Agency (EFA).

Contract monitoring

Some advice: do not enter any negotiations with a new provider until you have researched their background. Get information from your network of colleagues, check the invoice terms – do they charge if you are late in paying? And don’t forget to read the small print! A number of providers are now including a clause that one year’s notice must be given to end a contract. If this is ignored then they will renew the contract, without notification for the original term length.

Spring school census

There have been changes to the specification for the 2015-16 school census, details of which can be found on the Department of Education website. This document is aimed at schools which complete the school census so that they understand the purpose and rationale, can include, update and maintain the required data and complete the 2015-16 school census returns.

Plan premises works to be completed over Easter

When it comes to premises works, we have a great selection of content written by our experts. Just type ‘premises’ in the search box to find information including premises maintenance, standards and managing contractors. Also, our recently-updated buildings maintenance model policy has been very popular.

Here are some snippets of advice from the content: premises management is a responsibility under the Schools Financial Value Standard (SFVS); schools should have a five-year rolling maintenance plan; pre-order contractors in good time and coordinate their work into your time plan. Do also remember to link the plan to health and safety issues.

EFA issues information on post-16 funding factors

Final funding allocations for 16-19 pupils, high needs pupils aged 16-24 and bursary funding will be sent out in February and March this year. Information on understanding the process and how funding is calculated can be found on the DfE website. Funding is calculated using the EFA funding formula that incorporates factors such as pupil numbers, retention, high costs subjects and disadvantaged pupils. Schools need to supply data returns to the EFA so that their allocation of the following year can be calculated.

Maintained schools

EFA publishes 2014 to 2015 secondary school spend data with performance tables

The EFA administers education revenue and capital funding for learners between the ages of three and 19, or up to 25 for those with special educational needs and disabilities. It also supports building and maintenance programmes for schools, academies, free schools and sixth-form colleges.

There are some interesting statistics on income and expenditure in academies in England 2013-14 and planned expenditure by LAs in England 2015-16 on the DfE website.

Review SFVS Standard section B - setting the budget

The SFVS helps schools to manage their finances and to provide assurance to the LA that they have secure financial
management in place. The DfE offers guidance to help schools and LAs complete the 2015 SFVS and assurance forms. As governing bodies have formal responsibility for the financial management of their schools, the standard is primarily aimed at them. You can find more information (as well as an assessment form, support notes and additional resources) on the DfE website.

**Academies**

Submit accounts return for the previous financial year by 31 January

The EFA requires academy trusts to submit their 2014-15 accounts using a specific template by 31 January 2016. You can find the template at http://ow.ly/UQ2CO. Academy trusts need to complete this return if they are preparing financial statements as at 31 August 2015 and have academies open at 31 August 2015. The link explains how to complete the return and submit it using the EFAs Information Exchange. Trusts that have been incorporated but are not preparing financial statements to 31 August 2015 or do not have any open academies should not complete this return. In March 2016 the EFA will issue an alternative return for those trusts to complete.

**Condition Improvement Fund (CIF) applications**

The DfE have published information for applicants for academies and sixth-form colleges applying for the 2016-17 financial year (April 2016 to March 2017). The CIF is additional capital funding that academies and sixth form colleges can apply for each year. Most CIF funding aims to address issues with significant consequences that revenue or Devolved Formula Capital (DFC) funding cannot meet. For more details, visit the DfE website.

**EFA issues pupil premium payment number three**

The pupil premium grant (PPG) will be paid to academies and free schools by the first working day of January 2016, and then April 2016. Allocations are given using: the number of pupils recorded on the January 2015 school census who are Ever 6 FSM (not eligible for the Looked After Children and post-LAC premium); LAC and post-LAC; and Ever 5 Service child FTE pupils aged four and over. For more information, go to the DfE website. Also, type ‘pupil premium’ into the search box on our website.

**EFA issues information about the next summer schools programme**

Summer schools provide an excellent opportunity for secondary schools to help disadvantaged new pupils understand what and how they will be studying in KS3. It is also an opportunity for schools to help disadvantaged pupils who are behind in key areas such as literacy and numeracy to catch up with their peers. Schools will receive £250 (if running a one-week summer school) or £500 (if running a two-week summer school) for every eligible pupil who confirms they want to attend the summer school.

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**The SBM January 2016 Checklist for maintained schools and academies**

**BUDGET MONITORING**

When working with limited resources, make sure you determine known expenditure and non-negotiables, staffing structure and your school improvement plan

**CONTRACT MONITORING**

A number of providers are now including a clause that one year’s notice must be given to end a contract plan

**SPRING SCHOOL CENSUS**

The DfE has advice to help schools complete the returns and understand how to update and maintain the data

**PLAN PREMISES WORK FOR EASTER**

Pre-order contractors in good time and coordinate their work into your time plan

**EFA ISSUES INFORMATION ON POST-16 FUNDING**

Pre-order contractors in good time and coordinate their work into your time plan

www.optimus-education.com  OPTIMUS EDUCATION INSIGHT
The NASBM professional standards

There has been much talk about NASBM’s professional standards which were launched in November. MICON METCALFE reports.

Last year I was invited by NASBM (the National Association of School Business Managers) to be on the stakeholder working group to develop professional standards for school business managers. A number of other SBMs from around the country and I worked with Stephen Morales, executive director, and the trustees to write the standards which were launched at the NASBM national conference on 18 November 2015.

Why have professional standards?

The role of the school business professional has developed markedly over recent years and there are many more SBMs than there were five years ago, let alone ten years ago. The National College developed a suite of qualifications known as the CSBM, DSBM, ADSBM and Business Director Programme. The National College no longer offers these qualifications but a number of providers do offer them at Levels 3-7. They form an important foundation of knowledge and theory for practising and aspiring SBMs.

However, a mature profession takes ownership of its values and the qualifications required to fulfil the requirements of the SBM role at each level. The NASBM Professional Standards start us on this journey. They set out a framework which will be relevant for many school ‘back office’ staff and provide a career development path.

For NASBM members there is an interactive version of the standards wheel, where members can self-evaluate against each of the areas of competence. Over time, the idea is to develop or recommend training and exams which develop the SBM practitioner at each tier.

The decision to include different tiers of expertise recognises that this is a profession which has professional development routes. The range and scope of SBM and back office roles in today’s schools is vast and it was felt important that our standards recognised this. It is in line with other professions (such as CIPFA or CIPD) and I believe it enables practitioners to continuously develop and learn.

The Professional Standards focus on the qualities of the SBM as well as the core areas of expertise and knowledge that are required overall and the standards will prove useful for SBMs to evaluate their own practice but also for heads/principals and governors to develop job descriptions. It will help identify areas for professional development, especially for those who wish to progress within the profession.

What is being said about the school business management profession?

One keynote speaker at the NASBM national conference was education and childcare minister, Sam Gyimah MP. In his speech he said: ‘The role encompasses far more because the distinction between the back office and the frontline is false. You are all part of the frontline.

‘You are all directly enabling schools to drive up their performance which ultimately impacts outcomes for their pupils. You are all playing a vital role in the strategic direction and governance of schools.’

He went on to say: ‘The professional standards framework we are launching today will formalise this valuable role further.’

I was heartened to hear a government minister make such a strong statement in support of the school business management profession. Despite several years of difficult funding, the focus has been on headteachers leading and managing the finance function as well as developing the teaching and learning. This speech clearly recognised the contribution a good SBM can make in shaping the direction of a school and ensuring funds go into the areas that will make the most impact. The ability to advise on strategic financial planning is a key skill and central to SBMs’ wider competencies.

Final thoughts

The development of business management as a profession has been close to my heart for a long time and being asked to participate in the professional standards project has been one of the highlights of my year – if not my career.

For more details on NASBM’s professional standards, visit nasbm.co.uk
The Spending Review: 8 things SBMs should know

From the pupil premium and recruitment, to school buildings and procurement, the government’s Spending Review unveils a raft of changes for the education sector. ALEX MASTERS reports

Total spend
The government has pledged to protect the school budget in real terms and states that total spending on education (including childcare) will be £60 billion in cash terms in 2015-16. This will increase to nearly £65 billion in 2020. However, they are not fully transparent on precisely where and how spend will be allocated. **Expert advice:** There’s no doubt that purse-strings will be tightened and SBMs will have fresh challenges this year when it comes to shrewd investments. Check out our article ‘Get ready for tighter budgets’ on p.32.

Pupil premium
There had been rumours that the new government would scrap the pupil premium. Thankfully, it has confirmed that this funding will be protected at current rates. George Osborne announced that the £390 million of additional funding will be given to the ‘least fairly funded areas’ in 2015-16 and support will continue for free school meals for all infants. Funding for universal infant free school meals will not increase but will be maintained – the government was still keen to stress that this will be saving families around £400 for every infant each year. **Expert advice:** Check out our popular template online: ‘The pupil premium: 9 top tips for evidencing impact.’

Recruitment
There’s no doubt that recruitment will be a key buzzword this year. Ofsted’s annual report stated that recruitment struggles persist, especially in STEM subjects. The report has called for financial incentives to get trainees into the schools that need them most. The government will invest over £1.3 billion up to 2019-20 to attract new teachers into the profession. A focus will be on teachers for Science, Technology, Engineering and Mathematics (STEM) subjects and those delivering the English Baccalaureate (EBacc). **Expert advice:** We have some excellent advice on our site from educational lawyers, Browne Jacobson. Just type ‘recruitment checklist’ into our search box.

School buildings
The government said it will invest £23 billion to create 600,000 school places, open 500 new free schools, rebuild and refurbish over 500 schools and address ‘essential maintenance needs’. It added that it is also investing in new school places for children with special educational needs and disabilities. However, it did not offer details on where these schools are, nor how the funding will be distributed. **Expert advice:** Do check out our popular building maintenance model policy on our site.

Budgets
The government will be supporting schools to save money on common items such as stationery or furniture, including exploring the option of a price-comparison website to reduce the time and resources schools have to invest in securing cost-effective deals. **Expert advice:** Micon Metcalfe advises schools to check out the Academies Financial Benchmarking site and consider the school’s development priorities.

Efficiency
Savings of around £600 million will be made on the Educational Services Grant (ESG), including phasing out the additional funding schools receive through the ESG. The government will provide £295 million over five years to improve the energy efficiency of schools, hospitals and other public sector buildings. **Expert advice:** A key part of efficiency is collaboration. This gives increased control over finances.

Procurement
In 2016, the government will publish a set of specific actions to support school leaders target over £1 billion a year in procurement savings by the end of the parliament through benchmarking, guidance and improved framework contracts. **Expert advice:** Decide on your aim and why you want this policy and benchmark against other schools.

Local authorities
The government plans to reduce the local authority role in running schools and reduce a number of statutory duties. The goal is to end their role in schools completely. **Expert advice:** check out ‘What next for education in politics’ on our site where Micon Metcalfe offers a review of the year in politics and considers what’s in store for education.
International schools: sharing best practice

School business managers from around the world came together to attend this year’s COBIS conference and share best practice. ALEX MASTERS reports

‘You are the unsung heroes! Remember the important role you play.’ David Porritt, headteacher of Junior School Leidschendam, addressed an audience of school business managers in the school’s assembly hall.

From Qatar and Romania to Uganda and the US, SBMs, bursars and finance managers came together for the COBIS (Council of British International Schools) conference held at The British School in The Netherlands.

David was keen to express his admiration for business managers.

‘Remember the important role you play. Without you, we cannot do what we need to do. You make the impossible possible.’ He also stressed the importance of collaboration and related the story of a group of middle leaders working on the COBIS international programme who had recently met up at the school. They had been asked to get into a group with the brief to design a brand new international school. They had never seen each other before, David explained. ‘They were absolutely incredible.’

In their final presentations, each team stressed the importance of partnership. They all agreed that the idea of leadership of an organisation is about people and how they work with each other to be the best they can be. ‘We all need each other. It’s impossible to have a strong international school without great bursarial, HR and operational skills.’

David brought things into perspective with his conclusion: ‘In the end, the whole point of this school is the young people who come into it.’

What better way to be reminded than to hold the event in a junior school. During the following presentations, you could hear children in the playground and excited chatter in the science lab behind us: it was a brilliant way to constantly remind us why we were here.

‘Remember the important role you play. Without you, we cannot do what we need to do. You make the impossible possible’

Managing and wellbeing

The next speaker was Emma Donaldson-Feilder, director of Affinity Health at Work. Many SBMs have told us their concerns when managing and training staff and Emma offered plenty of advice, supported by research.

She stressed that a positive organisation is one where everyone is ‘engaged, motivated and doing their best’. One area that is currently in the spotlight is ‘presenteeism’ – turning up for work when unwell. ‘People who are not performing at their best are more expensive than absence!’ she said, adding that people who are poorly need time to recover. ‘Think how you can facilitate that.’

Another concern is the growing proportion of older workers. ‘This is going to be much higher which means a higher risk of health problems. Think how to manage this effectively.’

The main focus of her presentation was on management and its impact on wellbeing. Emma explained that the way an employee experiences an organisation
is 'directly impacted by their manager.' She asked the audience to think about their own manager. 'Think what they do and the impact this has on your wellbeing. Mine was terrible at “last minute-ism!” Also think about what they do that is good and makes you feel valued.'

So what does make a good manager? Emma offered five key attributes.

1. Be open, fair and consistent
The key here is to be able to manage your own emotions first. ‘If you can’t manage your own workload and issues, you can’t manage your team.’ Emma also stressed that managing is difficult and it is important to seek support to help manage your own issues so you then have the resource for your team.

2. Be able to handle conflict
Deal with conflict quickly and objectively. As a manager, don’t feel you have to do it all on your own: call upon the resources available. At the same time, you don’t have to run to HR each time - only when you’re out of your comfort zone.

3. Have knowledge, clarity and deadlines
Learn how to manage workloads and be clear in communicating what needs to be done. You also need to be able to give advice and guidance and know when to make effective decisions.

4. Build relationships
Be aware of empathy and consideration and recognise that people have different pressures and things that motivate them.

5. Development
Help your team in ways that are significant to them.

Paperless purchases
The audience was clearly impressed by the presentation from Ilka Loof, finance manager at The British School in The Netherlands.

She took us step by step through the process of switching from paper to an electronic purchase order system. ‘We have 2,500 kids and 400 staff! For a financial department it was very difficult, especially processing invoices!’

Ilka explained that the new system gives a live overview of budgets, including: current spend, what has been authorised, anything pending and how much is left. Staff can process an order any time of day. The system is right up to date and looks the same for everybody. Another clever aspect of the system Ilka was keen to share was that, if you’re ordering abroad, there’s even a pop-up that asks: ‘Have you taken into account freight charges?’

The system cost EUR 10,000 (approx. £7,030) in total. The audience seemed impressed by this, especially as Ilka stressed that, in the long term, it has helped them to save money.

One key aspect of the system is that departments hold their own budgets. ‘Staff are responsible for purchasing their own goods and we expect them to give us an indication of their plans,’ she explained. ‘They have to submit their budget by April.’

To ensure consistency and understanding across the schools, at the start of each year, Ilka visits all four British Schools in the Netherlands. ‘I give a budget presentation to staff budget holders and explain how to use the budget, what to take into account and what to compare. It’s also about raising awareness of spending habits and helping to compare previous years’ spending and
analysing fixed costs.

They also have a budget administrator in every school office to ‘keep an eye on things’ and act as ‘a double check’.

Many staff members had been reluctant to embrace the new system: people are often afraid of change, especially if it involves technology! However, Ilka has just updated the system and bought an app for the iPad which has made it ‘more fun’ for the teachers and ‘takes away the fear!’

Cost-effective decoration

The next day, we were taken to a senior school just outside The Hague. Ybella Hofstede Davies, head of operations at the British School, proudly showed us around and, again, the classrooms were bright, spacious and colourful. She explained that she had been keen to keep colour ‘themes’ across the school to give a sense of consistency. However, the sixth form pupils asked for a different colour in their common room to highlight a sense of independence.

Ybella had selected colourful sheets of felt as a more cost-effective way to decorate some of the walls and designed an incredible canteen that had a real ‘adult’ feel about it. Unsurprisingly, students responded accordingly and staff members noticed that their behaviour matured when they came into the room – another example of how buildings and decoration can impact behaviour. There were also some fantastic curving desks in one classroom which the pupils loved.

However, mistakes are made and we learn from them. Ybella regretted having a carpet, rather than flooring, in the common room that needed to be deep-cleaned each month and one home economics teacher regretted asking for tall stools in her classroom as it meant the pupils were taller than her and she felt it jeopardised her influence!

Learning culture

The morning keynote speech was from Kieran Earley, CEO and principal at The British School in the Netherlands. Again, he stressed the importance of school business managers in schools. ‘I’ve seen exponential growth in awareness of the business implications of what we do. That depends on you. It wouldn’t happen without you,’ he said. He also noted that we are seeing more SBMs on leadership teams – ‘Quite rightly so!’ – and stressed that we are all still learning: ‘That’s the very best culture.’

Next to take to the stage was architect Dirk Jan Postel. He showed a range of beautiful, innovative school buildings across the world. ‘Education is the main part of our civilisation,’ he said. ‘As we change educational needs, we need to change our buildings.’

Reassuringly, he said that most school buildings are ‘created for change’ so they can be adapted rather than rebuilt from scratch. However, he predicts that in the future classrooms will ‘disappear’ in favour of larger learning spaces – although there will always be ‘smaller, more intimate spaces’ for individual learning. One image that stood out was a classroom where the walls had been turned into floor-to-ceiling whiteboards. Dirk urged us to embrace new ideas and new technology, rather than be afraid of them.

NASBM standards

One presentation that did provoke a lot of questions was Nickii Messer’s speech which explained the new NASBM professional standards. Nickii, an SBM consultant who frequently contributes to Optimus Education, said that she loved the fact that the new standards celebrate existing best practice. ‘It’s exciting. We can really make a difference. But you’ve got to get it to work for you.’

‘We are running multi-billion pound businesses. We forget that sometimes,’ she added, stressing that that SBMs have ‘a huge contribution to make’ to the ethos and vision of the school. ‘Be more confident and assertive with your team and contribute to where you’re heading.’

For more information on the NASBM professional standards, please see page 26
The pupil premium: how to evidence impact

It’s one of the ultimate challenges: how to evidence the impact of pupil premium funding to Ofsted. ALEX MASTERS shares an at-a-glance summary of expert advice.

1. It’s all about the data. This is evidence to Ofsted that you are closing the gap.
2. However, avoid excessive attention to data which might eclipse a focus on quality learning.
3. Think about what ‘success’ looks like in terms of raising attainment and closing the gaps.
4. Don’t ignore the Education Endowment Toolkit!
5. Consider using the Boxall profile to assess non-measurable qualities like self-esteem and wellbeing.
6. Collaborate. Work with other schools to find the best ways to evaluate teaching and learning and evidence impact.
7. Be creative! If helping parents with literacy classes will have an impact then that is perfectly legitimate.
8. If Ofsted are more worried about the ‘how’ rather than the ‘what’ then challenge them!
9. Remember that data is not always 100% reliable and accurate.

For more information on the pupil premium, go to my.optimus-education.com
Effective financial management in MATs

Many schools feel daunted by the prospect of joining a MAT. Here, a range of experts who have first-hand financial experience share their advice. Alex Masters reports.

Hazel Wale
Deputy head at Sir John Lawes Academies Trust

Doing your due diligence on prospective schools is really important when they are joining a MAT. It helps to answer ‘what if’ questions that your trust board or governing body may have and to ensure you are fully aware of any financial or organisational risk the sponsorship could bring.

There was a school we were in reasonably serious discussion with about sponsoring. But we decided not to as our due diligence process showed us that in the medium and long term pupil demographics did not make it feasible. It would have put us in competition with other schools in the area for the same pupils. That’s not what we wanted to do: it would have been very divisive.

In becoming a small MAT you can be flexible. You can find what works for you but you also need the confidence to be able to do it and carry out the process.

The initial stages of the pre-MAT process are difficult as there appears to be no formal guidance or template available for this part of the stage. The next stage of legalities is very much documented and regimented and so much clearer.

Governors may come from business backgrounds. They have gone through company mergers and change management and will be used to seeing very detailed reports from various departments on what has happened, what it will mean, what has changed and why. They will want to be confident and require the same quality of information to ensure there is no negative effect on their schools.

After a year as a MAT, I felt that we should centralise services. This included finance, school business management, payroll, IT support and attendance. I felt it would be cost-saving, more efficient, and ensure consistency of practice in areas such as HR. This doesn’t mean that you do everything in the same way, as each school has its own ethos but you want to achieve the same standards.

An SBM needs to know an awful lot about many areas. If you don’t know, you need to know where to go to find out! In my opinion you have to be good at finance – if you don’t get that right, everything else is at risk.

We’re also able to offer career progression to support staff. In the finance department, in particular, we’re bigger and there is more room for opportunity. For example, someone came here as a part-time finance assistant and this week has been promoted to a middle leader role within central services.

We’ve drawn up a new structure to cope with expansion. We’ve taken advantage of some staff changes and have gone to the next stage of the structure to form more of a middle leadership tier, otherwise it wasn’t sustainable if we got bigger.

Dana Ross-Wawrzynski
CEO, Bright futures

Collaboration does drive improvement. Share your thinking and techniques. We’re attracted to that structure: the excitement of learning from each other and not worrying if we don’t have the same answers at the same time.

When it comes to procurement, change from individual school to trust-wide structure costs.

When we started working with more vulnerable schools in Manchester, we improved by 5%. Why? We learnt from each other.

There is a real crisis in teacher recruitment. Do we have an executive head over three schools or a principal of one? Change costs. You may need to let people go and pay for better expertise.
I don’t know any school that has reduced its salaries. There are even pay wars between schools.

LAs are less supportive when it’s not part of their agenda. Be aware when they’re working with you and against you.

Funding is falling in real terms by 12% over the next four years. Small MATs can join up for quicker growth, better funding and better use of resources. In the long term it’s the right direction but it does cost money.

Understanding the business of MATs is very important. We need to find our voice.

I think the landscape is going to change even further. We’ll have more regional commissioners.

In the future I think there will be MATs across the country. I think there’ll be a cap [on the number of schools] of around 16-20.

Vulnerable schools need much support and training investment.

We have to go through this turbulence and not lose our nerve. We need to be clear what vision we have for the future. We need to start being strategic rather than reactionary.

MIKE GIDDINGS
Director of Clement Keys Education Services Limited

It’s important to have an element of scale. You’ve got to balance the books and be careful with growth.

Do you know enough about your schools? What are the finances and buildings like? You really need to understand what you’re taking on. Have a specialist and then move to your own in-house.

Group procurement is expensive and complicated. MATs enjoy specialists. Remember, you are only one employer with one legal identity.

Financial stability for MATs is about acting as a group. Specialist equipment can be shared, especially if schools are close geographically. Use your buildings creatively: use specialists to increase income. Have your own supply agency.

Economies of scale can be achieved in all areas. For example, group purchasing of paper. Set up central contracts, set the price and dealer locally. You can make savings of 30-50%.

Restructure as a group. Staff could move around the group to save redundancies and recruitment fees.

MARK BLOIS
Partner at Browne Jacobson

The future is MATs. The number of MATs is accelerating rapidly, driven by regional schools commissioners. Regular new joiners will be a common scenario for many MATs over next few years.

Ensure you fully understand what you are taking on. This applies to existing multi-academy trusts and single academies which are asked to become MATs.

There are two key purposes of due diligence. The primary purpose is to obtain sufficient information about the organisation joining the MAT. Information can be used to provide a better negotiating position in terms of the transfer. Timescales will be increasingly tight; having an organised, planned process is critical.

The importance of due diligence is often downplayed in single academy conversions. A school’s view is often that it ‘knows about itself’ and is prepared to convert ‘warts and all’. You need to know what you are acquiring: the extent of the school improvement task; that the transferor has the legal right to transfer relevant assets; and the full extent of any liabilities you will become responsible for.

Due diligence is a robust and rigorous process. It involves a multi-disciplinary team. It’s also a sensitive exercise: due diligence work requires engaging with the school’s staff and governors in order to obtain the necessary information and make the judgements required. It also requires allaying concerns about the implications of becoming a part of the MAT or a sponsored academy.

Key due diligence tests include: financial, organisation, performance data, legal and commercial.

The due diligence report draws together multi-disciplinary findings into a single coherent report. It informs the board in their final decision about whether to proceed. It’s important to consider the findings in context of the MAT’s growth strategy and vision. The report also ensures there is an effective feedback loop so that schools are constantly refining and rebalancing their approach to due diligence to meet MATs needs.
Get ready for tighter budgets

Budgeting will be a primary focus for school business managers in 2016. Expert DAVID GORDON offers essential information to help your school

The year ahead is set to be a challenging one as schools face budget deficits, higher costs and frozen incomes. In a survey of more than 1,000 state schools published by the National Association of Head Teachers (NAHT), nearly two out of three schools said they could only balance their budget by raiding their savings or by imposing significant spending cuts. Half reported that they were making cuts in staffing, including teaching and teaching assistant posts. No wonder so many SBMs are having sleepless nights.

So, what can schools do to prepare themselves for a future where funds will be increasingly stretched? Fortunately there is no shortage of advice – and the government is at the forefront of those offering it.

The DfE has published a discussion document, ‘Securing our future: using our resources well’. It sets out the issues under four headings:

• procurement and technology
• resource use and financial management
• partnerships and shared services
• the role of national and local partners in supporting schools.

Procurement is an area where the government sees scope for significant savings. Collective buying is seen as offering great scope for better value for money and the document cites studies that have shown potential in areas including ICT procurement, facilities management, energy contracts, the use of supply agencies and photocopier contracts.

A range of advice to help schools get the best value from their purchasing can be found at the Educational Procurement Centre (EPC) and the Department of Education website http://ow.ly/UQmEo.

The EPC summarises its advice in these top ten tips.

1. Develop procurement expertise.
2. Plan ahead.
3. Know your own power.
4. Don’t buy unless you need to.
5. Don’t spend hours saving a pound.
7. Improve your buying power.
8. Negotiate, negotiate, negotiate.
9. Get it in writing.
10. Share best practice.

Energy supplies are another area where the government believes schools can save money and it has brought in a number of measures to help schools become more energy efficient. One is the provision of free energy display meters, which schools can register for online at www.energydisplaymeter.co.uk

Another initiative is a fund to offer interest-free loans for the installation of around 80 different energy efficient technologies, including building insulation, boiler and lighting upgrades and IT energy efficiency improvements. Eligible schools can apply for a loan from the fund, which is administered by Salix Finance. Any loans awarded must be repaid within five years. Local authorities should be able to advise their schools on how to apply for a loan. More details of the scheme can be found at www.salixfinance.co.uk/home.html

The DfE summarises the steps that schools can take immediately:

• Investigate schools in their locality that are working in partnership and sharing services and learn about their experiences and the benefits that they have secured.
• Have governors discuss whether they are taking full advantage of the scope for collaboration with other schools, and how they can do better for the school and its pupils by doing so.
• Benchmark expenditure against local and national comparators using the DfE benchmarking website to see if there are unusual patterns of spending that might suggest potential areas for investigation and improvement.
• Ask for a Smart meter to be installed to reduce the school’s carbon use, reduce its fuel bills and give a practical demonstration of good energy use to its pupils.
Introduction

What’s in this month’s Teaching and Learning section?

A new year always brings new challenges. From reformed accountability arrangements – covered in our guide to the coasting measure on page 36 – to exam reform (see page 38) there’s a lot going on around school, both in the classroom and out of it. Some of the content in this issue focuses on guidance for classroom teachers to draw directly into their practice: see Tom Fay on building powerful formative assessment. Other articles are designed to spark reflection – on page 48 some teachers explain why the issue of “what works” in the classroom really isn’t that simple. (Please do head online to download the full report – it’s fascinating). A few of our most popular pieces this month have focused on mastery teaching, so if this piques your interest do check out Jo Facer’s excellent guide in this issue.

We’re always looking for feedback, so if you have any thoughts, ideas or comments, please get in touch – it’s always great to hear what you have to say.

Owen Carter, Content Lead

Contributors in this issue

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Top tweets from @TeachingOE

Just published! Our paper on the realities and possibilities of research-informed teaching http://try.optimus-education.com/making_the_link/

Damian Haigh: if the work we set isn’t reasonably challenging and doesn’t create difficulty, it’s unlikely to be retained in memory #growex

High aspirations from parents can improve children’s performance, but only if those aspirations are realistic.

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Coasting measures and floor standards: the quick reference guide

What on earth does coasting mean? And what are the expectations for floor standards, progress and attainment? OWEN CARTER clarifies the definitions you need to know.

How does the new ‘coasting’ measure add to accountability judgements for schools? And what more ambitious targets can we expect for schools in the coming years?

Here I’ll set out the latest information about these measures for both primary and secondary schools.

Coasting measure defined
Coasting is an accountability measure combining attainment and progress. In order to be classed as coasting, schools will need to fall below both the attainment and progress standards for three years in a row: 2014, 2015 and 2016 initially. Schools cannot be classified as coasting until 2016. Its standards are deliberately set higher than floor standards as a more challenging target.

So what are the standards?

Primary
• Fewer than 85% of pupils achieving level 4 in reading, writing and maths.
• Below the national median proportion of pupils making expected progress from the end of Key Stage 1 to the end of Key Stage 2.

Secondary
• Fewer than 60% of pupils achieving 5 A*–C GCSEs including English and maths.
• Below the national median proportion of pupils making expected progress.

Clarity on progress
The government consulted recently on the coasting standards. This consultation document clarifies that the expected progress measure applies only if all the subjects are below this standard.

This means that for primary schools, if more than the national median of your pupils make expected progress in any of reading, writing or maths, you will be above the coasting standard; for secondary schools, if your pupils make above this progress in either English or maths (or both) you will be above the expected standard.

The complicated bit
The measures above will apply for 2014 and 2015. However in 2016 the coasting measure is set to change.

Primary
• In 2016 a new accountability regime will be introduced: a higher expected achievement standard will be in place. The coasting level will be if fewer than 85% of pupils achieve this new higher standard.
• The expected progress measure will be announced after 2016 results.

Secondary
• In 2016 the Progress 8 measure will define coasting. The exact level of expected progress will be set after 2016 results.

• From 2018 the definition of coasting will be based entirely on Progress 8 and not feature an attainment element.

So, to clarify: your school will be classified as coasting if it falls into the two criteria above for 2014 and 2015, and then falls beneath the new measures in 2016. If your school bucks this trend for one or more of these three years, it will not be classified as coasting.

Floor standards defined
Primary
In 2014 and 2015 a primary school will be below the floor standard if:

• fewer than 65% of pupils achieve level 4 or above in reading, writing and maths
• below the median percentage of pupils make expected progress in those subjects.

Secondary
In 2014 and 2015 a secondary school will

• fewer than 65% of pupils achieve level 4 or above in reading, writing and maths
• below the median percentage of pupils make expected progress in those subjects.

In 2016 a new higher expected standard will be in place, as will a new value-added measure of progress. A school will fall below the floor standard in 2016 where fewer than 65% of pupils achieve the expected standard and pupils do not make sufficient progress - details have yet to be announced about what these will look like.

Secondary
In 2014 and 2015 a secondary school will
be below the floor standard if:

- fewer than 40% of a school’s pupils achieve 5 A*-C including English and maths
- the school has a score below median for pupils making expected progress in these subjects.

In 2016 the floor standard will move to the Progress 8 measure. The absolute floor standard for 2016 will be -0.5 (where, on average, pupils in a school achieve half a grade less than those with similar starting points nationally).

Frequently asked questions
If my school is identified as coasting, will that mean it is forced to become an academy?
Not exactly. The coasting schools regulations state that ‘the plan is not automatically to seek academy solutions for all schools which fall within the definition of coasting’. However, your school will be required to explain its plan for improvement; if this is judged insufficient, academisation is the likely next step.

Who will assess a school’s plan to improve from coasting?
This responsibility will fall to the regional schools commissioner for your area. According to a DfE press release, ‘those that can improve will be supported to do so by our team of expert heads, and those that cannot will be turned into academies under the leadership of our expert school sponsors’.

If our school falls below the coasting measure for one year, is this a problem?
Not necessarily. In order to be labelled coasting you must fall under the measure for three consecutive years, so one year’s bad results will not be enough to have you identified as coasting.

Have Ofsted got anything to do with this?
Coasting and floor standards are measures purely linked to exam results, so your school’s Ofsted grade should have nothing to do with whether you are defined as coasting. However poor performance under these measures may trigger Ofsted inspection.

One interesting aspect of these proposals is that they may potentially reduce the role of Ofsted somewhat. If data becomes a key factor for judging the quality of schools, then the process of inspection may become more minor.

I heard primary floor standards were rising to 85% expected to achieve level 4. Is this the case?
No. While this was a previous plan of the DfE, it now appears to have been replaced by the coasting measure, which does require 85%. But primaries will have to face a new higher expected floor standard in 2016.

Is this all set in stone?
At the time of writing, the legislation implementing the new coasting measure is still passing through Parliament, so some details may be subject to change. However the substance of the policy is unlikely to change much.

How many schools will be affected?
We don’t know exactly how many schools the measure will affect because it will depend on the results of future examinations. However on current data Education Datalab have calculated that around 1,200 schools would be affected: 13% of secondary schools and 5% of primary schools.

As many of these schools are likely already under improvement pressure, the total number of schools that end up being majorly affected by the coasting policy may be rather small. Although the measure is intended to target schools with reasonable exam results whose pupils don’t make the progress they should, the exemption for attainment will in practice exempt many of these schools.

What about progress and attainment between external examinations?
The coasting measure and floor standards apply only to the results of these external examinations. However with the removal of levels accurately tracking progress between examinations is of course an issue of top concern to schools.

According to the assessment commission report, your assessment policy should contain six components.
1. The principles and aims of assessment in your school.
2. How governance, management and evaluation of assessment works.
3. How assessment outcomes are collected and used.
4. Ways teachers are supported to conduct assessment competently and confidently.
5. Details about the school’s approach to the three different forms of assessment (formative, in-school summative and external summative).
6. Implementation, including staff, pupil and parental engagement.

Schools should avoid creating huge data workloads for staff or measuring pupils’ progress summatively more than three times per year unless there is a very clear rationale for doing so. The report says ‘the primary principle of assessment is that it should be fit for the purpose intended’ – formative data should not be used summatively, and the purpose of summative assessments should be clearly defined, with the data produced used appropriately to that intention.
Exam reform and Progress 8: a whole-school briefing

Changes are underway with secondary school examinations and accountability measures. KATIE RENTON looks at how you can ensure your staff are well informed of soon-to-be implemented concepts and processes.

In October 2013, the Department for Education announced that a new secondary school accountability system would be implemented from September 2016. Named Attainment 8 and Progress 8, these two new headline measures aim to encourage a broad and balanced curriculum and reward schools for the teaching of all their pupils.

Such multifaceted reforms can be difficult to digest. To ensure your staff are well-informed, we have put together a briefing which explains the key points.

PART 1: Exam reform

What are the reasons for exam reform?
- Suggestions that qualifications were not demanding enough and failed to meet the needs of employers.
- The accountability system incentivises a focus on C/D borderline pupils.

Changes for 2015 onwards
- Reforms to GCSE include updated syllabus content, reduced coursework, and a new grading structure of 1 to 9.
- Reformed A level will be linear.
- Reformed AS exams will be available but will be stand-alone (decoupled) qualifications that will not contribute to final A level results.

Reforms are being staggered, with some subjects moving to the new reformed exam system with first teaching from September 2015, and nearly all remaining subjects following a year later in September 2016. Due to the staggered introduction of the new GCSEs and A levels, there will be a transition period when old and new systems run side by side.

GCSE key changes
- A new grading scale of 9 to 1 will be used, with 9 being the top grade. This will allow greater differentiation between students.
- New content has been developed by the government together with exam boards.
- Assessment will be mainly by exam.
- There will be new, more demanding content.
- Courses will be designed for two years of study and students will take all their exams in one period at the end of their course.
- Exams can only be split into ‘foundation tier’ and ‘higher tier’ if one exam paper does not give all students the opportunity to show their knowledge and abilities.

A ‘good pass’
- The government wants to raise the bar, so a 4 – equivalent to a C – won’t be good enough.
- The new ‘good pass’ level will be 5 – equivalent to a high C or low B.

PART 2: An explanation of Attainment 8 and Progress 8

Attainment 8
- Attainment 8 is the students’ average achievement across a set group of eight subjects.
- Grades will be measures on the new 1-9 point score scale, rather than the current 16-58 scale.
- Each students’ best eight subjects will be counted as long as they fall into one of three ‘buckets’.
- It is not mandatory for students to fill the three buckets or take eight qualifications.
If a student has fewer than eight qualifications, or if some of their qualifications do not fit into one of the three buckets then they will score 0 points for the unfilled slots.

**Bucket 1**: English and maths – both double-weighted (English only if both English Literature and English Language are taken – the higher grade is the one which receives double weight).

**Bucket 2**: Highest grades in Ebacc subjects.

**Bucket 3**: Open group - further Ebacc subjects or other academic, arts or vocational qualifications.

NB: Bear in mind that it’s not mandatory that the middle three buckets contain Ebacc subjects, and pupils can take less than eight subjects – any bucket not filled scores ‘0’. Also, if a pupil takes more than three ‘other’ subjects, the additional subjects count as ‘0’ in the calculation.

**Example Attainment 8 calculation**

**Bucket 1**:  
1. English: grade 7 (Double weighted = 14)
2. Maths: grade 6 (Double weighted = 12)

**Bucket 2**:  
3. French: grade 8  
4. Geography: grade 6  
5. Biology: grade 5

**Bucket 3**:  
6. Drama: grade 7  
7. Psychology: grade 4  
8. PE: grade 8

To calculate this Attainment 8 score, add each grade point and divide by 10.

\[
14 + 12 + 8 + 6 + 5 + 7 + 4 + 8 = 64  

64 ÷ 10 = 6.4
\]

**Progress 8**  
This measures students’ progress from the end of primary school to the end of secondary school by comparing Key Stage 4 results (Attainment 8) of students with the same prior attainment at Key Stage 2. Progress is the difference between their actual results and their expected results.

Progress 8 score = actual attainment 8 score – estimated attainment 8 score.

**Score example**

- Barry receives a KS2 average of 4.7; from that he would be expected to achieve an Attainment 8 grade of 4.9. This is based on the national average Attainment 8 score of other pupils who achieved the same KS2 results as Barry.
- Barry then achieves an actual Attainment 8 grade of 5.4.
- His actual Attainment 8 grade (5.4) minus his expected Attainment 8 grade (4.9) = a Progress 8 score of +0.5.
- This means that Barry achieved an average of half a grade better per subject than other pupils with the same prior attainment at KS2.

**When does Progress 8 come into effect?**

- The Progress 8 measure will be introduced for all schools in 2016.
- The Progress 8 score and the Attainment 8 score will be published in performance tables from late 2016/early 2017.
- Schools could choose to ‘opt in’ early to Progress 8 if they wish (from September 2015). If so they will be held to account on the new performance measures one year early.

**Impact on schools**

Progress 8 will be the only measure used for floor standards. A school will fall below the new floor standard if their Progress 8 score is below -0.5.

This score would indicate that the school’s average achievement is half a grade worse per subject than the national average of other pupils with the same prior attainment.

If schools fall below this floor standard, this will trigger an Ofsted inspection.
Formative assessment to improve teaching

Isolating misconceptions and providing pupils with meaningful feedback is crucial to effective teaching. What makes for powerful formative assessment? TOM FAY explains

Assessment strategies in our education system have once again been overhauled as we continue to serve the needs of an evolving educational landscape. Many teachers have lamented that education is all about the end figures; unfortunately for us these end figures can make or break the next steps a young person will take in their learning journey.

Getting assessment strategies right is therefore pivotal in ensuring we are doing the right thing by our pupils. Teaching to the test, while it has short term benefits, does not create a robust young person ready to take their next steps from one key stage to the next. If teachers drill pupils in techniques for earning marks, at the expense of teaching for deeper learning, then our best intentions are often a moot point.

Formative assessment is crucial both for exam preparation and enabling pupils to learn effectively more generally.

Formative assessment strategies to close the loop
All across schools in Britain formative assessment forms the heartbeat of the teaching strategy utilised to gauge learning. Assessment is not formative, though, unless it provides information that is actually used to take learning forward. Take the following simple example as an illustration.

- The teacher asks a pupil a question.
- The pupil does not understand the question, or cannot answer it.
- The teacher moves to a peer for clarification.
- The peer provides the correct answer.
- The original pupil acknowledges the peer's response.
- Nothing further happens.

This common example will be discussed later on when we deal with isolating and using misconceptions as learning tools. The use of formative assessment is not a tick box exercise whereby teachers can say 'I do ask questions in lessons' or 'we do have discussions about the content'. Formative assessment is more than about just doing; it is about strategically using information gained to personalise learning and drive standards upwards.

Formative assessment should help learners to grow in their capacity to manage their own learning and make progress in specific subject fields. Formative assessment should not be used as a labelling exercise but used to provide manageable and developmental next steps with any learning intentions.

What makes the ideal formative assessment?
The ideal is that pupils engage in formative assessment for one another in collaboration with the teacher. The mindset that needs to be adopted must therefore be that ability is incremental, not fixed.

Nations with successful educational systems tend to believe that young people are capable of anything because of the focus on progress and learning over time that can occur when the curriculum is taught effectively, enthusiastically and with high expectations. Assessment strategies should provide evidence of progression towards a planned end point. While there are many strategies to promote formative assessment they should all be learner centred, positive in ethos and focused on developing pupils' skills. It is ok to make mistakes (learning happens when the starting point is an error) so both teachers and pupils should embrace the progress that can be made through errors.

Record keeping, self-reflection, independent learning, revision and learning strategies are all habits that can be developed through formative assessment.

In summary, formative assessment is a central part of teaching pedagogy. It is so central in fact that many teachers often find
it hard to get right! The way to approach this problem is by planning for learning – not planning for lessons.

Planning for learning
As I emphasised in ‘Creating deep learning’ (see article online) planning for the end goal is crucial. Teachers should be able to answer these two questions.

- What do I want pupils to be able to do?
- How will I do it?

When planning a lesson decide on what the end goal will be – what do you want the pupils to be able to do at the end of the lesson (or series of lessons) and how will you guide them there? How do you identify pupils that are making more progress than others? What is the barrier to learning that is stopping them from moving towards point Z on the learning line below?

Characteristics of effective questioning strategies
The most effective way to find where pupils are on this line is by asking a range of developmental and challenging questions. It is just as important to find out what the pupils do not know as well as what they do know.

This means that without a doubt some of the most important strategies for a teacher to master are questioning techniques and the isolation of pupil misconceptions, errors and misunderstanding. Here is some guidance on strategies for getting to grips with effective questioning.

1. There is a dominant culture of ‘no hands up’ so everyone can be asked a question.
2. Provide wait time (for open-ended higher thinking questioning up to 15 seconds may be required).
3. Allow pupils to think or articulate their thinking in groups. Group thinking responses are reassuring and act as a good springboard for small/whole class intervention.
4. Ensure pupils fully understand questions being asked of them and the purpose of any task associated with them (exam scenario, marks available, development of model answers etc).
5. Extend and deepen thinking with follow up questions.
6. Pupils often give the first answer that comes into their heads: ask them instead to identify three possible answers and select the best one.
7. Get the pupils to generate ten possible answers by snowballing – you can then collectively decide the best one to use as your model answer.
8. Scaffold thinking and learning. Identified misconceptions can be peer analysed via questioning.
9. Create a climate where pupils feel safe to make mistakes. The best learning and innovation happens when multiple mistakes lead to the correct outcome.
10. Effective questioning strategies are embedded into lesson plans and teachers use the strategy to inform future planning, assessment and evaluation of teaching styles.
11. Generate questions together and always allow the pupils to explore their thoughts and ideas by asking you questions. Listen to the way in which pupils speak (oral literacy) to you and each other. Always comment on the quality of their written response (effective feedback, literacy) when answering questions posed.
Formative assessment to improve teaching continued....

**Intervention and misconceptions**

Having gathered this data from their questioning, good teachers utilise pupil feedback and progress markers to intervene at timely and appropriate points in a learning episode. Record misconceptions, and solutions, that have been uncovered at the individual and class level. Misconceptions are a great resource to plan personalised homework, starter activities, plenaries, future assessment and to provide evidence of learning over time.

The secret to powerful intervention is to make it personalised. Consider these questions.

1. What intervention strategies do I use in the class to positively impact rates of progress and learning?
2. What intervention strategies do I use out of the class to promote progress and learning?
3. Do pupils record their misconceptions and the associated solutions?
4. How much emphasis is there on this process?
5. What is the impact of my intervention strategies on pupil attainment?
6. How do I record individual/whole class misconceptions and successful intervention?
7. Do pupils make an accurate and reflective record of their learning ‘cans’ and ‘cannots’ over time for review prior to the examination?

It is very common to observe teachers teaching to the middle and it is essential that we get the balance right. The demand can pay great dividends. This is the nature of our job and it is essential for you, and for your pupils, that a record is kept of prior misconceptions so they do not occur again at a later point in the academic year. The framework is as simple as the learning diary template in the table. By using this framework pupils move along the learning line above.

**Bringing it together**

There is no one size fits all or any prescribed method of teaching that occurs where all pupils will be at the exact same place at any given time frame in their learning. Learning is a messy business that goes on inside the pupils’ heads. At any given time in a lesson the pupils will be located somewhere on the learning line highlighted above with a different skill set.

It is our job to differentiate the learning, make it accessible and ensure all our pupils are making progress towards the end point (Z) from their initial starting points (X).

Some pupils will be still developing new learning after a single lesson while others will be seeking extension.

It is very common to observe teachers teaching to the middle as most of our learners will be clustered here. The result of such a teaching strategy is that the more and less able in a class often get overlooked. Adjusting teaching strategies to cope with this demand can pay great dividends. This is the nature of our job and it is essential that we get the balance right.

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### Question paper analysis

A form of reflection that can go hand in hand with this framework, and tie it into the demands of exams, is question paper analysis, which looks as follows.

_Clarity of question, how many marks are available and what skills are required to answer the question._

- Describe and evaluate the questions and mark schemes that are related to this topic (common themes, what key words must you use, how many sentences do you need to write).
- From my assessments I have learned (evidence provided).
- I need to work on...
- I need to see (teacher) urgently about (a question, a mark scheme, some content, other).

To make this strategy effective teachers need to do the following.

1. Know the type of questions asked on particular topics.
2. Know how many marks/weighting is given to a specific topic/ content.
3. Understand the skills required to be able to answer examination style question types.
4. Plan teaching strategies that removes exam barriers for the pupils.
5. Insist upon understanding what the pupils know/do not know and a record being kept by both parties for further use.
6 cognitive psychology principles about learning

OWEN CARTER synthesises six learning principles in an easy-to-remember format

1. 
Brains aren’t that good at thinking
Where possible we will solve problems through recourse to long-term memory - not through thought.

2. 
Avoid overloading working memory
We can only process so much consciously in our minds. Build from prior learning rather than puzzling pupils.

3. 
Learning is context-specific
Skills do not transfer automatically across subjects or tasks. The more dissimilar the context is the harder it is to bring previous knowledge to bear.

4. 
Mindsets do matter
Pupils are more motivated if they believe that intelligence and ability can be improved through effort. Teachers should praise specific strategies, not ability.

5. 
Knowledge helps you think
Fact learning is often opposed to skill development. But learners perform more effectively on skills-based tasks when they have factual knowledge to apply.

6. 
Practice is vital to progress
Learners need to practice key ideas on at least three occasions. Spaced practice, reviewing content over weeks or months, works better than cramming.

Sources
Developing working memory: a guide

Pupils with working memory difficulties find problems harder and acquire concepts less easily. 

OWEN CARTER explains how to help pupils train their memories

Memory is integral to learning. When we say pupils have learned something, all we are effectively saying is that they have committed it to memory, ready to recall at a later date in order to solve a problem.

This has been brought into sharp focus by the move towards terminal, extended examination and a National Curriculum that prioritises depth of understanding as much as breadth.

Unfortunately, for a lot of pupils, staff and parents, memorisation brings into mind rote learning and endless copying from the board. But understanding both working and long-term memory is crucial to helping pupils succeed. Here I’ll explain why, and what teachers can practically do to support pupils’ memory skills.

Understanding the basic model of memory

The most simple model of the mind offered by cognitive psychologists effectively divides up the mind into two parts: working memory and long-term memory. Working memory is where conscious thought takes place, where pupils actively think about things; long-term memory is where knowledge (facts, skills and procedures) is stored.

The key principle for teachers is that where possible pupils will solve problems by recourse to long-term memory, rather than thinking about it actively. We don’t think about tying our shoelaces because we’ve done it a hundred times before – even though physically the action is quite difficult. In the same way if pupils spot something that is similar to what they’ve encountered before, they will attempt to leap to the answer based on previous experience.

This is because working memory is very limited and small in capacity. Long-term memory, by contrast, is much larger, and capable of storing information on a semi-permanent basis. If we can solve something through recall we will.

Problems with working memory

Pupils’ working memory is crucial because it’s where they balance the information recalled from long-term memory with the specific demands of the problem they need to answer.

It also matters because in order to learn pupils have to transfer information from working memory to long-term memory. But there are a number of reasons why working memory can be a stumbling block for a lot of pupils. For a start, working memory varies substantially between pupils. In a class of 30 children aged 7-8 years old, for instance, normally at least three would have the working memory capacity of the average 4-year-old, and at least three others that of the average 11-year-old (see Understanding Working Memory: A Classroom Guide, by Susan E. Gathercole and Tracey Packiam Alloway).

Working memory can also be impaired in a number of ways.

• Distraction. We’ve all experienced it: you’re focusing hard on a problem and then someone starts talking to you. The train of thought is lost. This is working memory being interrupted.

• Confusion. Our minds aren’t very good at filtering out irrelevant data. Answering how much it would cost to buy five handbags at six pounds each takes us slightly longer than 5 x 6, although they’re the same question. The principle holds for more complex problems.

• Overload. A simple case of too much confusion can impair working memory. If I ask you to find 7 + 62 + 9 + 15 + 48 + 5 + 12, although none of the sums are individually difficult, you’ll likely have forgotten the first number by the time I get to the end of the sentence. We can only hold so much in our working memory at once.

Adapted from Daniel Willingham, Why Don’t Students Like School (2009)
• Difficulty. Challenge is a crucial factor. Complex tasks that require pupils to do several things at once often stretch the limits of working memory. I can't expect someone to write an extended argument if their attention is too consumed by even getting the sentences right.

So what can we do to effectively develop pupils’ working memory?

Practical strategies
Building working memory skills is difficult – abstract teaching of skills often doesn’t carry over into specific demands. But there are some ways to change your teaching to accommodate those with working memory difficulties – and enable them to improve them over time.

1. Make the problems clear
Remember we noted that the brain isn't good at filtering useful from useless information? Naturally when teaching you want pupils to get to the essence of the problem. So you should design your tasks so that mental strain takes place where you want it to.

Say you're teaching the Blitz. You get pupils to make gas masks out of paper, play them contemporary footage, and encourage them to bring in foods that would have been rationed during wartime. All of this sounds very fun and engaging. But it does run the risk of pupils spending more time thinking about their outfit and foodstuffs than the knowledge you want them to acquire. Particularly for pupils with working memory difficulties, clear task design – which gets them applying mental effort where you want them to and nowhere else – is beneficial.

2. Prioritise knowledge retention
Imagine you want a pupil to master the solution to a given problem. But the working memory demands seem to be too much for them: they lose focus halfway through, or can't explain how they arrived at their conclusion.

One way to relieve working memory demands is, paradoxically, by enabling long-term memory to do its work. The procedures that can be done automatically should be. This is why learning your time tables is a genuinely useful thing: it helps pupils do more complicated equations with greater ease. One classic study examining reading comprehension on a passage about baseball found that the difference between high and low ability readers was less than the difference between those who knew lots about baseball and those who didn’t. So knowledge really matters, even on tasks where it might not be apparent.

The important thing for teachers to know is that you should prioritise getting fundamental procedures right no matter what subject, and provide multiple opportunities for practice spaced over time. You should also look for opportunities to build pupils’ knowledge base wherever possible. This frees up space for the conscious thinking required in working memory.

3. Break it down
As part of clarifying the problem, teachers can break tasks into smaller pieces. If you ask pupils to analyse a paragraph of text, you’re actually making quite a complicated demand. Instead you could use a frame such as Form, Structure and Language to help pupils make their response one step at a time (provided they adequately understand these terms)!

Resources to support working memory
Alloway and Gathercole suggest a useful list of tools to support memory, including:

- number lines
- Unifix blocks
- cards
- dictaphones
- wall charts.

They recommend practising the use of these tools with children initially to establish correct use in low-stress environments.

You could also:

- provide written instructions
- use the whiteboard to display prompts or key words
- model correct answers, and highlight the difference between them and answers that aren’t quite there, to guide practice
- be language aware, using short, active sentences rather than complex longer ones
- cultivate classroom routines which make simple processes automatic e.g. handing papers to the front of the classroom the same way every time.

4. Make the implicit explicit
If you notice a pupil repeating a certain mistake, ask them to say out loud the steps they take to complete a task. This can give you useful information about where their likely sticking points are. Asking the question ‘Do you understand this?’ is rarely useful; your questioning should instead assess specific aspects of their understanding.

Graphic organisers and other tools to encourage reflection are also crucial aids here. Try using the metacognitive reflection sheet or the pupil learning plan (both available on the Optimus website). Popular acronyms such as the PEE technique (Point, Evidence, Explanation) can also reinforce useful routines for pupils to adopt.

5. Pre-teach where possible
Avoid intervention by giving pupils with working memory difficulties the chance to get their heads round a topic beforehand. By allowing these pupils to run over some key concepts and skills in advance of the class you greatly increase the chance they can keep up during the lesson.

Use the start of the lesson to review prior content as an opportunity to reinforce central concepts, and link that knowledge to what will be taught in this lesson. ♦
Mastery teaching in English: a model for lesson planning

It’s easy to plan activities, not learning. JO FACER outlines how you can use the mastery model and high-leverage tasks to put pupils’ understanding first.

For too long in education we have over-complicated teaching. We have been obsessed with individualised tasks, which are tailored to countless unknowable “learning styles,” with many and varied activities to engage our learners, making planning complex, unwieldy, and burdensome for teachers. Thankfully, the tide is turning, and that turning tide is mastery.

A helpful definition can be found in the government’s recent report on assessment without levels: in mastery learning, ‘learning is broken down into discrete units and presented in logical order. Pupils are required to demonstrate mastery of the learning from each unit before being allowed to move on to the next, with the assumption that all pupils will achieve this level of mastery if they are appropriately supported.’

What is so compelling about this approach is its equality: for too long, low expectations have plagued our sector. We have taught Skellig in place of Oliver Twist in Year 7; asked children to make posters instead of write paragraphs. But while as individual teachers we have usually believed our pupils are capable, we haven’t always had the tools to be able to make every pupil successful. Mastery promises to be such a tool.

The lesson planning model
In mastery teaching, you firstly choose strong content: something worth teaching. For me, the guiding principles for deciding such content flow from E.D. Hirsch’s Cultural Literacy: we need to teach children the ideas, concepts, and texts that have been most influential in later years.

‘Comprehension underpins higher-level analysis; without a shared understanding of what we are reading, pupils are adrift’

rigorous content in English, but it is shamefully recent in my practice that I have recognised how many of my pupils are not understanding as much as they could. It is all too easy, as Doug Lemov points out in Teach Like a Champion 2.0, to ask pupils if they understand, see a sea of nodding faces, and assume you’re fine to move on. It is in this way we end up with year 11s who don’t know what a metaphor is, and our year 10s who think ‘vocabulary’ means ‘connectives’ (shocking, but both of these have happened in my classes this past year).

In my understanding of mastery teaching, along with selecting the best content to teach, we also need to use the highest leverage activities to ensure pupils engage with that content. What does high-leverage mean? Simply the strongest lever, the best tool to winch pupils above their current muddling to the heights of academic engagement.

Take one example in English: reading. Before adopting mastery, I would have pupils read in small groups, each taking a turn, while I circulated the class checking they were on task. But what increasingly concerned me was
hearing in each group those questions: ‘what does that word mean?’ ‘I don’t understand – who is speaking here?’ It was impossible for me to know, in a class of 28, who was understanding and who was not; which words or concepts were causing difficulties; and whether they were focusing in on the most important concepts or not. Mastering content and concepts in such an environment was all but impossible.

What is higher leverage? Reading to pupils and questioning them. Then, you know they all understand, and are getting the salient points from the text. Is this the highest leverage activity? Not yet – we still aren’t getting pupils to practise reading, that all-important skill. So the highest leverage activity to read a complex text is to read together, with the teacher selecting pupils to read parts in between questioning, and then reading the toughest parts themselves.

Checking for understanding is absolutely crucial. In many contexts we can assume nothing. The principal of my school related visiting a high-performing teacher’s classroom where they were reading a Sherlock Holmes story. He bent down and asked a pupil: ‘do you know what a “Manor House” is?’ The pupil nodded confidently, before responding: ‘it’s a block of flats.’ And indeed, ‘Manor House’ is, in the pupil’s context, a block of flats; it is also a country mile from what Conan Doyle intended the reader to envisage when reading those words.

A focus on comprehension

It is time to return to that long-forgotten poor cousin of the learning activity: comprehension.

Many of us have memories of frustratingly simple comprehension activities from our own school days, yet we cannot always assume our pupils have the same starting point. I have been using comprehension daily with my classes, and finding myself shocked when they have not elicited what I assumed they would.

Comprehension is necessary to underpin “higher-level” analysis; without a shared understanding of what we are reading, pupils are adrift. Strong comprehension questions, perhaps three to five for each double page of text, can ensure you redress key misconceptions before moving onto a “higher-level” discussion or analysis of a text.

I now prepare my English lessons in a very different way. I first select what pupils will read. I read that content carefully, before scripting four or five comprehension questions. I’ll do these orally with high-ability groups, but with my middle and lower groups they will write these out in full. I highlight vocabulary I think my pupils might struggle with, so I am ready to gloss these words with a short "translation", and script in some “checking for understanding” questions, having decided on a good place or six to pause as we read.

To follow, I prepare a more complex question ready for pupils to write at length about, with some modelling of how to answer this before they get going. Finally, I’ll look for any concepts in the text we have already covered, and create five or six ‘do now’ questions for the lesson’s starter, to activate their prior learning.

Mastery learning is simple. The highest leverage activities don’t change that much, so you will end up with similar feeling lessons.

In my experience, far from being bored, pupils thrive on this certainty. They feel more confident and more secure when they really understand the text, and their progress is quicker as a result. Pupils see their writing and hear their reading improve. I’m now dedicated to making every lesson about mastery.

Mastery planning

- Select rigorous content.
- Teach it, or read it.
- Use questioning to check for understanding.
- Make pupils practise key skills using their new knowledge, for example writing an extended paragraph.
Making the link: the role of the teacher in educational research

Evidence-informed education has never been more on teachers’ agendas. Whether it’s the work of the EEF or John Hattie, there seems to be a widespread desire for teachers to make decisions on the best available research about “what works”. Unfortunately, it’s not that simple. Different practices succeed in different contexts, delivered by different teachers. Most research claims are cautious, provisional; in our rush towards implementation we often overlook important nuance.

Making the link is a paper we’ve recently published, looking at the use and misuse of evidence in education, and what schools can practically do to establish a more research-informed culture.

It makes three main recommendations.

1. Top-down approaches won’t work. Evidence-based education is not a new idea: the trick is in the implementation. We have to invest in teachers’ decisional capital.

2. Research needs to be approached with a great deal of caution: different types of research are carried out for different ends. Teachers need greater research literacy to help to distinguish them.

3. Localised, applied research is likely to be the most useful for informing teaching practice. This means approaching research as a verb as well as a noun: something teachers do.

What follows is an excerpt from the paper. You can download the full report online at my.optimus-education.com/node/15206

Four perspectives on research-based practice

RUTH POWLEY
Deputy Headteacher, Wilmslow High School

We need to think deeply about the context of the push for research-based practice. Part of the “what works” agenda is driven by a lack of trust in teachers – they need to be told what to do, because they’re not capable of deciding on their own. Part of it is a lack of trust from teachers – because they’ve been fed too much pseudo research like learning styles. There is a real lack of expertise among teachers about how to use data and research: many suffer from learned helplessness because they’ve been told what to do, whether by their leadership team, by Ofsted, or by the government.

There is a real danger, then, that the search for the silver bullets of research-based practice de-professionalises the teacher. We need to build decisional capital in teachers, giving them ownership over what they do and don’t do, and the expertise to make such decisions in a smart way. Anything that ignores the quality of teachers’ decision-making is likely to fail.

In too many schools tables of effect sizes have become a bible, with potentially dangerous side effects. “What works” only tells you so much. Simply reading research can be revolutionary for teachers’ awareness and self-confidence, and the rush for implementation leads to important detail being lost.

The narrow juxtaposition of evidence versus opinion is too extreme. Biesta argued for the need for ‘intelligent action’ from teachers: that only by doing can we know things, and that research into “what works” tells us what succeeded in the past, not what will work. All teachers need to engage in some form of intelligent action so that they embed what they do in thinking and in theory. But the step to full blown research-based teaching is perhaps a step too far: research-informed is a more desirable and realistic first position.

'We need to build decisional capital in teachers, giving them ownership over what they do and don’t do'
My starting point in engaging with research was anger, real anger at being told lots of different things and realising they were nonsense. Initial teacher training didn’t introduce me to enough ideas or give me the ways to critically assess initiatives that were being thrown at the teaching profession. So research needs to start early in teacher training, and build critical mindsets.

In a lot of schools research is now becoming an accountability measure. As schools start to develop communities of professional learning, some of it is becoming target-based, linked to performance management. This is a scary direction for research to go down, because any agenda forced on teachers tends to create resentment, not engagement.

It is a good thing for everyone to engage in intelligent thinking about our practice, but it shouldn’t become an imperative for everyone to do research. It is all context dependent, and schools in difficulty are likely to look for quicker ways to demonstrate improvement. It might be desirable for everyone to engage with research, but it might not be necessary for everyone to do it themselves.

There is also a tension that arises: as you become more informed, you also question more. And the reality is that many leaders and school structures aren’t equipped to handle questioning of their practice.

Leaders in particular need to remember nuance: you can’t make big decisions based solely on EEF headlines. This top-level research can only tell you where to start thinking.

I read and heard had little practical relevance to me and the context I worked in. Much of it seemed contradictory and some of it was plain daft.

I became particularly wary of the terms “evidence shows” and “what works”. Both were being used as sticks to beat us with and to tell us what to do in the classroom, whether we found they worked or not.

And this is the great danger of research in education. We have to be far more circumspect about the conclusions we draw and the effectiveness of the methods we use. “Evidence shows” and “what works” are context specific and dependent on a wide range of factors.

Research in the social sciences is ontologically different to research in the natural sciences. Studying people is extremely difficult. They react, they change, and they even respond to the act of being researched. We need to be far more realistic about what we’re doing with research and what it can achieve.

“Research says” and “what works” need to come with a health warning: “educational research is complicated. Really complicated. So consider with extreme caution and apply using a critical mindset.”

Approached in this critical fashion, research can be useful. For it to be most powerful, though, we should view it as a dialogic process of self and professional development. A critical mind, an inquiry disposition, an open and questioning attitude to pedagogy, are exactly the qualities we want to develop in teachers.

The type of knowledge generated by research depends on what type of research has occurred. For Hammersley, scientific research contributes to a body of knowledge first and foremost and isn’t concerned with application; practical research, conversely, aims to provide knowledge of immediate use. In education we use both, but probably desire practical research the most.

We need to talk about practices, not a singular ‘research-based practice’. If we recognise the different opinions, backgrounds and practices of both educational researchers and teachers, it makes sense that research should help develop each individual teacher’s practice development.

What we should aim to help teachers develop is phronesis – practical wisdom used wisely in context. This would be a store of knowledge that would help teachers decide what to do in specific circumstances: not a diktat that one teaching method is the right way to do things. That would be both realistic and desirable.
Effective use of technology – what works for pupil learning?

What makes effective pedagogy for using technology in the classroom? OWEN CARTER reports on Johannes Ahrenfelt’s recent webinar sharing ways to use ICT to enhance pupil learning

Andreas Schleicher, the OECD’s director for education and skills, called in the organisation’s recent report for ‘more effective ways to integrate technology into teaching and learning to provide educators with learning environments that support 21st century pedagogies.’

That report found that in most schools technology was not being used meaningfully to support and enhance pupils’ learning; school administrators seem to have purchased first and considered pedagogy second.

It was with this in mind that we asked Johannes Ahrenfelt to share the experiences of his school so far, and outline their approach to digital pedagogy. What were the key messages?

What would an ideal pedagogy look like?

Johannes emphasised the need to start from first principles: if you were designing a learning experience from scratch, what would it look like? For him it would be:

• personalised and able to give detailed and individual feedback to learners
• integrated with learners’ experiences elsewhere in their life
• collaborative, allowing for sustained cooperative learning
• immersive, giving the sort of engaging experiences that pupils might experience in other walks of life.

Starting from these ideas, the next step for his school was to design a digital toolkit – for both staff and pupils – that could bring these to life.

Crafting a digital toolkit

The aims for putting together a digital approach to teaching were varied: to manage pupils’ expectations of learning in the classroom, to prepare them for a changing labour market, to develop staff expertise and more.

Their main initiative was launching the cross-school, concerted use of Google apps for education. Less confident staff remained solely on the Google range of tools, while more confident staff were encouraged to use other tools such as EverNote, YouTube, Explain Everything and Educanon.

To take one example, a team planning a new curriculum unit would use Google Drive to share documents, make comments visible and co-plan initiatives. They could then use Google forms to design a multiple choice quiz to test pupils’ factual recall. These forms are self-marking, saving teachers valuable time and ensuring pupils get immediate feedback.

The advantage of using technological tools like this is that it can allow for feedback to be collaborative and intervention less time-consuming to handle. If one pupil misses two weeks of school, they could take the quiz on the Google form to see if they’d managed to catch up on the factual content. A longer piece of work – like a short essay – could be set to assess their deeper understanding. This could be uploaded to Google Drive, where access settings could be configured to let their peers make comments, solely allow the teacher to view it, or to involve parents in the assessment process. Assuming they’ve demonstrated a good understanding, they can move on with the rest of the class – no dedicated catch-up time outside of the classroom needed.

Prioritising staff training

Technology, like any tool, is what you make of it. Johannes and his colleagues were careful to start small, put staff training first and develop their approach over time.

Starting with Google Drive, then, teachers were asked if they’d be interested in extending their use of technology to Google Classroom – a tool that allows teachers to create virtual classrooms, with assignments distributed online, and see how far their pupils have progressed. One example Johannes gave of its use was seeing a newspaper headline about the representation of women in the media. He took a photo, uploaded it to Google Classroom and pupils debated their opinions amongst each other; on returning to school on Monday this became his starter for the next lesson. Flipped learning in action!

The journey towards integrating technology into the school’s pedagogy is still continuing. But the impact so far has made it one that’s definitely worth pursuing.

What’s in this month’s SEN and Safeguarding section?

So many give-aways in this edition! Not only do we have a safeguarding In-House Training unit on the Prevent duty, but we also show you how to use an interview template two different ways. You can use it for training or put it into action when working with pupils with SEND and their parents when target setting. The sex and relationships diagrams in this edition should also be really useful. We’ve created one per year group to help you think of topics and activities that are age appropriate. In October we hosted a focus group with SENCOs, parents and education consultants to find out what they thought about co-production. Turn to page 52 to see what they said. Education, health and care plans can seem horribly confusing, but even more so when you’re trying to apply or transition to one. My diagram (see page 58) lays out some best practice examples from a couple of local authorities.

Evie Prysor-Jones, Content Lead

Contributors in this issue

Rebecca Jennings has over 14 years’ experience teaching relationship and sex education in schools; she works for RAISE and is the author of Sex and Relationship Education in Primary School.

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Co-production, collaboration or working together?

In October 2015, Evie Pryor-Jones and Sara Boomsma from Optimus Education met with a group of SENCOs, education consultants and parents of children with SEN to have an open discussion about the topic of co-production.

Co-production may only be mentioned once in the SEND Code of Practice 2015 (p.61), but as it describes the process in which the local authority should involve young people and parents in the Local Offer, you could argue it underpins the main ethos of the whole publication. Involving young people and parents in all aspects of SEND provision might be viewed as the major change of the 2014 SEND reforms. While many schools and local authorities may have already viewed it as an essential aspect, there were several reasons it needed to be made part of a statutory requirement.

The Lamb Inquiry
During the Lamb Inquiry in 2008-2009 the researchers spoke to thousands of parents, children and young people across the country. Brian Lamb describes the key message that came from the research as: ‘parents need to be listened to more and the system needs to be more ambitious for their children. These two essential insights run through the whole report and we need to respond urgently if parental confidence is going to be increased and children’s life chances improved’.

Terminology
Somewhere along the line this process was named ‘co-production’, but as Christopher Robertson, education consultant, explained at the beginning of our focus group, co-production is not a new concept. For year different groups of people have been meeting to collaborate on projects in order to make them better for all, but either it was’t given the co-production label, or it was just seen as the right way to work so not made a fuss about. Within special educational needs, the Lamb Inquiry has shown that co-production does need a fuss made.

Interestingly, I have already introduced another word that became a key talking point in our meeting. Many attendees of the focus group agreed that the term ‘co-production’ does not adequately describe the process of involving everyone and it now has too many negative connotations of parents being ‘told’ rather than ‘asked’ what is best for their child. The same goes for ‘working together’.

So what word can we use, if in fact the process of professionals working together needs a label? Many around the table agreed that ‘collaboration’ was all that was needed.

‘Many around the table agreed that ‘collaboration’ was all that was needed’

Communication issues
Once the terms were ironed out, we came to the real crux of the discussion. If collaboration is all it should take to get a pupil with SEND adequate and appropriate support in school, and in other areas of their life (such as health), why is it so hard?

A lot of the issues seem to come down to communication problems from all sides. Schools and parents feel that local authorities do not keep them in the loop with decisions over EHC plans, for example, or decide on processes without any input from the very people those processes will affect.

Local authorities are often under-staffed, suffering from funding cuts and do not get adequate training to raise their awareness of SEND, which would give them a better understanding of how their decisions and behaviour affect parents and pupils.

On the other side of the coin, parents are not a homogenous group and shouldn’t be treated as one. Some parents may be very engaged with their child’s needs but do not know the most effective way to communicate with authorities.
Other parents may be unaware of what they need to do, or are unable, due to their own needs, to take an active approach to procuring provision for their child. One parent at our focus group told us how as the local authority was providing the service of procuring provision for her child, it should carry more of the responsibility of reaching and working with parents.

When it comes to schools, the communication from the SENCO and other members of staff is also extremely important. It is now part of the SENCO skillset (according to one SENCO at the focus group) to understand the law surrounding SEND provision and EHC plans in particular. If the main goal is to get the right support for a pupil, then it may be the case that the SENCO needs to support the pupil and parents in communicating with the local authority. But there is also a huge amount of work that needs to be done in improving communication between parents and schools. The SENCOs at our focus group mentioned transition meetings, open afternoons for new pupils and home visits, but from the experience of the parents attending it does not sound like this is usual practice.

**Conclusion**

The conclusion that we came to was that co-production, collaboration, working together, or whatever you would like to call it, should be very simple. ‘Transparent and consistent communication and always remembering that the child comes first’ is all you need, said one SENCO. The reason it isn’t simple is that over-packed workloads, funding cuts, human emotions and a lack of empathy or awareness can get in the way. If we could discover a way of stopping those issues affecting important processes we would have solved many of the world’s problems!

On the Optimus Education website, and at several of our conferences, we suggest resources or initiatives that could help schools find ways to engage more positively with parents. The resource on page 55 is one example. Perhaps the first step towards achieving transparent and consistent communication is, simply, taking a first step. Look at your school, your SEND provision and your timetable and try to find one thing you could change to improve communication with parents and with your local authority.

‘Parents are not a homogenous group and shouldn’t be treated as one’
Target setting interview template

With the future of assessment still looking murky and the need for a whole-school cultural shift when it comes to SEN provision, setting achievable targets for pupils with SEND is more important than ever. Evie Prysor-Jones shares a handy template from SENCO ELIZABETH BURNS

Outcomes and aspirations are the lifeblood of good SEN provision and as many skilled teachers and SENCOs know, you can’t create achievable aspirations without involving the pupil from the beginning. But an aspiration can seem like a very big goal, even if it is simply ‘finishing my homework on my own’ or ‘going to lunch with my peers.’ These may seem like small steps to us but could be huge steps to the pupil.

Breaking it down
Setting appropriate targets can be an easy way to break down those aspirations into achievable bite-size pieces. You can sit down with the pupil, their parents or carer and any other professionals necessary to work out how best to achieve the desired steps that make up that aspiration, and what the outcomes could be.

Target setting interview template
There are many aspects to think about here, such as who in the school can assist with certain parts? The template created by Elizabeth Burns, SENCO at St James’ Catholic High School, can help streamline all those aspects. The template takes the form of a questionnaire so can be used to form the base of any meetings you have around setting targets. It can act as a guide to keep the conversation focused and make sure you cover all the necessary points. It also very clearly outlines how parents, carers and the pupil should be kept central to discussions and suggests practical ideas for actions they can take outside of school. What is also useful about this template is that once it has been filled in everyone present can sign and date it. This is helpful not only in that it helps you keep track of when decisions were made but also means you, the pupil and the parents have a record of what was decided in case there are any disputes later down the line.

Using as evidence
Evidencing progress of some pupils with SEND can be very difficult. When the aspiration is something like ‘remaining in the classroom for the whole lesson’ and the pupil achieves this, then you, the pupil and the parents know what positive outcomes this will have but it is a lot harder to show evidence of this journey to Ofsted or even to the SLT. By using this template or something similar you are able to display the process of target setting, what steps were taken and who was involved. It shows clear evidence of what the school is doing to provide appropriate provision that is tailored for the pupil and is helping to achieve the desired progress.

Not just for SEND
This doesn’t have to be a tool you only use with pupils with SEND. Target setting, outcomes and aspirations are important for all pupils within the school. It may not be necessary that parents or carers are so heavily involved but if the aspiration is to do with behaviour for example, then parental influence could be helpful. It could be an aspiration regarding stress during exam times. If it was something such as ‘reducing my stress levels during the exam period’ then this could result in the pupil being able to remain in the exam hall for the entire exam and achieving better grades in their exams, which are extremely positive outcomes. The template could be used in this context again to work out which members of staff could help the pupil in achieving this, what the pupil themselves can do and what actions could be taken at home to continue reducing stress.

Download the template from sencologyblog.wordpress.com - Tools for keeping pupils and parents involved in progress
# Target review

<table>
<thead>
<tr>
<th>Date:</th>
<th>Pupil name:</th>
<th>Year:</th>
</tr>
</thead>
</table>

## What’s working/not working? (including support)

## Things that are a challenge for me are…….

## What helps me to learn is…….

## What’s important now? What’s important in the future? What do I need to do? Who can help me?

## Current target:

## Did I achieve this? What was the outcome? What progress have I made? (including reasons why met/not met)

## New target set:

### Pupil’s actions

For example:
- To complete homework and hand it in on time.
- To ask if I do not understand homework by going to see the teacher or going to homework club.
- Bring all equipment needed to lessons.
- Arrive to lessons on time.

### Parent’s views and actions

For example:
- To sign your child's planner and let the school know if there are any concerns.
- To sign written homework.
- To check that homework is completed.

### School’s actions

For example:
- Homework Club available before and after school to ensure that homework is completed to a good standard and is handed in on time.
- LR 3 open at lunch time for homework.
- In-class support so that the success criteria is achieved and tasks are completed.

### Any other comments

## Signed

SENCO:  
Pupil:  
Parent/carer:

## Date: 
Working effectively with parents of SEND pupils

The relationship between teachers and parents can be a difficult one. With parents now playing a greater role, Elizabeth Burns’ interview template can also prove a useful training resource.

The template on the previous page was designed by Elizabeth Burns as an interview resource, as described in the accompanying article. However, when conducting training on working effectively with parents, this template can prepare staff for having constructive conversations.

As we know, the SEND Code of Practice means that teachers are responsible for the progress of all pupils in their classes. Where a pupil is not making sufficient progress, teachers, parents and - where appropriate - pupils should collaborate on problem-solving, planning support and teaching strategies.

Yet the teacher-parent relationships can often be fraught, so thorough preparation for clear, directed conversations is important to ensure a confident, clear discussion.

This interactive roleplay activity provides a clear framework for structuring productive conversations with parents. Use this activity to help you prepare and increase staff confidence around having important conversations with pupils and parents with SEND. To find the rest of the session, visit my.optimus-education.com/in-house-training.

What will you need?
Laptop, projector, screen, flip chart, marker pens and copies of the role play scenario and the target review template (see previous page).

Timing
This activity will take between 10 and 15 minutes.

Run the training activity
Ask participants to get together in groups of three. Within each group, select a role. Choose to be either: a pupil, a teacher or a parent. If there are four in a group, have two parents.

Take some time to read the roleplay scenario. Ensure everyone is clear on their role. Use the target review handout (see previous page) as a structure and role play a discussion between the pupil, parent and teacher. The teacher should lead the discussion.

If time, switch round roles and repeat the role play activity.

After the roleplay, elicit feedback from the group and start a discussion.
• Did they feel awkward?
• Were there any issues that felt uncomfortable?
• Did having a script help or not?
• What did that feel like?
• Is there anything else they would need?

Role play 1
Teacher viewpoint
Jack shows poor learning behaviour in your lesson. Work is untidy, he chats constantly, he distracts others and gets up and walks around the room. Rewards and sanctions are not working. He is making no progress because he often has to be removed from the classroom. You suspect he may have undiagnosed ADHD.

Pupil viewpoint
Jack is trying his best. No matter what he does he can’t seem to get it right. He is fine when he’s doing PE and art where he can walk around. These subjects are no problem. He feels he learns best when he can move around.

Parental viewpoint
Mr and/or Mrs Smith are fed up with being called to the school to deal with Jack’s behaviour. Jack refuses to do homework at home and it is a battle some days to get him to come to school. He never stays still at home and they are dreading another meeting with the school.

Remind participants that working with parents is like any other relationship in your life. You have to work at it. You have to be willing to compromise and invest time and effort. You must apologise for what you get wrong and celebrate good times and successes.
How to get an education, health and care plan

The complicated process of getting an EHC plan can be different at every local authority, but the legal essentials should be the same. **EVIE PRYSOR-JONES** presents a best practice example

These diagrams were created after studying the process of applying for an EHC plan from two local authorities, Lambeth (because that’s where I’m from) and Redcar and Cleveland (randomly chosen).

After posting an initial example on our SENCology blog, the feedback I received suggested that dividing the process into two steps would make it easier to understand. The first step is applying for a needs assessment, the second step is applying for the EHC plan. Another way to look at it is that there are three places where you can take the case to a tribunal.

I make no claim that this is the way the process should be done and perhaps your local offer has come up with some great ideas on how to make the process more streamlined. The aim of the diagrams is that they can act as a control when you’re looking at your own local offer. Are there things mentioned here that your local offer doesn’t do that would be beneficial?

If all the final details can be agreed on then you should have your EHC plan. Remember, it is a continuous process. As the key worker you should be vigilant the EHC plan is being upheld and communication between yourself, the pupil, parents, EHC coordinator and any other services is kept consistent and open.

Making practice better

If you have comments or suggestions on how to improve this control diagram then please get in touch with evelyn.prysor-jones@optimus-education.com

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**Diagram 1**

Key worker (usually SENCO) to gather supporting information from professional services. E.g. health, teachers

Request for needs assessment

Request confirmation sent to the key worker, pupil and parents

Referral planning meeting to decide whether to apply for a needs assessment

Yes, applying for needs assessment. EHC coordinator set date for summary assessment meeting now

No needs assessment

Between YES decision and summary assessment meeting could be up to 7 weeks

Right to appeal - first tier tribunal

The LA EHC coordinator for this case should be introduced at this point, and stay the same person throughout

The decision should be made within 4 weeks

Parents and child to be informed within 10 days of decision

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**Diagram 2**

Any additional assessments to be done

EHC coordinator has 2 weeks to complete EHCP

Summary assessment meeting - all meet to start EHCP template and discuss needs and outcomes

SEN Panel meet to decide on EHCP

Yes to EHCP

No EHCP

EHC coordinator creates draft EHCP

Right to appeal at tribunal

LA informs pupil and parents of educational setting being consulted

All need to agree with final EHC

Resolution and mediation required if don’t all agree

Right to appeal - first tier tribunal

16 weeks from the request for an EHCP

Parents and child to be informed within 10 days of decision

Non-statutory SEN support issued

It may be that the first education provider is not suitable or is incompatible so the LA will suggest another. At this point mediation may be necessary.

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www.optimus-education.com OPTIMUS EDUCATION INSIGHT
Keeping parent and carer confidence high on our agenda

Engaging with parents and carers is a vital component of the SEND Code of Practice 2015. GARETH D MOREWOOD examines what strategies work well to ensure that it is still a key priority.

The Lamb Inquiry 2009
Ever since the Lamb Inquiry into special educational needs and parental confidence in 2009 there has been a renewed focus on engagement with parents/carers. However, despite this being an important part of the new Code of Practice and the Children’s & Families Act (2014) there are considerable ongoing tensions with the current SEND system and the engagement with parents/carers.

In the Lamb enquiry, Brian and his team reported on the following important aims for a good school/parent relationship:
• a clearer focus on outcomes for the pupil
• a stronger voice for parents
• a more strategic local approach to SEN provision
• a more accountable system.

One may argue these key points were the cornerstone of the recent SEND reforms. However, reports like the Driver Youth Trust Report, ‘Joining the Dots’, demonstrate that the reality is currently far from that aspiration.

I think the stand-out quote for me was that the ‘Joining the Dots’ report found that there ‘was a “systems level” issue involving “a lack of transparency and openness” about the services offered by local councils’. Not something to instil parent/carer confidence at a time of significant change in systems, let alone all the associated pressures.

Developing a confidence measure
A few years ago Dr Caroline Bond and I developed a parent/carer confidence measure and wrote about it in the Support for Learning journal. Often I refer to this work during training and suggest that, in light of the earlier commentary, this is more important than ever.

As I am often asked for the confidence measure you can now download it for free from the SENCology blog. All we ask is that it is suitable referenced and cited when used in your schools/settings.

It takes the form of a questionnaire that can be filled out by parents/carers to establish how they feel about communication with your school, how well they are involved in the decisions around their child and if their child is appropriately supported. Whilst it was designed for a secondary setting, the questionnaire could easily be adapted for a primary setting.

Examples of practical approaches
Maintaining a consistent and positive focus through all aspects of work within the school is central to creating and supporting a positive ethos, and helps to challenge stereotypes and raise expectations (Humphrey and Lewis, 2008).

Some examples from our study include:
• postcards home
• text messages to parents/carers
• letters and telephone calls to parents/carers that support and reward positive aspects of each pupil’s day
• positive reward charts and target sheets linked directly into areas of challenge, with immediate short-term rewards
• positive focus in training and development activities.

All of which should be key parts of a positive, inclusive school environment. Other key points from our work include:
• keep parents/carers informed
• make sure parents/carers know who to contact and how
• provide honest communication (there is no long-term benefit in providing anything but the truth)
• listen to parents/carers – give decent time to discuss things
• try to avoid uncertainty/misinterpretation – be as clear and explicit as possible.

What to do next
Ask your parents/carers what they think and how they feel about provision. Then act upon the feedback and make improvements.

Finding positive solutions can be hard in the current climate but I think we can make a massive difference to some families with an open, honest and transparent approach.
SEND assessment: what the research says

Researching the top concerns for schools on specific subjects informs everything we do at Optimus Education. EVIE PRYSOR-JONES summarises current concerns about SEND assessment.

56% Said knowing what expected progress is for lower attaining pupils is a major concern.

50% Want to see example models of assessment.

36% Said these were top issues:
- Life after levels
- Benchmarking
- Ofsted - how do they expect to inspect a school with just school level data?

Are concerned with age-related progress

Aren't sure what to do about spikey profiles

I can evidence that pupils have learnt a concept, but I can't say that X% of pupils have achieved x levels of progress!

National data is well out of date. The last data is from 2009

When pupils with SEN have such varying needs, how can I compare them?

This research informs all the conference sessions at SEND Assessment: Evidencing Outstanding Progress. Details at my.optimus-education.com/conferences/SENDAssessment2016
It is now statutory for all schools to comply with the Prevent duty.

The Prevent duty is the duty in the Counter-Terrorism and Security Act 2015 to ‘have due regard to the need to prevent people from being drawn into terrorism.’ This duty is not new, but it is now statutory that all colleagues receive appropriate training so that they understand their obligations and know how to act.

The advice is all encompassing. Schools – maintained, academies and independent – special schools, alternative provision departments, PRUs, registered childcare settings and FE colleges are all bound by law to take heed of this guidance. Though it may be of particular interest to safeguarding leads, all staff need to be kept in the know.

The aim of the Prevent duty is to clarify the obligations for schools and childcare providers and make it clear what schools and childcare providers should do to demonstrate compliance with the duty.

How does Prevent guidance impact the education sector?

Complying with Prevent calls for:

• effective leadership – clear leadership of key challenges in school
• working in partnership – ensuring effective collaboration between your school and other relevant bodies
• appropriate capabilities – confidence that all members of staff know how the Prevent duty affects their role in school.

There are six key expectations of schools in line with the guidance, outlined below.

Risk assessment and action planning
Senior teams need to be able to:

• assess the risks of children being drawn into terrorism
• demonstrate a general understanding of the risks affecting children and young people in your area
• know what to do to identify and support individuals who may be at risk of radicalisation
• incorporate clear procedures for assessing risk of radicalisation

How to use the SLT briefing
Download the PowerPoint presentation and deliver it in 15 minutes during your next meeting, or distribute the short reference guide for staff to read.

This is hosted as part of your In-House training membership. Here’s a taster of your content update. Find it online at my.optimus-education.com/training/slt-briefings/prevent-duty

It is vital that your senior leadership team understands the Prevent duty and the demands it makes on schools'

In addition, it aims to inform schools and childcare providers about other sources of information, advice and support should they have fears.

It is vital that your senior leadership team understands the Prevent duty and the demands it makes on schools. Our concise SLT briefing aims to provide a quick and easy way to bring your senior team right up to date.

What is extremism?
Extremism is defined in the Prevent strategy as: ‘vocal or active opposition to fundamental British values, including democracy, the rule of law, individual liberty and mutual respect and tolerance of different faiths and beliefs.’

Also included in the definition of extremism is ‘the call for the death of members of our armed forces.’

The Prevent duty aims to stop individuals being drawn into terrorism. This includes violent and non-violent extremism which in turn can create an atmosphere conducive to terrorism and can popularise views which terrorism may seek to exploit.
within your existing safeguarding guidance.

Schools know their pupils best, and are in the best position to identify specific risks within their local context. There is no concrete guidance on what a child who is vulnerable to radicalisation looks like, so staff should use their professional judgement and be alert to changes in behaviour which could indicate a need for intervention or protection. Even very young children may be vulnerable to radicalisation.

There is no requirement for school staff to delve into family life where they have no concerns of radicalisation. However when they do have concerns, they must take appropriate action and report them to Channel.

Channel is a programme which provides early support for people who are identified as being vulnerable to being drawn into terrorism. If schools are concerned that one of their pupils might be vulnerable to radicalisation, it provides a mechanism to make referrals. More information can be found on www.gov.uk.

**Partnership working**

Schools should ensure that their safeguarding arrangements build on local partnerships with the Local Safeguarding Board (LCSB). They should also consider partnerships with:

- local authority Prevent coordinator
- channel processes
- police
- governors
- families.

Strong partnerships are necessary with LCSBs, since they are responsible for co-ordinating what is done for the purposes of safeguarding and promoting the welfare of children in their local area. In some priority local authority areas, Home Office fund dedicated Prevent co-ordinators will work with communities and schools.

It’s vital to engage effectively with parents, carers and families as they are in a key position to spot signs of radicalisation. Should they then raise concerns, it is important to assist and advise them and be able to point them to the right support mechanisms.

**Staff training**

Senior teams are expected to:

- equip staff to identify children at risk of being drawn into terrorism
- increase staff confidence in challenging extremist ideas
- ensure all staff know the procedures to refer concerns.

The onus falls on individual schools and childcare providers to assess their training needs in the light of their assessment of the risk of radicalisation in their organisation. However, all designated safeguarding leads must undertake Prevent awareness training as a minimum. Their role is then to provide advice and support to other members of staff on protecting children from the risk of radicalisation.

It may be more difficult for many childcare providers, such as childcare staff, to attend training. Using a briefing document such as this one is one way of raising awareness.

**IT policies**

It is important to ensure that there are:

- acceptable use policies (for staff and pupils)
- guidelines to raise awareness of online activity and other social media use in recruitment to terrorism.

In addition, schools should help pupils understand how to stay safe online, both in school and outside. As with other online risks of harm – such as sexting and cyberbullying - every teacher needs to be aware of the risks posed by the online activity of extremist and terrorist groups, since many seek to radicalise young people through the use of social media and the internet.

**Welfare and pastoral care**

Within the school, develop and implement:

- policies for use of prayer facilities
- sufficient pastoral support for pupils.

**Curriculum development of fundamental British values**

Across the whole school there is a responsibility to:

- build children’s resilience to radicalisation by promoting fundamental British values
- provide safe places to discuss challenging and sensitive issues
- embed these techniques within the curriculum.

Through PSHE and citizenship lessons, schools can provide a platform for debating and discussing controversial issues. Through these discussions, they can help young people to understand how they can influence and participate in decision-making. It is also useful to encourage pupils to develop positive character traits, such as resilience, determination, self-esteem, and confidence when they wish to make reasoned arguments around potentially sensitive issues.

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For more on how to deliver training to staff on identifying signs of radicalisation, see my.optimus-education.com/in-house-training
When you’re worried about a pupil or have an emergency on your hands, DEBS WARD explains why having the right contacts at your fingertips is essential.

At times it can be a dilemma for the designated senior person (DSP) to identify which is the most appropriate agency to contact regarding a concern they may have for a child and then finding the correct contact details to make the referral. Furthermore, in the absence of the DSP, for the member of staff who has to deal with a child protection concern, identifying and making contact with the most appropriate agency can be a daunting responsibility. Therefore a list of contact numbers, in my experience, comes in very useful for both DSPs and other members of staff. In an emergency it enables a referral to be made swiftly to the correct agency thus ensuring effective and timely protection of a child.

Who to include on the list
This list of the most important safeguarding agencies and their contact details should be kept to hand by the DSP and, in my opinion, all senior leaders in order to aid them in making quick and clearly directed referrals.

These agencies can also be contacted if advice is needed and if the referrer is unsure of what to do or where to take their concern next.

I have included Prevent and the Channel Programme as schools now have a duty to ensure that they fulfil the Prevent duty and take action to safeguard children and young people from radicalisation and extremism. I have also included the FGM contacts as schools must take action in this area and may only get one chance to get it right – time and accuracy is imperative.

Other agencies are more commonly used by the DSPs in the day-to-day protection of children, including Children’s Social Care and the Local Safeguarding Children’s Board.

<table>
<thead>
<tr>
<th>Service</th>
<th>Contact if</th>
<th>Name of contact</th>
<th>Telephone Number</th>
<th>Email/website</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Children’s Social Care (Local Authority)</td>
<td>You have concerns about a child or young person in care</td>
<td>LA Prevent coordinator:</td>
<td>Gov hotline: 020 7340 7264 LA Prevent coordinator:</td>
<td>Prevent contact: <a href="mailto:counter.extremism@education.gsi.gov.uk">counter.extremism@education.gsi.gov.uk</a></td>
<td>e.g. If Jane not available, ask for Barry</td>
</tr>
<tr>
<td>Local Children’s Safeguarding Board (Local Authority)</td>
<td>You are concerned about a child or young person but are not sure how to proceed</td>
<td>Local Channel representative:</td>
<td>For referrals to Channel or for more information around the process, in the first instance contact your LA Prevent Coordinator</td>
<td>Prevent contact: <a href="mailto:counter.extremism@education.gsi.gov.uk">counter.extremism@education.gsi.gov.uk</a></td>
<td></td>
</tr>
<tr>
<td>Channel Programme (Gov)</td>
<td>You are concerned about a child or young person who might be at risk of extremism</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Female Genital Mutilation helpline (NSPCC)</td>
<td>Mandatory reporting! Apply in cases of ‘known’ FGM - i.e. instances which are disclosed by the victim and/or are visually confirmed (by health professionals)</td>
<td>Immediate danger: 999 Concerned: FGM (NSPCC) hotline 24/7: 0800 028 3550</td>
<td><a href="mailto:fgmhelp@nspcc.org.uk">fgmhelp@nspcc.org.uk</a></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Child Sexual Exploitation (NSPCC)</td>
<td>You know a child is in immediate danger or are concerned about a child but unsure what to do</td>
<td>Immediate danger: 999 Unsure: NSPCC hotline: 0808 800 5000 LSCB</td>
<td><a href="http://www.nspcc.org.uk">www.nspcc.org.uk</a></td>
<td></td>
<td></td>
</tr>
<tr>
<td>School Nursing Service (NHS, Local Council)</td>
<td>You need support for health &amp; SRE, safeguarding, 1 to 1 confidential appointments for young people &amp; support for families</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>
Coping with depression: what can schools do?

Depression affects around one in five adults at some point in their lives, but the condition is not confined to the adult population. Unfortunately, the experience of childhood for some includes the overwhelming sadness, hopelessness, helplessness and lack of self-worth which are characteristics of depression.

According to the Office of National Statistics (2005), one in ten children between the ages of one and 15 has a mental health disorder. Nearly 80,000 children and young people suffer from severe depression, and over 8,000 children aged under 10 years old suffer from severe depression (McGinnity & Meltzer et al, 2005).

Regardless of whether they have received a diagnosis of depression or not, the impact of these symptoms will be felt in the classroom. Without careful support from a range of agencies, the experiences of these children will worsen and the likelihood of symptoms of depression continuing into adult life increases.

Dr Louise Richards, consultant child and adolescent psychiatrist, feels that it’s important for schools to be alert to the fact that some groups are more vulnerable to depression than others. She explains: ‘Some young people may be more likely to “act out” their feelings of depression, for instance through risk-taking or self-harming behaviour. Sadly, it can often be those individuals whose backgrounds have been most traumatic who find verbalising their emotional experiences difficult. Boys in particular tend to be prone to externalising their distress, whilst girls are often more likely to withdraw and internalise their depression.’

Spotting the signs of depression in children

Depression in children is very hard to spot, so it is important for parents and teachers to be alert.

There are certain signs that are noticeable within the classroom, such as a decline in standards of work, or commitment to work. They may also lose interest in their favourite subjects, activities or hobbies. There are physical ailments that could point towards depression such as frequent headaches, tiredness (even after sleep) or losing or gaining weight. The harder signs to spot are those that relate to personality traits. Being irritable and sullen and showing uncharacteristic behaviour can be signs of depression, but more alarming is when the pupil appears to be sad or unhappy a lot of the time, displays lows self-esteem or expresses that they are having thoughts of suicide. These aren’t the only signs of depression, but can be useful initial indicators.

It is important that signs and symptoms of depression in children are assessed by a doctor so that suitable treatment paths can be put in place. The ups and downs of growing up are perfectly normal and help us to develop resilience, compassion and humility. Depression, however, needs careful attention if children are to thrive.

How schools can support pupils with depression

Children may not want to speak to adults about their mood, but they may speak to peers. Schools should make sure that there are buddy groups in place so that all children have someone of their own age or similar to speak to if necessary. This isn’t about asking children to act as health carers for each other, but it does help to normalise the experience of low mood and encourages children to talk more openly about their emotional health.

Some children may be struggling with parents experiencing low mood issues too, and may not be receiving adequate support from them. Low mood may be a common, even healthy, experience for many as they navigate growing up, but when it is persistent and debilitating, children and young people need effective, timely support.

Schools should talk to parents about their concerns. If parents are not taking these concerns seriously, or are finding it difficult to accept that their child may be experiencing persistent low mood, schools can talk to social care or mental health services. Working collaboratively with mental health services, such as CAMHS, is important. Some symptoms such as self-harming can be triggered by workload struggles or bullying, so it is essential for schools and services to be communicating so that any school-based causes can be eradicated.

This article was originally published in May 2013. Due to the increasing demand for schools to be aware of depression, we have updated and re-published it.

The charity Young Minds has excellent resources on helping children and young people cope with depression. Find them online at www.youngminds.org.uk
Making SRE age appropriate

Sex and relationship education covers a number of topics so knowing which ones to teach when can be difficult. These diagrams from REBECCA JENNINGS suggest age appropriate topics to cover and give examples.

Why teach SRE?

It’s riddled with complications, controversy and challenges but nevertheless, an increasingly important subject. If we thought sex was everywhere in the 70s, it has really taken over now. Music lyrics, music videos, magazines, games, adverts, websites - the list of where children and young people see and hear about sex and relationships is enormous. Not just sex, but gender pressures are constantly in our faces. How many times have you needed to buy a child a present and there’s the pink girl’s option and the blue boy’s option? A report by the National Union of Teachers discovered that gender stereotypes can be accepted at a very young age and impress limits on children as young as five – usually when they start at primary school. For example, a child might give up on their preferred activity due to social pressure to do something more ‘normal’ according to their gender. When reaching young adulthood these limitations can mean young people are put off trying certain subjects if they are seen to be more suited to a certain gender, and this can limit their choices later in life.

Darker implications

A news story in 2014 reported that more than 5,000 children under 16 were treated for a sexually transmitted disease, with some as young as 11. We know from scandals such as those reported in Oxford, Rotherham and Rochdale that young people are at risk of sexual exploitation, but also campaigns such as PANTS from the NSPCC make it clear that young children may be at danger too. All of these children and young people may have had SRE lessons, but what is clear is that the majority would not have fully understood the consequences of their decisions, or why they were making those decisions in the first place.

'There is a huge cultural shift necessary throughout society to change the way sex, gender and relationships are portrayed'

The misconceptions

There is a huge cultural shift necessary throughout society to change the way sex, gender and relationships are portrayed, viewed and understood and SRE lessons can play their part. Understanding something is getting half way to not being frightened by it or making mistakes. There are various misconceptions about SRE including that it encourages children and young people to be sexually active, that it gives them confusing messages about their sexuality but also that it is only about contraception, STIs and puberty.

A clear curriculum that is communicated and understood can really help calm the nerves of staff, parents and pupils about topics that will be covered in SRE and why.

The following set of diagrams, created in partnership with Rebecca Jennings, set out some examples of age appropriate topics per year group, and include suggestions for interesting lessons and activities.

Things to remember

- Set ground rules before each lesson e.g. no personal questions.
- Don’t separate boys and girls into different lessons – it’s important everyone learns together and understands different reactions and feelings.
- Be aware of the individual pupils in your class – are there any pupils with sexual abuse in their history, from a same-sex/ single parent family, who identify as a particular gender or sexuality.
- If any pupil makes a statement such as ‘boys can’t play with dolls’, ask them to explain why they think that, rather than telling them that they’re wrong.

Template

Concerned about communicating your SRE curriculum to parents?

Download Steve Baker’s SRE template letter for parents from my.optimus-education.com/SSP
Year 7 SRE idea template

Body image
- Draw the perfect body or use magazines to cut out and create
- Discuss and use video clips around Photoshop
- Discuss qualities other than appearance
- What does a healthy relationship look like? Consider the risk of child sexual exploitation
- Use ‘My Dangerous lover boy’ video clips for discussions
- Outline where to go for help and support

Healthy relationships

Year 7

Year 9 SRE idea template

Condoms and STIs
- Explain and demonstrate how to use a condom
- Discuss how effective condoms are
- STI information and myths
- Discuss why people choose to have sex
- Outline support and signpost to local services
- Use scenarios to discuss ‘consent’

Reasons to have sex or to delay first sex

Year 9

Year 12 and 13 SRE idea template

Sexting
- Discuss how to take an image down from a site (explain that in most cases that image will remain on the internet)
- Use case studies from the experiences of other young people
- Use video ‘Alex’s Willy’ NSPCC to end the session (light-hearted but gets the message across)
- Discuss all choices including termination, keeping the baby and adoption
- Signpost to services such as bpas (British Pregnancy Advice Service)
- Discuss costs around having a baby and support that is available for young people

Pregnancy

Year 12 and 13

Access all diagrams as PDF poster pack or as Word documents at my.optimus-education.com/node/15178
How happy and prepared for life your pupils are is exceptionally difficult to measure, never mind show evidence to Ofsted. So it was with bated breath that we waited for the first few inspections of this academic year to see how schools fared.

SMSC can differ broadly from school to school depending on location, numbers of pupil premium pupils or pupils on the SEN register and the range of ethnicity within the school. Another factor is that unless SMSC is accepted as a whole-school approach, it can often fall to one or two members of staff to implement activities and raise its profile. The latest Ofsted reports should evidence that Ofsted are now taking SMSC very seriously, particularly as it can be so interlinked with British values.

Out of the latest 100 inspections (at the time of writing), there have only been eight secondary schools graded as outstanding, 43 graded as good and 40 as requires improvement. Only nine secondary schools were graded as inadequate. Not all of these were inspected since September 2015.

Looking through the reports I’ve pulled out various aspects from three outstanding reports that relate to SMSC from inspections since September 2015.

Effectiveness of leadership and management

• Pupils benefit from an impressive range of enrichment and extra-curricular activities, for example a wide variety of sports, visits to other countries and the Duke of Edinburgh’s Award.

• The academy’s spiritual, moral, social and cultural provision is extremely strong. Pupils are well prepared for life in modern Britain and have a very secure understanding of British values and the contribution they can make to maintaining them.

• The academy recently won funds to refurbish Second World War air raid shelters in their grounds into an air raid shelter museum. It will be used for history and contemporary affairs additionality and visited by pupils from other schools.

Quality of teaching, learning and assessment

• Teachers know pupils well; they have high expectations of them and what they can achieve. They skilfully question pupils to make them think deeply about what they are learning. For example, in a Year 10 religious studies lesson, the teacher carefully and persistently challenged pupils to explain the differences between absolute and evolving truths.

Personal development, behaviour and welfare

• The introduction of the ‘[school’s name] mindset’ means pupils develop resilience to accept criticism and to use it positively to improve.

• Pupils play a full part in decision making, for example deciding what topics to cover in their ‘learning for life’ sessions. As a result, they have an excellent understanding of issues that may affect their age group and gender, for example eating disorders.

• The senior students act as ‘big sisters’ for the junior girls, providing exceptional role models.

• They celebrate national events using ‘Queenie’ as a figure head for the celebrations. ‘Queenie’ is a twenty-foot ‘gigantes y cabezudos’ (giants with big heads) model dressed as Queen Elizabeth II. For example, ‘Queenie’ will be wheeled out to celebrate the opening of the new Second World War air raid shelter museum in academy grounds.

16 to 19 study programmes

• A group of pupils recently produced a high-quality short film exploring the dangers of eating disorders and poor body image, which has been taken up by Kent County Council for wider distribution.

By looking at these reports it may help you think of practical ideas to further embed SMSC into your school. Perhaps it’s looking deeper into the curriculum to see which lessons leave themselves open for cultural or moral discussions, or maybe there is an activity you could do with your community.

What these reports do show is that SMSC is not a tick box for inspectors. It is a prominent factor in how inspectors grade the effectiveness of leadership and management and cannot be simply shoe-horned into an assembly once a term. Examples such as the ‘big sisters’ model demonstrate how effective SMSC can benefit a range of pupils.
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E-Safety Consultant and Director of Digital Learning, Abbotsholme School

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