Insight
Updates, guidance and resources for your whole leadership team

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Welcome to Optimus Education Insight

Dear Reader

After months of relative quiet on the education policy front, there’s been a recent flurry of activity with the first consultation on the new national funding formula announced, swiftly followed by the white paper ‘Educational excellence everywhere’. What are the implications for schools? See page 26 for a round-up of responses to the funding formula, and page 22 for a look ahead to a MATs-led system.

Amidst this prospective change, Ofsted inspections continue to loom large in our members’ thinking. See page 10 for a useful guide to the different kinds of monitoring inspections being carried out, and pages 8 and 20 for two perspectives on school experiences of inspection. Christopher Robertson has sought clarification on the need to prepare SEND case studies for inspection; make sure your SENCO reads his findings on page 52.

Feel like your school role has become all about paperwork, data and inspections? For a potent reminder of your vital role in safeguarding students, take time to watch Jasvinder Sanghera’s powerful speech on forced marriage, recorded at a recent conference (details on page 63). It might just put some of that political rhetoric into perspective.

Liz Worthen  
Head of Content  
Optimus Education

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

May

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 restructures in the face of shrinking budgets or managing staff absence.

School Business Management

Safeguarding Teenagers
WEDNESDAY, 18 MAY, 2016
The only event specifically targeted around the common challenges you face when working to safeguard teenagers and older students. Leave with practical strategies and expert guidance to keep your students safe.

SEN and Safeguarding

July

Reducing SEND Paperwork
THURSDAY, 7 JULY, MILTON KEYNES
Attend this hands-on training day and learn how to review, declutter and slim down your SEND paperwork - giving you more time to spend on supporting the needs of the children in your care.

SEN and Safeguarding

September

Child Protection in Education 2016
THURSDAY, 15 SEPTEMBER, LONDON & THURSDAY, 6 OCTOBER, MANCHESTER
Book your place now for this popular annual event to get legal guidance and vital updates on your most pressing safeguarding issues.

SEN and Safeguarding

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

Teaching and Learning

October

The Multi-Academy Trusts Summit 2016
THURSDAY, 13 OCTOBER, BERKSHIRE
Join MAT leaders from across the country for two days of talks from high profile speakers, in-depth masterclasses and networking opportunities.

Leadership and Governance

November

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

SEN and Safeguarding

For a full list of our upcoming conferences, half-day briefings and training days please visit my.optimus-education.com/conferences. For further information or booking queries please call the conference team on 0207 954 3421.
Introduction

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

As a school leader you spend a lot of time investing in your staff, but does this come at the cost of your well-being? Viv Grant discusses how heads can get caught in the ‘sacrifice syndrome’ and the support they need. Showing how your school actively promotes British values is hopefully made a little easier with our template for writing a BV statement – simply adapt it for your setting. We have two Ofsted inspection case studies, including an interesting insight into the experience of an independent school being inspected by Ofsted for the first time. Staying with Ofsted, John Viner provides guidance in what to expect from monitoring visits under the CIF. Finally, get invaluable legal advice on managing both capability and disciplinary procedures ahead of our Education Law Update conference in May.

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.

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

John Viner is a writer, teacher trainer and consultant with Adept Education Associates. He was a primary headteacher for 28 years and has inspected for Ofsted for well over a decade.

Naseem Nabi is an education employment lawyer and partner at education law firm Veale Wasbrough Vizards (VWV). Naseem has over 10 years’ experience in the education sector.

Top tweets from @OptimusEd

Understand the #Prevent duty and meet the requirements without distressing staff and pupils ow.ly/Zx7VE

Ensure your staff are supported from the very beginning to develop their skills in the classroom ow.ly/ZtRj

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Ofsted inspection: sustaining outstanding improvement

Improving outcomes for pupils isn’t always a quick fix. SUZANNE O’CONNELL finds out how one school took time to develop and ensure sustained improvement

When Radclyffe was inspected in 2013, they were disappointed with the outcome. ‘We knew after we received the English results for that year that inspection was going to be difficult and that we were at risk,’ says Hardial.

‘The results were down and it did act as a limiting judgement.’ Even though they had a plan in place, there hadn’t been enough time to evidence that it was working and the result was the school was given a requires improvement grade.

‘From this point we weren’t satisfied with aiming for “good”. We wanted to reach “outstanding”,’ says Hardial.

They immediately began their focus on English and organised an executive English improvement group to meet after school every Monday. The group consisted of the headteacher, two deputy headteachers, an assistant headteacher and head of English.

The frequency of meetings meant that any issues could be addressed immediately. ‘We later changed the group to the English and maths executive group (EMEG) as we felt that maths needed additional emphasis too.’

The group still continues to meet even though the English results are now greatly improved. ‘We don’t chase league tables,’ says Hardial. ‘We have always done what is right by our pupils.’

An example of this is the fact that pupils are entered for English and maths in Year 10. This is the data that is used for the league table results and means that published data does not reflect the better results gained in Year 11 when they resit the exam.

However, Hardial believes this opportunity to take the exam early is worth it – a fact that is acknowledged in their Ofsted report.

A very personal approach

Perhaps what makes The Radclyffe so special is the attention they give to the individual. This could be seen as a challenging catchment area. The pupils come into the school below the national average and need all the support they can get to achieve the right results. Hardial believes that their personal learning guides (PLGs) are crucial to this.

Each pupil has their own PLG who they meet with individually at least once every three weeks. Many of these PLGs are not teachers but are support staff. ‘There are over 200 members of staff in our school,’
explains Hardial. ‘Half of these are not teachers.’

In 2002 The Radclyffe was chosen as a Pathfinder school for transforming the school workforce. As a result of this they have developed a tradition of seeking out employees and specialists who may not have a teaching background. ‘For example, where we need help with ICT we have an ICT specialist.

“Our leadership team of 13 includes four who are not teachers. Such a big team helps in many different ways. The cover is done by learning managers, not by teachers and it means that everyone is responsible for pupil welfare.’

There are no form teachers at The Radclyffe as the PLGs take on the pastoral role. The PLGs are responsible for up to a dozen pupils each and conduct individual meetings at the start of the school day.

‘It’s all about building relationships,’ says Hardial. ‘The PLG knows their pupils very well. They have regular, direct contact with them and they also have access to their data.’ This doesn’t just benefit the pupil. Having this close and focused relationship makes all staff feel a greater sense of involvement and investment in the success of the school. ‘Everyone wants to see their pupils succeed.’

Sustainability

Perhaps one of the most outstanding features of this outstanding school is that they have grown and developed over a long period of time to get to this point. There are no quick fixes and whatever they have introduced has had to pass the test of time.

‘Eighteen years ago we were not a first choice school,’ says Hardial. ‘Now we are oversubscribed in every year group. Our PLGs have been very popular with parents too: they like the personalised approach and the fact that we pick up problems very quickly.

‘You can’t achieve a culture change overnight. We’ve changed over the years in a sustainable way and our team approach has paid off.’

The school is part of a co-operative trust and Hardial believes this reflects their vision rather than having created it. ‘It was a journey we were already on and the co-operative ethos fitted in with our own views and values.’

Hardial’s many experiences of Ofsted do not mean that he is focused on playing the system. Rather he believes you must do what’s right to improve the school and this should be sufficient for Ofsted too.

‘You do need to be aware of the framework,’ he says. ‘You should make sure that you are addressing it but it must not be the sole driver of what you do. Be confident in your practice on a daily basis. Consider what it is like to be one of your pupils and Ofsted will take care of itself.’

Having reached outstanding, The Radclyffe is now focused on being ‘beyond outstanding’ and their new logo is there to reflect this. ‘We want to achieve personal excellence for each and every individual pupil,’ says Hardial. ‘The journey is never ending and this is the message we must get across to everyone in the school community.’

Read more case studies on the Ofsted CIF at my.optimus-education.com/topic/performance-and-accountability-measures
Ofsted monitoring inspections guide

Monitoring visits are used for a variety of purposes. Understand what to expect under the new Ofsted CIF with this guide from JOHN VINER

The regular two-day inspection is described in section 5 of the Education Act 2005 and ‘other inspection’ in section 8 (in England). This includes the new ‘short inspection’ of good schools and also applies to outstanding schools (which are exempt from section 5).

A short inspection will not result in individual graded judgements or change the overall effectiveness grade. This is why a conversion to section 5 is necessary in some circumstances since only a section 5 inspection can change a school's grade.

Section 8 inspection applies to the following circumstances.

- Short inspections of schools judged good at their latest section 5 inspection and those outstanding schools that are not exempt from section 5.
- Monitoring inspections of schools judged as requires improvement at their latest section 5 inspection.
- Monitoring inspections of schools judged as having serious weaknesses.
- Monitoring inspections of schools judged as requiring special measures.
- Unannounced behaviour inspections.
- Any inspection that is undertaken in other circumstances where the inspection has no specific designation, known as 'section 8 no formal designation inspection'.

Short inspections of good schools (or non-exempt outstanding schools)

HMI will arrive on site no earlier than 8.00am, meet with senior leaders and determine the plans for the day. HMI will have key lines of enquiry around whether the school remains good or outstanding, though these may change in the light of emerging evidence.

There will always be a safeguarding check and inspection of the single central record, then they will focus on evidence of how effectively the school's leaders, including governors, are:

- sustaining a good quality of education for pupils
- demonstrating capacity to remedy any minor weaknesses that are not of sufficient concern for HMI to convert the inspection to a section 5 inspection.

HMI will report to the headteacher whether the school remains good, in which case the section 8 status is maintained, or if there are any reasons to convert to a section 5 inspection. In this case the inspection is re-designated from the first day, making the following day the second day of the inspection.

The framework permits the second day to take place within 48 hours, which allows for any difficulties in assembling a team but most commonly it's the following day.

Schools judged as RI at a section 5 inspection

Schools in RI will be re-inspected within two years, so the initial monitoring inspection will take place at some point in the first 24 months, sooner rather than later in most cases.

This inspection will focus only on the reasons the school required improvement and can have several outcomes. HMI could decide that further monitoring activity is required, in which case there will be at least one further monitoring visit.

If HMI believes the school has made exceptional progress, they can bring the next full inspection forward and, conversely, if they believe that the school would benefit from more time for improvement, they can recommend that the re-inspection is moved to the end of the two year period.

At the end of the monitoring inspection HMI will make a single judgement as to whether or not the school leaders and governors/relevant authority are or are not 'taking effective action to tackle the areas requiring improvement identified at the last section 5 inspection in order to become a good school'.

HMI will hold a feedback session for stakeholders and there is an expectation that as many governors should be there as possible.

Schools judged to require ‘significant improvement’ (serious weaknesses)

For schools identified as having serious weaknesses, the relevant
'The focus of the inspection will be the steps that the school is taking towards the removal of special measures'

authority must submit a revised action plan within ten days. HMI will provide feedback on whether the plan is fit for purpose and the first monitoring inspection will take place between three and six months of the inspection. There could be up to three visits in the first 18 months.

The inspection will focus only on the actions taken by the school's leaders and governors to tackle the areas for improvement that judged the school to have serious weaknesses.

Monitoring inspections will also consider the progress the school has made since the judgement. This is likely to be a rigorous process with leadership and governance in the spotlight and is all about capacity to improve.

Where HMI judges that there is a good rate of improvement, they may allow the school time to improve before the section 5 re-inspection, which will take place within 18 months.

If leadership and governance are strong and having a significant impact on the school's performance, HMI can convert the visit to a section 5 inspection which can remove the school from serious weaknesses.

**Monitoring inspections for schools in special measures**

The relevant authority must submit its plans to HMCI within 10 days of the inspection and will receive written advice from HMI on them. These schools are re-inspected within two years and in the interim are likely to have up to five monitoring inspections, the first of which is likely to happen within three to six months.

The expected timescale for the removal of special measures given the current rate of improvement is a crucial factor. The Act states that ‘a school that is taking effective action will be on course to have special measures removed within 18 to 24 months of the monitoring period following the inspection that placed the school in special measures.’

The first monitoring inspection begins with a meeting between HMI, the school leaders, the chair of governors and a representative of the relevant authority.

The focus of the inspection will be the steps that the school is taking towards the removal of special measures. Subsequent monitoring visits will also consider the support being provided or commissioned by the relevant authority.

At the end of the first monitoring inspection the lead inspector must weigh up the evidence of actions and their impact and judge if the school is making sufficient progress towards the removal of special measures. Subsequent visits will focus on the impact of the support the school is receiving, the effectiveness of the actions it is taking and whether it is making progress towards the removal of the category.

Schools in special measures need not have the full tariff of five monitoring visits. If, at any point, HMI is of the opinion that special measures are no longer required, the monitoring visit is deemed section 5 and a full inspection report is written.

**Unannounced behaviour inspections**

These are unannounced and the first a headteacher is likely to be aware of one is when they receive a telephone call from an HMI who declares that they are fifteen minutes away. Inspectors arrive on site between 8.00 and 8.15am

These inspections can take place at any time and there are several possible triggers. Experience suggests that a common trigger is a ‘qualifying complaint’. This is related to child safety, safeguarding or pupil welfare.

The behaviour inspection focuses on:

- pupils' attitudes to learning and their conduct around the school
- how well and how consistently pupils' behaviour is managed
- how far the school's culture promotes and supports good behaviour.

Since this is a behaviour inspection the inspector(s) will likely dip into lessons, observe informal activities and behaviour around the school and look at the school's records.

At the end of the inspection, the lead inspector will reach a judgement as to whether leaders have or have not ‘taken effective action’ to improve or maintain standards of behaviour. The monitoring report will explain the actions the school has taken and set out any further actions, which can be followed up at the next inspection. If behaviour is judged inadequate then it’s likely that the inspection will be deemed section 5 and turn into a full two-day inspection.

**Inspections with no formal designation**

This is the inspection heading that allows Ofsted to inspect schools outside the normal scheduled arrangements. The most likely trigger is a complaint, other than about safeguarding. Information from other sources about a sudden decline in standards or high turnover of staff will raise Ofsted's level of concern.

If the inspector judges that provision has declined since the last inspection then the visit will be deemed as section 5. Alternatively, if the inspector judges that there has been a decline but not sufficient enough to be a concern, then the next full section 5 inspection can be brought forward.
The sacrifice syndrome of headteachers

The shortage of headteachers is well documented and effectively supporting them an ongoing concern. We talk to VIV GRANT about the ‘sacrifice syndrome’ of heads and overcoming it to be a visionary school leader.

As someone who has been in challenging leadership roles herself, Viv Grant fully understands what it takes for school leaders to overcome the struggles of leadership and to succeed in fulfilling their vision for a school. A former headteacher, Viv now works with current school leaders as an executive coach and director of Integrity Coaching.

Viv has been in the education profession for over 27 years. 17 years ago she became one of the youngest headteachers to turn around a failing school. Around the same time, she became a mum and the demands of both roles began to take their toll.

Last year, Viv famously wrote an article for The Guardian on her experiences as a headteacher, entitled ‘Isolation, stress and tears … the truth about being a headteacher’.

‘If we’re going to keep our school leaders in post against the backdrop of the recruitment and retention crisis, we have to be serious about the type of support we provide for them,’ says Viv.

What shapes a leader?

We bought Viv together with a group of school leaders to discuss the support that headteachers need and where they can find this.

Viv opened the discussion by asking the group what the key experiences are that have shaped the way they lead. Blocking out time in the diary once a week for reflection and review was discussed.

Building on the ability to recognise your own strengths and weaknesses, and developing a commitment to doing so, makes reflection a habit.

One similar strand of thinking from the group was the impact that previous leaders have on their own leadership. Working with different leadership styles exposes a range of behaviours and emotions.

One of the group revealed that they’d never had strong leadership aspirations but had been led so badly by numerous leaders that it made them determined to be a better leader. Finding out what type of leader you don’t want to be is just as important as finding out about the type you do want to be.

School leader experience

Viv spoke about one pivotal moment as a headteacher. ‘One night I went on a home visit to a child who lived with his sister, who was also his legal guardian. She made it clear she didn’t want me there by raising her voice and swearing at me. I left, got back in my car with my colleague and broke down in tears for the first time.

‘That was a wake-up call for me. Up until that point I’d been wearing my “super head” armour. I could deal with anything and not let it get to me emotionally. I’d been used to it for so long but that night I realised that showing my emotions wasn’t something to be ashamed of.

‘I read a lot of the work by Brene Brown on vulnerability and courage. As a school leader you can feel like you’re not allowed to be vulnerable or show emotion, but if we’re to have courage we have to be able to face up to our fears.

The sacrifice syndrome

On leaving headship and working more closely alongside headteachers, Viv realised that what she had experienced, and what heads today experience, is an emotional and psychological state that academics have referred to as the ‘sacrifice syndrome’.

The sacrifice syndrome was coined by Richard Boyatzis and Annie McKee, writers of Resonant leadership: renewing yourself and connecting with others through mindfulness, hope, and compassion. Boyatzis and McKee refer to leadership in the business world but it’s extremely relatable for headteachers.

They discuss how, as a leader, you’re expected to respond to and meet other people’s needs. You’re reactive to them all the time which isn’t sustainable but you get caught in the sacrifice syndrome without a way out.
The renewal cycle
Viv presented the group with the following statement and asked what it meant to them.

‘A school leader’s vocational vitality, or capacity to be vital, present and deeply connected...is not a fixed, indelible condition, but a state that ebb and flows with the context and challenges of the leadership life’ [Intrator & Kunzman, 2006].

The first reply was ‘leadership is fluid, not linear and you won't always get it right.’ As a school leader you never know what is going to happen next or what challenge you will be faced with.

Boyatzis and McKee discuss the transition from the sacrifice syndrome to the renewal cycle. Leadership can be stressful and all-encompassing. Leaders need to be able to manage themselves by recognising and addressing the stress and creating ways of renewing themselves.

Visionary leadership
School leadership is highly emotional and impacts on mental, physical and spiritual wellbeing. These are not exclusive, they are mutually dependent on each other. If emotional resilience isn’t maintained it will inevitably begin to have an impact on physical wellbeing.

Visionary school leaders have the ability to set clear objectives and share them with their team so that they understand both the next steps and the end goal.


Find out more about Viv’s work with headteachers at www.integritycoaching.co.uk


'Visionary school leaders have the ability to set clear objectives and share them with their team so that they understand both the next steps and the end goal.'
Capability and disciplinary procedures

NASEEM NABI shares tips to ensure capability and disciplinary procedures are managed effectively

**CAPABILITY PROCEDURE**
Managing a capability procedure can be tricky, especially when a grievance or sickness absence may be the unintended cause. It's vital that you have robust systems in place to ensure the process is transparent and runs smoothly.

**What procedure to follow?**
Firstly, consult your school's existing capability procedure. Is it up to date and in accordance with the Acas Code? If so, it should generally be followed though it may be necessary to depart from your school’s procedure in certain circumstances to ensure fairness and efficiency. You should take care however, if your procedure is contractual.

Generally performance issues should initially be dealt with informally by the employee’s line manager. If matters are not resolved a formal process should be followed.

The capability procedure will generally involve several meetings to consider and discuss the employee's performance and ways to improve (for example agreeing and reviewing performance targets).

**Investigation**
Before commencing a formal capability procedure, undertake an assessment or investigation to establish whether a formal procedure is completely necessary and the best way forward.

Investigation could involve reviewing the personnel file, monitoring work and interviewing other employees, if appropriate. You should provide your findings to the employee to give them the opportunity to comment at any subsequent meetings.

**Warnings**
If you decide that performance is unsatisfactory you may give a written warning. If performance is substantially below standard, you may decide to move straight to a final written warning.

Warnings should set out the areas where performance is below standard, the targets and timescale for improvement and anything being put in place to assist the employee to improve their performance. If the warning is a final written warning it should set out the consequences of failure to improve within the review period.

Warnings usually remain active on the employee's personnel records for a set period of time (for example six months). After that time has passed they should be disregarded.

Employees should have the right to appeal each decision or warning under a formal capability procedure.

**Review**
The length of any review period will depend on what is reasonable in the circumstances, taking into account the needs of the school and the nature of the performance issues.

You should ensure that performance is regularly monitored during the review period. If you are satisfied with performance at the end of the review period then no further action is needed. If not, a further capability meeting should be held.

**Medical issues**
Does the employee have any medical condition which could have contributed towards the performance issues? If so and in order to avoid disability discrimination:

- obtain a medical report or occupational health advice
- consider whether the medical condition amounts to a disability
- consider whether you have a duty to make reasonable adjustments
- consider whether any adverse action to be taken against the employee including dismissal can be objectively justified.

**Settlement**
Would it be preferable to offer settlement as an alternative to going through the capability procedure? This would involve making a financial payment in return for the employee agreeing that their employment will terminate.

Remember that the terms of any agreement should be recorded in a written settlement agreement.

**DISCIPLINARY PROCEDURE**
Your school should have written disciplinary rules and procedures to deal with staff performance issues. Procedure should outline what action you will take if the rules are broken. Your staff should be aware of these and know how and where to access them.
**What procedure to follow?**

Consult your school’s existing policy. Is it up to date? Is it in line with the Acas Code? Is it contractual? If your school’s existing policy is not out of date and complies with the Acas Code it should generally be followed.

It may be necessary to depart from your school’s procedure in certain circumstances to ensure fairness and efficiency; however, take care if your school’s procedure is contractual as a variation from the procedure would technically be a breach of contract.

It is important for the procedure to comply with the Acas Code. A tribunal will consider whether an employer has followed the Acas Code when deciding whether a dismissal is fair or not. An unreasonable failure to follow the Acas Code may lead a tribunal to adjust the level of compensation payable to the employee.

**Early planning**

Early consideration will need to be given as to who will have responsibility for the three stages of investigation, disciplinary and appeal.

Ideally you should have three separate individuals or panels to manage each stage to avoid criticism that those involved have prejudged the issues. Where possible, each stage should be led by someone more senior than the previous stage.

Those involved in the investigation or on the disciplinary and appeal panels should not be witnesses. Early consideration should therefore be given to who the likely witnesses will be. Discussions between those involved should also be avoided.

**Suspension**

Depending on the circumstances you may want to consider suspending the employee pending the outcome of the disciplinary procedure.

Suspension may be necessary in order to ensure a fair procedure or provide effective working arrangements during the investigation.

**Investigation stage**

An investigating officer should be appointed to manage the investigation process. The investigating officer should initially gather information which may involve:

- speaking to witnesses and arranging for witness statements to be prepared
- collecting relevant documents
- checking information provided by witnesses
- interviewing the member of staff faced with disciplinary allegations to obtain an initial response.

The investigating officer then forms a view as to whether the allegations are with or without foundation. If the investigating officer decides that the allegations are founded and warrant a disciplinary hearing they should prepare a report summarising how the information came to light and how it was investigated, attaching the relevant evidence.

The member of staff should be notified in writing of the allegations and the possible consequences, including where there is a risk of dismissal, and should be sent all of the evidence. The notification should also include details of the disciplinary meeting (date, time and place) and the right of the member of staff to be accompanied by a colleague or union representative. Legal advice should be sought before the final draft is sent to the employee as the manner in which the allegations are framed is key.

**Disciplinary meeting**

Your school should not make a decision to dismiss or take other disciplinary action without a disciplinary meeting taking place first. At the hearing:

- the investigating officer should present the report of the investigation and the evidence
- the member of staff should be given a chance to respond to the allegations and set out their case
- the member of staff should be given a reasonable opportunity to ask questions, present evidence, call relevant witnesses and raise points about the information provided by witnesses.

It is recommended that the meeting then closes for the disciplinary officer or panel to consider the decision. The decision should be communicated in writing to the member of staff as soon as possible. Advice is normally needed on the letter, as this is a critical document.

**Appeal**

The staff member should be given the opportunity to appeal any decision, which may be dealt with by either a re-hearing or a review, depending on the grounds put forward. The procedure will be the same as for the disciplinary meeting and advice should generally be sought on the letter advising of the outcome.

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Join us at our Employment Law in Education conference on 5th May in London. Gain legal advice from education lawyers and clarify whether your policies and practices are up-to-date and compliant to ensure you’re prepared for 2016/17.

Visit my.optimus-education.com/conferences/ELU16 for more information and to download the conference brochure.
British values statement: templates for your website

Use this template to write a British values statement for your school website and evidence how your whole school actively promotes fundamental British Values

Schools in England are required to actively promote fundamental British values to their pupils, both in lessons and in extracurricular activities.

According to the DfE: ‘Actively promoting the values means challenging opinions or behaviours in school that are contrary to fundamental British values. Attempts to promote systems that undermine fundamental British values would be completely at odds with schools’ duty to provide SMSC.’

Not only do you need to show how each British value is embedded in your school, you also need to prove how you are preparing all pupils for life as adults in modern Britain.

One way of doing this is to create a British values statement for publishing on your website. Evidence the work your school is doing to promote British values with the template below and overleaf. Simply adapt the language of the British values statement template for your setting.

(Insert name of school) is committed to working closely and in harmony with its community and celebrating the diversity of the UK. We aim to prepare children for life in modern Britain and to ensure that our school ethos, curriculum and approaches to teaching and learning reflect and promote British values.

We recognise that these values are not exclusive to being British and that they have come to be accepted throughout the democratic world as the method of creating an orderly society in which individual members can feel safe, valued and can contribute to for the good of themselves and others.

We work alongside our local community and recognise the variety of religious beliefs within it. We take children outside the school to take part in local events and meet different members of the community to appreciate the valuable contributions they make.

We take opportunities to:
- acknowledge, celebrate and commemorate national events and anniversaries related to key events in Britain’s past
- join in with international sporting events and find out more about the countries that host them
- support a number of charities that are selected by the children and arrange fundraising events
- invite members of the local community to our school events.

We understand the role that our school has in helping prevent radicalisation and supporting our children in developing a world view recognising Britain’s place within it. The four British values are:
- democracy
- the rule of law
- individual liberty
- mutual respect and tolerance of those with different faiths and beliefs.

On the next page we include more details about how each British value is embedded in our school.

'Not only do you need to show how each British value is embedded in your school, you also need to prove how you are preparing all pupils for life as adults in modern Britain'
### British value

<table>
<thead>
<tr>
<th><strong>Statement</strong></th>
<th><strong>In practice</strong></th>
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<tbody>
<tr>
<td><strong>Democracy</strong></td>
<td>Students within the school have key roles and responsibilities and are democratically elected to take on leadership roles. They understand that they are accountable to the school community for the way in which they carry out these roles. Our Student Parliament allows students to explore and understand the democratic process. During national and local elections we hold our own mock elections. How to work as a member of a team as well as team leadership are included in PSHE and during form tutor meetings. In citizenship students learn about the British electoral system, how it has developed and how it works. Regular consultations, formal and informal, take place throughout the school year. Students receive feedback and are made aware of any actions that are taken as a result.</td>
</tr>
<tr>
<td><strong>The rule of law</strong></td>
<td>Our school works closely with our community police officer. We set ground rules during PSHE classes where sensitive issues are discussed. IT lessons include discussion around data protection and our e-safety code of conduct. Each year, every tutor group discusses the school code of conduct and tutor group code of conduct with their tutor. Although some of these are set, others are not and students are encouraged to make their own contributions to the way in which the rules can be applied. School sanctions are clearly established and shared. Tutor group sanctions are discussed and agreed within the tutor group. In citizenship students learn about the legal system in the UK.</td>
</tr>
<tr>
<td><strong>Individual liberty</strong></td>
<td>Each year group studies the individual biography of someone who has had a particular impact on the history of Britain and who the students can empathise with. We try to select from a range of cultures and include those who came as immigrants to the country. Human rights is a topic included in our PSHE curriculum. In citizenship we discuss what it means to ‘contribute to society’ and discuss what it means to be ‘free’.</td>
</tr>
<tr>
<td><strong>Mutual respect and tolerance of those with different faiths and beliefs</strong></td>
<td>Respect is one of our school values. We recognise the importance of not only respecting one another but also of self-respect. We have a clear anti-bullying policy which emphasises the importance of us creating an environment both within school and the wider world in which individuals can feel safe and valued. Our welcome for visitors is part of the school ethos as is the focus on each student as an ‘ambassador’ when they are out in the community. Every individual is respected in our school and our actions towards one another reflect this. We welcome difference and diversity and aim to create understanding of how this adds to the richness of our community. We aim to do more than ‘tolerate’ those with different faiths and beliefs. We recognise the extent to which our own traditions and history have developed side by side and the rich cultural heritage that different world religions bring. We believe that exploring and understanding other people’s faiths and beliefs are rewarding experiences and help us understand our own faiths and beliefs better. Our PSHE curriculum includes topics on relationships and what a good relationship consists of. We have links with local feeder schools that enable our students to work with younger children on specific projects. Our extra-curricular clubs and enrichment activities focus on building self-esteem and self-respect. They also include team-building activities. The staff code of conduct ensures that staff behave towards each other in an exemplary way, setting a good example for the students. The language used between staff and students at all times is considered to be vital in showing how we respect one another. Our RE curriculum which follows the Agreed Syllabus for (insert name) teaches about a range of faiths, religions and cultures. We invite representatives from different religions into our school and visit teaches about a range of faiths, religions and cultures. In citizenship students learn about the British electoral system, how it has developed and how it works. Regular consultations, formal and informal, take place throughout the school year. Students receive feedback and are made aware of any actions that are taken as a result. We carry out these roles. Students within the school have key roles and responsibilities and are democratically elected to take on leadership roles. They understand that they are accountable to the school community for the way in which they carry out these roles. Our Student Parliament allows students to explore and understand the democratic process. During national and local elections we hold our own mock elections. How to work as a member of a team as well as team leadership are included in PSHE and during form tutor meetings. In citizenship students learn about the British electoral system, how it has developed and how it works. Regular consultations, formal and informal, take place throughout the school year. Students receive feedback and are made aware of any actions that are taken as a result.</td>
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Governance

IN-HOUSE TRAINING

Pupil premium governor update

KATIE RENTON looks at how our compact governor briefing ensures every member of your governing body can hold your school to account over pupil premium spending

'Raising the attainment of disadvantaged pupils and closing the gap between them and their peers is an important priority for schools across the country. The governing body at every school should fully understand what the pupil premium is, how their school is spending it and the impact it is having.

Your governors should also be equipped with questions to ask that ensure they are holding you and the SLT to account regarding the pupil premium funds.

In order to support your governing body with this, we have summarised the key points in our clear and concise briefing.

This is hosted as part of your In-House Training membership, but we’ve put together a taster of the briefing below for you to consider. Find the rest online at my.optimus-education.com/training/governor-briefings/preventing-extremism-and-radicalisation

You’ll find a downloadable PowerPoint presentation which you can deliver in 15 minutes during your next governor meeting, and a short reference guide to distribute to all governors to read.

Aims and outcomes

• Understand what the pupil premium grant is and how it should be used.
• Know what is expected of schools by Ofsted.
• Identify the key questions to ask that hold your school to account.

Pupil premium: the facts

The pupil premium (PP) is additional funding for publicly funded schools in England to raise the attainment of disadvantaged pupils and close the gap between them and their peers.

This funding is available to:

• local authority maintained schools, including special schools and pupil referral units (PRUs)
• voluntary-sector alternative provision (AP), with local authority agreement
• non-maintained special schools
• academies and free schools, including special and AP academies.

'Governors should decide upon a group of interventions or actions in which they will invest their PP funding'

Funding

In the 2015 to 2016 financial year, schools will be receiving the following funding for each child registered as eligible for free school meals at any point in the past 6 years:

• £1,320 for pupils in reception to Year 6
• £935 for pupils in years 7 to 11.

Schools also receive £1,900 for each pupil who has left local authority care because of one of the following:

• adoption
• a special guardianship order
• a child arrangements order
• a residence order.

These funds are paid quarterly by the Department for Education.

What do Ofsted want to know?

According to the Ofsted School Inspection Handbook, Ofsted will be looking at the pupil premium in relation to some key issues.

• The level of PP funding received by the school in the current academic year and levels of funding received in previous academic years.
• How leaders and governors have spent the PP, their rationale for this spending and its intended impact.
• Any differences made to the learning and progress of disadvantaged pupils as shown by outcomes data and inspection evidence.

Inspectors will recommend an external review of the school’s use of PP if they identify specific issues regarding the provision and
Governors should know how much PP funding the school received last year.

Key points for governors

- Governors should know how much PP funding the school received last year and what this was spent on.
- Governors should be aware of the difference in attainment between pupils who are and aren’t eligible for PP.
- There should be a regular item on your meeting agenda to monitor termly attainment and progress data for all pupils to compare different groups.
- Governors should consider their PP cohort in context, and understand what areas of learning or behaviour those pupils need to progress in to narrow the gaps.
- Governors should decide upon a group of interventions or actions in which they will invest their PP funding.
- It is important that for each intervention there is a target outcome for each pupil and the ability for governors and staff to measure the impact and effectiveness of the intervention.
- You could ask for a specific report on the effectiveness of PP interventions as a regular item (at least once a term), with a view to making swift changes where an intervention is not having the desired impact.
- Governors should ask for regular updates on the attendance, behaviour and exclusions of pupils eligible for PP, as it may be that spending would be well targeted at narrowing attendance gaps, for instance, for this group.

Example Ofsted feedback

Here are a few examples from inspection reports from Ofsted, extracted from the judgements on governance, to give an idea of what is required.

1) Outstanding

Governors know about the effective allocation of the school’s finances and pupil premium funding, the impact of which they check regularly.

2) Good

The governing body monitors how effectively the school uses the money it receives to improve the progress of pupils entitled to extra help from the pupil premium.

3) Requires improvement

Governors have not checked data on the school’s performance well enough. They have limited understanding of how pupil premium funding has been used to accelerate the progress of those pupils eligible and have not held senior leaders to account for their performance.

4) Inadequate

The governing body has good knowledge, not only about how the funding for pupil premium is spent, for example, on extra staff, but also on the impact that it is having.

Governors ensure that statutory duties are met and that financial resources, including the pupil premium, are managed effectively.

Governors do not effectively assess whether the pupil premium funding is helping to boost the achievement of those pupils known to be eligible for this extra support.

Questions to ask

Note: A great amount of crucial data for these questions can be found on RAISEonline.

- How many pupils are eligible for PP funding?
- Are there any key year groups where the percentage is higher than others?
- How much funding was received last year, and how was this spent?
- Which member of staff is responsible for managing PP?
- What has been the impact of PP on closing the gap between eligible pupils and others, in terms of progress made last year and final attainment?
- What is the current difference in attainment between eligible pupils and others in core subjects?
- Are senior and middle leaders checking that PP funded actions are working and are of suitable quality?

Head online for lots more PP funding resources. Go to my.optimus-education.com and search ‘pupil premium’
Inspecting an independent school using the common inspection framework

Non-association independent school inspections now fall under the Ofsted CIF. SUZANNE O’CONNELL finds out what the similarities and differences were for one school

**School information**

- **Name of school:** Bethany School
- **Type of school:** Christian independent day school
- **Number on roll:** 68
- **Headteacher:** Mrs Judith Baxter
- **Other information:** the school caters for boys and girls between the ages of four and 16. It is a school of religious character and belongs to the Christian Family School Trust. The school admits pupils without regard to their ability and offers places to families and their children who profess the Christian faith, other faiths or none.

**Comments from Ofsted**

‘Leaders and governors have a strong, well-articulated vision to provide high-quality education and opportunities for personal development for all pupils, aligned to their faith beliefs.’ (Summary of key findings)

‘The quality of teaching overall is consistently good across a range of subjects, including those in the early years. Pupils make good progress as a result. Sometimes pupils make outstanding progress. This was seen, for example, in Key Stage 4 religious studies work where pupils benefited from thinking deeply about what they were doing, and considering different points of view about baptismal rites.’ (Quality of teaching, learning and assessment)

Bethany School used to be inspected by the Bridge School Inspectorate (BSI). The inspection team would consist of three inspectors; one Muslim, one Christian and a lead inspector.

Headteacher Judith Baxter was used to the format of the BSI having experienced three of these types of inspections previously as deputy headteacher. Ofsted was to be a new experience and added to this it would be a new inspection framework.

‘We knew we would get an early inspection,’ explains Judith. ‘We had already had a fact finding British values inspection and because we had previously been inspected by the BSI we knew there was a strong chance they would be coming soon.’

Whereas some other schools similar to Bethany had opted for Independent Schools Inspection (ISI), they had decided that they would be inspected by Ofsted.

Bethany consists of 68 pupils and the importance of family is central to their ethos. They have children from the ages of four to 16 with very small numbers in each year group. Although it is a Christian school and the teachers must be Christian, the pupils do not have to be.

**Preparing for inspection**

Some of Judith’s difficulties in preparing for the inspection are consistent with being the headteacher of a small school rather than the school’s independent status. The number of policies that need to be written and checked can become an onerous task when shared out between very few people.

Added to this is the fact that Judith must pay for everything as her school is independent. ‘We also have to pay Ofsted for the inspection. We do not have set fees for our school and we sometimes take children from the LA who have been having difficulties in maintained schools.

‘Because of this we are lucky that Sheffield do help us out with some of the safeguarding training and we can buy into the service rather than paying as we go.’

With the change of inspectorate, Judith re-visited all their policies to check that they were compliant. She was also aware that some terms they used were no longer considered appropriate.

‘We used to refer to being a radical Christian meaning that you practised your Christianity in an active way. We have now removed the word ‘radical’ because of its other connotations.’
Show what you want to be inspected

‘When our inspector arrived it was evident that it was going to be a hard job for him to inspect across the age range in three days on his own,’ says Judith. With such a heavy agenda and so many requirements and expectations of inspection the task was a mammoth one.

Fortunately he was a very experienced inspector, although his background was secondary. ‘The framework is really too rigid,’ says Judith. ‘There is so much that inspectors have to get through that it is difficult for them to appreciate the work that a “different” school, like ours, does.’

Fortunately Judith felt that the inspector, although tied to the framework, did his best to acknowledge the very different circumstances that the school works under. ‘For example when it came to the statistics, we just don’t have enough children in some groups to be able to make a reasonable analysis,’ says Judith. ‘He did accept that. He was a very fair man who was prepared to get an impression of our school. He was positive and open minded.’

In many respects, although the inspection had a positive result for Bethany and the school was judged to be ‘good’, Judith feels that the BSI model worked well for them previously.

‘People tend to believe that you’re not properly inspected unless it’s by Ofsted’

In particular, having an inspector of another faith seemed a good way of checking for balance while also recognising how a faith school is different. ‘It particularly concerns me that with one inspector you are so reliant on their viewpoint. We were fortunate in having someone who could see what we were about. This might not always be the case for every school.’

‘There are, however, some benefits in being Ofsted inspected. ‘I think there is a kind of acceptance of Ofsted as a real inspectorate that perhaps Bridge didn’t have. People tend to believe that you’re not properly inspected unless it’s by Ofsted’.

Be familiar with the framework

Judith advises others contemplating their first CIF to familiarise themselves with the framework. ‘Make sure your policies are in place and you have them to hand,’ Judith advises.

‘If you don’t have time yourself, use other sources for model policies that you can adapt. Contact schools in similar settings – don’t be afraid to ask for help.’

Judith had written an anti-terrorism policy which has been shared among schools and she sees this sharing element as being very important for the sanity of the small school headteacher. ‘With the inspector having so little time you do need to have everything ready,’ she says. ‘Don’t be afraid to express yourself if you feel that something isn’t relevant. For example, with the statistics we explained that we couldn’t do it the usual way but that we had an alternative.’

‘Show that you have thought about it, that you’re not just saying you can’t do something. Much of it is about staying in control and helping the inspector to do their job.’

With her first Ofsted inspection behind her, Judith does have concerns about its application for independent schools. Although she is pleased with the outcome for Bethany, Judith has heard from schools who have not had such a positive experience and she will be involved in a panel of teachers at a Christian schools trust conference discussing this issue.
The ‘Educational excellence everywhere’ white paper announced that all schools need to become academies by 2020, or in the process of conversion, meaning multi-academy trusts (MATs) look to be the future. We recently launched our second annual Multi-Academy Trusts Summit, providing a chance to network with fellow MAT leaders and explore future challenges.

Capacity issue
With a rapid rate of academy conversion in store, capacity at all levels will be an urgent issue. We’ll need more expertise in academy finances, more executive headteachers, more business-minded CEOs and CFOs and more academy sponsors to name a few. How will the education system cope?

Ahead of our MATs Summit and in research undertaken with CEOs, CFOs, and financial directors among others, these issues and more were discussed. An important theme in research was the differentiation in challenge that comes with being a new MAT as opposed to an established MAT.

New MATs vs established MATs
As a new academy or MAT, where do you begin to set up a new structure? Making the move from one system to another, in terms of governance, leadership, staffing and finances is a huge undertaking. You need a system that maximises efficiency across all of these areas but building such a system, and more importantly ensuring sustainability of it, is a long term process.

Moving from headteacher of a school to an executive head or CEO of multiple schools requires new skills: how do you align the values, vision and ethos of several schools? How do you maintain standards across the schools? Our research found many heads may not feel ready to take on such a role and that there’s limited training available to fully understand what it entails.

For those established MATs planning on growing, building capacity is a challenge. If you’re adding a school they need some kind of incentive. You may need to convince a good school, who fear losing their autonomy, to join your MAT rather than set up their own. A successful MAT will need a number of good schools to help achieve improvement and build capacity. Adding too many challenging schools may drain your resources: getting the balance right between minimising the impact of a failing or challenging school and improving it without harming the rest of your schools is crucial.

MAT accountability
A transparent system of accountability is needed. We found current confusion around the role of Ofsted, the DfE and regional school commissioners (RSCs).

Ofsted can visit academies in a MAT and write an inspection report on their findings but won’t provide a grading. Those involved in our research were concerned with ‘how to align practice with expectations from the DfE and scrutiny from Ofsted.’ How will the impact of a MAT, which consists of both good and failing schools, be judged as a whole?

Currently there are eight RSCs. With an increase in MATs, the number of schools RSCs will be responsible for will rise dramatically. Will we see more RSCs? Many of those we spoke to weren’t sure of the role of the RSCs. It seems there is work to be done to eliminate doubts. One school leader we spoke to commented: ‘there seems to be a lot of conflict between DfE, Ofsted and RSC expectations – what are we supposed to do? We need more transparency’.

MATs can also be visited by the Education Funding Agency (EFA) who will check the financial accounts of academies annually.

Performance and standards
There’s no evidence so far to prove that becoming an academy raises standards. Some academies do well, others do badly, just like other types of school.

A new league table of performance for MATs is to be created so we will find out how progress and attainment is to be measured and compared across the one MAT and then across many. If a MAT-based system is the future, they should be at the cutting edge of education, innovating and leading the way in teaching and learning, research and development, CPD, the curriculum – the list goes on.

Find out more about our MATs summit and download the programme at www.matsummit.co.uk
What’s in this month’s School Business Management section?

The SBM profession is a varied and challenging one but the new NASBM professional standards will set the role on a path to growth. We held an exclusive interview with Stephen Morales, CEO of NASBM, who explained the aim of the new standards. In the world of funding, the new national funding formula has caused ripples across the sector: find out what the leading experts think. It’s also the season for recruiting! Do check out our expert advice which guides you through the process from advertising to the final interview. We also have a safer requirement checklist compiled by education lawyer Dai Durbridge, and some step-by-step advice on teacher wellbeing. Building maintenance can often be stressful: read our detailed guidance on how to achieve a successful refurbishment project. And, of course, we have the SBM May checklist to ensure you’ve got everything covered!

Alex Masters, Content Lead

Contributors in this issue

Elizabeth Holmes taught in secondary schools before leaving full-time teaching to write. Over the last ten years, Elizabeth has had many books published including The NQT Handbook and FAQs for NQTs.

Matthew Wheeler leads the support staff at Bordesley Green Girls’ School and is head of the NASBM professional standards. He is also a corporate governance specialist with 18 years’ board level experience.

Russell Dalton is finance and business director at Pershore High School. He has been in school business management roles for many years and before that had a successful military career.

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

#StephenMorales explains the new NASBM standards and much more in this exclusive interview owl.li/Zxvdh

How to #budget your school’s money effectively #SBMs

How to plan a school restructure in 2016/2017 with a tight budget. #oeELU16 http://owl.li/ZKdyd

Have you seen the DfE’s financial efficiency metric tool? owl.li/Xgfbx

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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 @BusinessOE

Download a digital version of your Optimus Education Insight magazine by logging into your My Account area on optimus-education.com
The SBM May checklist

A new month means a new set of challenges. Are you ready for the weeks ahead? Alex Masters has collated the SBM May checklist to ensure you haven’t forgotten anything and offers links to expert advice.

Our monthly checklists are proving to be exceptionally popular. They are collated and amended regularly by a team of practitioners and consultants to keep them as up-to-date as possible.

Maintained schools

Prepare final accounts
Expert advice: Preparing final accounts can feel overwhelming. SBM expert Lindsey Lester offers some excellent advice which includes: prepare a timetable for when your end-of-year statements are to be completed and be aware of issues (e.g. staffing or governance issues) which might impact your ability to meet submission deadlines. Be aware that auditors, solicitors and insurance companies are not always cheap: avoid signing up for long contracts – that way you can always move elsewhere at the end of the term. Network with colleagues who can provide excellent feedback on their experiences.

Prepare information for governors
Expert advice: This includes information to help them complete and return the budget template and Best Value statement as well as the Consistent Financial Report (CFR). As an SBM it’s vital that you provide your governors with the legally required information they need to carry out their job of holding your school to account. Don’t forget that governors don’t need to see the full detail of every cost centre, but do need to interrogate the consistent financial reporting against the budget. If governors are asking about the cost of paperclips, rather than ensuring contracts are being tendered for best value, then you need to speak to the chair and do some training with them!

Academies

Submit audited accounts to Companies House by 31 May 2016.
Expert advice: Please see the government website for more details.

Academy trusts: publish financial statements as at 31 August 2015 on their websites by no later than 31 May 2016

Prepare draft budget, including forecasts of staffing structure and pupil numbers
Expert advice: The budgeting process is indeed a complex one and it can seem daunting. Expert Ruth Bradbury offers her advice from professional experience. By now, you will have a relatively clear idea of anticipated expenditure out-turns across the school. This is the best time to estimate new year budgets for many areas, including repairs and maintenance, utilities costs and day-to-day departmental expenditure, for example. Be aware of particular circumstances that may affect costs. The review of the current year expenditure should also provide you with the opportunity to identify any areas where costs are unexpectedly high and/or where savings could potentially be made.

Both maintained schools and academies

Review school policies
Expert advice: Visit my.optimus-education.com to see
our extensive list of statutory and non-statutory model policy templates. These templates have been developed by our team of experts, practitioners and contributors and have been through a rigorous quality assurance and legal review by advisors Browne Jacobson. These templates are designed to help save you time and can be customised to meet the specific needs of your setting - as well as ensuring you’re prepared for an Ofsted inspection! Model policy templates include: health and safety; pay; staff discipline, conduct and grievance; governor allowances; building maintenance and staff wellbeing.

Create detailed plans for work to be done in the summer

**Expert advice:** Check out our guidance from SBM consultant Cate Hart. Planning will include year-end accounts with specific reference to PEPPs, IT works (curriculum and staffing, supply and demand and adjustments). If you have spent Easter getting the smaller premises management jobs out of the way, then when the summer break comes, you will have a decent period of time to tackle the larger projects. By the end of the Easter break, have your contractors booked for the summer or they will have been snapped up by other schools.

Schedule training for support staff

**Expert advice:** Appraisals are the best time to discuss staff progress and wellbeing and to talk about training. Consider whether a lack of training might be a barrier to them achieving their targets. Remember: people perform better if they understand that they’re being listened to and encouraged - that’s the biggest motivation.

Contract monitoring

**Expert advice:** Do remember that a contract is a legally binding agreement between two parties and any negotiations that are undertaken must be satisfactory to both and not be detrimental to the academy or school. When negotiating new terms and conditions, have to hand all the facts, figures and documents to establish your case. Also, don’t accept the first offer that is placed on the table; take time to consider what is being offered against your priority list and it’s a good idea to ensure that the contract does not include a clause that enables them to increase costs during the contract period.

Book a holiday!

**Review staffing**

**Expert advice:** Staffing costs can make up to 80% of a school’s expenditure and SBMs must ensure that they get value for money from people. Before you start your review, consult with HR and governors and inform staff. Then check relevant policies and see if they need updating and review the effectiveness of your existing structure. Consider the school’s wider strategic aims and identify how every post holder contributes daily to the success of the school. Be aware that any restructuring may involve redundancies and ensure you gain governing body approval, publish, consult, revise, present and inform staff.

Recruit new staff

**Expert advice:** Recruitment is a complex area for SBMs, especially given the frequent changes in policy. Do check out our ‘Recruitment checklist: keeping children safe’ article on my.optimus-education.com. To ensure that your recruitment policies and procedures are robust and compliant with the new statutory guidance start by using the checklist from lawyer Dai Durbridge. Please note: this checklist covers the basics and is not exhaustive. Do also check the Single Central Record which will contain a lot more.

Budget monitoring

**Expert advice:** Make sure there is a clear link between the budget and the requirements of your school’s development plan over the next three years. Also, try not to rely too much on past budgeting, which can be restrictive, and check that capital funding can be used to support key priorities (suitability, sufficiency, replacement and safety). Check that you have a properly-costed development plan to ensure any balances you are accumulating for future years can be justified and explained.

Summer school census

**Expert advice:** Do check the Department for Education website for the most up-to-date guidance on this.
The government is on track to introduce a new funding formula from 2017-18. The aim is to ensure that every school has funding ‘matched to need’ and will get ‘straight to the front line’ rather than relying on local authorities to determine allocations. The aim is to create a sense of fairness across schools but it is likely to have an adverse effect on many urban areas, including London. I spoke to a range of professionals and experts across the country to hear their views on the new funding formula.

FIONA MILLAR Journalist and campaigner on education issues

‘There is unfairness in the way school funding is calculated at the moment, and this is largely due to complicated historic arrangements in different local authorities that then became embedded when the last large scale funding reform was introduced in 2006.’

‘However it would be equally unfair to reform the system in a way that means some authorities benefit at the expense of others, especially if the losers are educating a high proportion of disadvantaged pupils. The proposed changes will adversely affect many urban areas, including London, so we would want to see a gradual phasing in of the new arrangements, and enough cash injected into the system to ensure that the less well funded authorities can benefit while more highly funded authorities can continue to provide the same standard of education without reducing the life chances of their pupils.’

MATTHEW WHEELER NASBM head of professional standards

'There is unfairness in the way school funding is calculated at the moment'

of the current parliament, the updated—every-five-years nature of IDACI funding means there will inevitably be unpredictable volatility at the outer edge of each school and academy trust’s five year forecasts. Whilst staffing budgets can be turned around in that timeframe, it makes using revenue funding to fund capital works over the long term unwise. We need clarity on capital funding arrangements going forward too.

‘Schools who are set to lose out under the arrangements will be pleased to see the retention of the Minimum Funding Guarantee - but level will be crucial. Those who are set to gain will want change implemented faster than providing an MFG for losers may allow.

‘There is the million dollar question - what will the basic pupil led funding amount be for primary, Key Stage 3 and Key Stage 4 children? How much does it cost to “fairly” educate a child in England today before other factors are added in?’

MICON METCALFE Director of finance and business at Dunraven School

‘Any redistribution of funding will mean winners and losers if the funding envelope is to stay the same. Of interest is the Government’s wish to ‘hard fund’ schools. This requires legislation so it can’t be implemented until about 2019/20. It also means that local authorities won’t be able to divert funds from the school block to support the high needs block. A consultation on high needs has been launched at the same time and it is worth reading and considering both together. If LAs can’t divert money into high needs, it follows that there is a smaller pot to go around.

It also means that although schools are getting an agreed per pupil amount, they will still have to fund the high incidence, low
'SBMs will have to bear the burden of driving through the changes within schools'

need SEN from their resources. This inevitably means that some children will have more spent on them than others.

'Knowing that there is a proposal to change school funding once again in 2017/18 makes longer term planning difficult. I do not expect any detailed modelling to come out before academies set their 2016/17 budgets and maintained schools have set theirs already but it means what we may have projected over the next three to five years is really an unknown. I will be modelling various scenarios and scanning the horizon for the second part of the consultation. As ever, SBMs will need to think creatively about solutions for efficiencies in their schools.'

RUSSELL DALTON
Finance and business director at Pershore High School

The news regarding the consultation for the NFF is particularly good for my local authority, although I know there will be colleagues who are worrying about potential reductions in their budgets. Obviously the consultation document was quite lengthy, as you would expect for something of this nature, so I am sure we all worked hard on digesting each question to ensure that the feedback we gave was thorough enough to ensure the NFF is fair for all. My concern was around the tight deadline, especially with Easter being in between, so I actively encouraged SBMs to engage with the process as this will significantly affect every school.

'Whether you are a fan of the NFF or not we will have to embrace it as a profession and work more collaboratively to ensure it works for all schools. There will be 'winners' and "losers" in the process but it could be argued that the "winners" have had to work with considerably less funding to date and therefore equalisation in some form is only fair. I do feel that SBMs will have to bear the burden of driving through the changes within schools when the NFF is introduced and that we need to be preparing for this now.'

NINA SIDDELE
Business director at Keswick School

'As an SBM in an academy within the lowest funded authority in the country, I welcome this consultation. As a region, we have wanted such a review for many, many years although we would not expect it to make an immediate impact. My concern is that whilst we may finally gain on a fairer per pupil level of funding, other adjustments may be made to the formula which may mean that overall we don't gain particularly as much as we may like. Also, in a pocket of high deprivation, our academy benefits from relatively high deprivation funding, and in fact has this year lost its Minimum Funding Guarantee (MFG) funding because of this. Other schools in the area don't all benefit from the deprivation funding and attract MFG. My thoughts are that as the per pupil funding possibly increases they will lose MFG protection and overall not see massive increases to funding.

'In respect of distribution, if this was done centrally then at least all LAs would be consistent, whereas at the moment this is not the case. It does however throw more concern over the position for LAs and their sustainability. With the gradual removal of the Education Services Grant, what their remaining dedicated grant will look like moving forward will be pivotal to how they continue to operate.'

CATE HART
SBM consultant

'We should all have read and responded to the consultation which was launched. What are the discrepancies which are to be ironed out? Pupils are funded between £4200 and £6300 depending on location and local authority. Prior attainment funding varies enormously from a few pounds to thousands of pounds. Historically wealthy LAs have put extra funding into schools. While it is acknowledged that social factors should effect the funding, this has not always been the case.

'It was apparent from the monthly meetings at the DfE that getting this (the proposals, including basic per pupil funding, funding for additional needs, school costs and area costs) right is not going to be easy. Modelling was done on various LA schools and there would be winners and losers across the board. Plotting schools in rural areas was done, trying different factors and weightings to see the effects. Suggestions were made that there would be a period of protection for losers and maximum increases for gainers.

'It is the intention that by having a national formula, schools will be able to predict their budgets better, control the funding (which will come directly to them, not via the LA), and ensure that pupils get a fair deal. It remains to be seen if this can really change for the better, or whether at the end of the consultation/implementation period, a new government may come along and change it all again! It is the responsibility of SBMs to be involved and have your say, looking at the likely impact to your school and informing the SLT and governors as soon as possible so action can be taken.'
SBMs: Why 2016 could be your most significant year

The school business management profession is a varied and challenging one but a new set of professional standards will set the SBM role on a path to dramatic growth.

Someone recently summed up the SBM profession brilliantly: ‘We do our jobs with a calculator in one hand and a packet of tissues in the other.’ This was Matthew Wheeler, NASBM fellow and trustee, giving an extraordinary and inspiring speech at the recent NASBM awards.

The image is amusing but also true. School business managers have become more qualified and the role is increasingly varied and diverse: you could be spending time supporting the emotional needs of staff and pupils in your schools, as well as sorting the finances and budget monitoring.

Is there a more complex job out there? Sadly, the very nature of the profession – namely the complexity and variety – means that many other staff members lack clarity about what SBMs do.

Lack of clarity can be dangerous. If other staff members don’t really understand what you do, how can you work cohesively as a team and offer mutual support? How can you fully enter into discussions in SLT meetings if some of the team don’t respect your views, let alone understand just how much you contribute to the school? The result? Confusion, frustration and loneliness.

But times are changing. SBMs are becoming more respected and understood; they are working more closely with the heads and contributing fully to SLT meetings. And here at Optimus Education we continue to listen to SBMs and try to drive awareness and provide support for ongoing professional development.

New heights
This year, SBMs have the opportunity to embark on a new enterprise: the new NASBM professional standards. NASBM committed to a long consultation and they have created a detailed set of standards which school business managers can work towards to progress in their profession.

The new standards have been met with great support from the Department for Education, the chief executive of the Education Funding Agency and MP Sam Gyimah. Many school business managers have also told us how delighted they are to have this clear sign of support and direction moving forward and are excited to get involved.

However, with novelty comes uncertainty and many of you have told us your concerns about the standards. ‘Why have they been introduced?’ ‘How am I to use them?’ ‘There is a lot of detail: this seems overwhelming!’

Exclusive interview
Thankfully, we had the opportunity to hold an exclusive filmed interview with Stephen Morales to shed light on these questions and more. In the video, Stephen takes us through the new professional standards, explaining why NASBM created them and how they can help SBMs progress in their careers.

Stephen explains that the aim is to focus on the very specialist areas around leadership standards and behaviours that schools need to address and legitimise school business managers as education leaders.

He said that the standards offer a wide approach to professional development: from the start of a professional journey through to the competencies, skills and behaviours needed to reach strategic level – described as level 4 within the standards. They also aim to help those operating at the highest level who may have less of a specialism and want to grow experience and knowledge in other disciplines. Stephen stressed that the school business manager title is confusing: we need to think carefully about how we categorise practitioners, given the responsibilities and accountabilities they have.

Stephen talks about the new national funding formula, addresses specific SBM concerns on this subject and offers advice on how to prepare for the imminent changes. He answers your questions on the difference between Ofsted inspections and visits from Regional Schools Commissioners.

After the inspiring NASBM awards last year and now news of these standards, it’s clear that the profession can only go from strength to strength.
Recruiting: advertising, shortlisting and interviews

It’s the season for recruiting. Do you feel confident you are following procedures correctly? LINDSEY LESTER offers expert advice

All schools are committed to safeguarding and promoting the welfare of pupils and, in relation to this, one of the tasks that an SBM is usually responsible for is organising interviews. This particular role should be one of your high priority tasks and training should be offered as a matter of course.

Your school should already have in place stringent recruitment and vetting procedures for staff and other adults, with the same rigorous procedures being applied to volunteers. SBMs must ensure that these procedures are undertaken correctly and that all checks are carried out and supported by relevant evidence with appropriate records being kept; if they are not, then this should be questioned. It is imperative that the recruitment and selection process is planned and conducted fairly and consistently within the policy and procedure at your school, so that the best person is appointed to the job.

You can download a recruitment and selection model policy to tailor for your school from my.optimus-education.com

Advertising the post

SBMs should take into account the requirement not to discriminate during the recruitment process and bear in mind that an applicant can lodge a claim to an employment tribunal at any stage. When placing an advertisement, ensure that it will reach all of the wider community. Specifically requesting a male, female, young or mature person can be held as discriminative. Preferably, include a sentence in your advert encouraging those with a disability to apply. Your advert is the first impression that someone will gain of your school, and you want to be sending out the right message including the requirement to notify applicants that the post holder will be subject to a DBS check. I always use the sentence: ‘(School Name) is committed to the safeguarding and welfare of every child and the successful candidate will be required to undertake an enhanced DBS check.’

Practical exercises are useful in assessing the ability of your applicants

Preparing for the interview

When inviting a candidate for interview, give as much notice as possible and include in the letter directions to the school, an agenda for the day and a request to bring with them proof of qualifications and identification. Send for references immediately as these should be received before the interview date. Should there be a delay with these, then any offer of employment must be conditional on receiving satisfactory references.

Interview methods

Should you have a high number of excellent applicants then the selection of suitable applicants could take place over two days, with the first day being the shortlisting of candidates to be interviewed on the second day.

For this first day you could consider: tests, team exercises, practical tasks,

Continued ☞
Recruiting: advertising and shortlisting to interviews continued....

meeting with a pupil panel and even an interview. Alternatively, you might prefer just to apply a weighting value from the actual applications to identify those who are most desirable.

Practical exercises are useful in assessing the ability of your applicants. For example, our sports technician candidates were asked to design and deliver an out-of-doors lunchtime sporting activity observed by the PE department and a student, with feedback being given to the shortlisting panel.

Whatever procedure you decide to choose, the process must promote fairness and consistency as, should an appeal be lodged, you will be asked for evidence to support the decisions you have made.

Interview questions
The panel's interview questions need to be clear and concise and reveal the abilities of the candidate. It is important to remember that interviews are not just about questions and answers but also explore the candidate's personality and how they would fit into your school. These could include the following: 'What are your weaknesses and strengths?' 'Who has had the most influence in your life?' 'How do you deal with different personalities?'

Explore the candidate's personality and how they would fit into your school. You will get more information from a candidate by avoiding closed questions such as 'Do you...' or 'Can you...' but rather asking them to 'Explain...'

Your candidates should have questions to ask the panel. Remember that as well as the panel interviewing the candidate, the candidate should want to interview the panel. The panel should expect to be asked questions about training opportunities, confirmation of pay, advancement opportunities within the school, whether this is a new position, to whom they will be responsible, etc.

Be mindful of inconsistencies
Any gaps in the employment history on an application could be a cause of concern and the applicant should be asked for an explanation; you could do this in the interview process, but if you have any serious doubts I suggest that you contact the applicant beforehand. There could be a simple explanation, such as staying at home to look after the children, or a period of unemployment, but any inconsistencies must be explored and explanations verified against the references provided.

Also, when looking at a candidate's employment history, consider how many changes of employment there have been. Obviously, with the current economic climate this could be a result of companies opting for temporary six-month or one-year contracts rather than offering permanent positions. However, are there other reasons why they have not been able to acquire a permanent role?

Handling convictions
Should an applicant declare a conviction, then I believe that this should not be made known to the shortlisting panel until after the shortlisting process. If the applicant is then selected you should inform panel members of the conviction, and it is for the panel to decide what further information they may require. However, all posts within a school/college are exempt from the provisions of the Rehabilitation of Offenders Act 1974, and your school must abide by relevant legislation including the Safeguarding of Vulnerable Groups Act 2006, The Protection of Children Act 1999, and the Education Act 2011.

This is one area of the process that I do not particularly like, but the school must assess how any declared convictions will impact on the applicant's ability to undertake the job. For example, an applicant with a conviction of fraud would not be able to work in the finance department, but may be able to work supporting students; it is for the panel to make this decision.

Don't forget...
Finally, there are some points to remember: please do not ask the candidate about their age, family situation, child-minding arrangements, their origin or ethnicity (unless of course it is to verify the 'Right to Work') as this could be deemed as discriminatory.

Some candidates are brilliant at selling themselves but are not so good at delivering the results. Your interview is an investigation and preparation is vital for the success of the interview and selecting the right candidate.

Read the application forms thoroughly and their CVs if they have been provided, so that you can verify any work history queries. Ensure that each member of the interview panel is aware of the interview process!

Once the interview is over, thank them again for attending and inform them of when you will contact them with the outcome.

Your school should already have in place stringent recruitment and vetting procedures for staff.
Recruitment checklist: keeping children safe

Ensure that your safer recruitment policies and procedures are compliant with statutory guidance by using this checklist from education lawyer Dai Durbridge. Recruitment is a complex area for SBMs, especially given the frequent changes in policy. This checklist will help to ensure you are on track and meeting all the legal requirements.

Please note: this checklist covers the basics and is not exhaustive. The Single Central Record will contain a lot more than this and it varies depending on the type of school. Refer to our article: ‘The Single Central Record: what you need’ for further information.

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<tr>
<th>YOUR POLICY</th>
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<tr>
<td>Introduction</td>
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<td>Aims and objectives</td>
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<td>Roles and responsibilities</td>
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<td>Job description and person specification</td>
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<tr>
<td>Advertising</td>
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<td>Application forms and inviting applications</td>
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<td>Recruitment panel</td>
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<td>Short listing and references</td>
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<td>Selection process</td>
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<td>Offers</td>
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<td>Employment and DBS checks</td>
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<td>Induction</td>
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<td>SCR and record retention</td>
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<th>DISSEMINATION</th>
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<tr>
<td>Ensure your staff know this policy well.</td>
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<tr>
<td>Train staff on safeguarding.</td>
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<tr>
<td>Make the policy freely available to pupils and parents.</td>
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<tr>
<td>Keep the policy and procedure updated.</td>
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<tr>
<th>SAFER RECRUITMENT TRAINING</th>
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<tr>
<td>Ensure at least one person on an appointment panel has undertaken safer recruitment training.</td>
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<td>Check who has provided this training.</td>
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<tr>
<th>THE SINGLE CENTRAL RECORD (SCR)</th>
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<tr>
<td>Your SCR must cover all staff (including supply staff and teacher trainees on salaried routes).</td>
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<tr>
<td>You must have a record that the following checks have been carried out/certificate obtained and the date:</td>
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<tr>
<td>- ID check</td>
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<tr>
<td>- Barred list</td>
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<tr>
<td>- Enhanced DBS</td>
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<tr>
<td>- Prohibition</td>
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<tr>
<td>- Overseas</td>
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<tr>
<td>- Professional qualifications</td>
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<td>- Right to work in the UK</td>
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<th>SCR – SUPPLY STAFF AND VOLUNTEERS</th>
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<tr>
<td>You must have written confirmation that the agency has:</td>
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<tr>
<td>- carried out all relevant checks</td>
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<tr>
<td>- provided any enhanced DBS checks</td>
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<tr>
<td>- obtained the appropriate certificates</td>
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<td>- the date that confirmation was received.</td>
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<th>VOLUNTEERS</th>
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<tr>
<td>All checks to be noted on the SCR.</td>
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<tr>
<td>New supervised volunteers should obtain enhanced DBS checks. Cannot obtain barred list check.</td>
</tr>
<tr>
<td>Existing supervised volunteers: no requirements to request enhanced DBS check but can request one ‘as you think necessary’. Cannot obtain barred list check.</td>
</tr>
<tr>
<td>New unsupervised volunteers must obtain enhanced DBS with barred list check.</td>
</tr>
<tr>
<td>Existing unsupervised volunteers should not request enhanced DBS check (as the volunteer should have already been checked unless you have a cause for concern).</td>
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<th>REFERENCES</th>
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<tr>
<td>Guidance requires two written references.</td>
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<tr>
<td>If a candidate for a teaching post is not currently employed as a teacher, check with the school, college or local authority at which they were most recently employed to confirm details of their employment and reasons for leaving.</td>
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<th>AGENCY STAFF</th>
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<tr>
<td>Obtain written notification from any agency/third party that they have carried out the necessary DBS checks.</td>
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<tr>
<td>Check that the person who attends is who they say they are (ID check).</td>
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For more interview advice and example questions, please go to my.optimus-education.com and put ‘interview’ in the search box.
Teacher wellbeing: supporting new entrants to the profession

How does your school help NQTs to settle into the profession? ELIZABETH HOLMES suggests ways to help new teachers thrive.

The support that schools offer their newly qualified teachers (NQTs) can make the difference between them flourishing in the profession or fleeing from it at the earliest opportunity. Naturally, other factors will come into play in a decision to leave, but the significance of school input at this stage of a teacher’s career cannot be underestimated.

The tremendously varied demands of the job are virtually impossible for new teachers to balance effectively without the support of more experienced colleagues and peers.

When evaluating the support that your school offers to NQTs, with a view to nurturing their wellbeing and getting them through their first year successfully, it will be worth broadening the scope of the term ‘wellbeing’ as widely as possible, to establish what more could be done.

And more can always be done! The following suggestions may help.

Differing needs
Be aware of the differing needs of teachers who are new to the profession. Mature, career-changer new teachers and those joining the profession as their first career will need different kinds of attention.

For example, the mature career-changers are likely to have extensive experience of working life prior to entering the classroom. It is important to build on this experience in this new context in which they are working. For younger, first-career entrants, other needs may come to the fore.

It is essential to support the new teacher from the point at which they are operating. This means no generic approaches; rather, draw on the experiences that they have in the profession to date – and in life generally – as well as their personal constructs about what being a good teacher means to them.

Facilitate interaction
Facilitating plenty of interactions and collaborations between NQTs and established teachers will also help to address differing needs, as will finding ways of using and building upon new teachers’ experiences as educators.

These experiences bring valid perspectives to any professional learning, which, if used productively, could evolve into springboards for further development.

Overwhelming
The breadth of skills that a new teacher must develop can be overwhelming; from subject knowledge to pedagogy, behaviour management techniques to basic social work, knowledge of psychology in the classroom to working with colleagues of differing aptitudes and temperaments, not to mention joining a ‘system’ that is constantly in flux and the focus of political and professional point-scoring.

How can we support new teachers through that little lot? If nothing else, a simple acknowledgement of the breadth and depth of demands on them will go a long way. From that point, start to build skills and strategies for each demand, one at a time, while being fully aware of how vulnerable new teachers are to overload.

New teachers need support through the particularly tricky transition from theory to practical experience. This is one of the major challenges of the drive for a research-led profession.

As any experienced teacher will confirm, research can be incredibly useful in informing classroom practice, but it must always be contextualised.

Help new teachers to achieve this, and to make sense of what theory might mean for them in their classroom.
Take a holistic approach
Wellbeing cannot simply be about effective teaching. It has to be about the teacher as an individual, whose experiences can contribute to a sense of wellbeing at work – or a sense of unparalleled stress.

Being emotionally aware is essential for new teachers, just as it is essential for all educators at every stage of experience. Their emotions will impact on the nature of their relationships with colleagues and pupils, and this will have a significant impact on their perception of success in the job. To ignore this important point is to do new teachers a great disservice.

It’s not personal
The more new teachers take things personally in their developing careers, the harder it will be for them to retain a useful, objective distance. And yet, the more stressed and pressured we feel, the harder it is to achieve a balanced perspective.

That’s when those mentoring new teachers need to remind them – repeatedly – of the good work they are doing and of the need to take a step back and view the bigger picture. Focus on what’s going smoothly as well as on what is proving challenging. Help new teachers to derive professional development from each and every teaching experience that they have.

Motivations to teach
A major task of professional learning and support for new teachers as they travel through the year is the need to balance the pressures of the role with the inherent enthusiasm for the job that they may have. It’s easy for feelings of being overwhelmed to impact on their interest and commitment. When this happens, new teachers are more likely to leave the profession.

Perhaps a focus on the right balance of the full scope of a new teacher’s needs will prevent this. This isn’t just about survival or getting through (an appalling concept when linked to the working environment!). It’s not even about resilience and perseverance. It’s about thriving in a way that will support the new teacher throughout this year and beyond. This is not an unrealistic expectation. Reflective practices will help.

Manage transitions
Ask yourself how your school supports NQTs through transitions. How is the transition from the NQT year to year two handled in your school? Does support for professional learning drop off dramatically after the NQT year is completed? If so, how can this be rectified, to create a bridge between starting out in the profession and becoming an established educator?

Take time to consider the overall environment in your school. How conducive is it to the development of a sense of wellbeing at work in all staff, regardless of their level of experience in the profession?

If we view new teachers in isolation, we may miss factors that could enhance – or hinder – great development across the board.
Building projects: how to manage risk, time and cost

Replacing or refurbishing buildings is a key challenge for SBMs. JASON PROSSER, partner at law firm Veale Wasbrough Vizards, outlines the keys to achieving a successful project.

First steps
An essential first step is to write a clear statement of the required outcomes for the project and their respective priorities. This helps prepare a business case which identifies the need for change, reviews a range of options, costs, benefits and risks (legal, commercial and political), and recommends a solution.

The prospects for success are greater if you can identify a project champion within the school with personal responsibility for delivering the project.

Impediments and risk
The next step is to prepare a detailed assessment of the risks and impediments (internal and external) to implementation and to develop a strategy for addressing them. Assess the risk in view of both the likelihood and consequence of any event occurring.

The list will include issues of: finance, funding and VAT, compliance with charity and procurement law, internal governance, legal title issues, the need for planning, and other statutory consents.

Appointing the contractor
Aside from any procurement law requirements, it’s important to engage an external contractor or development partner with the appropriate technical competence, track record and financial soundness.

Investigate its financial strength, corporate and group structure, availability of funding (and pre-conditions to the availability of funding) and in appropriate cases the availability of a parent company guarantee and/or performance bond.

Quality
The risk is that the developer fails to deliver a good quality construction, including mechanical and electrical services and lifts, fittings and finish.

There are a number of ways to reduce this risk. Firstly, make sure you use a detailed specification and limit the circumstances in which the developer may vary the specification. Next, help the developer to construct to specified standards, including compliance with the specification, planning permission, building regulations and all relevant statutory consents and requirements.

Try to ensure the school has the opportunity to approve the identity and terms of appointment of the key consultants and sub-contractors, including the terms of collateral warranties and that the school has access to inspect the progress and quality of the works, with a mechanism for concerns to be addressed.

It’s also recommended that you ensure the school has meaningful influence over certification of practical completion of the works, including control over the extent of any permissible list of snagging items.

Lastly, do make sure the developer has ongoing obligations to rectify defects during an initial (minimum) 12 month rectification period, backed by a retention which the school can use if the developer defaults.

Time
If work is completed late this can have an impact on operations, reputation and finances. However, there are ways to mitigate these. Create a pre-agreed programme identifying key milestones. These can be linked to formal progress meetings where the school has an input in the outcome, possibly resulting in a requirement for the developer to deploy additional resource to ‘catch-up’ with the agreed programme.

Also, make sure you have independent certification of any extension to the timescales with the certifier having power to decide whether any extended period should run concurrently or consecutively.

Have a right to charge liquidated damages (‘LADs’) for each week’s delay. As a last resort, explain that failure to meet agreed milestones or insolvency should trigger termination or a right for the school to step-in after prior warning.

Cost
There is also a risk that the total cost exceeds the school’s budget.

Ways to mitigate this include:
- use a detailed specification to enable the contractor to commit to a fixed price with minimal provisional sums
- enable the school to require variations to the specification without prohibitive additional cost
- ensure tight control over the build programme to minimise additional cost that the school might incur if the project is delivered late
- maximise the tax efficiency of any payments
- structure any funding deal to avoid excessive charges if there is a delay in drawing down funds.
What’s in this month’s Teaching and Learning section?

Is professional development in your school useful? Almost every teacher wants to improve, but blanket inset sessions or snippets of advice here and there don’t quite cut it: most analysis of CPD shows a strong positive response, but little follow-through later down the line. In this issue we share what one school has done to personalise professional learning for their teachers to deliver more powerful outcomes. Use this in conjunction with our ideas for sharing good practice (page 40) to help revitalise the CPD culture in your school, and make sure to share our advice on constructive lesson observations (page 39). Jo Facer covers what teachers need to know about the science of reading, from decoding to comprehension to fluency, and Damian Haigh kicks off a mini series on assessment without levels and the approach his school has taken. Enjoy!

Owen Carter, Content Lead

Contributors in this issue

Chris Moyse is head of staff development at Bridgwater College Academy and an education consultant with over 25 years of experience in education. @chrismoys

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

Nigel Paine is a coach, mentor, writer, broadcaster and speaker, specialising in leading learning and building learning organisations. He also led the BBC’s training and development operation. @ebase

Jo Facer is head of English at Michaela Community School. She is passionate about reading and getting her pupils to do the same. Jo blogs at Reading all the Books. @jo_facer

Top tweets from @TeachingOE

It is not the words we use that matter, but pupils’ lived experience throughout the school. Advice on #behaviour http://bit.ly/1S6wJOx

‘Reading for pleasure is more strongly linked than parental education to cognitive progress in adolescence.’

A reminder: measuring pupil progress means more than taking a straight line. Via @edudatalab https://sway.com/8K1bVMHlsmci5P/

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I often have this definition of insanity in my mind when I plan for staff development at Bridgwater College Academy (BCA). If we are serious about continuous professional development then we simply cannot do the same thing in the same way and expect things to be better.

Six years ago, in response to Ofsted requiring us to have 75% of lessons graded good or better, we removed lesson observation grades. To further demonstrate that we implicitly trust our teachers we reduced the number of observations to one a year, most of which are not undertaken by senior leaders. We encourage reflective collaborative enquiry by using ‘unseen’ observations.

At BCA we are constantly in the pursuit of excellence and trying to make our processes more effective and efficient.

Our context
We currently have 69 teachers, 35 of which are in their first four years of teaching (including eight NQTs and five Teach First participants). Nationally many teachers leave the profession in their first four years and therefore it is vitally important that we retain and support these young teachers.

In addition to being a relatively inexperienced staff, we are also an all-through 3-16 academy. Consequently there is a wide range of development needs which is problematic when it comes to planning a CPD programme: our staff development has become increasingly bespoke.

Owing to this range of experience, subject and age group we generally do not have whole school twilights or INSET training days – we quickly found that these are not sufficiently differentiated enough.

Improving outcomes through professional development
BCA is now the third most improved school in SW England: outcomes and the quality of teaching have been on their way up for some time. Now we have to ask ourselves where our next 5% comes from: the bar is higher now and raising it even further is harder.

At BCA we prioritised professional development. Confident teachers make for better pupil outcomes. We have two members of senior staff whose sole responsibility is to support the teaching staff. We both work part time at BCA, collectively equating to five full days a week, meaning that teachers’ professional development is high priority and high quality. Most importantly it is highly bespoke to the individual teachers.

A professional growth timeline
Our vision for professional development, learning and growth at BCA is to promote and sustain professional growth that is based on collaborative high-trust processes with a collective responsibility for children’s outcomes.

To realise this vision we have mapped out a timeline of events for each academic year:

‘The main purpose of lesson observation at BCA is not to judge the quality of teachers but to help teachers to become even better at improving learning’
year (see overleaf). September is a time of reflection and analysis for existing staff and induction for new staff. We analyse data and video our teaching. In addition we undertake an analysis of our current class or classes to ascertain their issues and needs.

In October we prepare for our appraisal and capability process by reflecting on the teachers’ standards and drafting our personal development plan (PDP). While we acknowledge that we work within parameters, it is essentially left to staff, in negotiation with line managers, to establish their own focus for professional development. This negotiated focus forms our teachers’ PDP and thus provides focus to our teachers’ development.

Full engagement in the PDP process forms one of our three appraisal targets. The intention is that staff seek the input, support and challenge of others so that their development is sustained, collaborative and high-impact.

In November and December our staff research their PDP focus, receiving support and further information from the staff development team. They also display their focus on their ‘teachers are also learners’ cards as a visual reminder to themselves and a prompt for visitors so that targeted feedback can be provided, if appropriate. At some point during the autumn term all staff, except NQTs and Teach First participants, have a PDP focused lesson observation which is undertaken by their line manager to ensure that the target is appropriate and, if so, how well you have started and what impact this focus has had so far on the children. A subsequent follow up meeting, set within a GROW (Goal, Reality, Options, Will) structure, establishes next steps.

During the autumn term NQTs and Teach First participants have weekly 10-15 minute unannounced observations as we find that our teachers develop most quickly when they receive frequent, focused feedback that is based on typicality. We also find that giving less feedback but more often maximises the development of our new teachers. The main purpose of lesson observation at BCA is not to judge the quality of teachers but to help teachers to become even better at improving learning.

Go to learn observations
In the spring term we undertake our ‘go to learn’ observations in which all teachers visit a colleague’s classroom to observe teaching. The focus of this observation, where possible, is on the teacher’s PDP. These visits are written up and next steps planned.

Our NQTs and Teach First participants have an individual bespoke training day during this term in which they visit classrooms across the academy accompanied by one of the staff development team to learn from colleagues. Each NQT and Teach First participant has two of these days a year.

Unseen observations
To further demonstrate the trust we have in our staff, we have removed the usual summer term observation and replaced it with an ‘unseen observation.’ The purpose of this approach to observations is to create an opportunity for reflection, analysis and sharing.

The ‘observation’ is undertaken by the teacher with the development work happening mainly in the pre and post-lesson conversations about planning and analysis of its effectiveness. The focus for the lesson is the teacher’s own chosen area for growth as outlined in their PDP. The process involves three stages:

1. pre-lesson planning with your team to establish a lesson that further develops your PDP focus
2. within a one week window, you teach the lesson with no observer entering the classroom and no disturbance to the classroom dynamics
3. you contribute to a post-lesson conversation with your team to encourage analysis and self-reflection on the lesson. Each teacher completes a write up of their PDP and shares this with their team so that everyone in the team can learn from their experiences.

Staff are required to consider and share the following.

- What did you set out to achieve this year?
- What did you do to move towards achieving this aim?
- What has the impact been of this work on the children’s learning?
- How might you further develop this work?

Evaluating the impact
This bespoke approach to professional development has led to BCA becoming an ever improving school. It is a high trust establishment with a strong sense of cohesion which is consistently demonstrated through effective classroom practice.

Staff relationships across our academy are increasingly characterised by mutual trust, honesty, respect and support. Staff are open about their practice and everyone’s contribution is valued. A desire to do the best for all our children pervades our academy and more frequently staff now plan together, collaborate and share ideas.

Our academy is seen as a place where everyone is a learner. Staff are involved in a range of bespoke professional learning opportunities in which evidence-based strategies are investigated and practised in order to improve children’s learning. Staff are trusted, given autonomy and take responsibility for their own professional learning yet are supported and challenged to become even better.

Continued >>
**An annual timeline for professional growth**

Professional growth at Bridgwater College Academy

‘Professional growth that is based on collaborative high-trust processes with a collective responsibility for children’s outcomes’.

**September**

**Reflection and analysis.**
- Analysis of your results and data.
- Video of your own teaching.
- Analysis of your current class or classes to ascertain their issues and needs.

**October**

**Preparation for the appraisal and capability process.**
- RAG rating of teachers’ standards.
- Draft of your personal development plan (PDP).
- Appraisal and capability meeting with your line manager/appraiser:
  - reflection on last year’s PDP
  - agree self-reflection of teachers’ standards
  - establish 3-4 targets: data, PDP, team contribution, leadership (if appropriate).

**November**

- Research your PDP focus and receive support and further information from the staff development team.
- Initiate practice of your PDP focus.
- Display your ‘teachers are also learners’ card.

**November/December**

PDP focused lesson observation.
- Focused on your PDP target.
- Undertaken by your line manager who will help you establish if the target is appropriate and, if so, how you have started and what impact this focus has had so far.
- Follow up meeting for feedback, professional dialogue and your next steps set within GROW structure.
- Update your PDP, if appropriate.
- Update your ‘teachers are also learners’ card, if appropriate.
- Staff development team collate GROW forms in order to plan for further support.

**January**

Continue to research your PDP focus and receive further support and information from the staff development team. Continue with the deliberate practice of your PDP focus.

**January/February**

‘Go To Learn’ observations.
- Visit a colleague’s classroom to observe teaching.
- The focus of this observation, where possible, should be the focus of your own personal development plan.
- Record your visit on the ‘Go To Learn’ form and send to the teacher you observed.
- Identify and record your next steps to excellence on the GROW form and send to your team leader and the staff development team.
- Update your PDP, if appropriate.
- Update your ‘teachers are also learners’ card, if appropriate.
- Staff development team collate GROW forms in order to plan for further support.

**March/April**

Continue to research your PDP focus and receive further support and information from the staff development team. Continue with the deliberate practice of your PDP focus.

**May**

Continue to research your PDP focus and receive further support and information from the staff development team. Continue with the deliberate practice of your PDP focus.

**June/July**

Unseen observation.
- A process of reflection on, and analysis of, your teaching and your PDP focus.
- Pre-lesson planning with your team to establish a lesson that further develops your PDP focus.
- One week window - teach lesson with no observer.
- Post-lesson conversations with your team to encourage analysis and self-reflection on the lesson.
- Complete a write up of your PDP and share with your team (in the same meeting) and send to the staff development team.
Make lesson observations meaningful: 6 success tips

Lesson observations should create meaningful improvements in teaching and learning - not make teachers' lives miserable. OWEN CARTER gives some pointers

We know that high quality teaching and learning is key to pupil progress. In theory, lesson observations should be a powerful tool for transforming outcomes.

But there are a few problems. For a start, we all act differently when we are being observed: observed lessons rarely reflect daily practice. Add to that the fact that reliability for lesson observation judgements is generally less than 50%, and observations end up being a bit of a mess.

So how can we make lesson observations genuinely helpful?

Distinguish between performance and development

While observations are a crucial part of the performance management process, focusing too much on this leads you on a path to nowhere.

One head of department summarised his approach as: ‘have you met the teachers’ standards? Good. Now let’s have a conservation about specific things you might want to develop’.

Our lesson observation model policy (downloadable at my.optimus-education.com/lesson-observation-model-policy) distinguishes between four types of observation:

1. performance related observations
2. pedagogy focused observations
3. learning walks
4. drop-in and coach observations.

You can use these distinctions to help clarify exactly what the intended outcomes are for different types of observation.

Keep the conversation off grades

How many lesson observations have ended with teachers walking out thinking ‘I’m inadequate’, or ‘I’m good’?

We know that for pupils focusing on the grade they have received tends to lower performance. Why would it be any different for teachers?

Regardless of whether your school chooses to grade lessons or not, you should focus on specific points that went well or poorly, and feedback needs to concentrate on actionable things that can be done.

Make it a shared enterprise

Observations work best when both observer and observee feel involved in the process. One way to do this is to agree a focus linked to personal development goals. Say a teacher wants to work on their levels of challenge - the observation could focus exclusively on this aspect. Dr Matt O’Leary, a researcher into lesson observation, recommends prioritising the feedback and feed forward stages of the observation process.

If you’re based near Birmingham, we’ll be running an observation training day on the 15th November with Dr Matt O’Leary and Joanne Miles – more details at my.optimus-education.com/conferences

Embed a process

To transform lesson observation many schools have moved away from the stop-start model of unconnected observations. One option is lesson study: a process of collaborative planning that puts the learner first, and encourages teachers to jointly unpick their impact on specific pupils.

Keep it painless: save time

Teachers and leaders are both very busy. So having agreed proformas and templates can help take the thought out of preparation, and make sure that both participants are on the same page. When using these types of resources, remember:

- templates should be a guide, not a list to tick
- lesson observations are only a snapshot of practice: don’t expect to see everything
- look ‘at’ the lesson, not just ‘for’ specific features.

Prioritise training

Lesson observation is a skill that needs to be developed like any other. Too often we take for granted that people know how to observe and how best to give feedback.

You should also challenge the assumption that observations need to be led from the top. Many departments and teams have had great success leading their observation on a more peer-to-peer basis. But again this requires training to ensure sensitivity and a critical eye.
Effective CPD: sharing good practice

Every school has excellent teaching going on in at least a few pockets. How can CPD leaders make sure practical teaching ideas are shared? We share some suggestions from JOANNE MILES

Why share your practice?
What do you do to ensure that good practice is shared across your school?
We know that within schools the single biggest impact on pupil achievement is the quality of teaching. We also know that in the classrooms of the best teachers, pupils learn at twice the rate they do in the classrooms of average teachers—they learn in six months what pupils taught by the average teachers take a year to learn. And in the classrooms of the least effective teachers, the same learning will take two years (Wiliam, D, 2009).
The result of the enormous effect of teaching quality is that differences between classrooms in the same school are often larger than differences between schools (Creemers & Kyriakides, 2008).
Whereas we tend to think about good schools supporting struggling schools, research evidence suggests that if we seriously want to improve outcomes we need to put a premium on sharing good practice within schools as well as between schools.

Reflection activity: what do you do currently to share good practice within your school? Are there any additional ideas you might like to implement?

Ideas for sharing practice
Which of the following strategies do you think would be most useful for sharing practice? In absence of a structure for doing so, much good practice in classrooms can be lost. These ideas are adapted from work by Geoff Petty and Jackie Rossa.

1. The first ten minutes
Reserve the first ten minutes of every meeting of your teaching team or department for learning and teaching. You could for example explain a new teaching method, or share good practice etc. This puts learning high on the agenda – literally, and makes sure it doesn’t get squeezed off. Consider asking team members to take it in turns to run these ten-minute sessions.
Most meeting time is often used to disseminate information, but this could be done more effectively in other ways. If you disseminate information by pigeonholes or e-mail and require that people read this before your meetings you might be able to save meeting time to discuss learning.

2. Have a go!
Explain a new teaching method. Or better still, use a new teaching method to explain other teaching methods or to communicate vital new information to the meeting. Once the team have learned using the new method or you have simply explained it, ask them to try it out with their classes. Agree a date by when they can have used it and then share experiences on how it went.

3. Piloting
The team leader/CPD trainer tries a new teaching strategy and then tells their team about it. ‘I’ve tried getting my pupils to self-assess their assignments and look what happened.’ The leader/trainer shares what worked and what didn’t. They ask for advice on how to do it better next time.
Then they try the strategy again, taking the team’s advice on how to do a better job. Once the leader/trainer has done this a few times others usually volunteer to try other strategies on behalf of the team and to report back their experiences. If there are no volunteers you could ask for them. They may need a collection of likely teaching strategies to try.

4. Swapshop
Each team member brings one thing they do that really works to the meeting (anything!). Everyone has to take one thing away and try it with their classes and feedback their experiences to the next meeting.

5. Cross team dissemination
This is the same as the swap shop, except two teams meet to share their different approaches. It could have a particular focus, such as building literacy skills, or could be very general. The two teams do not necessarily need to be in similar curriculum areas.

6. Guerrilla staff development
Good news version: Stop people in the corridor, toilets or staff-room, and tell them about a teaching strategy that you are making a success of.
Bad news version: Again stop someone, but this time, complain about a difficulty you have been having with your teaching and ask for advice, ‘How do you overcome that problem?’
This approach encourages a blame-free culture and gives people permission to say what they have difficulty with.

7. Let’s admit our failures together
Informally as part of conversation or during
a meeting, the leader/trainer of the team admits to difficulties, and to not knowing what they should have known either now, or in the recent past. He or she may also own up to something he/she doesn't understand or can't do now, and ask for help.

8. Peer observation
This is observing to learn, not to criticise. The team observe each other teaching, but the focus is on what we can learn from the observation, not on judging the performance. What went well? What strategies did the teacher use that others could use? The observer could be asked to bring these positive points to the meeting. Video cameras can be used if it’s difficult to get into sessions together.

9. Active scheme of work
The team discuss their different ways of teaching a specific topic on their scheme of work in turn. They agree the best way(s) and these are recorded on the active scheme of work. This encourages team members to share handouts and other resources as well as activities and ideas, and to use the best active learning methods for each topic.

10. Video teaching
Modern video cameras are discreet, easy to use, and don’t require high lighting levels. You can set one up on a shelf or tripod at the back of the room and video one of your lessons. There is no need for anyone else to see the video if you don’t want them to. Videos give you an opportunity to see your teaching from the pupils’ point of view. Arghhh!

11. Developmental observation
An observation is made, not with the intention of grading, but with the intention of improving the teaching. Developmental points are drawn up. The teacher explains what they feel they need support on. The observer identifies the good practice they have seen in order to pass this on to other teachers in the team.

12. Weekly experiments
Members of a teaching team each carry out one experiment a week for the term and report back on how it went at meetings. The experiment could be a new teaching method, an assessment proforma, etc. This works best after a staff development session where possible experiments are suggested.

13. Spinning the bottle
Participants write on a card their ‘tough topic’ – a topic that is boring, hard, or conceptually difficult for pupils or teachers. They also write down why it is tough – e.g. pupil motivation, complexity, irrelevance to pupils etc. The cards are then put in the centre of the table. When the bottle is spun, this person’s tough topic is explained along with its difficulty and the others around the table offer solutions and ideas.

Planning for implementation
Now you’ve ranked these ideas, what are your top three choices? Before you put them into action, think about the problems CPD normally encounters – and how you can avoid them while carrying out these activities.

Finally, put your top three of the activities above (or some you’ve thought of yourself) into the evaluation table (see left) and give your answers to the questions. Often we are keen to share ideas but don’t plan for potential challenges or failures, which can lead to initiatives that never really get off the ground.

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<th>Idea to implement</th>
<th>How would you implement this?</th>
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What can neuroscience tell us about how pupils learn?

Many theories of teaching are only loosely linked to what we know about how the brain works. **NIGEL PAINE** outlines the key findings that teachers should know.

When it comes to neuroscience and education, it’s a jungle out there! Don’t ignore the lessons neuroscience has to teach us about learning, but do not imagine that every ‘brain friendly’ supplier or neuro-learning book has a reasonable and scrupulous approach to the subject.

We are all fascinated by the brain, and that means that a market for the gullible readily exists. A reasoned approach, backed by evidence, is the only way to avoid being taken for a ride.

Most learning paradigms are locked into models of delivery that have not changed for decades, even centuries. Some of the reasons for this are sound: we have been organising structured programmes of learning for millennia, and a huge body of literature, much of it research based, exists to challenge and excite us in equal measure.

This history has helped us define how we learn, and how we can make learning more effective. Other reasons for not embracing change are much harder to justify. We are a conservative lot when it comes to learning. All adults have been taught something, and the replication from learner to teacher can continue for generations.

We should not ignore, however, changes in our understanding of the process of learning, or the research that has emerged, in particular over the last 20 years in neuroscience. Some of this shows that the brain learns differently at different stages of development and for different age groups; other studies reveal how different techniques of learning delivery are more efficient and effective than others.

If this article encourages you to re-examine your current assumptions and practice, sets an agenda for you to review, allows you to debate the degrees of certainty around current learning research, and introduces you to some of the key players and issues, it will have done its job.

**What do we know?**

I discussed some of the ideas around neuroscience and learning with an experienced teacher. Her conclusion was ‘that neuroscience merely confirms the best ways of learning rather than reveals them’.

Is she correct? Are the research conclusions that are emerging now merely reinforcing good teaching practice, or are there new insights emerging which need to be incorporated into a whole range of learning environments?

My starting point is The Royal Society’s report on neuroscience and learning, ‘Brainwaves’. This report was compiled by the best neuroscience brains in the UK under the chairmanship of Dr Uta Frith, so is fairly trustworthy. Five assertions about learning from the report are particularly relevant.

- Emotional engagement is important to effective learning: biology is not determinism. (3.1)
- Physical exercise keeps the brain alert and ready to learn. (2.5)
- The learning environment needs attention: a great environment encourages learning, a poor environment discourages learning. (2.1)
- The ageing brain needs special attention. (2.3), (2.5)
- Every brain needs time to reflect and repose in order to turn information into understanding and eventually into new behaviours. (2.3), (2.7)

Any teacher sensitive to the needs of her learners and wanting to build effective learning knows the truth of many of those assertions. But there are a number of actions from that list that any learning leader should think about.

**Be critical of learning environments**

A key resource for a class teacher is the room itself. Physically this is about the flexibility of the space, use of colour or light (windowless grey rooms tend not to encourage effective learning). Equally, the way an online environment is designed is no less important, and hardly any attention is paid to this.

**Keep moving**

The need for regular physical movement when learning has hardly had any attention. Sitting in the same place for 3 or 4 hours is bad for the body and shocking for the brain. You could easily:

- never present material for longer than 20 minutes without some kind of discussion exercise or break
• have feedback sessions standing up
• move any groups around, swapping places or mixing the groups
• with the right classes, build in ‘walk and talk’ sessions, where pairs leave the room and spend a few minutes walking in one direction with one person talking and the other listening and then reversing that process on the way back to the classroom.

The impact of this is to maintain energy and concentration levels over a school day rather than a declining return on teaching effort.

**Go deeper rather than faster**

There has to be time devoted to reflection and absorption of generic information into ‘what can I personally do about this?’. Pushing ever larger amounts of content into tired brains just accelerates the Ebbinghaus forgetting curve. Time to sit quietly and think, time focusing on what was important, and time to practice and discuss learning can hugely impact on the degree of engagement and behavioural change relating to a specific learning event.

**Stimulate your staff**

The concept of the ageing brain has had hardly any attention at all in organisational learning. The ageing brain needs to be challenged and stimulated and new connections made, if it is to retain any kind of cognitive reserve that will help resist dementia and maintain engagement. For senior or middle leaders in schools, we should prioritise staff’s learning for their own good and the good of their pupils. We know through the work of Dr Joel Kramer from the Osher Center for Integrative Medicine that ageing can have a significant impact on brain structure and function, but these changes are neither universal nor inevitable. Kramer’s work on ageing brains has revealed that scans from similarly aged adults can reveal signs of advanced Alzheimer’s in both brains. One person has those symptoms of Alzheimer’s and cannot function independently; the other person has few outward signs of cognitive disability. This is down to what Kramer calls ‘cognitive reserve’: in other words those adults who keep their brains healthy during middle age create the capacity for their brain to rewire around the damaged area and retain cognitive function.

Whether you’re looking after yourself or developing your staff, maintaining physical activity, cognitive activity, social activity and a good diet will lead to better results in the classroom long-term.

In the words of the British neuropsychologist, Guy Claxton, if you can cultivate key habits such as ‘inquisitiveness, perceptiveness, determination and scepticism’ in teachers, productivity, engagement and ultimately brain health are far more likely than if you ignore these things.

**Next steps**

In some ways it is a huge relief that many of our instincts about what creates effective learning have been reinforced by the research emerging from neuroscience. But that reassurance should not lead to complacency or to dismiss the research data.

If you dig below the surface, even the messages that are emerging now, which are likely to be greatly extended and reinforced over the next few years, have some powerful and immediate lessons for learning.

**Things to read**

*Barbara Arrowsmith-Young, The Woman Who Changed her Brain*
*Mark F. Bear et al., Neuroscience: Exploring the Brain*
*Guy Claxton, Noises from the Darkroom*
*David Eagleman, Incognito: the secret lives of the brain*
*Dr Uta Frith et al. Brainwaves Module 2: Neuroscience: implications for education and lifelong learning*
Managing a G&T register: best practice guidance

Labelling or not labelling, the frequency of review, and stretching mindsets: keeping a more able register can raise a few concerns. Use TORSTEN PAYNE’S guidance on how to manage it.

If gifted and talented, or more able, register is going to be fair and constructive it must allow for two things:

- subject specific identification
- academic mobility.

The first is because subjects may use different skill sets and it is extremely unusual for anyone to master them all. Just because a pupil is a talented linguist does not mean they will also be good at sports.

The second point is that the register must allow for pupils to be added or taken off to reflect the level they are currently achieving. This is the only fair way of doing it as there are a host of reasons why a pupil may not initially present as more able.

1. They could underperform on the first assessment (perhaps they felt ill, or had trouble at home the night before).
2. A special educational need could mask their abilities. For example, a written test is never going to accurately assess the understanding of a dyslexic student.
3. They simply progressed into the top flight. Progress doesn’t really occur in a smooth uphill line, but rather in fits and spurts: some pupils develop their abilities later on.

Carol Dweck’s work on mindsets has shown how almost anyone can significantly improve if they are prepared to take on board the advice of the experts (their teachers!) and put in the necessary hard work. However, the converse is equally true. If a pupil attains a level and then ceases to put in any effort their progress will stall and others may overtake them. Keeping a pupil on the register in that situation will help no-one, least of all the pupil.

What does this look like in practice?

Personally, I’ve found the most useful definition for more able to be ‘currently working in the top 10% of the year group in this subject.’ This allows a revolving door approach that both guards against complacency and recognises and encourages those pupils who are working hard to improve their subject mastery.

Reviewing the register twice a year seems a good balance between tracking progress and not overloading staff. I’d recommend holding the reviews at the start of the spring and summer terms. This gives the first term for staff to get to know their classes and allows for several assessment opportunities as opposed to basing the register just on a single baseline test.

Also, don’t forget that there is no government dictated way of determining who deserves to be on the register. Use any and all data that might prove helpful but remember that ultimately it is the teacher’s professional opinion that counts. They know their subject and their class. Having some respect for their judgement goes a long way towards garnering the goodwill necessary to get the register completed on time from staff who always have too much to do.

To ensure that nomination to the register is also a productive act for the pupils beyond recognition, make it clear that they were chosen because of their hard work and perseverance. See the example letter to parents (online at my.optimus-education.com/node/15405) for the wording we use.

This fits perfectly with mindsets theory in that it praises their attitude rather than promoting the fixed idea of an innate talent. It also means that when parents ask why their child has dropped off the register I’ve been able to reply with something along the lines of:

‘Their work lately hasn’t put them into the top 10% of the year group in this subject. We know they have the ability as they’ve got onto the register before but they’ve slipped a bit of late. I hope they take this the right way and ask their teacher what they need to do to get back on the register at the next review. What do they need to work on and where can they do this? Can they go to the after school club? Spend a bit more time on homework? Do some research?’

Just like mindsets, when it’s done well the gifted and talented register is, as Carol Dweck said, ‘a tool for learning and improvement. It’s not just a vehicle for making children feel good.’

For a day packed full of practical strategies and expert guidance, attend our Supporting the Most Able conference (taking place in London and Manchester). Head to my.optimus-education.com/conferences for more information.
Help students successfully use academic sources

Academic journals are full of specialist information that more able students can use. **DR ANDREW SHENTON** outlines how students can use Bradford’s Law to navigate research.

**By the time** pupils reach the sixth form, teachers may want to introduce the most capable to academic journals.

At the more advanced levels of academia much of the information needed in order to investigate a topic rigorously is found not in books but in academic journals. In recent years Access to Research, a collaboration between publishers and librarians, has made accessing journals for free much easier – see www.accesstoresearch.org.uk

How can students best exploit this resource? A simple subject search may well yield too many hits. A helpful alternative may lie in searching via a combination of the subject and the name of a journal that is known to publish material on the area. When this method is applied to different journals in turn, the student should be able to retrieve sufficient documents to enable choices to be made, without being overwhelming. The best way to narrow down like this is through a knowledge of Bradford’s Law.

**Bradford’s Law: finding the core sources**

In the 1930s, S.C. Bradford formulated a law whose implications remain important today. Bradford’s Law tells us that when we look in scholarly journals for information on a particular subject, we find a marked concentration of the relevant material in a few titles. These form a ‘core’ for that subject.

Let’s take an example. We might explore the literature on, say, information behaviour by consulting a leading textbook. One such work is the second edition of *Looking for Information* by Donald Case. If we use the book’s references to assess the distribution of the literature within the field, we learn that as many as a third of the relevant articles are found in just five journals. Clearly, any student who wants to use Access to Research by searching via topic and journal name needs to identify at least some of the individual journal titles that form the core in relation to their subject.

Teachers can alert pupils to various ways in which the core can be detected.

a. Examining lists of the work of key players. A pupil who knows their subject well may already be familiar with the foremost academics within it. Where do such scholars publish their work?

b. Analysing past experience. Even sixth formers who have not sought information from scholarly journals before may well have received photocopies of appropriate articles from teachers during the course of their studies. Many of the pieces may have come from just one or two journals.

c. Talking to experts. These may include teachers known to have a particular interest in topics about which a pupil wants to learn more.

d. Consulting the references list in a major work. The chosen volume could well be a subject textbook already known to the pupils.

e. Employing generic tools such as Google Scholar. Here the reader constructs a network of references, initially through identifying important papers, finding out who has cited them and noting the journals in which this “secondary” work has appeared.

f. Footnote-chasing. Here, having traced one of the articles cited in the references list of a major source, the reader then selects an item from the references list it provides and looks at the works this paper cites.

Having adopted some of these techniques, the student should pay special attention to the journal names that crop up most frequently, as these are likely to form the core. The greater the number of methods used and the greater the rigour with which they are applied, the greater the probability that the student will make an accurate assessment of the core journals.

**Final thoughts**

When used in conjunction with the opportunities provided by Access to Research, the Bradford-based approach advocated in this article can serve as an ideal way of helping sixth formers take their first steps in the world of finding information via academic journals.

Using Bradford’s Law may also have longer term value to the same learners since it offers a means by which students can stay up-to-date during the course of their degree with the literature of a particular area. Browsing the latest editions of journals that have been identified as core can form a key current awareness strategy.
Meaningful assessment – without levels

Does your assessment system distinguish formative from summative? Are you clear about what it is meant to achieve? DAMIAN HAIGH outlines his school’s approach to assessment.

In common with many schools our approach to assessment after levels is still very much in development in spite of having been in progress for over 18 months. Considerable work remains to be done in terms of integrating principled assessment with our curriculum development programme and also reporting assessment in a way which is meaningful and promotes the right attitudes.

There are some important things which we are clear about:

- we are making a very explicit distinction between summative and formative assessment
- summative assessments will occur only twice a year and will be reported to parents in a way that is honest and transparent: we will remove the ‘fudge factor’ that has created problems for us in the past
- formative assessment will be frequent, low stakes, take many forms and only be recorded where it is practical and useful to do so; we will often use formative assessment quite instrumentally as a means of potentiating learning, building automaticity and rehearsing the retrieval of important ideas, processes and facts
- while we will compare summative assessments to prior performance and high quality statistical estimates provided by Fischer Family Trust, CAT4 or our own statistical recipe, the expectations that are associated with our ongoing granular, formative assessment will not vary by pupil: they will all be expected to demonstrate a ‘complete’ knowledge of the material we have taught them.

This article marks the beginning of a short series in which I will write about the thinking behind this approach and some of the technical detail that you can borrow to help develop your approach.

The distinction between summative and formative

The intended purposes of our assessments have frequently been unclear in the past, and we have also been unclear about the effect we intend them to have on pupils. Teachers are rightly wary of downgrading vulnerable pupils who are going through personal difficulties, or are concerned that challenging parents or school leaders will present concerns if pupils are not seen to be making good progress.

This means possible impact of the assessment becomes a part of the assessment process, which is not helpful. We are therefore seeking to be very clear with our teachers that there are some assessments whose purpose will be summative.

These will need to be conducted in a fair, consistent and unbiased way (no generous marking for pupils who are known to work hard, no previews of what the questions might look like, good moderation) and will then need to be communicated to all stakeholders in a meaningful but straightforward way which does not overstate the accuracy of the assessment.

Formative assessment will be frequent but summative will occur twice a year

There are many times when we wish to use assessment quite instrumentally – not to measure performance but to prompt a class or a pupil to behave in a particular way. For example, we assess a pupil’s knowledge of vocabulary to induce them to spend time learning it and to give some additional practice in retrieving that knowledge. We might end a lesson with a quiz to encourage groups to share their learning from recent lessons and so iron out any misconceptions.

None of these forms of assessment really gives us any reliable indication of an individual’s fluency in the key constructs we are trying to teach. These are formative applications of frequent, low stakes, informal assessment.

We should not normally be using this sort of information to make judgements about whether a teacher’s approach is currently effective, whether our disadvantaged pupils are on track to perform well or whether a particular pupil is in the right set.

We have therefore decided that we will reserve some high quality assessments for this type of purpose, and that we will only do this as often as is actually helpful and sustainable.

We think that the best frequency of this summative assessment is about twice a year: frequent enough to inform strategic decisions at many different levels, yet not so frequent that the considerable work that goes into good quality assessment is wasted by having too little impact.

This summative assessment can tell the pupil if they are working hard enough, the
parent if their child needs more help, the teacher if their approach is working, and the school leader if they have got the right groupings with the right teachers teaching the right curriculum.

Making summative assessments meaningful without levels or grades
In a later article I will describe simple statistical approaches that enable us to analyse performances in assessments without necessarily needing assessment criteria or a level or grading scale. Using these fairly simple approaches we can:

- process raw assessment data in a way that helps us to judge how pupils and groups of pupils are performing
- enable pupils to compare their own performances across different times and different subjects: this is ipsative assessment designed to encourage pupils to reflect on their own performance rather than comparing their performance to others
- aggregate assessment results over time to get an increasingly reliable view of a pupil’s overall performance and likely future performance in an external examination
- compare different information (KS1 assessment, Key Stage 2 assessment, CATs test, examination results) on the same scale in order to spot discrepancies and trends.

The basic process is to:

1. administer a good quality assessment that validly and reliably assesses some important aspect of the construct you are trying to measure
2. put assessment results onto a Cohort Standardised Scale that means something to stakeholders and motivates pupils to continue to work hard
3. analyse those results in a useful way to inform future action.

First write a good assessment
Any of these approaches first requires a well written assessment which validly and reliably assesses what has been taught and outputs a number like a percentage. One way to do this is to write a good test or set an extended writing question and arrange with colleagues to mark it in a consistent, unbiased way. There are a couple of potential flaws here.

1. This is likely to be a compensation based test, in which marks gained in one question compensate for marks lost in a different section. This is ultimately inevitable given the way summative, terminal assessments currently work. It limits the diagnostic potential of the data generated by the assessment but careful assessment design and clarity about the purpose of the assessment (e.g. are we measuring reading comprehension, or writing ability?) can minimise the downsides of compensation based assessment.

2. How do you mark a piece of writing without first agreeing criteria or bandings? Actually there is a rather neat answer to this that not only improves the accuracy of marking but also speeds up the process considerably: comparative assessment. The idea is explained simply and clearly at nomoremarking.com. By replacing criteria with a clear idea of the qualities you are looking for writing can be quickly and impartially compared by a group of teachers and a very accurate rank ordering established. This approach also allows for a much more subtle approach to assessment which digs deeper into children’s understanding: rather than setting children problems with negative numbers you can ask them to write about their understanding of negative numbers. This is an approach which will seem odd to many mathematics teachers, but one which has been successfully trialled.

Put your marks on a Cohort Standardised Scale
The aim here is to take the messy output of a real assessment and tidy it up so that it can be compared to other information you already know about a pupil. By using what we already know about a whole cohort as part of a simple transformation of the data we can produce a score on a standardised scale which effectively removes the variation in difficulty across different assessments. A detailed description of the mechanics of this process is given in the next article in this series.

Analyse results in a useful way to inform future action
The key thing here is to ensure that the results of summative assessments prompt useful reflection about the effectiveness of the approach. The problem with our existing assessments is that the teacher judgement ‘fudge factor’, the variability in marking standards and the difficulty of comparing and aggregating performance in different assessments over time makes it harder to see groups diverging in their performance. If, for example, our disadvantaged pupils are progressively worsening in their English performance over time then we need to know that and root out the differences in their educational experiences that are producing that change. More on how you can do this in the next article in this series.

See much more on effective assessment without levels at my.optimus-education.com/formative-assessment
The science of reading: how can we teach pupils who struggle to read?

Teachers are often not entirely familiar with the skills needed for pupils to be effective readers, or how they can teach them in the classroom. JO FACER outlines what you should know.

Teachers, parents and school leaders up and down the country are rarely united in a single aim, with the possible exception of reading. We all want our pupils to read more, and to love reading. Everybody I've met has taken for granted that pupils must read fluently; they have also accepted that the more a pupil reads, the more likely it is that they will learn. Where we can diverge, though, is in our methods.

The science of reading

Daniel Willingham, in Raising Kids Who Read, describes the three stages of creating a reader.

First, pupils need to be able to decode: to understand how the letters they read relate to sounds which are made. Then, they need to be able to comprehend what they read: understand that those letters and sounds denote objects and ideas which link together to convey thoughts. Finally, the reader must read fluently: they must read a wide range of texts with ease and expression. Reading needs to be taught in exactly that order: we cannot expect fluency from poor decoders or those who little understand what they read.

There are, sadly, too many pupils who arrive in our secondary schools unable to decode. The new KS1 phonics check should help this issue, but the next few years for secondary teachers will continue to present the challenge of children who cannot decode. We would be fooling ourselves to believe that 100% of all children will eventually come into Year 7 being able to decode, not least in local authorities with high numbers of new arrivals.

Ruth Miskin's Fresh Start programme is the best rated I have come across for enabling pupils' phonic awareness.

Following the challenge of decoding is the challenge of comprehension, which is not as simple as knowing that 'cat' denotes a furry creature with four legs and a tail. We also must contend with what Willingham calls the 'inference gap.'

As expert readers, we are often unaware of the complexity of texts for novice readers. Willingham gives the following example: 'Trisha spilled her coffee. Dan jumped up from his chair to fetch a cloth.' To the expert reader, the meaning of this sentence is clear. But look again: nowhere does it explicitly link the fetching of the cloth to the spilling of coffee. That is an inference we have made, based not only on our experience of being around multiple spills and the associated social norms, but also based on our accumulated experience of reading countless complex texts, all of which require similar inference leaps as standard.

In Doug Lemov's Reading Reconsidered he advocates in particular pausing on pronouns in lengthy sentences and saying to the class: 'who does "him" refer to in this sentence? "It"?' The results are very surprising – even my most able Year 7s frequently make mistakes, opening up a clear gap in understanding we often

The process of creating a reader

- **Decoding**
- **Comprehension**
- **Fluency**
skip over in our lessons.

In teaching pupils to become fluent readers, we need to expose them to a breadth of language. There are three tiers of vocabulary: tier 1 vocabulary is basic, tier 2 contains words which are high-frequency and includes words with multiple meanings, and tier 3 contains low frequency words which are often subject-specific. For our pupils to thrive in later life, they need to be reading tier 3 vocabulary as standard – and where better than in their subject lessons?

Reading in lessons
As noted by E.D. Hirsch when he visited Policy Exchange last September, knowledge predicates reading success. Hirsch spoke passionately against the chimera of ‘reading skills’, which he believed could be taught within a week.

What makes pupils better readers is not to work tirelessly at the mythic skill of reading, but rather to build up their knowledge. It is broad general knowledge that determines a pupil’s success as a reader. It is only within subject lessons that pupils can be exposed to tier 3, subject-specific vocabulary, which will open so many doors for their future. Our weakest readers come to us with weaker knowledge. It is that, and not ‘skill’, which makes them poor readers.

Hand in hand with this knowledge gap is the reading practice gap. Our weakest readers read less at home – this we take for granted. But the reality is that they also read less within our lessons.

We teachers, and I include myself in this, fear asking our weak pupils to read. They slow the pace of the lesson, for one thing; they require constant correction of pronunciation and pausing and skipping words, which feels like you are picking on them; and cruel older pupils can laugh and make fun of the poor reader, which is something we then have to sanction as a teacher. All of this leads us to rely instead on eagerly raised hands when calling for volunteers, and inevitably means our weakest readers read least.

Closing the reading gap
We must push ourselves beyond this fear that ends up with the weakest readers not reading. It is only frequent reading practice which will help these children, and yes, that may well encompass frequent correction.

Doug Lemov advocates a method which he calls ‘Control the Game’. He advises text to be read aloud, chieﬂy at ﬁrst by the teacher, who then ‘cold calls’ subsequent readers at random. This approach should ensure that all children are ready to ‘pick up’, are following along and therefore reading both silently and aloud. At ﬁrst, he advocates only asking pupils to read a small portion of text, and increase this as both their conﬁdence and reading ability blossoms.

In introducing ‘Control the Game’, I have found a few tweaks help with the transition. It is very hard for pupils who may have never been expected to read in class to suddenly adjust to reading every day. Preparing them beforehand (‘Camilla, I’m going to ask you to read at the top of the next page’) or even giving them a ‘get out clause’ (such as being able to ask to read the next sentence along) for the ﬁrst few sessions can assist your least conﬁdent readers.

Similarly, reading around the class initially sets up an expectation that all will read and allows pupils to mentally prepare. All these are crutches that are best disposed of as quickly as possible, to ensure pupils really are following along and reading every word, rather than relaxing and daydreaming once their turn is done.

Critically, we must ensure that this is an expectation not just in English lessons, but in all lessons across a school. We need to ask ourselves: what could pupils be reading in science? History? Geography? Art? Could they read explanations in maths, which a teacher then expands on and explains?

I have heard teachers before complain: ‘they don’t write like scientists!’ It is worth exploring in these cases just how much science such pupils have read. It is only by reading rigorous, subject-speciﬁc texts, and lots of them, that we can create ﬂuent readers. And only ﬂuent readers will be likely to enjoy reading in their own time.

We have a duty as educators to ensure that all of our pupils can read, and then that we provide the maximum amount of practice in reading. It is only by practising reading complex, subject-speciﬁc texts that our pupils will gain the required ﬂuency to become readers for life.
Getting CPD for EAL right

'New teachers are starting a journey, not being prepared, glazed and kiln baked by CPD to be career-ready.’ Elizabeth Holmes interviews DIANE LEEDHAM

Diane Leedham, English, literacy and EAL teacher and advisor, and all-round voice of sense and reason on education on Twitter, has clear ideas about helping children to learn and thrive. I caught up with her for a chat about getting CPD right amidst the pressures facing teachers now.

EH: It seems these are difficult times for teachers. Dissatisfaction and lack of professional learning opportunities are taking their toll.
DL: Yes, it does seem that there is a whole generation of teachers who feel they have been let down. And too often the CPD they are offered seems inadequate for their needs.

EH: Too many twilights?!
DL: When I’m asked to run “a twilight” for the whole school, particularly for EAL when that’s the only input available on the topic, it makes me sigh. It’s almost impossible to be relevant for everyone and keep the whole staff of a school on board. It’s far better to be based in a school for a period of time so that you can work on specific issues. Working with individuals and small groups of people, team teaching, team planning, helping setting priorities and other such collegiate collaborations can really help teachers to develop.

EH: When it comes to professional learning with regard to literacy and EAL, what’s going to help new teachers in particular?
DL: It’s important not to overload them with too much too soon. A few core research-informed theories and strategies with practical examples from the classroom work well, combined with teacher-initiated questions and next steps enquiries. This would be a much better approach. New teachers are starting a journey, not being prepared, glazed and kiln baked by CPD to be career-ready.

EH: Is there such an important point. This is not about identical teachers rolling off a production line.
DL: It is important to begin to develop core knowledge, for example about second language acquisition, so that teachers have a valid professional lens for observing and evaluating practice - whether their own or others. However, zone of proximal development applies to adults as much as to children. Individual teachers need to make connections with their prior experiences and go from there.

EH: Absolutely. And professional learning for the context in which teachers actually work is also key.
DL: Yes. We need to focus on individual children and the complexity of individual children’s needs for example through shadowing, case studies and so on. Teachers coming to schools in their twenties are often a long way away emotionally and psychologically from their childhood and teenage years. Parent career changers perhaps less so – I have certainly learned more about pupils from having my own children than from my memories of being at school. I think all teachers need regular opportunities to do pupil shadowing and shift their perspective. This is particularly important for EAL in order for people to understand multilingual experience.

EH: Support along the way is crucial, isn’t it?
DL: Partnerships and mentoring (including time for the mentor!) are so important. Teachers need a supported professional framework arrangement over time to raise questions, see how things go, report back, reframe and rejoin so that development spirals and bunny hops from lesson to lesson.

EH: Partnership planning over time is particularly good, I think. It’s very motivating for a new teacher with a fresh approach to suggest something and have the more experienced teacher say ‘yes, I love that - I’ll do what you do!’ That’s a real partnership but does mean the mentor needs coaching too. I think this aspect is often overlooked.

DL: Of course the experienced teacher should be modelling and coaching successful practice, hopefully drawing attention to its evidence base too, but some partnerships turn into ‘let’s plan how you can pretend to be me’ , which is clearly not so constructive.

EH: Finally, about Twitter. Is it a useful tool for CPD?
DL: Yes, definitely, providing you curate your own timeline. You don’t have to persevere with individuals if they seem deliberately disruptive and draining, but collaboration and debate in the spirit of learning is very positive. Not to mention the jokes!

Want to hear more from Diane? Catch up on her webinar on developing an effective EAL policy: my.optimus-education.com/node/15366
What’s in this month’s SEN and Safeguarding section?

How many times have you felt buried alive by piles of SEND case studies for Ofsted? You never will be again once you read Christopher Robertson’s myth busting about their necessity. In the safeguarding and pastoral section we’re continuing our focus on the Prevent duty: Debs Ward examines how to implement the duty in a special school and Abi Clay explores how essential an understanding of cultic abuse is to protecting pupils from radicalisation. Behaviour continues to be one of the toughest topics to get right in your school. Steve Baker takes a thorough look at how schools can help their staff to be assertive and why this can be of huge benefit to pupils. One of the stars of our Protecting Children Update conference in February was Jasvinder Sanghera, who presented a powerful keynote on her experiences of forced marriage – I describe what I took away from her inspirational talk.

Evie Prysor-Jones, Content Lead

Contributors in this issue

Steve Baker is a freelance behaviour and attendance consultant based in West Yorkshire, following a career in drama teaching, with local authorities and the National Strategies.

Evie Prysor-Jones is content lead at Optimus Education, focusing on SEN, safeguarding and pastoral care. She previously taught SRE at a youth centre in Leeds.

Christopher Robertson was previously a lecturer in inclusive and special education at the University of Birmingham. He now acts as advisor to the DfE and is a leading figure in the SEND community.

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

Top tweets from @OptimusSEND

Is Prevent damaging safeguarding? Without a whole-school ethos, personal reactions can get in the way. http://buff.ly/1pLtL2s
SENCOs, feeling stressed by lack of time? Take back your time! Free ebook #TakeTimeSENCO http://buff.ly/1V9DM2x
Don’t panic about #e-safety, you’ve actually learnt a lot! Blog from @esafetyadviser http://buff.ly/1nKMHN3

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.
Do SENCOs need to provide pupil case studies to Ofsted? **CHRISTOPHER ROBERTSON** clarifies schools’ responsibilities under the common inspection framework

### Recent discussion

Recent discussion on the SENCO-Forum – an online mailing group for special educational needs co-ordinators – has highlighted a concern about the use of pupil case studies during school inspections.

Some SENCOs have indicated that they consider the preparation of case studies for a representative ‘sample’ of pupils with special educational needs and/or disabilities as essential in the lead up to an inspection. The main reason for this appears to be that there is a perception that Ofsted inspectors will expect to be able to scrutinise and discuss these case studies with SENCOs during inspection visits.

This perspective is well founded in a tradition of ‘good practice’. During the past decade the use of case studies to explain pupil achievement qualitatively as well as through the use of raw, quantitative data has become commonplace.

Inspectors working in this tradition have often discussed a case study sample of five or six pupils with a school’s SENCO, and used this information as a source of evidence when making a judgement about the quality of SEN(D) provision.

Both SENCOs and inspectors appeared to share an expectation that case studies would be available during a school inspection and that not having any for review could lead to a negative judgement about SEND provision.

### A different view

Other SENCOs, and some professional advisers, have argued that there is no Ofsted expectation that case studies should be prepared in advance just for Ofsted. Instead, schools and SENCOs should just ensure that their system for identifying, assessing and supporting pupils with special educational needs and/or disabilities is effective in enabling them to achieve good learning outcomes. This perspective appears to reflect changes to the school inspection approach that are linked to the Ofsted and Department for Education joint commitment to reducing unnecessary administrative burdens on schools and teachers. The ‘new’ model of inspection (Ofsted, 2015a) is unequivocal (pp. 10-12, section 28) in setting out: ‘[T]he requirements of Ofsted and to dispel myths about inspection that can result in unnecessary workloads in schools.’

Further confirmation of this view can be found in the ‘busting myths’ section of Ofsted’s Developments in Education Inspection blog launched in 2015 (Ofsted, 2015b) and additional online guidance (Ofsted, 2016).

### Who’s right?

Whilst the ‘no need for case studies’ view is in the ascendancy – and for good reason – it is understandable that SENCOs may not wish to risk relying on their SEN(D) identification, assessment and support system alone during an inspection. This is because of a concern about variations in inspection practice and the possibility that some inspectors will still expect to see case studies as essential evidence.

With this concern in mind I decided to ask Ofsted ‘central’ via its blog comment facility for a definitive opinion on case study expectations and requirements. Here is the response I received:

‘There is no expectation that SENCOs should prepare case studies in advance just for Ofsted. If they are preparing them at all it should be to help them reflect on their own practice and hopefully be useful for their own evaluations/SEF. For example, they may be useful for governors to help evaluate the provision or used to inform pupils’ review meetings. Inspectors would only look at them to help with identified lines of enquiry and may prefer to simply look at a pupil’s file, chosen at random, rather than a pre-prepared ‘set-piece’ with no supporting evidence.’

(Ofsted Communications Team, 05/02/2016)

Ofsted does not expect to review SEND case studies during an inspection – this is clear advice. Nor does it ‘...expect performance and pupil-tracking information to be presented in a particular format. Such information should be provided to inspectors in the format that the school would ordinarily use to monitor the progress of pupils in that school.’

(Ofsted 2015a, p.12, section 28)
In other words, school leaders and SENCOs should decide what methods of identification, assessment, teaching and record-keeping are most appropriate and be able to justify these.

**Good practice**
Given the flexibility that Ofsted allows I am wary of advocating a model of ‘best practice’ with regard to the ways that a school can make effective provision for pupils with special educational needs and/or disabilities. Rather, I think we need to acknowledge that good practice in identification, assessment, teaching and record keeping can take many forms. What matters is that provision improves outcomes. For some schools and SENCOs using case studies may be a helpful part of this process. For example, they may:

- Explain pupil needs and performance to school leaders and governors
- Illustrate the range and complexity of education, health and social care support for individual pupils or designated pupil groups
- Provide staff – through professional development activities – with detailed information that can be used to understand key aspects of learning support and how it might be enhanced.

If case studies are useful in these, or other ways, then they are likely to be worth sharing – as part of an evidence base – with inspectors. But their primary purpose is not to satisfy non-existent Ofsted requirements!

**Sting in the tail**
At the risk of confusing SENCOs and school leaders, I think it is worth noting that there is a reference, only one, to case studies in the School Inspection Handbook (Ofsted, 2015, p.51, section 167). When gathering evidence about personal development, behaviour and welfare:

> ‘Inspectors evaluate the experience of particular individuals and groups, such as pupils for whom referrals have been made to the local authority (checking how the referral was made and the thoroughness of the follow-up), disabled pupils and those who have special educational needs, looked after children, those with medical needs and those with mental health needs. Inspectors must look at a small sample of case studies about the experience of these pupils.’

Does this contradict the advice at the beginning of the Ofsted Handbook and that given to me via the Ofsted blog? I don’t think so. What is being referred to here is important, but procedural. The required case study information can be found in referral records, notes of decision-making and the use of follow-up triggers when action has not been taken. Inspectors will just need to be signposted to it.

A final point of concern that I have is that not all school inspectors will have been ‘brought up to speed’ with 2015 guidance on case studies. Some may still be playing catch up and want to see substantive pupil case studies. In these instances school leaders and SENCOs should remind an inspection team of its own ‘clarification for schools’ pre-inspection guidance in its own School Inspection Handbook.

**References**
Streamline your SEND paperwork

ANITA DEVI'S new training day will see SENCOs' desks decluttered and their minds back on loving their job

When you're not sure what to do, you make a list. If it's a bit more complex than that you might make a spreadsheet, or, if not complex at all sometimes a Post-it will do. You want all the information about a pupil in one place so you make a pupil profile. But you have 60 children that need pupil profiles – better find a ring binder to keep them nice and tidy. Then there is performance data, provision mapping, that letter you need to send to that pupil's parents, about a million letters from the local authority and now, just as you’ve got everything into neat piles, someone opens the door and the hurricane that is an EHC plan application sets you right back at square one.

Where is square one? Usually it's sitting at your desk well after your working hours, tired and stressed and wondering when the digital age is going to happen to paperwork.

Looking over the paperwork parapet

Aside from the papercuts, ink stained hands and lack of space due to endless ring binders, the huge amount of paperwork that you as SENCOs have to wade through can have serious and significant consequences on your wellbeing and ability to do your job. It's extremely rare that I ask a SENCO why they chose their current career and they reply 'Oh, I just love forms!' More commonly it is because of the pupils, because they care about education and they like working in a team. But with the huge amounts of forms to fill in and boxes to tick, we're hearing more and more from SENCOs that they do not have the time they would like to dedicate to their pupils.

Reducing SEND paperwork: training day

If this is all sounding a bit too familiar then firstly, remember you’re not alone in this, and secondly, know that there are resources available to help you.

Recently, we published an ebook, Take Time, where we presented SENCOs with tried and tested techniques to take back control of their time and get back to what they enjoy about their job. See my.optimus-education.com/TakeTime

Anita Devi, author of Take Time, is running a training day where you can learn how to review, declutter and slim down your SEND paperwork. If you attend you will need to bring samples of setting-based paperwork, your SEN Support Register and any strategic action plans (e-copy or hard copy). You will be surveyed in advance of the training day to ensure the content is appropriately tailored to your individual needs.

It's not just for SENCOs. Directors of inclusion and inclusion managers would also benefit from attending. Places are limited so secure your space soon!

This year our aim is to help SENCOs rediscover your love of your job. We know it's there, but it's been buried beneath paperwork, workloads and restricted by time. This year is the year to get it back.

Date: 7th July 2016
Location: Leadership and Training Centre, Shenley Brook End School, Walbank Grove, Shenley Brook End, Milton Keynes, MK5 7TZ
Times: Registration will run from 09:30-10:00. The training day will run from 10:00 until 15:00. Lunch will be provided.
Price: Delegate rate: £199 + VAT
Member rate: £150 + VAT
Unlimited CPD: Free*

Link to register: www.oeconferences.com/SENDpaperwork

*Unlimited CPD members are entitled to book a place for one delegate per conference. Unlimited CPD members can purchase additional delegate places at a discount of 50% off the standard price. All conference places are subject to availability and bookings are taken on a first come, first served basis.
From bell to mountain curves: assessment for aspiration and inclusion

ANITA DEVI takes a look at the hot topic of assessment from the perspective of children and young people with dual multiple exceptionality (DME)

We are passed the mid-year point of the academic year. Some schools have shifted their reporting systems to mid-year reporting, thereby making target setting within an academic year more meaningful and co-productive. Others are beginning to consider end-of-year reporting timelines. For primary schools and secondary schools there are a number of aspects they need to consider in a changing system. Life without levels can indeed lead to ‘learning without limits’ and greater autonomy in schools and classrooms; however, change is not an overnight process in education and it requires us to drill deeper into our understanding of assessment.

As a teacher, and in relation to assessment, I see myself undertaking three different roles: chef, guest and judge. Each employs a different focus on assessment approaches and (in addition to observation and learner voice) provides me with a toolkit of seven generic types of assessment; as highlighted in the table below.

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<th>Role</th>
<th>Chef</th>
<th>Guest</th>
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<tr>
<td>Assessment for Learning</td>
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<td>Assessment about Learning</td>
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What this means

This involves continual tasting and amending, as part of the journey of learning.

This model matches the ‘Come Dine with Me’ approach. The meal is evaluated by performance on the day.

This is a MasterChef model, where specialist expertise enables us to distil core ingredients and processes.

Types of assessment

Formative Dynamic Synoptic Ipsative

Summative

Diagnostic Criterion-referenced

The Problem

Some aspects of our assessment system, however, are predicated on a bell curve model. Indeed, the Assessment Principles published in 2014 also seem to suggest effective assessment systems: ‘Differentiate attainment between pupils of different abilities, giving early recognition of pupils who are falling behind and those who are excelling.’

However, what if we have children and young people who have special educational need and/or disability (SEND), but also excel in some areas? This is what we refer to in the UK as ‘dual multiple exceptionality’ (DME), though it is not formally noted in any of the SEND 2014 reforms documentation. In the USA, this is known as ‘twice-exceptional’ or 2E. In effect, we have to consider the supposition that high achievement is NOT always synonymous with high ability.

Defining high ability

So this raises the question, what is high ability? Like with ‘inclusion’, the definition is problematic, with different organisations and settings using different benchmarks. There is also much debate as to whether the terminology ‘high ability’, ‘more-able’ or ‘gifted’ should be used. In the early 1990s, The Columbus Group started to consider the approach of asynchronous development:

Giftedness is asynchronous development in which advanced cognitive abilities and heightened intensity combine to create inner experiences and awareness that are qualitatively different from the norm. This asynchrony increases with higher intellectual capacity. The uniqueness of the gifted renders them particularly vulnerable and requires modifications in parenting, teaching and counselling in order for them to develop optimally. (The Columbus Group, 1991)

This, by far, has provided us with the most effective approach to meeting the needs of children who have DME. It caters for a holistic approach to child development, as well as recognising the partnership between educators and families. In effect, it resonates with how SEN is defined in the 0-25 SEND Code of Practice (2014, p15).

Another key aspect of the definition is recognising the inner
experiences and challenges, which could result in mental health problems and therefore advocates counselling.

**Identification**

DME is what we would consider to be a ‘low incidence, high level need’. Its complexity is often confounded when abilities mask learning difficulties and learning difficulties often mask high abilities. A holistic approach needs to be taken to identification – combining informal and formal assessments. In other words, the process involves looking at life skills, social skills, language, theory of mind, literacy, memory, parents and schools’ expectations/aspirations and background.

The key is considering development milestones in relation to their peers. This is true for both their SEND needs and higher abilities. In schools, this can be undertaken through tasks, observations, questionnaires, interviews, play, academic assessments, as well as standardised assessments such as the WISC-JV (WISC-V due for release in December 2016). The Strengths and Difficulties Questionnaire (SDQ) is also another effective tool. Co-productive dialogues and the use of person-centred approaches facilitate the gathering of information to deepen understanding and strengthen identification.

Where accurate identification has taken place, the challenge is often balancing interventions to support the difficulty or the high ability. There are no easy solutions, but it is important for teachers, TAs and SENCOs to be aware of the possibility of DME and consider what can be done in terms of support and as part of the graduated approach cycle.

**Supporting and enabling children with DME**

The report ‘What makes great teaching?’ (2014) by The Sutton Trust identified two elements of classroom practice that hold the strongest evidence for improving pupil outcomes:

1. teachers understanding the learner in relation to the subject and how the student identifies misconceptions i.e. teacher - pupil relationship
2. effective questioning and use of assessment to support point 1 above.

Graphically the interplay between these two factors can be represented as follows:

This is a good place to start with children who have DME.

When considering additional interventions, use an outcomes grid to identify key areas of focus and then consider what interventions to put in place. It is unhealthy and counter-productive to a child or young person to be out of class too often in a week. They are missing out on key learning opportunities and peer interactions. In the past, non-core subject teaching time has often been used to deliver interventions, which has meant children missing out on art, music and other subjects in which they may demonstrate higher ability. The recent focus on making the best use of teaching assistants by the Education Endowment Foundation is a vital piece of work that supports pupils with DME. Some researchers (Silverman 1989) argue that problems manifest in the school because at home there is freedom to

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**Case studies**

These two case studies illustrate some of the challenges and complexities of DME

**Dan**

Meet Dan: a child with autism – his bell curve profile is given below. From a young age Dan demonstrated high comprehension ability and mathematical skills. However, his behaviour, social communication difficulties and emotional outbursts in school left his parents with no alternative but to place him in an independent setting. His academic abilities continued to excel and this created an even wider gap between him and his peers. Dan was encouraged to pursue his academic interests. Simultaneously, out of school an 18-month management training programme was set up to deal with behaviours such as noncompliance, impulsivity, anger outbursts and anxiety.

Unfortunately, whilst the management training had some impact, his behaviour in school deteriorated but academically he was accelerating, thus increasing the tension. Dan’s parents moved Dan to a mainstream school and the new pace of expectations appeared to have a calming effect. Regular dialogue between school and home helped and Dan was placed on medication for his anxiety.

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**Source**: PIP-2 Belin-Blank Center for Gifted Education and Talent Development (Dan/ASD)
pursue personal hobbies and interests. This certainly supports the case for both differentiated and personalised approaches to curriculum delivery (page 25 1.24 of The 0-25 SEND Code for Practice 2014).

Another example in the UK, where I believe effective support for DME has been put in place, is the use of Lego therapy. The key is understanding the thinking schema of each child – their own unique thinking thread. To read more about how Lego can support creativity, take a look at Anita’s article on the Knowledge Centre at my.optimus-education.com/node/13294.

Role models not heroes!
A few years ago when I was part of a local authority inspection team, I asked a few secondary students about what they were learning in a DT lesson. Please note the emphasis of my question was on learning NOT doing. One lad piped up and said, ‘I am a dunce Miss, I’ve got dyslexia’. I took him over to a computer and we looked up famous dyslexics together. He was amazed to see so many actors and actresses had dyslexia and still succeeded in learning their lines. These famous icons became his role models, but not his heroes. He still had to figure out what his aspirational purpose was and how he was going to achieve it. This lad and I then went on to talk about his aspirations.

So is it time to change the bell curve?
In his blog ‘The Mountain Curve vs. The Bell Curve’ (2011) Niall Cooke (@mistercooke) suggests it is. He proposes instead of the bell curve we consider the mountain curve, which places every student in the success zone – including children and young people with DME.

I agree with the principle behind the mountain curve – everyone succeeding – but I think the solution also lies in HOW we use the bell curve. Too often it is used to represent a cohort or groups of children. In the example below a single bell curve is used to look at the different facets of ONE child and thereby offers a much more holistic approach to assessment. As a SEN

Mandy
Mandy has a specific learning difficulty, but is also very able. Early identification however, did not lead to the right support being put in place. Mandy missed out on fine-motor co-ordination intervention support and two years later her difficulties, now so severe, were recognised as a disability. Mandy continued to excel academically. At school, on-going use of a computer for written work, provision of extra time for written assignments and reduction in the length of handwritten assignments was encouraged. Simultaneously, Mandy was required to complete higher level thinking tasks to demonstrate deeper understanding. Voice recognition software was also used on some occasions.

Source: PIP-2 Belin-Blank Center for Gifted Education and Talent Development (Mandy/SpLD)

Reflective questions for school leaders
- Are you aware of any children or young people in your setting who have DME? What provision is in place for them?
- Do you have a broad range of in-house assessments that enable teachers to be the chef, guest or judge?
- How could you employ a single bell curve approach per pupil? What would be the advantages or challenges?
- What’s the plan?
Training activity: identifying SEND need

Train your staff to be confident when identifying pupils with SEN with this short group session

Just because a pupil is not achieving at the same level as his or her peers doesn't mean you immediately think they have SEN. Or, it may be the first thing you think of. It’s incredibly important to make sure your assumptions are challenged and checked so that pupils can receive the provision they need. By doing this training session with your classroom teachers you can ensure it’s not just you, the SENCO, who is confident at spotting the signs of SEN.

Aims and outcomes
Upon completing this activity, participants will be able to:
• understand and utilise a variety of different ways of identifying SEN needs in the classroom
• clarify and decipher the difference between SEN and underachievement
• identify different ways of removing barriers to learning.

Participants
• Teachers
• SLT
• Teaching assistants

This is an awareness raising session to help staff think about their roles and responsibilities. The session can be used with any number of staff but a minimum of 10 is recommended to enable discussion. It can be delivered for whole staff training sessions of 100+.

Resources
• Copies of the list of signs to look out for in the box on this page.
• Copies of the case study on the next page.

Timing
45-60 minutes depending on discussion time and number of participants.

Step 1: SEN and underachievement (15 minutes)
By the end of this activity participants will:
• understand different ways of identifying SEN needs in the classroom
• understand the difference between SEN and underachievement
• know when to ask the SENCO for help.

Running the training session
1. Ask participants the following question: what do you believe SEN need is and how does this differ from underachievement?
2. Ask participants to discuss and write down in note form what they understand at present by the terms SEN and underachievement.

List of signs to look out for

- Inconsistent pattern of achievement in schoolwork subjects
- Inconsistent patterns of achievement within a subject area
- Discrepancy between ability and achievements, with ability much higher
- Lack of concentration
- Daydreaming
- Clowning and other work-avoidance strategies
- Poor study skills
- Poor study habits
- Non-completion or avoidance of assignments
- Refusal to write anything down
- Other activity or restlessness
- Overassertive and aggressive or over-submissive and timid social behaviour
- Inability to form and maintain social relationships with peers
- Inability to deal with failures
- Avoidance of success
- Lack of insight about self and others
- Poor literacy skills
- Endless talking, avoiding doing
- Membership of stereotyped 'minority' group e.g. not Caucasian, male, middle class
- Having fear of failure and/or success
- Being unmotivated to achieve in school despite having high self-concept
- Having a lack of clear personal goals and values
- Blaming others and acts of chance

Underachievement and how to recognise it in able pupils, University of Glasgow

3. Ask participants to review the list of signs in the box below. If five or more are present underachievement might be considered.
4. Next, take a look at the official definition of SEND from the 0-25 SEND Code of Practice (see above).

5. Explain that the key to understanding the difference between SEN and underachievement is the cause of the barrier to learning. Highlight also that assessment is needed to clearly decipher between the two.

6. Allow time to run through what makes diagnosing so difficult.
   - The difference must be greater than others of the same age nationally.
   - It shouldn’t be the result of poor teaching.
   - It shouldn’t be the result of patchy schooling – frequent absences.
   - It shouldn’t be EAL.

7. Ask participants to discuss in pairs any ways that they assess pupils at present; elicit feedback from the group. Some examples might be formative assessment, summative testing including specific tests, working with the pupil in lessons, book scrutiny, observations of the pupil.

8. Suggest these other ideas if not yet mentioned: checklists, conversations with the pupil, conversations with the parent, comparison to national data, comparison to historical data in school, referral to outside agencies.

Step 2: Application of knowledge so far (10 minutes)
1. Ask participants to read the case study below and discuss in small groups what they think. Take feedback from each group.

Case study
Jane is in Year 8. She reads well but has poor understanding of what she has read. Her reading score is average and she’s also disorganised. Her spelling score is above average. Her CATs scores are within the average, but she’s working at level 3 in Year 8 in your subject.

2. Use the questions below to explain what extra information could be thought about and what strategies could be put in place.
   - What else would you need to know?
   - Do you think he has SEND or is he underachieving? Why?

3. Once underachievement has been identified, a review is needed of certain areas.

   Personalised learning – Did we give enough help and guidance for this pupil’s learning strengths and weaknesses?

   Quality-first teaching – Was the teaching good enough? Did we explain well? Did we use resources available to us?

   Differentiation – How did we remove barriers to the learning – did we consider using a visual prompt, word banks, sentence starters, scribe, computer or reader? Was the content delivered in too fast or slow a pace?

   Environment for learning – Was it quiet enough for the pupils? Was the room too hot or too cold?

Only when we get these elements right and the pupil still makes no progress or far too little progress should we consider SEN.

‘Only when we get these elements right and the pupil still makes no progress or far too little progress should we consider SEN’

Download the full training session from my.optimus.com/in-house-training

Definition of SEND
A child or young person has SEN if they have a learning difficulty or disability which calls for special educational provision to be made for him or her.

A child of compulsory school age has a learning difficulty or disability if he or she:
- has a significantly greater difficulty in learning than the majority of others of the same age
- has a disability which prevents or hinders him or her from making use of educational facilities of a kind generally provided for others of the same age in mainstream schools or mainstream post-16 institutions.

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‘Only when we get these elements right and the pupil still makes no progress or far too little progress should we consider SEN’
Safeguarding pupils with SEN against extremism

In this expert answer, DEBS WARD explains how to go about training staff and making sure your school is a safe space for pupils with SEN.

Question
I have been asked to coordinate a group of SEN schools to improve their practice around supporting their pupils from being drawn into radicalisation and extremism. I lead on the Prevent duty and have already supported the schools to be duty compliant. However, I am not an expert in SEN and have a few questions.

What special considerations do SEN schools need to make in regards to the Prevent duty? How can schools support pupils? How can schools support staff to recognise signs? What else can schools do?

Answer
What special considerations do SEN schools need to make in regards to the Prevent duty? Many SEN schools have a high turnover of both staff and support staff which could mean that signs are missed, the jigsaw of pieces showing a picture over time is incomplete and vital referrals are not made.

The difficulty in communication that many of the children and young people have in these schools means that they are unable to make disclosures or share clues to their thoughts, feelings and views. It is important for SEN schools to have clear policies, procedures and pathways for seeking advice and support if they have a concern for a child, young person or family.

Staff need to know their children well, making sure they are observant and attentive to the finer detail of the child’s behaviour and personality in order to pick up on any changes which may occur. These need to be documented to help build up the all-important ‘picture over time’.

How can schools support pupils? Pupils need to be supported through the creation of a ‘listening environment’ where all staff are encouraged to make time to listen. It can be very difficult in a SEN school as the children often have severe speech, language and communication difficulties but providing them with visual pictures and alternative communication prompts can help them to share their thoughts and feelings; this may also be done through Makaton and BSL.

Pupils can be supported through helping them to build resilience and teaching them to have the confidence and courage to tell someone they trust if they feel they are being harmed or going to be harmed. In a SEN school, this is particularly challenging but providing a designated ‘safe’ area where children know they can go if they are worried is a great start.

Try to meet the families of the children in school and get to know them well. This is particularly difficult for SEN schools as many of the children get transported into school by local authority transport providers, but meeting families could be done through school events such as parents coffee mornings, bring a mum/dad to lunch day and other such events. These events may give a glimpse into life at home for the child and possible views to which they may be exposed.

How can schools support staff to recognise the signs? Quality training is key. I cannot emphasise how important training is for all staff within SEN schools, not just the designated teacher or the Prevent lead.

We must remember that teaching assistants in SEN schools know their children very well and are often the people who have the best understanding of the child’s communication methods, their moods, how they display their anxieties and their patterns of self-regulation. Many of the teaching assistants deliver a wide range of personal care to children within SEN schools and are best placed to notice any ‘unusual’ or newly acquired marks, significant change in the style of clothing, change in attitude towards themselves or their peers and most importantly the language they are using e.g. talking about social media or language around supporting extremist ideologies or groups.

Staff need to know what to do if they have a concern about the change in a child which may be linked to radicalisation. They may see or hear something which concerns them and it is important for them to be clear about the pathway they take when they have a concern. This should be covered in training and outlined in the school’s safeguarding policies and procedures.

To read the full answer go to my.optimus-education.com/node/15462
Cultic abuse and its part in radicalisation

The Prevent duty puts a requirement on schools to protect pupils from radicalisation, but by ignoring the cultic elements of extremism, ABI CLAY argues, we are undermining our safeguarding efforts.

There are few, if any, who would dispute that radicalisation of children and young people is a form of abuse. But those who work in safeguarding could be tackling this more effectively by recognising a disturbing but overlooked facet of this challenging issue.

Let us first ask these questions.

1. Is radicalisation effectively managed using our existing safeguarding approach?
2. Is radicalisation an issue which includes, but also goes beyond, the current safeguarding approach?

My answer to the first question is ‘yes, if’.

Yes, radicalisation can be effectively managed using our existing safeguarding approach. The skills and experience of those in the safeguarding sector are fantastic but, and this is where the ‘if’ comes in, we need to push the boundaries of our knowledge and be alert to new and different influencers. What I contend is that a change is needed to the accepted premise that radicalisation to violent extremism is purely another safeguarding issue, albeit of significant proportion.

Of course, there are many similarities, particularly with grooming for sexual exploitation, but the government is naïve by putting it into the same bracket and wrong to assume radicalisation can be responded to effectively using the same methods.

The similarity to child sexual exploitation

As I mentioned, child sexual exploitation (CSE) is the closest relation to radicalisation in the world of abuse and this, from the NSPCC, is key: ‘Child sexual exploitation is a hidden crime. Young people often trust their abuser and don’t understand that they’re being abused. They may depend on their abuser or be too scared to tell anyone what’s happening.’

This is where the commonalities with radicalisation lie. In the early stages of CSE grooming, the young person will not self-identify as a victim and will likely strongly dispute this proposition if it is put to them. However, when the relationship later becomes abusive and violent, they will begin to recognise that what is happening to them is not what they wanted or assumed would be the outcome of the relationship. By then their ability to escape may well be severely limited but, at some point, they will identify as a victim of abuse.

‘Very little reference is made to terrorist groups as cults and therefore the consideration of radicalisation as cultic abuse is rare’

Why we need to look at cultic abuse

There is another form of abuse that has been little discussed as part of the Prevent agenda but I believe it is time to shine a light on the striking similarity of radicalisation to cultic abuse.

Radicalisation is more closely aligned with this form of abuse than any other. As such, I feel it is imperative that the profession learn more about it to better inform our safeguarding processes.

Cultic abuse has had only marginal attention in the whole issue of radicalisation, and the requisite knowledge and experience in the safeguarding profession is patchy.

From research undertaken with Islamic State defectors (1), Peter Neumann acknowledges the ‘process of radicalisation and/or recruitment is complex and multi-faceted and consists of a variety of factors and influences such as grievance, beliefs, social dynamics and even chance.’

Jason Burke reported in The Guardian on a young woman, Maysa from Brussels, who had experienced radicalisation. Maysa’s mother speaks of her daughter being ‘brainwashed by extremists’ and Maysa herself reflects that: ‘I was totally radicalised. I was not thinking my own thoughts. I was not who I am.’

Brainwashing within this context sits well with my understanding of the process of radicalisation and the outcome of terrorist actions. From what we hear of known recent terrorists such as Isa Ibrahim, Nicky Reilly and Muhammed Emwazi, one thing they had in common is that the people they became bore no similarity to the people they once were. They all changed beyond recognition and undertook acts which would have seemed totally alien to their ‘former’ selves.

It would be naive to see this as a simple change of mind.

Continued ››
Cultic abuse and its part in radicalisation

following some discussions on the internet! I believe this is as a result of the complex process identified as cultic abuse.

Cultic abuse and terrorism

Anne Khodabandeh, who has nearly forty years of research and experience as an activist, campaigner, writer and practitioner, is established as a leading authority on cultic abuse and terrorism. Anne describes cultic abuse as:

'...the systematic and sustained application of an array of recognised techniques for psychological manipulation without the knowledge or informed consent of the victim (aka brainwashing), in order to effect a breach of a person’s psychological, emotional, intellectual and social integrity for the purposes of abuse, exploitation, slavery and/or pecuniary gain, and to so inhibit their critical faculties that they do not recognise their own predicament so that they may act in ways harmful to their best interests on instruction, by command or by neglect. Although there are similarities and overlap with other forms of coercive persuasion — such as grooming for sex and domestic violence for example — one of the defining characteristics of cultic abuse is the use of deception so that the victim is unaware of the extent of the exploitation they are suffering and sincerely believes they and their group are doing good.

Cults and terror (2016)

However, very little reference is made to terrorist groups as cults and therefore the consideration of radicalisation as cultic abuse is rare. Reference is made in the Counter Extremism Strategy and the Prevent Strategy to the relationship of cults to terrorist organisations but this is something that should be explored further in order to improve our understanding of the practice of cultic abuse as radicalisation.

When we hear about acts of terror committed by people in the name of any ideology, it is difficult to see the perpetrator as a possible victim of abuse. The notion of a victim being at the centre of cultic abuse is tricky when the person involved would not self-identify as a victim. What they see themselves doing is admirable, important, worthy and certainly not something they need protecting from. We are, however, charged with compliance with the Prevent duty and as such we have to do everything we can to prevent radicalisation and, ultimately, stop people from going on to commit acts of terror.

Implications for the education sector

From my experience of supporting professionals within the education sector, I have heard first-hand an overwhelming plea for help in improving understanding and increasing confidence in their abilities to identify and prevent young people from being radicalised.

The government’s Prevent duty guidance clearly places preventing radicalisation within safeguarding. With my experience of supporting schools, colleges and universities with their understanding and compliance with the duty, it’s clear the education sector rightly sees it as part of its responsibilities.

However, we run the risk of being accused of complacency if we believe the issue of cultic abuse will slot into existing practice, as is expected with other emerging safeguarding problems such as female genital mutilation (FGM) and spirit abuse (where an abuser believes someone to be demonically possessed). With any new element adding to the radicalisation mix, it is crucial that training is available for the professionals involved, including identification of signs and indicators of that specific type of abuse.

Action is needed now to also promote a wider awareness and understanding of cultic abuse to enable the safeguarding profession to recalibrate its efforts to tackle radicalisation.

Abigail Clay is a nationally respected expert in safeguarding and the government’s Prevent strategy. A consultant, trainer and speaker, she has more than 30 years’ experience within the school/FE/HE sector, much of it gained in Leeds and Bradford in West Yorkshire, and is a Fellow of the Higher Education Academy.

References

(1) International Centre For The Study of Radicalisation and Political Violence, Victims, Perpetrators, Assets: the Narratives of Islamic State Defectors, Peter R Neumann

Child Protection in Education conference

With the new Keeping Children Safe in Education guidance on the horizon and uncertainty surrounding the Prevent Duty and your legal obligations, our annual Child Protection in Education conference will ensure you remain fully compliant.

Over 600 senior leaders responsible for safeguarding attended last year and this year 15 targeted workshops will address your key concerns.

Find out more and secure your place at www.oconferences.com/childprotection
The raw truth about forced marriage

EVELYN PRYSOR-JONES reflects on the lessons she learned from a true story of forced marriage

At our Protecting Children Update conference, Jasvinder Sanghera gave a powerful keynote on her escape from a forced marriage. There are three points that are vital pieces of knowledge for all of us.

1. Family as perpetrators
One of the reasons forced marriage is an under-reported and hidden form of abuse, according to Jasvinder, is that it is very hard for those of us in a western society to fully understand how a family can harm a child for the sake of honour.

The first response for many safeguarding professionals in a case of disruption in a family setting would be mediation. In a case of forced marriage, this will not work. In the 2014 government guidance, 'The Right to Choose: Multi-agency statutory guidance for dealing with forced marriage' this is what is said about mediation: ‘...it is important that agencies do not initiate, encourage or facilitate family counselling, mediation, arbitration or reconciliation. There have been cases of individuals being murdered by their families during mediation. Mediation can also place the individual at risk of further emotional and physical abuse.’

Jasvinder is insistent, and the guidance mentioned above supports this opinion, that perpetrators will never admit that a forced marriage is their intention and they will give all the right answers when professionals do show concern. It is behind closed doors that everything changes and becomes very dangerous.

2. Unexpected indicators
Guidance on spotting the signs of abuse tends to encourage us to look for pupils who are withdrawn and disinterested in education. Yet quite often in a case of forced marriage, the event itself is triggered by a girl being too ambitious, bright and westernised. For Jasvinder, and in the well-publicised case of Shafilea Ahmed in 2003, one of the first big indicators of danger was them being taken out of school – the belief being that a girl does not need aspirations or education if she is going to be a wife.

This is why education and educational settings are at the heart of protecting young people from forced marriage and honour-based violence. Teachers know their pupils: Shafilea was a bright and ambitious girl. One of the alarm bells rang when her teacher called her parents to ask why Shafilea hadn’t been coming to college. When her father’s response was that his daughter didn’t want to anymore and had burned all her books, the teacher knew something was wrong because that just didn’t sound like Shafilea.

3. Know what to do
Giving the support and knowledge young people need in order to think through what they are being told by their families and make up their own minds is crucial. Jasvinder was disowned by her family, though she admits she made that choice. She could have stayed, gone through with the marriage and kept her family, but have no freedom. For many 16 year old girls this is the choice they are faced with, and how many have the knowledge and support to be able to think through how much they are giving up, no matter what choice they make?

What to do
Get in contact with Karma Nivarna. Jasvinder and her team are happy to visit your school and talk to your pupils.

Put up one of the Karma Nivarna posters in your school to raise awareness of forced marriage and give pupils the tools and support they need.

Keep yourself informed. There are lots of resources on Karma Nivarna and the Forced Marriage Unit.

Make sure you know how to apply for a forced marriage protection order. Visit the www.gov.uk website.

On average, there are 12 murders through honour-based violence per year in the UK alone (Honour-based violence awareness network). The Forced Marriage Unit reported that in 2015, 80% of the calls they received were from professionals and other third parties, rather than from victims themselves – due to the fact that people forced into a marriage do not see themselves as victims of abuse or are too afraid to speak out. It is of the highest importance that all safeguarding professionals, and everyone working with children and young people, are trained to recognise the signs of honour-based abuse and forced marriage and know what to do.

Watch Jasvinder’s entire keynote by visiting my.optimus-education.com/node/15532
How to encourage assertiveness in staff

STEVE BAKER discusses how senior leaders create conditions to enable staff to become and remain assertive

Last week I conducted a review of behaviour in a secondary academy in the north of England. It is rapidly improving after a challenging inspection judgement and I was there to help the leadership team identify some ways forward. I sat in the library with six smashing young people and after discussing what they liked about the academy, we got onto the subject of improvements they would like to see. A diminutive Year 7 girl wrinkled her nose, looked into the distance and then came out with it: ‘I think the teachers could be a bit more assertive.’ How right she was. During my day at this academy, although I saw flashes of undue severity from time to time, I saw far more examples of teachers failing to assert themselves appropriately. I am the first to say that the current generation of teachers is the best I have seen during my thirty years in education, but some of our newer colleagues do struggle to present themselves as authoritative figures and some of those with more miles on the clock have lost sight of what it is that they should be asserting.

How right she was. During my day at this academy, although I saw flashes of undue severity from time to time, I saw far more examples of teachers failing to assert themselves appropriately. I am the first to say that the current generation of teachers is the best I have seen during my thirty years in education, but some of our newer colleagues do struggle to present themselves as authoritative figures and some of those with more miles on the clock have lost sight of what it is that they should be asserting.

We all know those aggressive teachers, the ones who are always shouting for ‘something to be done’ about behaviour. They ignore decades of collected wisdom, academic research and common sense, choosing instead to blame the kids and decry any suggestion that their own behaviour might be a factor.

Then there are the passive ones. While the class riot they can be heard, though possibly not seen amidst the melee, calling ‘Guys! Guys! Please guys! Let’s calm it down OK? Yeah? Guys?’ They ask permission of the class for being in charge: ‘You’re in detention now Ben... OK?’ and they appear reluctant to apply any consequences (‘I don’t want to give you a formal warning Reena.’) When an adult is so determined, the green light is given to every misdemeanour.

The views of these colleagues can only be challenged by a behaviour policy that makes the beliefs of the school crystal clear.

Does your ethos help?
Firstly, we need to address the school ethos. Is it clear, and understood? I could name schools where vast atriums boast words such as ‘Aspiration,’ ‘Confidence,’ ‘Respect’ and ‘Resilience.’ During my visits to these schools it is hard to escape the conclusion that this must be a list of banned words, because I never hear them in classrooms. We need to show staff how to use the school ethos in their lessons, or it will never have any traction in the school.

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Firstly, we need to address the school ethos. Is it clear, and understood? I could name schools where vast atriums boast words such as ‘Aspiration,’ ‘Confidence,’ ‘Respect’ and ‘Resilience.’ During my visits to these schools it is hard to escape the conclusion that this must be a list of banned words, because I never hear them in classrooms. We need to show staff how to use the school ethos in their lessons, or it will never have any traction in the school.

Worse, it will have a corrosive effect on the trust between young people and adults because we put up these words in letters two feet high and then we never talk about them.

Assertive staff don’t rely on rules and sanctions alone, they assert the school ethos, challenging inappropriate and unhelpful behaviour on the grounds that it doesn’t meet the expectations the school has set. For example, when a child hasn’t written more than a sentence in half an hour, they say ‘Ikram, are you really trying your best?’ rather than ‘Ikram, what do you think you’re doing?’ or similar. A set of Golden Rules provides simplicity for pupils and allows staff to intervene in a principled dignified way. One school I visited recently has a three word mantra: ‘Ready, Respectful, Safe.’ Adults can use this to question pupils: ‘Was that behaviour safe? Was it respectful? Were you ready to learn?’ This enables them to get to the heart of the matter, to avoid the distracting secondary issues that pupils are skilled at introducing (‘yeah, but...’) and very importantly, to speak a common language.

Arranging CPD on how to use the key tenets of the school ethos in lessons and around the site is a key action to take.

The school behaviour policy is a vital element in supporting staff to be assertive. Whatever systems of sanctions you put in place, you can be sure that your pupils will know it backwards within a week and be quite capable of quoting it. (‘No Miss, you can’t give me a C3, you haven’t given me a C2 yet!’)

The system has to be simple enough that adults can remember it, not only when they are fantastically busy but also when they are under pressure from uncooperative pupils.
Teach it, model it, reward it

You may be familiar with ‘Whackamole’, an attraction that you can find at Clacton, Blackpool or any other seaside resort. You put your money in, then the moles pop up randomly and you set about bashing them with a hammer. I use this metaphor to describe the approach of teachers who deal with behaviour reactively. They plan the lesson content but not for pupil behaviour, thinking that when some ‘behaviour’ happens, they’ll deal with it then. It is no wonder then that pupils, unsure of the teacher’s expectations, begin to wander off track.

My contention is that to act assertively teachers need to teach, model and reinforce the behaviours that they want to see. Senior leaders can support staff who struggle with behaviour by asking them these questions.

1. What learning behaviours do you want to see in a particular lesson?

Describe them in detail. These might include, for example:

- scanning a resource for relevant information
- giving feedback to a partner
- putting up a hand and waiting to be invited to speak before doing so
- taking turns to use equipment.

I regularly see staff who begin a class discussion and fail to tell pupils the rules of engagement. In other words, they have an expectation in their heads that pupils will put up their hands to speak, but they don’t share this with pupils. Then they allow quite a lot of calling out before it gets too much and then say ‘We don’t shout out’, in flagrant contradiction of what they’ve just been tolerating.

In fact ‘hands up’ is the enemy of the assertive teacher. The reason some teachers run a discussion via ‘hands up’ is that it guarantees them a pleasant interaction with a pupil who has already signalled their willingness to answer. Insisting ‘Keep your hands down and I’ll choose someone to answer’ is a clear and effective way of asserting the teacher’s authority.

It keeps everyone on their toes and it gives us a chance to differentiate in our questioning. Yes, it may rankle at first with those pupils who have been able to remain under the radar while the keen ones carried the lesson, but like anything else, with practice and persistence it will work, to everyone’s benefit.

A 10 point checklist

1. Does the school ethos support staff to intervene assertively?
2. Have the staff received CPD on how to do so?
3. Have departments identified the learning behaviours that they want to see and where in schemes of work they are taught?
4. Do teaching staff plan for behaviour?
5. Are sanctions applied consistently?
6. Do pupils attend the detentions they are given?
7. Does pupil voice confirm that relationships with staff are positive?
8. Do we as leadership model a culture of sincere appropriate praise?
9. Is assertive behaviour leadership a focus of staff coaching?
10. Does assertive behaviour leadership feature in lesson observation/learning walk documentation?

Assertive staff don’t rely on rules and sanctions alone

Continued ››
How to encourage assertiveness in staff continued....

2. How are you going to teach those behaviours?
One obvious way is a behaviour objective. We have success criteria coming out of our ears so why not set success criteria for behaviour? This would sound like:

‘In a moment, you’re going to feedback your peer assessment to your partners. How will I know you are doing a good job? What will I see you doing and what will I hear you saying?’

In this way the teacher builds up a picture of what positive learning behaviour looks like. The calm use of available sanctions will demonstrate the teacher’s boundaries. Faced with a pupil who persists in shouting out, the passive teacher will just keep nagging, and the aggressive teacher will send the pupil out.

The assertive teacher will use the language of choice: ‘Jake, this is your warning for calling out. If you do it again you’ll be back at break; your choice.’

Flexible displays that show the desired learning behaviours at any stage of a lesson are an excellent way to assert clear expectations: ‘Pair voice, table voice, class voice.’ Things like this can be drilled, just as with hands up/no hands up.

Assertive teachers teach expected behaviour not only via their words but also via their own example. The stuff I talk about isn’t rocket science – and habits are hard to break!

3. How will you highlight and reward these behaviours?
It is amazing how often I watch an adult who is waiting for quiet to announce to their class ‘there are still a few people talking.’ To my ears this roughly translates as ‘Hey everybody, there’s some poor behaviour happening at the back of the room, let’s go take a look!’ Why highlight what is going wrong?

Pointing out the good behaviour is far more effective: ‘Thank you Jane for listening, thank you Parvez for listening.’ Pupils will soon cotton on that you can get grade A teacher attention for doing the right thing and some will then stop insisting on getting grade D teacher attention by being a pain. (A school pupil once told me, in a pupil voice activity in Leeds, ‘the only way to get noticed around here is to be a badass.’) The assertive teacher highlights the positive learning behaviours that happen so that the rest of the class can emulate them.

One of the key things the leadership team can do is to model this positive approach for the teacher. If SLT regularly catch staff doing positive things and give them appropriate, sincere praise this will demonstrate the benefits of a positive approach far more effectively than a target on a personal development plan.

As far as tangible rewards are concerned, there is much talk these days about the value of intrinsic rewards, as if there is something wrong with the tangibles.

Personally I think rewards are like any other aspect of the behaviour policy, which has to suit the school’s current situation on its journey. Where schools are turning cultures round and establishing control, the tangibles can be a valuable tool. Then as positive behaviours become the norm they can move towards becoming their own reward. As far as the assertive teacher is concerned, rewards should take place within rewarding relationships.

The language of choice
Assertive teachers need a repertoire of useful language. Dr Bill Rogers set out years ago his ‘least intrusive’ scale of responses. This included techniques such as the non-verbal cue, description of the obvious, the rule-reminder and the consequence-reminder, which are simple and effective ways to assert the rules while protecting our dignity and that of the pupil. His book You Know the Fair Rule should be required reading for every teacher.

The stuff I talk about isn’t rocket science but it is difficult because it is about habits – and habits are hard to break!

The assertive school
One frequent complaint I hear is ‘if I ask a pupil to come back for detention they don’t come.’ Good leadership teams back their staff, deploying associate staff if necessary to procure pupils at the end of the day. Pupils soon learn that sanctions cannot be avoided. Assertive teachers will thrive in assertive schools.

I believe that teams should be challenged with the three questions I listed earlier:

1. What behaviour do you want to see?
2. When do you teach them?
3. How do you highlight and reward them?

Once teachers are teaching learning behaviours in a systematic way, and challenging poor behaviour by asserting clear, shared expectations and unavoidable consequences, then we are in a position, once and for all, to smash the pastoral/academic divide.
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