Updates, guidance and resources for your whole leadership team

TEACHING AND LEARNING

Shifting mindsets for assessment without levels
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Generating income from staff expertise
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Welcome to Optimus Education Insight

Dear Reader

It’s that time of year when on the one hand you may be caught up in the final round of exams and a variety of end of term activities – and on the other, you’re looking ahead to September and planning for the new academic year.

Transitions are no doubt on many minds. Primary to secondary, KS3 to GCSE, GCSE to further education... transitions are an ongoing feature of school life. In this issue we take a thorough look at transitions from the point of view of pupils with special needs, including what can go wrong (see page 54), how to make sure you get it right (page 56) and the different kinds of transitions that need to be considered and planned for (page 58).

It’s not just pupils facing transitions. With the academisation agenda still going strong, it’s making your mind up time for some schools. What’s the right path for your organisation? Whether you’re a local authority school considering becoming an academy, or a stand-alone academy weighing up the pros and cons of joining a MAT, make sure you read our options guide on page 16, and take note of lawyer Nick MacKenzie’s advice on page 22.

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Liz Worthen
Head of Content
Optimus Education

‘Forging new paths’

Liz Worthen
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.

**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 now to get legal guidance and updates on the most pressing safeguarding issues. Clarify the impact of ‘Keeping Children Safe in Education’, know your Prevent obligations and understand e-safety responsibilities.  
🌐 SEN and Safeguarding

**Supporting the Progress of the More Able**  
**TUESDAY, 27 SEPTEMBER, MANCHESTER & TUESDAY, 4 OCTOBER, LONDON**  
Learn more about maximising potential, developing mastery and supporting the achievement of the more able pupils in your school. Return with strategies for increased stretch and challenge in every lesson.  
🌐 Teaching and Learning

**October**

**The Multi-Academy Trusts Summit 2016**  
**THURSDAY & FRIDAY, 13-14 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

**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. Take away a toolkit of teaching resources to use in your school.  
🌐 SEN and Safeguarding

**November**

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

Unlimited CPD is here  
Now you can attend all our conferences for one annual cost... as well as having full access to our Knowledge Centre and over 40 download-and-deliver professional training courses.
What’s in this month’s Leadership and Governance section?

Developing the best leadership team for your school is crucial to its success, which is why we have a big focus on leadership skills for your whole SLT in this issue. Our webinar on CPD for headteachers looks at how to remain focused on your own professional development while building the skills of others. For deputy heads we provide some guidance on taking the lead on staff CPD. Middle leaders hold a key position in school, close to leadership and classroom teaching. Use our middle leader skills audit template to highlight strengths and areas for improvement, then head online to download our middle leadership toolkit containing strategies and training to grow your own leaders. While you’re there, download our MATs report on the leadership skills needed to successfully grow an organisation. Finally, read our guide to the various options available to your school when collaborating or partnering with others.

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. @Suzanneoconnell

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

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To continually improve a school, you must continue to develop yourself and ensure that as a headteacher you remain in the best possible condition to drive change and improvement.

With this in mind, Helen Morgan recently held a webinar on CPD for headteachers – four dimensions for growth. The importance of personal and professional development is key for headteachers, particularly in forging a successful and sustainable career in an increasingly complex and accountable educational landscape.

The 7 habits of highly effective people

- Habit 1: Be proactive
- Habit 2: Begin with the end in mind
- Habit 3: Put first things first
- Habit 4: Think win/win
- Habit 5: Seek first to understand, then to be understood
- Habit 6: Synergise
- Habit 7: Sharpen the saw

Helen referred to Steven Covey’s book, The 7 Habits of Highly Effective People. Taking a look at the seven habits, it’s clear that you need to be able to embrace change to be effective. Helen focused largely on habit seven, ‘sharpening the saw,’ and described this as the one that underpins the others.

What does it mean to ‘sharpen the saw’? Imagine you’re walking through the woods. You come across a man feverishly sawing down a tree. You stop to ask the man ‘What are you doing? You look absolutely exhausted!’ ‘Yes, I am. I’ve been doing this for five hours,’ he says.

You ask why he doesn’t stop, have a break, and sharpen his saw. ‘I haven’t got time. I’m too busy sawing. I don’t have time to stop,’ he replies.

In terms of ‘sharpening the saw’ for headteachers, how do you do it if you haven’t got the energy or time in a busy job?

The idea of the habits is based on Aristotle’s notion that ‘we are what we repeatedly do.’ Excellence is a habit, not an act. The seven habits can support heads with many of the challenges they face, not just at a strategic level but also operationally in the management of a school.

Habit one is being proactive. When heads are proactive they find positive solutions to complex issues. They’re aware of what needs to be done, that they can’t do it all alone and so distribute leadership and responsibility. As a result they build capacity across teams and across the school.

Moving on to habit two, ‘begin with the end in mind’, headteachers need a clear vision. A vision that they can communicate in a compelling way but, most importantly, with a really clear and flexible plan that will enable it to be achieved.

The complexity of the role of the headteacher is often seen in habit six, ‘synergise.’ The role of the head is to bring lots of threads together – teaching and learning, behaviour and safety, leadership and management – as well as lots of different groups of people – governors, pupils, parents and the wider community. Bringing everything together and working towards a shared and common goal is an ongoing challenge when there are targets to achieve and national agendas to meet.

Sharpening the saw

As a headteacher, you’ve probably had many conversations with your staff about the importance of pausing to step back and reflect on what you’re doing. How often do you do it yourself? To be able to do your job effectively and have the maximum impact, it’s vital to take that time to nourish yourself. Ask yourself two questions.

‘Do you have a considered plan for your own personal and professional development?’
As a school leader you need to constantly reflect on how to develop yourself in order to make sure you’re effective in your role.

**The four dimensions**

There are four dimensions of human nature.

- Physical.
- Social/emotional.
- Mental.
- Spiritual.

In the context of a headteacher they can help you create a strong sense of professional balance and enable you to drive change at many levels.

Physical is a key dimension to start with. When you find time to exercise or take time out from work to do something you enjoy, it increases your productivity, positivity and energy. You gain confidence and a new level of focus and engagement which helps to counteract the tiredness that you can feel during a term.

Balanced against that, the notion of spirituality is very important. Perspective is everything in education. When the going gets tough it can be difficult to maintain that sense of perspective. Holding on to your moral values, purpose and remembering why you do things in the first place helps keep you balanced and realise that you need time for you, time for others and time for work. Stepping back and looking from a different perspective is very important.

The social and emotional aspects of leadership, such as empathy, listening and responding, are key to building relationships and synergy in your school. They bring systems, people and ideas together to work collaboratively towards a common goal.

Finally the mental dimension is about clear thinking, understanding and knowledge to help you make informed leadership decisions. Reading, taking time to reflect and visualising and planning all help with this.

Helen asked some questions for school leaders to consider.

- Do you have a considered plan for your own personal and professional development?
- To what extent do you value and address all four dimensions of your development?
- What are the personal and professional benefits of sharpening the saw for you?

**The upward spiral**

The idea of development and renewal is based on the upward spiral to secure continuous improvement. It’s a process where we learn new things, commit to them, and do them. Our ability to do new things, learn new skills or hone existing ones and expand our knowledge increases as we take the time to invest in ourselves.

Helen encouraged attendees to choose one of the four dimensions to focus on first. It could be the physical dimension, and perhaps involve taking an exercise class once a week or committing to a long walk at the weekend.

You may focus on the social element and choose to leave early one day after school and spend time with friends or family. Or perhaps look at the mental dimension and take a course, invest in coaching, or host a teachmeet and help staff with learning.

Start with just one area of focus. Take time to sharpen the saw and to develop personally and professionally to achieve long term improvement which will benefit everyone in your school and in your wider community, personally and professionally.

Watch or download the full webinar at my.optimus-education.com/node/15375
Deputy heads and CPD: a whole school approach

Strategic CPD plans help ensure the best outcomes for pupils. JO SMITH provides guidance on how deputy heads can take the lead in successfully developing staff

As a deputy headteacher you’re one of the most highly visible and influential members of your school and therefore ideally placed to take the strategic lead on continual professional development (CPD) at your school.

Your role involves ensuring pupils receive the very best learning experiences and that staff development opportunities are well focused on improving identified areas for growth, sharing best practice, ensuring that any training budget is well targeted and that its impact is measurable.

Establish a planning cycle
Start by identifying development needs. Staff in different roles will have differing levels of experience and different needs.

Your school development plan needs to identify specific areas for improvement that all staff can work on together and your development budget can target.

Action
1. Ask staff what they feel their developmental needs are
Do this late in the summer term and audit staff skills at the same time. This can feed into performance management preparation for colleagues but also provides you with a chance to identify patterns in need.

2. Look at these needs in conjunction with other evidence about what the school is already successful at and needs to develop.
Use pupil outcome data, learning walk and observation findings as well as an awareness of national developments or changes (e.g. syllabus changes) to do this.

3. Draw up the school development plan with other senior colleagues
Team development plans should reflect the whole school priorities in the school development plan.

Plan your whole school quality assurance (QA). Having identified the whole school needs, your whole school QA schedule for the year ahead can be planned. Calendar your learning walks, work scrutiny, pupil voice and/or team review activities and decide on their focus.

4. Match this schedule with your staff development sessions
If your learning walk in March, for example, is going to focus on the effective use of higher level questioning techniques to promote stretch and challenge, run a session for staff on questioning early in the spring term or send a colleague on a training course in the autumn term and ask them to run a workshop back in school on the January training day.

The whole school schedule can be mirrored at phase level with similar but subject-specific QA focuses.

‘The most strategic thing you can do is ask whether the training will improve pupils’ learning experiences’

Statutory versus developmental
Although a DfE published list of mandatory training for staff in schools doesn’t exist, the following areas will need consideration:

- health and safety
- fire safety
- child protection and safeguarding
- first aid
- control of substances hazardous to health (COSHH)
- training for designated teachers of looked after children
- SENCO training
- Prevent duty.

Action
- Be sure which staff need the training listed above and when they last received training of a similar kind.

- Create a rolling schedule for the updating of such training.

If you have created a planning cycle like the one suggested above then it will be clear what training all staff need to attend and which can be offered for voluntary §
Leadership Skills

Leadership Skills

Leadership and Governance

Training days
If you have training days create a three part day for each one. First up would be a lead session for all staff on a whole school or statutory theme.

After break provide a choice of workshops on wider teaching and learning themes e.g. questioning, assessment, group work, higher level thinking skills, or creativity in the classroom. These can be attended by colleagues across subject areas.

After lunch provide time for staff to meet together to follow their subject specific training agenda.

Remember to create a specific annual CPD schedule for the following distinct groups of staff:
- an ITT programme
- an induction programme for colleagues new to the school
- newly-appointed middle leaders
- training for pastoral leaders
- a governors’ training schedule
- a support staff training schedule.

Who delivers?
In most areas the cost effective service provided by local authority school improvement services is pretty much gone so you need to plan and cost the various training sessions you want to offer.

Remember to start by scheduling and costing the statutory training that you can’t provide as a school. Then consider how to spend your budget on the following options.

- Make good use of your school’s membership of a teaching school alliance (or of organisations like the SSAT).
- Use expertise already in school and encourage people to offer short sessions on topics they feel comfortable with.
- Be bold and budget a sum for a quite high profile session once a year that comes recommended by colleagues in other schools. You can minimise costs by sharing the event with local schools or as part of a teaching school alliance.
- Decide what could be quickly dealt with by some free, or relatively inexpensive, online training.
- Look out for teaching and leadership programmes for key staff in new roles.

If you receive numerous requests for different training, the most strategic thing you can do is ask whether the training will improve pupils’ learning experiences. The more costly it is (in time or money) the more difference it needs to make, to the biggest number of pupils. Make a plan for the year, be prepared to deviate from it as the need arises, but use it to shape your decisions and guide your response to requests.

Read case studies of successful CPD in schools online at my.optimus-education.com/successful-cpd-leadership-schools-case-studies
Leadership and Governance

Leadership Skills

Sharing learning from external CPD template

Paul Ainsworth provides a template to ensure you get value for money from external CPD, plan team sharing and capture the impact of learning.

If you choose to book a member of staff onto a conference or a one-day course it comes at a cost and you want to be sure that any outlay for your school results in measurable school improvement.

Many schools reduce such opportunities as much as possible due to declining budgets. However, for specialist topics and training there are not always in-house CPD solutions and so external courses do have a role to play in your CPD menu.

Use the CPD impact template to help get the most out of it for both the individual attending and the rest of the staff back at school.

Before the course

- Encourage colleagues to plan carefully in advance. If they are attending a conference this could include planning the sessions they wish to attend.
- Ensure your colleague completes the first section of the template (see right) and take a copy.

At the course

- Build contacts and get email addresses.
- Look for speakers who are practitioners in schools similar to yours with current experience, in addition to experts in their field.
- Jot down key points for reference.
- Begin to think about an action plan for back in school.

'Plan a meeting with the colleague to ask for feedback on what they have learned, discuss how this can improve your school and agree on how they will share their learning with wider colleagues'

- Look at what makes the best presenters and adopt some of their techniques for training in school.

After the course

The most successful courses provide plenty of advice and pointers and the best way of capitalising on these is to follow them up while you have the focus, enthusiasm and impetus to do so.

You could cover the colleague for a lesson the next day so that they can consolidate what they learned the previous day and turn the ideas gained into practical working suggestions for your school.

Plan a meeting with the colleague to ask for feedback on what they have learned, discuss how this can improve your school and agree on how they will share their learning with wider colleagues.

CPD leadership toolkit

Head online to access this toolkit of resources for school CPD leaders and coordinators, containing advice on high-quality professional development activities, evaluating the impact of CPD and developing a coaching culture.

School CPD leaders face a range of challenges from evidencing impact to getting all staff on board. It’s easy to lose sight of what should matter: professional development that improves outcomes for all learners.

Use our toolkit of ready-made planning templates, case studies and research summaries to support you in your role – and save time.

Areas covered include:

- the research: what do we know about effective CPD?
- personalising training: making CPD relevant to teachers’ needs – not one size fits all.
- evaluating impact: how can you do it reliably and consistently.

Download the toolkit at my.optimus-education.com/cpd-leadership-toolkit
This could range from an article for an in-house publication, a slot at a meeting or even a demonstration lesson. Complete section C of the template.

- Collate key learning points and/or an action plan.
- Book time out the next day to follow up on ideas, online references, email contacts, or convert what was learnt into an article or review.

- Meet with the colleague to ask for their feedback.
- After two months go back and review your progress as a result of the conference; look for leads you didn’t have time to follow initially.

**Long term impact back at school**

If this follow up work is fruitful, projects or initiatives will begin to develop. It is a good idea to copy and store the conference handouts and presentation slides.

Make yourself a reminder to meet with the colleague in a couple of months. This is your chance to really review the effectiveness of the conference or training day and reflect on the difference it has made to working practice and other colleagues.

Complete section D of the template.

---

**Template**

Use this template to share learning from external CPD.

<table>
<thead>
<tr>
<th>Name:</th>
</tr>
</thead>
<tbody>
<tr>
<td>CPD Title:</td>
</tr>
<tr>
<td>Date of CPD:</td>
</tr>
</tbody>
</table>

**Section A: Before attending the CPD**

- What do you hope the impact of this CPD will be on you? [Appraisal targets reference]
- What do you hope the impact of this CPD will be on your subject area, pastoral group or whole school? [Subject or school improvement plan reference]

**Section B: After attending the CPD**

- What were the key learning points?
- What do you expect to be able to do now?
- What will the timelines be?

**Section C: Sharing the learning**

- How could learning be shared with colleagues?
  - ☐ Slot at a subject meeting
  - ☐ Slot at a middle leaders meeting
  - ☐ Slot at an in-school TeachMeet
  - ☐ 10 key points for staff
  - ☐ Demonstration lesson
  - ☐ Other (please specify)

**Section D: Next steps in implementing key learning (review 2 months after external CPD)**

- How have you measured the impact of CPD?
- How did the CPD fulfil the subject or school aims?

---

Download more CPD resources online, including a CPD report to governors template at my.optimus-education.com/cpd-report-governors-template
SLEs in the school-led system

The specialist leader in education (SLE) plays a key role in the school-led system. SUZANNE O’CONNELL talks to two SLEs

Teaching schools are responsible for the selection of SLEs and their placement. The role of the SLE is to develop leadership capacity in others: it lasts for four years before it’s reviewed and can take up to 15 days out of your current school role. Two SLEs told us why they do it.

In some cases the support extends over a period of time. One school wanted a proactive ‘Inspiring Maths Programme’ that involved five days of discussions and staff development sessions, followed by lesson observations to see the aspects discussed in practice.

Observations and discussions

In another case a school wanted to review the teaching and learning of its maths department and asked Neil, along with a senior leader from the teaching school, to come in and give his impression. ‘This involved me completing observations and discussing them with the head of department,’ explains Neil. ‘It included undertaking desktop reviews of the progression shown in schemes of work with the department and hosting the head of department in his own school to see alternative practice.’

In some cases, the SLE might just be in for a day visit with a very specific focus or perhaps the delivery of an INSET. ‘It’s not just mainstream schools either,’ says Neil. ‘I also met with a new maths lead from a special school who wanted a better understanding of the issue of progression through KS3.’

Neil has had the opportunity to take part in the England/Shanghai exchange. This is a national research project and Neil was delighted to be able to visit Shanghai and report back.

‘I was impressed by their carefully structured curriculum and the format of the school day for teachers. They really maximise what pupils get as the teachers have considerable time for planning, feedback and intervention. They’re not constantly facing change like teachers in the UK. There’s much more stability.’

A balancing act

SLEs must balance their time out helping others with the needs of their own school. ‘I have to manage my time carefully,’ says Neil. ‘Being in other schools and talking through their issues helps me reflect on our own practice.’

‘There have been times, for example when discussing the new GCSE, when it’s led to me flagging up something with our own staff.’ Neil also keeps his teaching commitment: ‘It’s an excellent opportunity to work with other middle and senior leaders while still retaining a commitment to the classroom.’

‘I would recommend the role to those considering it. ‘It’s given me lots of stimulus and presented many challenges. I am convinced by the importance of partnership working. We need to share as much as possible.’
Angela applied for the SLE role after seeing an advert put out by her teaching school alliance. ‘I’d been the head of department here for a while and felt that my experience would be useful in helping others as well as being good professional development for me too,’ explains Angela. ‘I enjoyed working with others, training and developing them, and I could see that this would give me an opportunity to extend this role further.’

Angela has worked in two local schools recently. ‘Usually you are there because they haven’t received the Ofsted judgement they were hoping for,’ she says. ‘They’re often struggling in some way and you’re there to try and help them identify what the issue is. One school had received RI and it was a case of looking at the leadership team and doing observations to try and identify where the patterns were and what needed changing.’

**People skills**
The role does require good interpersonal skills. ‘In one recent case, I did an observation of a teacher who had had a series of unremarkable lesson observations. I was able to tell her that what I had just seen was outstanding. It really lifted her spirits. ‘In most cases people are open with you and respect your role as an experienced practitioner. You’re not an inspector and you’re there to help. However, there are some cases where there is reluctance and your involvement has been imposed. Then there’s work to do in gaining trust.’

Angela spends time in the schools she is working with talking to teachers to try and identify how they feel about what’s working and what’s not. ‘It’s being a part of the change process. You then leave them with ideas and perhaps go back in to find out how it’s going and what difference it has made.’

She recently conducted a two-day review where she worked with the SLT as well as doing lesson observations. ‘You’re expected to go in and see the SLT first before the department,’ she explains. ‘This is important because that way you find out exactly what they’re expecting from you.’

**Benefits back at home**
Angela feels that being an SLE has provided an opportunity to reflect on her own school while talking to others about theirs. ‘It’s really interesting to see different practice and teams working together well. There have been ideas I’ve brought back too. It makes you more aware of what’s important in your own context.’

Angela’s advice to anyone considering the SLE role is to do your homework so you know about the school you are visiting. ‘Be compassionate to the staff. Be professional. If you get it right you could really make a difference to the experience of the pupils in that school.’

---

**Name:** Angela Lucas  
**Role:** SLE and head of English at Sidmouth College  
**Teaching school:** Jurassic Coast Teaching Schools Alliance

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Read more on school collaboration models on page 16.
School partnerships and collaborative structures

School collaboration is an increasingly important way of sharing resources and best practice. LISA GRIFFIN explores the various models

There are many different ways and structures to collaborate with other schools, which makes it all the more important that you choose the option which is right for your setting and ‘find your fit’. Common models of collaboration include: informal and formal partnerships, collaboration companies, hard federations, Teaching School Alliances (TSA), multi-academy trusts (MAT), umbrella trusts and collaborative partnerships.

Informal and formal partnerships
These are commonly made through verbal agreement (informal) or by signing a non-legally binding document detailing the school’s intentions and responsibilities (formal). The collaboration agreement should detail how activities will be funded and what each school should expect.

Pros
- Schools can collaborate and maintain complete autonomy.
- Quick and straightforward set up.
- Flexibility to make changes to agreement where needed.

Cons
- The agreement can end on short notice.
- May not be the most appropriate for those schools looking for a long-lasting partnership.

Collaboration company
A collaboration company is similar to a formal partnership but you also have a shared company with the other school(s). Schools of all types and phases can be part of the same company, which can be for or not for profit.

Pros
- Each school retains their own governing body and complete autonomy.
- Each school is a member of the shared company with equal voting rights.
- Company directors are appointed by member schools.
- Risk management is shared among any joint activities between schools.

Cons
- Can be more complicated to establish and difficult to end on limited notice.
- Employment of staff can be complex.

Hard federation
One legal entity responsible for all schools in the federation, with a single governing body supported by governing committees responsible for particular aspects of school improvement. Hard federations may comprise schools from the same phase, though it isn’t possible for academies and independent schools to exist in a hard federation with maintained schools.

Pros
- Works for community and voluntary controlled schools looking for a group: they can exist in a federation with foundation and voluntary aided schools.
- Schools share common goals and collaborate at all levels, including governor level.
- Shared procurement and services to save money.

Cons
- If one schools chooses, or is required to become an academy, the federation is broken unless the other schools convert too.
- May be concerns over losing autonomy.
- Legal agreement is more difficult to end.

Teaching School Alliance
Teaching schools are outstanding schools that work with others to raise standards and drive school improvement in their local area. They are part of the government’s plan to develop a self-improving and sustainable school-led system.

Pros
- Recognised as the most elite schools.
- Staff demonstrating leadership potential are encouraged and given opportunities to grow and develop by working with other schools.
• Struggling schools are able to learn from the best teachers and leaders through mentoring and coaching.

Cons
• Giving enough time and resource to other schools to support progress whilst maintaining your own school’s high standards can be challenging.
• Addressing needs of partners, highlighting your services and putting on a programme which will attract other schools to join can be complex.
• Moving from core funding to self-generated income and managing additional revenue streams to ensure self-sufficiency is difficult to achieve.

Are you an academy thinking of joining a group?
There are three common models: a multi-academy trust (MAT), an umbrella trust, and collaborative partnerships.

Multi-academy trust (MAT)
A single legal entity with the MAT board having ultimate responsibility for running the academies in the trust. Members of the academy trust sit on the board and delegate running of individual academies to a local governing body. The academy trust has a master funding agreement with a supplemental funding agreement for each academy. Staff in the academies are all employed by the MAT.

Pros
• Schools pool financial resources and share services.
• Retain staff by providing increased development and progression opportunities.
• Access to a range of resources/learning materials for teachers and pupils.
• Share best practice and ideas across schools.

Cons
• May be fears that joining a MAT means losing autonomy.
• A good school may not want to join a MAT; they may consider starting their own.
• Risk that if one of the schools in the MAT is failing the reputation of all will be damaged.
• Ensuring consistent systems and procedures are applied across the trust is complex.

Umbrella trust
Each academy is its own legal entity with its own governing body. The UT has its own governing body, often made up of governors from each school. This structure is particularly useful if different school types want to collaborate together, for example it allows a single academy trust to continue to have the same representation as when they were maintained schools (e.g. from the Church).

Pros
• Separate funding agreements.
• Benefits of being part of a larger organisation but retaining autonomy.

Cons
• The umbrella trust isn’t accountable for the performance of each school.
• Looser nature of collaboration can make it harder for the trust to intervene when a school is failing.

Collaborative partnership (CP)
Each academy trust has an individual funding agreement. Academies sign a collaboration agreement that sets out how the academies will work together and how joint activities are funded. Academies maintain their own governance and accountability while also working collaboratively across the partnership within areas such as leadership development.

Pros
• Ideal for schools who want to establish more formal ties with other local schools.
• Collaboration can include sharing facilities, loaning staff, joint training programmes etc.

Cons
• Loosely structured: limited risk sharing.
• Collaboration agreement may not be secure enough to deal with unexpected or challenging situations.
• No shared governance so collaboration at this level may not be effective.
Skills audit template for middle leaders

PAUL AINSWORTH provides a template to help evaluate middle leadership skills and prepare for your performance management meeting.

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

- **Leading pupil achievement**
- **Collaboratively**
- **Leading strategic change**
- **Practically**
- **Development of self and others**
- **Collaboratively**
- **With courage**
- **With sensitivity**
- **With integrity and by example**

<table>
<thead>
<tr>
<th>Proficiency</th>
<th>Criteria</th>
<th>0 = no proficiency or experience</th>
<th>5 = an average standard of proficiency for someone with your leadership experience</th>
<th>10 = area of considerable proficiency or experience in your opinion</th>
<th>Provide examples of when you have demonstrated this (in the past 12 months) using the following prompts</th>
<th>Measureable outcomes for the school as a result of your work/contribution</th>
<th>Any other comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leading pupil achievement</td>
<td>Secure outstanding results for pupils</td>
<td>• Classes you taught • Intervention sessions that you have led</td>
<td>• Performance of the team that you lead</td>
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<td>Enable others to secure outstanding results for pupils</td>
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<tr>
<td>Analyse and interpret a range of information to judge effectiveness</td>
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<tr>
<td>Leading strategic change</td>
<td>Be innovative</td>
<td>• Development of schemes of work for your team • Structure of your setting</td>
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<tr>
<td>Proactively take on new professional challenges</td>
<td></td>
<td></td>
<td>• Which whole school initiatives have you implemented with your team? • What new developments have you led?</td>
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<tr>
<td>Have a clear vision for development</td>
<td></td>
<td></td>
<td>• How have you expressed your vision in your departmental or team improvement plan?</td>
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<tr>
<td>Clearly articulate the school vision</td>
<td></td>
<td></td>
<td>• How does your improvement plan link with whole school actions?</td>
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<tr>
<td>Set clear milestones for self and others</td>
<td></td>
<td></td>
<td>• Does your improvement plan have clear milestones? • Do the milestones have SMART targets attached?</td>
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<tr>
<td>Prioritise effectively</td>
<td></td>
<td></td>
<td>• Are you managing your time well and meeting targets?</td>
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<tr>
<td>Generate commitment in others to change</td>
<td></td>
<td></td>
<td>• Does your team understand your improvement plan? • Are they completing the tasks you are setting them?</td>
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<td></td>
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<tr>
<td>Leading practical implementation</td>
<td>Realise a vision</td>
<td>• Consider a strand of your improvement plan: how does this link to your overall vision?</td>
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<tr>
<td>Meet deadlines</td>
<td></td>
<td>• Breaking strategic work into steps and achieving change over a period of time</td>
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</table>
## Leadership Skills

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<tbody>
<tr>
<td>Manage change promptly</td>
<td>• Efficient work on projects that have led to improvement</td>
</tr>
<tr>
<td>Manage change effectively</td>
<td>• How well are you deploying your resources?</td>
</tr>
<tr>
<td></td>
<td>• Do you manage your budget effectively?</td>
</tr>
<tr>
<td>Strike the right balance</td>
<td>• Are you delegating tasks to your team?</td>
</tr>
<tr>
<td>between strategic and practical</td>
<td>• How much of the project are you leading yourself?</td>
</tr>
<tr>
<td>leadership</td>
<td>• How does it impact on other classrooms beyond your own?</td>
</tr>
<tr>
<td>Develop 'expert' knowledge in</td>
<td>• What reading/research have you undertaken to support your change?</td>
</tr>
<tr>
<td>(a) relevant area(s)</td>
<td>• Is there evidence of positive impact in other schools?</td>
</tr>
<tr>
<td></td>
<td>• Have you trained other colleagues in this area?</td>
</tr>
<tr>
<td>Leading development of self</td>
<td>• Have high expectations of yourself, staff and pupils</td>
</tr>
<tr>
<td>and others</td>
<td>• Have the performance management targets you have set for your team been deemed suitable by the head?</td>
</tr>
<tr>
<td></td>
<td>• Are your class targets in line with whole school targets?</td>
</tr>
<tr>
<td>Show commitment to your own CPD</td>
<td>• What CPD have you engaged with this year?</td>
</tr>
<tr>
<td>Recognise others' skills,</td>
<td>• What skills do members of your team have?</td>
</tr>
<tr>
<td>develop and utilise them</td>
<td>• How have you used this knowledge in their deployment?</td>
</tr>
<tr>
<td>Engage in a range of CPD</td>
<td>• How have you used team time for CPD?</td>
</tr>
<tr>
<td>opportunities</td>
<td>• Have you led CPD activities for wider groups of staff?</td>
</tr>
<tr>
<td>Give challenging and</td>
<td>• Have you kept the performance management schedule?</td>
</tr>
<tr>
<td>supportive feedback which</td>
<td>• Are any members of your team on informal support plans?</td>
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<tr>
<td>facilitates improved</td>
<td>• Have you given staff feedback from your quality assurance activities?</td>
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<tr>
<td>performance</td>
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<tr>
<td>Develop parental engagement in</td>
<td>• Have you led any sessions for parents?</td>
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<tr>
<td>their child’s learning</td>
<td>• Have you written materials or resources for parents which enable them to support their children?</td>
</tr>
<tr>
<td>Celebrate pupil and staff</td>
<td>• How do you support school reward systems?</td>
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<tr>
<td>achievements</td>
<td>• How do you know that they are used appropriately within your team?</td>
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<tr>
<td>Lead team development</td>
<td>• Have you been involved in appointment processes for your team?</td>
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<tr>
<td></td>
<td>• What new skills have colleagues in your team developed?</td>
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<td></td>
<td>• Have any of your team been promoted?</td>
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<tr>
<td>Create the conditions,</td>
<td>• Developing new skills in staff</td>
</tr>
<tr>
<td>organisation and climate for</td>
<td>• How do colleagues in your team support and challenge each other?</td>
</tr>
<tr>
<td>teamwork</td>
<td></td>
</tr>
<tr>
<td>Empower others</td>
<td>• What tasks have members of your team completed?</td>
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<tr>
<td></td>
<td>• Have members of your team taken responsibility for certain projects?</td>
</tr>
<tr>
<td>Work effectively with people</td>
<td>• How do you work with middle leaders outside of your team?</td>
</tr>
<tr>
<td>in a range of different contexts</td>
<td>• How do you support colleagues who are not in your team?</td>
</tr>
<tr>
<td>Positively influence and</td>
<td>• Do you coach or mentor other colleagues?</td>
</tr>
<tr>
<td>motivate others</td>
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</tbody>
</table>
# Leadership and Governance

## Leadership Skills

<table>
<thead>
<tr>
<th>Leading with courage</th>
<th>In challenging situations</th>
<th><strong>Work effectively with the governing body</strong></th>
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</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td><strong>• Have you invited your link governor to participate in quality assurance?</strong></td>
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<td><strong>• Have you written a report for the governors?</strong></td>
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<td><strong>• Have you submitted a bid to the governors’ development fund?</strong></td>
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<td><strong>• What have been your biggest challenges this year?</strong></td>
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<td><strong>• How have you overcome these challenges?</strong></td>
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<td></td>
<td></td>
<td><strong>• Is your teaching continually graded as good?</strong></td>
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<td></td>
<td></td>
<td><strong>• Do you know what you need to do to deliver outstanding lessons?</strong></td>
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<td></td>
<td></td>
<td><strong>• Do members of your team understand the difference between outstanding and good teaching?</strong></td>
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<td></td>
<td><strong>• How do you quality assure the work of your team?</strong></td>
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<td><strong>• How does your team participate in the quality assurance process?</strong></td>
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<td></td>
<td><strong>• What is pupil behaviour like in your area?</strong></td>
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<td></td>
<td></td>
<td><strong>• Do teachers understand behaviour management systems?</strong></td>
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<td><strong>• How do you know the behaviour management system is used appropriately in your area?</strong></td>
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<td><strong>• What challenging conversations have you had with members of your own team?</strong></td>
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<td><strong>• What challenging conversations have you had with parents?</strong></td>
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<td><strong>• Have you remained positive in the face of difficulties?</strong></td>
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<td></td>
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<td><strong>• Have you supported staff in your team to manage pupil behaviour?</strong></td>
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<td><strong>• Have you advised colleagues in your team on how to make improvements?</strong></td>
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<td><strong>• Have you been told by senior leaders when to intervene?</strong></td>
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<td><strong>• What interventions have you chosen to make?</strong></td>
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<td></td>
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<td><strong>• Is attendance consistently high?</strong></td>
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<td></td>
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<td><strong>• When have you needed to stay positive during a difficult time?</strong></td>
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<td><strong>• What extra-curricular activities have you supported this year?</strong></td>
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<td></td>
<td><strong>• What trips or visits have you led?</strong></td>
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<td><strong>• Do your team come to you for advice?</strong></td>
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<td></td>
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<td><strong>• Do other middle leaders seek your support?</strong></td>
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<td></td>
<td></td>
<td><strong>• How do you remain positive?</strong></td>
</tr>
</tbody>
</table>

[Download this template online at my.optimus-education.com/skills-audit-template-middle-leaders](http://my.optimus-education.com/skills-audit-template-middle-leaders)
Leadership Skills

Get more from the core: developing middle leaders

Middle leaders provide the vital link between leadership and the classroom. LISA GRIFFIN looks at how they can best be supported.

Put simply, middle leadership is about leading a high-performing team to improve the quality of teaching and learning and raise standards and achievement in your school. So how is it actually done and what makes an outstanding middle leader?

Schools need middle leaders to be expert leaders of learning, demonstrate outstanding practice and help others to be able to achieve it too.

To really drive improvement across the whole school, middle leaders need to collaborate with leaders in other subject areas, years or phases to ensure consistency between teams.

Leading teaching and learning

The best middle leaders develop and improve teaching in their subject area by having a clear vision and getting team buy-in. They undertake regular lesson observations and have excellent communication and feedback skills. They are experts at analysing data and can use data to hold staff to account. They are also skilled in mentoring and developing staff.

To sustain high-quality teaching within a team, middle leaders need to identify strategies to help close gaps in attainment.

Middle leaders have a big role to play in closing the achievement gap across schools but firstly in their own school. The quality of teaching and learning is vital: variation in teaching and pupil performance may exist not only within a department or subject team but also between departments and teams in a school. Working with other middle leaders in the school, challenging each other and sharing best practice and successful teaching strategies, helps ensure standards of teaching are consistently high across the school.

Middle leaders implement whole-school strategy at a team level on a daily basis. They're closer to teacher practice than the SLT and provide the crucial link between the classroom and leadership.

Managing processes

As a middle leader you are both a leader and a manager. You need to be able to identify leadership strategies to influence and improve the quality of teaching, while also implementing whole-school policies with your team as their manager.

At a management level, it’s your job to ensure the effective running of systems such as data and financial management, and procedures such as teacher performance and capability.

Leading and managing

A good leader needs to be able to apply their own and others’ management skills to achieve their vision. The journey set out by a leader needs a manager who can help break it down into day-to-day tasks which they oversee. Middle leaders break down the vision of the school into a vision for their team and guide their staff to ensure they are constantly working towards it.

To be a successful middle leader you need to be able to manage the responsibilities of teaching and leading. A middle leader will excel at demonstrating excellent teaching in their subject area, but they may have never led or managed a team. This is the area which needs developing.

Identifying, nurturing and developing potential leadership is an important part of staff retention. Strong investment in middle leadership will encourage teachers to see it as a clear step in career progression and one which they would want to take.

The role middle leaders play in reducing within-school variation is a process which happens over time. By making this an attractive prospect for staff and offering support and opportunities for development, you are providing them with a strong reason to stay, progress in their career and the ability to become outstanding leaders.

Download ‘Growing your own: a middle leadership toolkit’ online at my.optimus-education.com/growing-your-own-middle-leadership-toolkit
Create or join a MAT: making the right decision for your school

Education lawyer NICK MACKENZIE answers a member's question about the benefits of becoming a stand-alone academy versus joining a MAT

Question
We are a good to outstanding joint Anglican and Catholic and Free Church non-selective secondary school with 1750 pupils. Finding a MAT would be tricky, whilst keeping our unique identity. What must we do so to survive in the longer term? Would it be better to become a stand-alone academy (as we are already good and big, so have the economies of scale) and buy in advice from a school improvement service, as well as semi-formal networks of collaboration with other schools?

Answer
It is understandable that finding a suitable MAT would be tricky in these circumstances. On the assumption that standards at the school have been maintained since the last inspection and that you are not at risk of falling into the coasting school category you do at least have time to fully explore the possibilities; as the saying goes ‘time is options’ so having the conversations now would be sensible taking into account the wider education landscape.

It would undoubtedly be a careful balancing act to develop a MAT solution that addressed your unique identity within the DfE’s model whilst addressing the needs of the other schools within the MAT. However, a carefully designed governance structure which dovetails with a management and leadership structure which provides supported autonomy could alleviate many concerns.

At Browne Jacobson, we have created guidance for senior leaders and governors on how to structure conversations with potential partners. You can find the guide on Browne Jacobson’s website by searching ‘Forming or joining a group of schools: staying in control of your school’s destiny’.

Other relevant factors you will want to consider are:
• the impact of increasing numbers of schools joining or creating MATs on the semi-formal networks of collaboration
• the challenging fiscal climate in which schools will continue to operate. With flat-cash, rising costs and tougher accountability for performance, not to mention the start of the fair funding consultation, schools will increasingly look for the benefits of more formal collaboration
• the ability to attract and retain staff – MATs may increasingly be seen as offering interesting career pathways and therefore attractive to work for.

In ‘Educational excellence everywhere’ it is clear that the MAT is the favoured structure, with a range of benefits cited, including improved support for teachers and leaders, more robust governance and greater efficiency in back-office arrangements. The white paper states that MATs tend to get the real benefit of centralised systems at a size of around 10-15 academies.

It further states that the single academy trust structure will still be available for schools which are ‘successful and sustainable’. However, in our experience, regional school commissioners are now not approving standalone conversions. It will therefore be interesting to see how policy evolves.

Even where it is possible to be standalone you would need to consider whether you wanted to be one of the relatively few standalone trusts with the vast majority of academies maintained by MAT.

Ask the Experts service
The Ask the Experts service is for members only. Members can be expected to rely on this service to provide advice from experts on how to deal with challenging situations. We take seriously our responsibility to provide this advice in good faith and to the best of our ability, and we will always do our utmost to live up to this responsibility. You should independently verify any information and content on this website before relying on it. Please see our full Terms and Conditions online when using this service.

Find out more about our second annual MATs summit at: www.matsummit.co.uk
What’s in this month’s School Business Management section?

Our new report ‘Making money for your school: Creative ideas to help you generate income’ has been very popular and we’ve cherry-picked some of the expert advice for this issue. SBM expert, Nazli Hussein, also offers nine top tips for income generation, so you will be spoilt for choice for creative ideas! Despite the recent government U-turn on academisation, future conversions are still inevitable. One SBM shares her experience of working in an academy and the new challenges she embraced. Our Employment Law in Education conference was a huge success this year – check out our article on what we learned. We’ve also had some interesting questions put to our ‘Ask the experts’ panel, including off-site family visits and staff union duties. Last but not least, we have a bumper summer checklist to ensure you have everything covered so you can enjoy that well-earned break!

Alex Masters, Content Lead

Contributors in this issue

Sue Birchall is an experienced business manager with knowledge of the maintained and academy sector. She is currently a specialist leader in education and is registered as an associate trainer for NASBM.

Dai Durbridge is a partner in the education team at Browne Jacobson solicitors and specialises in safeguarding. He provides advice and training to education professionals on legal and practical issues.

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

We gathered a range of new ideas for income generation in your school. Check the results here #makemoney report http://ow.ly/4n9XeL

‘Focus. Be clear about your objectives - don’t try to be all things to all people.’ Advice to teaching schools #oeNTSS @ OptimusEd

Wow. Packed auditorium for the Teaching Schools Summit. Looking forward to hearing the fantastic speakers #oeNTSS

Be part of the Optimus School Business Management network

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

Ask the Experts
Got a specific question? Get in touch with our expert panel by submitting your query via 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
SBM summer checklist

It’s the final term of the year. Are you prepared for those last weeks until the summer break? Alex Masters has collated the SBM summer 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.

Both academies and maintained schools

JUNE
Complete interviews for new September staff
Expert advice: During the interview process whatever procedure you choose, the process must promote fairness and consistency. Should an appeal be lodged, you will be asked for evidence. Any gaps in employment history could be a cause for concern and the applicant should be asked for an explanation. Do not ask the candidate their age, family situation, child-minding arrangements, origin or ethnicity as this could be deemed as discriminatory. For more expert tips check out our infographic online: ‘Recruiting for your school: 9 top tips.’

Conduct appraisals for support staff
Expert advice: We have nine top tips for support staff appraisals on our site. Tips include: issue any paperwork two weeks in advance and ask the appraisee to bring their personal development plan and evidence for achieving previous targets. At the meeting work together to set new objectives. Think about barriers to achieving those targets – could it be a lack of training or funding? Look at weaknesses as well as strengths to be developed.

Also don’t forget:

- EFA publishes universal infant free school meals (UIFSM) revenue allocations for the next academic year
- EFA makes payment 1 of UIFSM, pupil premium and summer schools grant
- Update ICT equipment.

JUNE AND JULY
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.

Review staffing and budget for September
Expert advice: Do check out our article ‘Managing your staffing budget’ where SBM consultant Cate Hart offers expert advice including: carry out an ongoing curriculum analysis to assess the supply of teaching periods to the lessons required – although changes to teaching staff do take place at other times of the year, this period is particularly busy. Use robust software to calculate budgets – the best will project five years, automatically increasing the incremental rises.

Schedule training for support staff
Expert advice: Visit my.optimus-education.com to see our article ‘Training your support staff in times of tight budgets’. Advice includes: remember that all staff need to understand the teaching and learning priorities of the school and to see clearly how they contribute. This can ensure that staff feel part of a community working towards common goals. This can take the form of regular team briefings, SLT meetings or encouraging staff to become more involved in T&L. We need to get across the message that support staff are not ‘second-class citizens’.

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.

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.

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.

Also don’t forget:
- create detailed plans for work to be done in the summer.

JULY

Also don’t forget:
- new staff induction
- order grit/sand
- EFA confirms pupil premium allocations for the next year.

Maintained schools

**JUNE**

Don’t forget:
- LAs agree top up funding and contracts with institutions for high needs students
- EFA finalises Dedicated Schools Grant (DSG) early years block allocations for the last year based on January census, and updates allocations for the next year
- review SFVS section D - protecting public money.

**JUNE and JULY**

End-of-quarter 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. Remember, governors do not want to see the full detail of every cost centre, but need to interrogate the Consistent Financial Reporting (CFR) heading against the budget.

**Academies**

**JUNE**

Don’t forget:
- new academy trusts (without statements from 31 August) to submit their accounts return for the last financial year
- EFA makes devolved formula capital payments
- for governors: draft budget for new financial year.

**JULY**

Don’t forget:
- submit budget forecast return for the next financial year by 31 July
- closing date for applications for round 2 of the ACMF
- EFA issues pupil premium payment number 1
- return signed funding agreements to the EFA Teachers Pension as annual return due
- plan audit cycle
- obtain final budget funding details and prepare second draft budget for discussion at finance committee meeting.

For governors: provide information to assist them in auditing school funding

**Expert advice:** Do check out our article ‘Managing statutory reporting to governors’ on our site. There are a number of policies that need to be agreed by governors and published on the school website. The Schools Financial Value Standard provides the framework for the statutory response governors have for overseeing the financial aspects of the schools’ administration.

For governors: provide information to assist them in reviewing staff pay

**Expert advice:** Our detailed article ‘Preparing governors for taking pay decisions and managing appeals’ explains what governing bodies need to do to prepare for making pay decision. As the article states, ultimately, the decision-making body in relation to who receives a pay award and what this award is, is the governing body. Governors will need to determine what evidence they will require from the headteacher. This will likely include anonymised performance management objectives for each teacher and a summary of the reasons behind the pay recommendation.

Also don’t forget:
- submit consistent financial reporting data for the last year.
Academisation and the evolving SBM

Despite the recent government U-turn on academisation, it is inevitable that conversions will continue in the future. SUE BIRCHALL explores the impact for SBMs

The education industry is open to some interesting times ahead and the role of the school business manager (SBM) will have to embrace greater challenges.

When I became an SBM in 2001 I had a vision, which I think many of us have held at some time or other, of a profession that was to grow inside the quite regulated auspices of our education system. Certainly for the next ten years, education became a testing ground for all sorts of government led initiatives and social expectations which created an environment of constant change. This time it's different; this change alters the very concept of the SBM role particularly at primary level.

A larger proportion of secondary schools than primaries has either chosen or been encouraged to become academies. As a result, through necessity, this has encouraged a change in SBMs' traditional roles. Separation of the workload has created many roles to support business functions within establishments and the SBM role has evolved.

In recent years, the profession has been working towards a more conventional and consistent way of working and the role of SBM can encompass many areas and responsibilities. NASBM has been working closely with government and unions and published the new SBM professional standards in 2015 to assist the professional direction of SBMs. There is also the work that has been going on to create a fairer national pay strategy.

So, where does this leave you?

Inevitable change
You may be someone who has kept up with all of these changes and has relished the opportunities that inevitably follow change. Or you may be in a school which doesn’t encourage the personal development which will have been required to do this. Equally, you may have wished to. Whichever of these applies to you the reality is that academisation does bring with it a lot of changes to the fundamentals of the role.

There is now a need to have genuine accountancy knowledge: the fact that you become a small to medium company or part of a large company brings with it the need for business accounting. A further requirement is an understanding of academy funding: no longer is the local authority there to hold your hand and sort this for you; their role will become more diminished and may even disappear. As we all know, finances are often only a small part of what the SBM may be required to do and other areas will bring their own challenges. Site management becomes an enterprise in itself. All of the things that you used to have to do are now your responsibility – it is the same for HR.

As an SBM since 2001, I have studied and tried to keep abreast of all new developments within my chosen profession. I took my studies to degree level and strived to work, not only as an SBM but also as a specialist leader in education, trainer, assessor and writer. In 2015 my desire to develop led to me taking a role outside of an LA controlled school and I joined a multi-academy trust (MAT) last October – it has been a massive culture change. I am fortunate in that I have experience in accounting and business outside of education in a past life, which I believe has helped me to face the significant challenges that the change brought with it head on.

Primary to secondary
The first challenge for me was moving school phase from primary to secondary, although a part of my role as financial controller is working with primaries as well. A bigger change and challenge was the way that the SBM role changes in an academy. The budget has always been at the very core of what I do but it increases in prominence in your day-to-day work. The demands in terms of financial regularity and accountability extend far beyond anything that you will experience in the maintained sector. This was the first time that I had dealt with other professions such as auditors, accountants and solicitors for a very long time.

'There is no longer the "comfort blanket" of the LA in the background thinking for you, reminding you when deadlines are approaching'
As stressed above there is no longer the ‘comfort blanket’ of the LA in the background thinking for you, reminding you when deadlines are approaching, organising statutory returns or being there as a failsafe if something doesn’t go as it should. This also applies to the other areas for which you have responsibility. Site management becomes a much larger proposition: all statutory requirements become your responsibility to organise, cost and implement. The same applies for personnel and staffing and, as the level of knowledge needed increases, you may find yourself having input into areas such as salary scales, professional development and performance management which you may not have had before.

**Responsibility**

This all sounds rather pessimistic and seems to suggest that there are only negative aspects to taking on the role within an academy. If I left you with this impression that would be wrong of me. It is true that the role becomes more significant and you will be expected to act as the subject matter expert (SME) within your academy. The support that you used to obtain at the end of the phone from your LA now becomes your responsibility to find out. Whether this is achieved through your MAT, shared good practice with a colleague or research on your own, this is not a bad thing. In fact, in many academies the role and responsibilities get divided as they have in my own situation.

Many schools are also considering becoming part of a MAT and many of the back room functions should be supported by this. However, with removal of the education services grant support to pay for this, there will inevitably be some responsibility to the individual academies and thus the SBM. A true development for the SBM role in my view and the opportunity for it to be recognised as a true profession.

Now for the soul searching where many SBMs will have to start considering exactly where they would like their career to take them. There are opportunities to study: the Certificate of School Business Management and subsequent levels are available and there are training courses offered from various sources. MATs have a policy for training and as existing staff you will no doubt have access to these.

Traditional training courses in areas such as accountancy or facilities management may benefit you depending on how your role evolves. Whichever direction it takes, this will be necessary along with a ‘can do’ attitude and a desire to develop your role. As an academy your leadership team and governors will have a multitude of new responsibilities and requirements and you will be key to them achieving this.

The question is, will you see this as an opportunity to develop or the push you need to move on? You decide!

'This was the first time that I had dealt with other professions such as auditors, accountants and solicitors for a very long time'
Income generation: nine top tips

Generating income needs to be a leading priority for schools. Most employ a limited approach, leaving a range of potentially lucrative and rewarding options untapped. SBM expert NAZLI HUSSEIN offers nine top tips to help you achieve this.

1 **Promote your projects**
What does your school need to generate income for? Pose this question to your staff and it will result in a long wish list of items. Alone, these will not sound like an attractive option for an individual or organisation to put money or time towards. There is a huge amount of competition vying for that money and time so you need to develop each item on your wish list into an engaging-sounding project. Create a background case and narrative that you can then keep drawing from to produce numerous campaigns that can be communicated in a number of ways with your various stakeholders. The aim is to encourage their engagement with the story and the reason behind the need for your original item.

2 **Identify your stakeholders**
Spend time identifying the full range of internal and external stakeholders available to your school. These can range from staff, parents and carers, pupils, governors, the local community and businesses, charities, and national organisations. Collate their contact details and create a stakeholder database. Additionally, recording whether each stakeholder can provide money, time or both will help to differentiate how you communicate your campaigns with them on a continuing basis. Every name, mobile number and address should be 100% reliable, so that you can get the most out of your marketing efforts and feel confident that you’re making decisions based on reliable data. By increasing the accuracy and consistency of your data, you can improve your response rates, which leads to increased return, supporting a low effort strategy.

3 **Access a database of grants**
There is funding available to education organisations within the UK. Funding providers will have their own guidelines and criteria that they will follow when deciding who and what causes to allocate funds to in order to achieve their own organisation’s vision and aims. Having developed your project you then need to match its aspirations with the objectives of the funding providers. Without that match being in place, time will be wasted completing grant applications that will never be acknowledged. Save time by accessing grant databases that are available specifically for schools, supporting quick and easy searches for suitable matching funders.

4 **Discover Gift Aid**
Gift Aid is one of the key ways the government supports the charitable sector to encourage charitable contributions by giving back to the charity the income tax that a donor has already paid on their donation. By using the Gift Aid scheme stakeholders can increase the value of their donations by 25% at no extra cost. However, this doesn’t happen automatically: your school must be a registered charity, and the charity has to collate signed Gift Aid forms from stakeholders donating money and make claims back through the Gift Aid system. Additionally, to qualify for Gift Aid, donations must be outright gifts and there should be no benefit to your school in return. The donation cannot be used against payments for services. It is crucial your school researches and understands the detail around these guidelines.

5 **Innovative lettings**
There are organisations that will bulk book the use of your sporting facilities across several evenings during the week as well as weekends. They will bear the effort around marketing and attracting interest in the sport they are offering and making sure they fill the space to make it profitable for them, whilst meeting your schools hire charges. Other creative sources of income through lettings can come from registering your schools availability with production companies who are likely to pay high daily rates. Furthermore, do not limit lettings to just space that can be let: what other resources does your school have available that can be hired out to the local community or businesses? Consider items your school may have such as tables and chairs used for exams, media resources,
vehicles and specialist equipment that other schools may benefit from using.

6 Connect with local businesses
Local businesses will very likely want to align themselves with one of your projects if their product or service resonates with it, or if they are trying to reach a target market that your school has access to. This win-win situation can be leveraged through offering a sponsorship package or opportunity and your school can either focus on receiving money or goods from the company, in exchange for displaying their logo and creating awareness amongst staff, pupils, parents and carers and anyone else visiting the school. It is obviously imperative that the company's products and services are acceptable to the school and fall within boundaries that are appropriate for the end audience.

7 Cultivate commercial services
Schools have an enormous and valuable pool of skills and knowledge among their staff that can be provided onsite, opened up to the local community and shared with other schools as well as local and national organisations. Many schools are going through staff restructuring and will be looking for a more cost-effective way to still meet the needs of their curriculum and pupils while avoiding the cost of full-time staff. Your staff can work for these schools on a consultancy basis, as well as supporting education organisations that can benefit from their knowledge. It may be that the catering team is able to outsource to local community events or individuals, or even create a new niche service. The reprographics team could provide a printing and multimedia service to local businesses and nearby schools. As a school business manager you could be in high demand from a number of different sources. Specialist teaching knowledge could be shared through training workshops and providing a range of adult education classes onsite, according to market demand. These are all ideas that can generate a healthy income. For more details on this, please see page 28 'Generating income from staff expertise'.

8 Develop creative events
Schools have a captive audience with parents, pupils, governors and the local community and businesses. Ask them what events they would like to benefit from and provide those events. Income generated from the obligatory summer fair and non-uniform day will not stretch very far. Get creative: there are plenty of ideas on the internet that can then be put forward to your stakeholders so find out what they would like and begin planning. A large number of events will not feel like you are continually draining the same source of hard earned income if the events are needed, wanted and diverse.

9 Access income generation training
Finally, income generation and all the activities surrounding it may require skills and knowledge that have not been previously developed and also may require a level of organisation that is not in place to effortlessly bring all activities together. Consider workshops that focus on specific areas of income generation or marketing and share information gained back at school among key staff responsible for income generation activities. Confidence will increase as a result of knowledge gained, and that in turn will encourage movement towards a new way of approaching income generation.

Nazli Hussein is a freelance school business manager offering services through www.sbm-support.me

Check out our in-house training at my.optimus-education.com which will save you valuable time and money. Our course on ‘Achieving value for money’ is proving to be particularly popular.
Generating income from staff expertise

School business management expert RUTH BRADBURY offers some creative ways to help your school generate those much needed extra pounds.

It is becoming increasingly critical that schools generate their own income streams in addition to the funding they receive from the government. While traditional areas such as lettings and uniform sales may provide some profit, they can be very labour intensive and often have limited capacity.

Most schools are full of individuals with knowledge and expertise from which schools could benefit. Make entrepreneurial use of the human, not just the physical, assets in your school to generate additional income.

The first step is to identify your strengths and decide what assets you could potentially sell. What areas of expertise could be valuable for others? Consider: your rewards and sanctions framework; the quality of pastoral care; and particular skills from finance and support staff (e.g. management of capital projects, or financial forecasting).

The next stage is to ensure you have covered everything.

- Review your recent Ofsted reports for areas graded ‘outstanding’.
- Carry out a SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis by the leadership team or other staff groups.
- Ask your staff for their views on what they consider to be particular strengths or canvas opinion from relatively new staff who have come from other schools.
- Ask visitors to the school what impressed them - fresh eyes may pinpoint strengths that you might have overlooked.

Once you have identified the potentially saleable areas within your school, the next step is to transform these into a product or package that you can take to market. Consider the examples below.

Consultancy packages
This could be an offer of a bespoke service tailored to an individual school. This could include initial diagnostics and assessments of need, training sessions for staff, and online and/or telephone support.

Depending on your particular identified strengths, the types of support on offer could be as diverse as targeted assistance to improve teaching skills, training in behaviour management, or advice on support staff restructure.

Charges
Charges for this type of work would have to be competitive but would also have to make a profit once staffing and any transport costs had been taken into account. Your staff need to be fully committed to any external support contracts, and to delivering a quality professional service at all times. Costs to factor in: staff costs, transport, administration and marketing materials.

Initial outlay
While in most cases you would not be committing significant staff time to a project until you had some customers, there will almost always be some unavoidable initial costs that may not be recovered if plans do not come to fruition. Identify what these may be and ensure they are affordable, even in a worst-case scenario of no customer take-up.

You can minimise the risk of getting no return from your initial investment by researching the likely response to your products from potential customers. This could either be done informally through existing networks and relationships, or formally through a market research consultant.

Governor knowledge and support
Especially if there is any significant financial risk, it is vital that governors are aware of your plans; that they know the potential...
costs; and that they are supportive. Present a detailed outline of all proposals and costs to the finance committee or even the full governing body, and ensure that formal approval is granted (and minuted) before proceeding.

**Staff buy-in**
If you are offering the services of members of your school staff, you have to ensure that they are happy for this to take place. Just as important is securing the buy-in of the leadership team and other staff, especially the line managers of the people who may be involved in delivery of these services.

**Things to watch out for**
Financial commitment is an obvious thing to be aware of when undertaking any new income generation project. However, there are also other issues you will need to consider before implementing your plans.

The commitment of your staff time to any project, whether they are preparing resources or going out on consultancy visits, is likely to have implications for the day-to-day operations of your school. Be aware of the extent of the impact, so you can be sure from the outset that you will be able to cope with the implications – and whether the activity will add value overall once any costs (financial and other) are taken into account.

**‘Mission drift’**
Even if you can manage the day-to-day impact of providing products and services, there is still a decision to be made about whether the project may have a more fundamental effect on the core aims and objectives of the school. From a school leader’s perspective, the key test will always be whether the activity will contribute to improving outcomes for young people – either directly, or through the creation of resources, capacity or knowledge.

Alternatively, if an activity raises the profile or reputation of the school, then it could also be seen to be valuable, although this would always have to be balanced against any impact on core business.

**Effect on relationships**
The vast majority of school staff are willing to work with and support staff from other schools on a largely informal basis. This is one of the great things about working in the education sector, as it means you are able to share ideas and best practice with colleagues from a range of different settings.

If you begin to charge for the type of services that may previously have been offered for free, there is the risk that professional relationships will be damaged and that many aspects of partnership working will suffer. So it is worth developing a clear policy that defines contractual relationships and delineates clearly between these and the less formal information-sharing that is part and parcel of most educationalists’ working life.

**Intellectual property**
If you are deriving income from the work of staff, particularly in the case of published material, you and the staff concerned must be clear about the ownership of intellectual property on any products. As a general rule, the rights to work produced by your staff in the course of their employment belongs to the employer.

**Accounting considerations**
If you decide to go down a commercial route and sell some of your in-house expertise, then you need to account for income properly, especially in relation to taxation.

Allocate a separate cost centre for all income and expenditure that relates to the development and sale of the products or services. To ascertain full income and expenditure, ensure that all costs – including staff time – are taken into account. Regular review of this cost centre should then form part of your financial reporting to the leadership team and governors.

The rules around VAT in schools are complex and it is likely that some or all of the supply of expertise and services to other schools may well be regarded as ‘business income’ by HM Revenue and Customs (HMRC). Obtain the advice of your auditors, or of HMRC themselves, on the correct treatment of VAT on any income.

**Be clear on corporation tax**
While schools are normally exempt from corporation tax, there may be a liability if profits are derived from trading activities that do not seem to advance their educational or public benefit objects. It is worth obtaining professional advice in this area, and considering whether it would be worth setting up a trading subsidiary.

**Realise benefits**
Income-generating activity of this nature can bring substantial benefits – both financial and in terms of the profile and reputation of your school, and to staff development. The important thing is to ensure you are fully aware of all of the implications, negative and positive, and that your decision on which, if any, such activity to pursue is taken in an informed and measured way.
Optimus Education recently held its 15th annual employment law conference. ALEX MASTERS shares some of the main messages and relevant expert advice for 2016

Headteachers, deputy heads and school business managers flooded into the plush reception area at Grand Connaught Rooms in London. With the promise of eight established lawyers covering all aspects of employment law, from recruitment, restructures and performance management to sickness absence and MATs terms and conditions, it was set to be an informative day.

Dai Durbridge, partner at education law firm Browne Jacobson, kicked off the day by setting the scene. He reminded the audience that, while we are experiencing a ‘relative period of stability’, staff management remains an issue and restructuring and redundancies are on the horizon, particularly in view of the imminent changes to fair funding and the recent publication of the white paper, ‘Educational excellence everywhere’.

‘The white paper is intention, not legislation. Make of it what you will’
Heather Mitchell, Browne Jacobson

and the government’s plans to reform the national funding formula, the Department for Education set out its vision for schools in England for the next five years in its new white paper. We’ve summarised the main points, including academisation, leadership, teacher training, governance and challenges. To access this summary, log in to my.optimus-education.com and type ‘educational excellence’ in the search box.

Restructuring
An imminent issue for schools will be restructuring. Naseem Nabi from Veale Wasbrough Vizards outlined what you need to know before you start. This included: ensure that your current structure is clear: are all staff fully utilised? Do you have supply/cover arrangements? Do you have responsibility allowances? Are there extra-curricular and pastoral duties? Are contractors used effectively?

In a later breakout session, Peter Woodhouse from law firm Stone King

Case study – Surfers’ Paradise Academy
The Surfers’ Paradise Academy (SPA) in Weymouth is suffering. There has been a combination of factors (a perfect storm perhaps) causing significant cost pressure. Central funding per pupil is down, and there is a declining roll. An interim consultant (Mr Slash) has been hired to advise governors how to remove the budget deficit in three years and to modernise the structure.

Mr Slash has identified some areas as ‘low-hanging fruit’ and wishes to make the savings. He also thinks that SPA is overly focusing on pastoral matters and it needs more HR-driven recruitment, and more data capture.

SPA has a girls’ school and a boys’ school. Currently, the SLT structure looks like this:

<table>
<thead>
<tr>
<th>Head of boys’ school</th>
<th>Head of girls’ school</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alan</td>
<td>Beth</td>
</tr>
<tr>
<td>Assistant head, teaching</td>
<td>Assistant head, pastoral</td>
</tr>
<tr>
<td>and learning</td>
<td>Dot</td>
</tr>
<tr>
<td>Colin</td>
<td>Assistant head, teacher</td>
</tr>
<tr>
<td></td>
<td>training</td>
</tr>
<tr>
<td>Assistant head, curriculum</td>
<td>Freda</td>
</tr>
<tr>
<td>Ed</td>
<td></td>
</tr>
<tr>
<td>Assistant head, pastoral</td>
<td></td>
</tr>
<tr>
<td>George</td>
<td></td>
</tr>
</tbody>
</table>

Other ‘facts’
- Alan and Beth are rumoured to be in a personal relationship.
set out a case study for us to discuss (see below). Take a look and consider a) the issues involved and b) outline a timetable for implementation.

It was interesting to hear people’s responses to this case study. Many were concerned about the capability issues surrounding Freda and were keen to offer her a new role. Others suggested that you ‘get all seven people to fight for three places’. Many also agreed that Mr Slash was being very strategic and not thinking about the best interests of the school and its pupils. The group I was in thought that there should be a focus on better recruitment in the first instance, and from that day forward focus on better staff retention.

**Optimus restructuring advice**

We have a range of advice on our website to guide you through the complex and often sensitive process of restructuring (log in to my.optimus-education.com and type ‘restructures’ in the search box).

One popular piece of content is ‘Support staff review and restructure’ which includes a range of advice from experienced SBM, Ruth Bradbury. Her advice includes:

- before you start, consult with HR and governors and inform staff
- check relevant policies and see if they are due for review
- review the effectiveness of your existing structure
- consider the school’s wider strategic aims
- identify how every post holder contributes daily to the success of the school
- be aware that any restructuring may well involve redundancies
- gain governing body approval
- consult, publish, revise, present and inform staff
- then you can begin to allocate posts.

Do also check out our model policies, which include: performance management and capability; staff discipline, conduct and grievance; and complaints procedure.

**Absence**

Peter Woodhouse took to the stage next, only to promptly walk away and out of the main doors, much to the audience’s surprise. Moments later he returned smiling: ‘Well this is about absence!’ He explained that sickness is responsible for 90% of absence. ‘Must you extend sick pay? Probably not!’ he said. Other reasons for absence include: stress, grievance, bullying, harassment, victimisation, ostracism and discrimination.

Peter recommended the ‘carrot and stick approach.’ The carrot approach – ‘the soft stuff’ – includes: offer flexible working policies to assist a better work/life balance; offer training in how to cope with stress; promote healthy lifestyles; offer income protection and/or attendance incentives.

The stick approach – ‘the hard stuff’ – includes: the right to run a school/business; offering a short time to demonstrate improvement; setting out expectations and fairness to all.

**Optimus absence advice**

Absence can be a very complex subject, as was illustrated by the number of questions raised during the day’s conference. We have a range of advice on our site, including this expert question and answer from Heather Mitchell.

**Question**

A teacher has been refused five days’ leave of absence in term time for a holiday. The teacher has appealed to the governing body against the decision. Should this be heard by a panel of governors or is it the headteacher’s decision?

**Answer**

There is no prescribed format for this. Some school policies would have the decision heard by the governing body, others by the headteacher. If your school does not have a policy for this then I would suggest that it is good practice to mirror your grievance procedure. If the grievance appeal goes to governors then it would be appropriate for the same to happen here.
Ask the experts

Our ask the expert service answers your burning questions. This month we look at off-site family visits and staff union duties

**Question: Off-site family visits – when is the school liable?**

We organise family visits to theme parks and farm parks where the school provides families with admission tickets, informs the family they are responsible for their child, but also sends staff to the location to act as a point of contact (meet and greet; issue admission tickets; available for advice).

To what extent is the school exposing itself to liability by being involved in these off-site enrichment visits?

**Answer**

In general, what the courts would look for is whether the event was clearly a school organised or managed event, regardless of any attempts to state otherwise in writing. Let’s look at a case study.

**A visit not sanctioned by the school**

An enrichment event takes place in the holidays. The school suggests a list of top ten enrichment activities. A group of parents decides to arrange for their families and others from the school to attend. They ask the school for contact details and information about the school’s insurance cover for this event, a copy of the safeguarding policy and for staff to attend.

The school provides the contact details and states that this is not a school sanctioned event, that the school insurance policy would not afford cover and no staff would be involved in the organisation, management or support of the event before or on the day.

In these circumstances, it is highly unlikely that a court would find the school liable for any negligence or deliberate acts that took place during the event.

**A school sanctioned visit**

Let’s look at the same facts, but a different school response. This time, the school says that it would love to support the event. The school ensures that the trip meets with its own policy and procedural requirements, advertises the trip to other parents on school headed paper and on its website (making no mention that this is not a school event), books the tickets, takes the money from the families, provides six staff to attend the day, ensures the school insurance policy provides cover and travels to the event in school minibuses at no charge to the families. Having done all of that, the school then states in writing that the event is not a school organised/managed event. The court will look at the facts here, not the last ditch attempt by the school to avoid liability. The facts make it quite clear that this is a school managed event. The court will look at the facts here, not the last ditch attempt by the school to avoid liability. The facts make it quite clear that this is a school managed event.

The advice here is to do one of two things: keep well away from the event to ensure the school is not liable or assume that the involvement will lead to the school being held liable and take reasonable steps to discharge your duty of care in relation to this event. Anything in between leaves you at risk.

Dai Durbridge – Browne Jacobson

**Question: Releasing staff for union duties**

We have a senior member of staff who has been elected to serve on a teaching union. This has been done without any agreement from the headteacher or governors and in fact was done against advice that such approval would not be given.

The person has already undertaken the role for several years, again without approval, and was told that this could not be allowed to happen again. The role requires two days out of school every week for which an inadequate compensatory payment is received. Can we stop this person from taking two days out of school each week?

**Answer**

The legal position is that the employer has to permit ‘reasonable’ time off to carry out Trade Union Activities. Unfortunately, there is no set amount of time that is considered to be ‘reasonable’. The Department for Education has issued guidance which covers this point. In summary, this states that their view is that trade union representatives should spend the majority of their working hours carrying out their school-based jobs and that it is their view that the union duties should be covered in one day a week or less.

However, in the circumstance you describe, it will be very difficult to do anything about the amount of time that the employee is working as he has now been re-elected. If you were going to refuse permission then this should have been done before the election.

Heather Mitchell – Browne Jacobson
What’s in this month’s Teaching and Learning section?

As the end of the school year comes into sight, it can be a good time to take stock and do some planning. Where do you want to be next year? What sort of culture of teaching do you want in your school, and what do you want your own teaching to look like? Hopefully there’s a fair bit in this issue to support you in this process. Our focus on effective CPD continues with a summary of the relevant research, a case study of a successful school and some handy planning templates to help out your CPD coordinator. We also cover testing and assessment: a cognitive psychologist explains why low-stakes testing can be much more beneficial for pupils than we sometimes think, while Damian Haigh explores why assessment changes have been so difficult for schools, and what you need to do to avoid just having levels in another name. I hope you enjoy it, and do check out the supporting resources online for more.

Owen Carter, Content Lead

Contributors in this issue

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@DrSmithRIC

Top tweets from @TeachingOE

Marking is not the same as feedback, and we should not treat them as such. Good feedback is important, written marking "may" not be.

The biggest reason for schools not engaging with research? Our survey respondents said time.

Last-minute interventions and cramming are unlikely to help results. Space practice over time rather than massing it.

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Principles of effective CPD: a research summary

How to improve the CPD offer for teachers in your school? Owen Carter summarises some of the research evidence on professional learning.

Regardless of the specific goals and targets you may have for CPD, the overall aim for schools is enabling professional learning that is of great quality and that is focused on improving the outcomes for pupils.

Fortunately a substantial amount of research has focused on the question of high-quality professional development. Here we’ll summarise the top findings from some of the largest systematic reviews.

Collaboration matters

The CUREE report ‘Understanding what enables high quality professional learning’ asked the question: ‘What are the characteristics of high quality professional learning for practitioners in education?’ Their focus was specifically on CPD that leads to benefits for pupils.

One of their top findings was that CPD is most likely to benefit students if it is collaborative, involving staff working together over time, sharing evidence about practice and trying out new approaches.

The same finding was made by the Teacher Development Trust review ‘Developing Great Teaching’, which noted that peer support was a common feature of effective professional development.

The CUREE report suggests a few ways to embed effective collaboration:
- learning from observing teaching and learning exchanges
- immersion in exploration of pupils’ learning and teachers’ contributions to it
- joint enquiry, coaching and mentoring, development of networks and structured dialogue
- active engagement with professional learning through collaborative problem-solving and role play, practising, planning, experimenting, adapting, reviewing and debriefing.

Focus on pupil outcomes

In Helen Timperley’s booklet Teacher Professional Learning and Development, the first principle for effective CPD is to ‘focus on valued student outcomes’.

This means that focusing on what pupils need to learn, or the needs they have, is an effective way to direct professional development. Keeping outcomes in mind first of all avoids probably the most common problem with all CPD: ideas might be taken in, but practice never actually changes.

This is an idea strongly echoed in both the TDT and CUREE report, and it links to our next principle.

Make it relevant

Much CPD tends to focus either on generic pedagogy – such as differentiation – or on subject knowledge, without relating the training to the specific contexts and needs of individual teachers.

The research evidence suggests that this approach is flawed. CUREE recommend giving time for the synthesis of ‘relatively generalised, context-free theories and concepts with the specifics of the teacher’s working context’. The TDT report suggests that schools need to do a better job in helping teachers to identify and understand their needs, and making sure that training is relevant to them.

Training on teaching skills should be woven in with material on subject-specific pedagogy and knowledge

Sustain CPD over time

Duration, rhythm and opportunities for
feedback really matter for CPD to work. Joyce and Showers studied over 200 Inset programmes in Student Achievement through Staff Development and found that the vast majority of training programmes failed to make any changes in participants’ practice. Those that were successful were sustained over a long time, and provided multiple opportunities for practice, in particular peer coaching both before and after training.

This is a big emphasis in the TDT report as well, which went so far as to claim that ‘the most effective professional development lasted at least two terms – more usually a year (or longer).’ This can sound daunting, but what it means for the CPD leader is to embed any one-off sessions within a longer-term programme of support and engagement. Difficult, certainly, but not impossible.

**Connect theory to practice**

Dylan Wiliam once commented that CPD often tries to get teachers to ‘think their way into a new way of acting, whereas it would be far more effective to get teachers to act their way into a new way of thinking’ (see his paper ‘Teacher quality: how to get more of it’).

When speaking to Healing School in Grimsby (see more about what they do on page 36), we discussed a few innovative methods they use to make sure that professional learning connects to practice. These could be freely adopted by any school to make sure their CPD actually changes what happens in the classroom.

1. **Watch, impress, share.** The teacher selects anything from the teachers’ standards that they are really good at. This enables a teacher learning champion (TLC) to visit and become ‘impressed’. The TLC can then share this idea with other teachers. This can be used as evidence for any TLC application.

2. **Reflection lessons.** A TLC can visit a lesson of the teacher’s choice, normally dropping in for a 20 minute segment of the lesson. The teacher then reflects on the lesson with the TLC and keeps the documentation as evidence.

3. **Plan together, teach together.** Recently qualified teachers plan a lesson with either their peers or the TLC, and then teach this lesson with the TLC and possibly one other teacher watching. Only positive feedback is allowed.

Many schools have also made use of lesson study or related approaches to promote an action-focused professional development. At its most simple, this involves teachers collaboratively planning a lesson with a few case study pupils in mind who will be the means by which they evaluate their impact. This takes place over a series of lessons so that a cycle of reflection, improvement and evaluation leading to further changes is created.

**Use specialist and external support appropriately**

The research reviews all stress the value of external expertise, when appropriately put to use. Substantive professional learning often requires participants to have their preconceptions about teaching and learning challenged, and this sort of critical input can be easier from external sources. The principles above apply to external training as much as internal: think about how it can be embedded into a long-term programme of change, how relevant it can be made to the needs of teachers, and how practice will be shared and implemented.

What could this look like in practice? A group of teachers, in collaboration with their CPD coordinator, could identify an area of interest or development which both parties feel would enhance their impact on their pupils. The teachers would then do some initial research on the topic, looking at relevant academic studies, books or articles. Having identified any initial doubts or questions, they could then attend an external event such as a conference with experts in this area speaking, using the day to address these questions on the topic.

Post-event the teachers would be expected to feed back to other staff members on any relevant learning, and begin implementing some of the ideas. Ideally using a developmental or peer observation model, small changes in practice would be initially introduced and then sustained over time.

Any feedback from pupils or teachers’ observation of changes in behaviour would then be used to inform future action.

This approach could work because it fits the principles above: it is sustained over time, uses a collaborative approach, and is immediately relevant to context and focused on pupil outcomes.

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**Rethinking Lesson Observations: From Performance to Professional Learning**

After our sell-out Lesson Observations training day in London, we’re delighted to be taking this practical training day to Birmingham.

Led by two expert trainers, Joanne Miles and Dr Matt O’Leary, this training day will ensure you leave with the skills to promote sustainable teacher development through observation across your organisation. For more information, take a look at our website at www.oeconferences.com.
Almost every teacher in the world wants to improve. But the demands of the job, time pressure and mental fatigue means that reflection time often gets put at the bottom of the to-do list – and drops off it.

We’re always excited to hear from schools who have made a real and sustained commitment to CPD. So that’s why it was great to speak to Richard Burrows, assistant principal at Healing School, about how they have put professional development at the heart of what they do.

Make CPD central in school life

‘I need to know everything the staff do has an impact’, says Richard. For CPD to work successfully, tracking, structuring and evaluating it has to be at the heart of school life.

All teachers at Healing belong to one of four professional learning groups.

1. An NQT group, based around ‘securing good’. This group is supported by lots of in-house training and constant guidance.
2. A ‘consistently good’ group for recently qualified teachers or new staff. The emphasis is on developmental lesson observations, peer observations and mentoring, as well as identifying potential areas of need so appropriate support can be put in place.
3. A group of ‘lead practitioners’ who have demonstrated their effectiveness in the classroom. These teachers have their lessons open so anyone who wants to observe can.
4. A group of ‘teacher learning champions’ who are responsible, along with SLT, for making whole-school teaching and learning as good as it can be. Their lessons are always open and they take on a leading role delivering CPD in the school.

By having groups focusing on key teaching and learning issues, supported by each other and more experienced practitioners, the CPD structure keeps the main business clearly in sight – prioritising continual improvement in teaching and learning.

Personalise – not one size fits all

While this CPD programme has worked well so far, Healing School also want to prioritise opportunities for teachers to learn from each other, and to embed a culture of personal ownership of learning and research.

It’s all very well sharing ideas or signposting resources, but if practice doesn’t improve over time then the main point of CPD has been lost. Healing School’s solution to this was to roll out research enquiry using Optimus resources: teachers doing research with a mentor guiding, supporting and checking up on them.

In the NQT group, for instance, every teacher will be expected to undertake some form of research on the Knowledge Centre: they might look, for instance, into best practice on marking and formative assessment, mastery teaching or statutory safeguarding responsibilities.

Recently qualified teachers will pick three units to cover from Optimus’s teacher development programme, on top of the school’s own training, ensuring they are clear about good practice in some of the core issues of classroom teaching.

Create a structure for individual development

Richard is clear that just asking teachers to research a topic without support or structure is likely to fail. ‘A structure needs to be in place to make sure research has an impact and help share what’s been learned.’ Both lead practitioners and teacher learning champions will be expected to act as authorities on Optimus’s resources and other sources of good practice – they will signpost teachers to the most relevant resources.

Teacher learning champions will be expected to keep a weekly log to track and reflect on what they’re doing: another way of making regular review of the effectiveness of CPD an intrinsic part of school life.

This large internal community of teaching and learning focused practitioners means that much of the professional development is created, led and evaluated by middle leaders – keeping them at the heart of change in the school.
Whole-school CPD plan

A template to plan strategic CPD priorities over one year and three years, kindly shared by BENYNA RICHARDS and ROBERT RANDALL of Tanglin Trust School

For CPD leaders, keeping track of professional development activities and coordinating them in a way that will have a whole-school impact can be a real challenge.

Benyna Richards of Tanglin Trust School has shared her planning templates for CPD priorities over one year and three years.

The template can easily be customised to suit your school, and if you are in a large or complex setting then this overview can be valuable for focusing CPD on what matters most. Tanglin is an all-through school, so the plan offers differentiated paths for the infant, junior and senior school staff.

This could be adapted to different phases within a school, or even subject areas.

Download an editable version of the templates online at: my.optimus-education.com/node/15599

1 Year Action Plan – CPD 2016/17

<table>
<thead>
<tr>
<th>Developing Our Learning Organisation</th>
<th>Focus Area (From school/department strategic plan)</th>
<th>Objectives</th>
<th>Goal (What will success look like?)</th>
<th>KPIs &amp; Timeline (How do we know we are making progress?)</th>
<th>Actions (What do we need to do and who needs to do it?)</th>
<th>RAG T1, 2, 3</th>
<th>Review – WWW/EBI</th>
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3 Year Action Plan CPD 16/17 - 19/20

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<td>Continuous Professional Development (CPD) at Tanglin is a collective responsibility which promotes, develops and supports our vibrant learning within the Tanglin community. A cycle of review, delivery and evaluation exists in order to enhance pupil achievement and drive improvement for all.</td>
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How retrieval practice can help pupils remember and understand

Cognitive psychologist MEGAN SMITH explains why quizzes can help learning and how teachers can use them to support pupil progress.

Testing is often thought to oppose learning. Time spent quizzing pupils on their knowledge, the argument goes, takes away from time that could be spent acquiring it. What this ignores is the power of the testing effect: testing can help reinforce knowledge, as well as assess it.

Whenever I am planning a new sequence of lessons, I identify what the point of taking these lessons will be, and what I want pupils to achieve by the end. I want them to gain knowledge, and I want them to understand what they have learned and be able to transfer it to situations outside of the classroom.

To help my pupils do both these things, I give frequent tests and quizzes in all of my classes. I give these quizzes for two reasons: I want to help my pupils learn, and I want to teach them how to take control of their own learning and use learning methods that are effective when they study on their own. Evidence from cognitive science labs and research in the classroom suggests that quizzing can do both (1).

Why do I love quizzing?
When pupils answer questions on tests or quizzes, they engage in retrieval practice. In other words, they actively bring information to mind in order to answer the questions. This act of bringing information to mind improves learning in a few different ways.

Here is what it can look like in practice: at the beginning of lessons, I would present a few questions, and pupils would write their answers in their books. I’d make sure to ask broad questions, and require the pupils to describe and explain concepts taught previously.

With my university students, for instance, I might ask them to describe how air pressure is turned into sound in the ear. They will need to explain what happens in the outer ear, middle ear, and inner ear. They will also need to explain how each part works together to create a signal for the brain. The questions require a fair bit of writing, so I will usually give them around 10 minutes to answer the questions. I collect the booklets, and then call on the students to answer the questions out loud. We talk about the answers, and I correct misunderstandings.

How do quizzes help pupils learn?
Engaging in retrieval practice via quizzing helps pupils learn in more than one way. First, practicing retrieval directly helps pupils learn. This happens even in the absence of feedback, or an opportunity to restudy the information (2). Bringing the information to mind literally causes the pupils to learn the information better. What’s more, bringing the information to mind improves pupils’ ability to apply the information in new situations (3).

There are a lot of indirect benefits of giving pupils regular quizzes as well (1). For example, my pupils know that they can only do well in the quizzes if they are listening and engaged in lessons. By providing quizzes I’m hoping to motivate my pupils to come prepared for lessons, and to pay attention during them.

Quizzes also give me an idea of how well the class as a whole grasps the concepts. If many pupils are struggling this tells me that I need to do something different during lessons. I can rethink the way I am explaining something, or provide additional instruction in the classroom to make sure I am clearly presenting the points.

All of these benefits come from about 10 minutes at the beginning of class. And - the icing on the cake - the pupils actually
like doing these quizzes! Who could ask for more?

**What about other methods of having pupils practice retrieval?**

My example above is just one way to implement retrieval practice in the classroom. Research has shown that multiple-choice questions, short-answer questions, and asking pupils to simply write everything they know from memory helps pupils learn! Retrieval-based learning can extend beyond just quizzing as well. Pupils can create a concept map or another visual representation of material from memory (5, 6). As long as they are bringing information to mind in absence of their notes or books, and they are successful at bringing the information to mind (7), they should benefit from retrieval practice!

**Does this apply to secondary school pupils?**

Retrieval-based learning is for all age ranges. Much of the research has focused on university age students, but a number of studies with children of different ages has found similar benefits for low-stake quizzing.

Research has shown that pupils from years 7-9 benefit from taking frequent quizzes in their science classes throughout the semester (8). In this research, the pupils took three multiple-choice quizzes, during class, spaced out within the unit. The quizzes contained definition questions and questions requiring them to apply concepts to new situations.

The table above shows example questions from their research.

On the exam at the end of the unit, quizzing greatly improved performance compared to when the pupils did not take the quizzes.

Most importantly, the pupils were better able to remember definitions from the unit, and were better able to answer new questions requiring the pupils to apply the concepts in new situations.

Adding just three multiple-choice quizzes in this science class improved pupils’ ability to understand and apply the concepts!

Teachers are often looking for ways to help their pupils learn basic information about a topic and to better understand the concepts and be able to apply them in new situations. For both of these goals, for college students to secondary school pupils, engaging pupils with retrieval practice is effective.

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<tr>
<th>Topic</th>
<th>Definition Question</th>
<th>Application question</th>
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<tr>
<td>Ecology</td>
<td>What is the struggle between organisms to survive in a habitat with limited resources? A. Parasitism. B. Limited factors. C. Predation. D. Competition.</td>
<td>A group of 500 pandas are living in a reserve. Recent dry weather has reduced the bamboo populations, which the pandas rely on. The pandas are in what type of relationship? A. Parasitism. B. Competition. C. Predation. D. Limited factors</td>
</tr>
<tr>
<td>Environment</td>
<td>Which of the following represents the idea that humans have the right and ability to use resources from the earth without restraint, especially those that will benefit humans? A. Preservation viewpoint. B. Conservation viewpoint. C. Development viewpoint. D. Manifest viewpoint.</td>
<td>A person who says, ‘I will use all the coal available if that is what is economical, even if it hurts the environment’, would hold which of the following viewpoints? A. Preservation viewpoint. B. Manifest viewpoint. C. Conservation viewpoint. D. Development viewpoint.</td>
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Examples of questions used during research conducted by McDaniel and colleagues (2013)

**References**


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TEACHING AND LEARNING

Formative Assessment

Quizzing is a crucial part of the learning jigsaw.
Six steps to inspiring a love of reading

We all want our pupils to read more. But how can we get children to really love reading? JO FACER outlines the key principles for motivating pupils to read

If there is one preoccupation that unites teachers, parents and school leaders up and down the country, it is reading. We all want our pupils to read more, and to love reading. But how do we know they are doing it? And how do we make them do it more?

Motivating pupils to read is not an easy task by any stretch of the imagination, and it’s a problem we’re still trying to crack in my school. But here’s what we’ve worked out so far.

What not to do

Many schools have opted for ‘DEAR’ systems to encourage their pupils to read more. The acronym stands for ‘Drop Everything and Read,’ and the idea is that for a certain portion of the day, ordinarily between 20 and 30 minutes, pupils stop what they are doing and read their own books silently.

In some schools, time is set aside for this (form time, lunch break) and in other schools it is during timetabled lessons on a rotational basis. Logistical issues aside (hard to timetable, difficult to justify whether 20 minutes of silent reading actually is more beneficial than 20 minutes of quality teaching), DEAR provides absolutely no guarantee that pupils are actually reading. Children are all capable of staring at a book, pretending to read.

Secondly, ‘World Book Day’ has grown into a craze in the education profession, whereby teachers (and occasionally pupils) come into school for one day dressed up as characters from books. I’m not sure I buy into this as a smart way for kids to suddenly love reading. Many justify such actions as creating a positive ethos or culture for children and staff, and that’s fine – but don’t fool yourself that costumes make kids read.

Daniel Willingham tells us in Raising Kids Who Read that for children to choose to read it must be the ‘most attractive option’: in a world of video games, television and mobile phones that is no easy feat. With that in mind, here are some ways we might be able to make children want to read.

Communicate

The longer I work in schools, the more I realise the importance of repetition. You cannot repeat your school’s core messages enough! In terms of reading, the message is: repetition, repetition, repetition. Take every opportunity to talk about reading: assemblies, form time, over lunch, at the end of an English lesson. Every Friday I stand at the door saying goodbye to my class and rattling on about what I’m excited to read over the weekend.

Excite

Excitement is infectious: we know this from our teaching experience. We need to be excited about books. With that in mind, ensure the people delivering the messages about reading at a whole-school level are engaging, and genuinely excited about reading.

At my school, we have ‘family lunch’ every day, where one teacher stands up and talks about the topic of the day before handing it over to pupils to discuss it. Every other week, the topic is reading, but it is crucial that only the teachers who really and genuinely feel passionate about reading deliver this topic – and that includes the maths teacher who loves reading!

In fact, find those teachers who are passionate readers no matter what subject they teach and encourage them to communicate: pupils need to see that reading is something that people in general are interested in, not just teachers of English.

Practice

For our pupils to choose to read in their spare time, they need to be good readers. We rarely choose to do in our spare time what we have failed at when forced to do it.

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. And reading needs to be taught in exactly that order: we cannot expect fluency from poor decoders or those who little understand what they read.

Don’t assume that comprehension will follow automatically from decoding. Daniel Willingham gives the example of the sentence ‘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 texts like this.

To help pupils comprehend what they read you need to make sure they have a good base of general knowledge, a depth and breadth that your curriculum should hopefully be reinforcing.

We also need to expose pupils to a breadth of language. There are three tiers of vocabulary: tier one vocabulary is basic, tier two contains words which are high-frequency and includes words with multiple meanings and tier three contains low frequency words which are often subject-specific. Think about where in your curriculum pupils are being exposed to the more challenging tier two and three vocabulary.

Coerce

Our weakest readers will categorically not be choosing to read when they aren’t made to. After testing pupils’ reading ages, take the weakest fifteen and make them attend reading club after school. These pupils need the most practice, and they need practice with an adult guiding them.

In my school, the adult chooses the book, and reads most of it to pupils as they follow along, occasionally asking for readers to check the pupils are following along. In this way, our weakest readers have 30 minutes of reading every day – guaranteed – even if they do not go home and pick up a book.

Inform

Many pupils would want to read if they only knew what to read. I remember being about thirteen years old and telling my English teacher: ‘I’ve read all the books. There is nothing left for me,’ because I’d exhausted a small, age-appropriate section of my local, small, rural library. He responded with a list of one hundred books I should read, opening the doors of Victorian literature to me and ensuring I had plenty to be getting on with. Hand out reading lists in lessons, but, perhaps most importantly, over a parents’ evening – parents who buy in are very likely to use such lists.

In my school the English team runs ‘Friday reads.’ Each English teacher recommends a book to their class for five minutes at the end of their Friday lesson. We then place at least five copies of these books in the library at the end of the week. By the end of one year, pupils will have heard someone be excited about 36 books, and over the course of five years that is 180 books.

This ensures pupils can arrive at the library with some ideas in mind of what they may like – even if they can’t find the exact books recommended that week, they can usually locate one that has been recommended before, or another by the same author.

Provide

The creature comfort of the library is not a possibility for all schools, but if you have any say in the matter, make it big, warm, comfortable and not too noisy. It needs to be an oasis of calm.

Hire an excellent librarian, and have them ensure the right atmosphere. In some schools I’ve heard of the library as the calmest place in the school, and therefore somewhere many children choose to be. A great librarian is absolute gold dust!
Assessment without levels: why we need a shift of mindset

DAMIAN HAIGH explains why moving away from assessment without levels has been so difficult for schools – and why it needs a complete change in methods

The reasons for
dispensing with levels are well documented, as made clear in the Assessment Commission’s final report. In spite of this clear rationale, many schools have struggled to cope without a prescribed scale with which to communicate judgements about progress. The systems many schools have come up with to replace levels have frequently relied on a grade based scale which, being levels by another name, suffers the same flaws but without the benefit of being nationally defined.

Some schools have genuinely removed levels and adopted a formative, diagnostic and construct-rich system. Great in principle but how effective in practice? Have they landed themselves with an unworkably complex system of granular assessment which is hard to maintain and makes it difficult to see the summative wood for the formative trees?

Why is this happening?
The current environment in schools is not fertile ground for good innovation. We’re all terrified of coming up with a system that might be criticised by an Ofsted team, so an inefficient but safe solution is preferable to genuine innovation. Just as with the safeguarding hysteria of a few years ago we’re desperate to be given some bureaucratic hoops to jump through so that we can be sure that we won’t be made an example of. Add to that the most serious curricular change in a generation and financial constraint causing redundancies up and down the country and it’s clear that schools’ capacity for research and development is at an all-time low. It’s not as though we have ever felt the luxury of time to ponder our options.

Flightpath fixation
The accountability threat has resulted in a flightpath-fixed mind-set where the primary purpose of assessment is seen as showing measured progress along a linear trajectory. Schools have also looked for an approach which is easily communicated to pupils and parents or carers. No surprise then that secondary schools have extrapolated the GCSE grade scale to track the flightpath of progress from entry to exit, and many primary schools have adopted a tick-box attitude to assessment. This is problematic for a number of reasons, but most fundamentally because of the effect flightpath thinking has on teachers’ behaviour.

What’s the problem with flightpaths?
The problem with this starting point is that a pupil’s growing knowledge is more network or tree-like in structure than linear. Even in a subject like mathematics where there are often right and wrong answers, it is not as easy as it first appears. A linear assessment approach can promote over-hasty progression through new material while neglecting the fluency and security of pupils’ grasp of the fundamentals.

What is often needed is not rapid linear progress but a deeper and broader understanding of the most central concepts in a discipline. If progress is only measured in linear, content coverage terms there is no incentive to recap, practice and then ask harder, more searching questions on the same material that was taught last week. Progress in flightpath terms always requires that new ground be covered, retained as far as the assessment (and then perhaps forgotten), preventing real mastery of the most important things. At its worst this discourages the long term accumulation of knowledge and prevents the connection of existing learning to new learning.

On the other hand, a more granular approach which records the extent to which individual constructs (or elements of learning) have been mastered is complex, labour intensive and does not necessarily give a reliable and easily grasped summative result.

There are clearly roles for distinct approaches to assessment here but schools will have to make strategic choices in
order to avoid spreading staff time too thinly and failing to meet either purpose effectively.

**Constructs in assessment**
Those who have read any of the good writing about assessment that has been circulating in recent years will have come across phrases like ‘construct validity’ and ‘assessing constructs’. It’s worth spending some time to clarify what is meant by a ‘construct’ in assessment.

A good place to start is to consider the brain as a ‘black box’ whose workings are unknown to the assessor. All that the assessor is able to do is provide assessment inputs to the ‘black box’ (e.g. tasks or examination questions) and then observe the outputs, i.e. the pupil’s responses.

When we talk about an ‘assessment construct’ we are conjuring up an abstract capacity that the black box may or may not have. A construct cannot be measured directly (we can’t open the black box and have a quick look) but is implied by the varying responses of different learners to an assessment item.

Some constructs are simple facts which can be fairly easily and reliably assessed – e.g. ‘does the child know their 3-times table?’ – while others are less clear in definition and more complex to assess: ‘what is the child’s developed level of literacy?’; ‘how well developed is their grasp of irony?’. From what I witnessed in a recent visit to Michaela Community School there seems to be much to gain from ensuring pupils amass a large quantity of factual constructs, though it’s doubtless also important that the students think carefully about the connections between the pieces of information set out in their lessons and knowledge organisers.

**Cognitive bias and proxy assessment**
As teachers we have a vague intuitive impression of a pupil’s current ability in a subject, but that impression is hard to measure precisely and easily affected by cognitive bias. Children with neat handwriting or some impressive pieces of vocabulary might be mistakenly assessed as good at English while those whose presentation or verbal confidence is poor yet have excellent skills of inference may be judged less positively.

We often lack a good formal understanding of the constructs we are trying to assess so end up relying on proxies in the form of assessment criteria that do not really do the job. A classic example of this is the way many schools awarded a level 6 in MFL in the previous national curriculum: write some sentences with various different tenses in and, hey presto, you’re level 6. The desired aim of fluency in the language may be entirely missing because the pressure to deliver measured progress subverts both the curriculum and the assessment process.

My worry is that schools that have adopted flightpath, criteria-based assessment are likely to continue to fall into this trap where their assessments are either not construct-valid, or the constructs they are assessing against are not incentivising good quality learning for the long term.

**How can we escape from the linear flightpath fixation?**
There’s a choice for school leaders when designing reporting systems: do we report the results of assessments directly, or allow room for a fudge factor by expressing them as a projected grade or a teacher assessed level? There are positives and negatives to both approaches. The result of an accurately marked assessment is a bald fact, whereas a teacher judgement can round off the rough edges of the vagaries of assessment. On the other hand, teacher judgement can be affected by cognitive bias as well as broader considerations around the potential impact of that judgement on a child and on other stakeholders like parents and school leaders.

Assuming that our assessments are well designed and administered correctly it makes sense to operate a system in which they are communicated honestly to pupils and parents. The challenge here is to enable a parent or pupil to make sense of the score you give them and raw marks or percentages are actually not a particularly effective way to do this. The problem is that assessments vary both in difficulty and what they attempt to assess; this term’s maths test might be harder or easier than last term’s and it’s very likely to assess different material. If all we communicate is a percentage score we will not be able to see progress in learning or the impact of an intervention.

Awarding bodies get around this problem by using Uniform Mark Scales which can be calibrated to allow comparable outcomes from one year to the next. In schools we don’t have the time to tinker like this so we need a simple way to modulate results onto a standard scale, ideally a scale which has some national currency and tells us how our pupils compare to pupils nationally.

How to do this? It’s easier said than done, but head to my.optimus-education.com and search ‘assessment without levels’ to access the other articles in this series where I outline the specifics of the approach to assessment data we have taken, and provide a step-by-step guide to doing it yourself.

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GROW coaching model: effective questions to use

What questions should you ask to get the most out of coaching or other professional conversations? Use CHRIS MOYSE’S examples of GROW questions to create change

‘Coaching is unlocking’ a person’s potential to maximise their performance. It’s helping them to learn rather than teaching them. ’Timothy Gallwey (1986)  
Learning flourishes in an environment in which people are encouraged to be reflective and self-critical, take risks, try out new strategies and approaches, learn together, support each other, challenge and be challenged – teachers as well as pupils!  
At Bridgwater College Academy (BCA) we are trying to create a learning culture through solutions focused coaching.  
We have not graded lessons for six years at BCA as judgements generate an emotional response and emotion is a barrier to reflection. The purpose of lesson observation at our academy is, therefore, not to judge the quality of teaching but to:  
• stimulate professional reflection and dialogue  
• inform the coaching process and future developments both as an individual and at whole academy level  
• help us deepen our understanding of learning and how we can, and do, make an impact upon it  
• make us even better teachers.

Sometimes you get real insight from someone who sees what you don’t or can’t see, who questions what you take for granted and who makes you think differently. However, the lesson observation is just the start of a process of reflection and planning for continuous improvement in our teaching.  
One of the aspects of coaching that makes it different from mentoring is the use of a structured conversation. At BCA we use the GROW model, designed by Sir John Whitmore, as our basis for giving structure and purpose to our professional conversations.  
At BCA a lesson observation is a way to collate evidence of a predetermined focus and the GROW conversation that follows a way to reflect and plan next steps. Non-judgemental data is key to ensuring a culture of professional dialogue and reflection.  
Our professional development is about sustained practice of an evidence-based, challenging and negotiated focus with support and challenge from all levels. This focus is supplemented with opportunities for reflection with a commitment to next steps and a gradual increase in the level of challenge. We are trying to develop a culture of continuous improvement in which staff always strive to improve and develop their classroom skill.  
In order to guide our staff we produce some example questions which are used not just for post lesson observation conversations but in any professional dialogue. In fact we have just started to use the GROW model to structure meetings and training.  
You can download these bookmarks by logging in online on the Optimus Knowledge Centre.

GROW model: possible questions to guide your professional conversations

GOAL
• What would you like to discuss? What would it be useful for you to discuss in this session?  
• What did you want to achieve in that lesson? What would you like to achieve in this session?  
• What would you like to be different when you leave this session?  
• What would indicate to you that this has been time well spent?  
• What do you want instead of the problem?  
• Imagine that you were really successful with this focus. What is that like? What will you be doing differently? What would we notice? What would it be like if things were even better?  
• When things are more like you want them to be, what will you be doing differently? What will the students be doing differently?

REALITY
• Where are you right now? What are the facts?  
• Let’s look at the evidence from the lesson. What does it tell you?  
• What really pleased you about that lesson?  
• Describe to me the issue from your perspective.  
• On a scale of 0-10 where are things right now?
These questions guide higher-quality conversations

• What tells you that you are at 6? How did you get there? What do you need to do to keep your 6?
• Have you taught that lesson before or since? What happened then?
• What were you doing or thinking differently when it worked better?
• Tell me about the last time this issue was more manageable. Tell me about the times when this problem is a little better. Tell me about the most recent times when this happened. How did you do it?
• Have you achieved something similar in the past?
• Does the goal really bring you the benefits you want?
• How achievable is it?
• What have you tried so far? Was it helpful?
• Would you like some feedback?

OPTIONS
• What are your options for action to achieve your goal? What options have you thought of so far?
• What are the different ways you could achieve the goal? How could you do it differently?
• Have you any ideas/thoughts?
• What are the pros and cons of each?
• Who might be able to help us? Would you like suggestions from me?
• Which option would you most like to act on?
• Who or what will be useful to you in this process?
• If you are 5 on your scale now, what does 6 involve? What would it take to move 1 point higher?
• What are the possibilities? Best one?

WHAT NEXT?
• Which option will you take? What are the next steps?
• How will you do that?
• How committed are you to this course of action? Scale of 1-10?
• When will you achieve it by?
• How will you recognise you’ve reached your goal? Who would notice that things had changed? How will you know when this has got better?
• What would be the first signs that things were moving in the right direction? What is your ideal/vision? When will you do it?
• What might get in the way?
• What support might you need? Could I be of assistance?
• How and when can you get that support?

PE, Health and School Sport
Interested in applying coaching and high-performance techniques to PE in your school? Don’t miss our 2016 conference on PE, Health and School Sport, packed with an interactive itinerary of timely keynotes, case study sessions, resource showcases and in-depth masterclasses. Plus, hear from Margaret Alphonsi, England Rugby World Cup Winner, on the psychology of winning. Find out more at www.peandschoolsports.com

Somewhere along the way, these various strands of my career became hopelessly entwined. Ideas discovered through research began to influence my classroom practice and, in turn, my classroom practice became the focus of my research.

The summer of 2010 I spent bashing a keyboard, chipping away at the marble to reveal what turned out to be a fairly fruitless early attempt at using philosophical enquiry as an approach to teaching Year 8 PSHCE. One day, I dragged myself away from my darkened room to attend a friend’s 30th on Hove Lawns. ‘There’s a homeless guy eating your buffet’, said one guest to the birthday girl. ‘No that’s just James. He’s doing a Masters.’

By the end of August, I was spent. ‘No more academia for me!’ I resolved, shaken. ‘I have scraped the bottom of the barrel, and I don’t like the noise it makes.’ I submitted my dissertation and returned to the classroom, contemplating the prospects of senior leadership, perhaps a headship one day.

There was one novel thing on the horizon: alongside teaching science, I was going to be teaching Learning to Learn (L2L) to a group of Year 7s, for five lessons a week. I hadn’t paid it too much attention – my main involvement to that point was to have been appointed to the L2L team, following a competitive selection process.

When I returned to the classroom that September however, something was different. Not just something – everything. I spoke differently. The children spoke differently. They behaved differently. And I responded to them in ways that were different again.

The process of writing 20,000 words over the summer – reading, thinking and reflecting so deeply about my classroom practice – had been utterly transformative. Ideas that I had previously grasped only on an intellectual level, I now felt in my bones. It was as though on some fundamental level, my very professional identity had been disassembled, reconditioned and put back together by people who knew what they were doing.

Hopelessly hooked on teacher research

On the one hand, this was, of course, a welcome development. My morale, and that of my students, had received a significant boost. What’s more, my summer of sitting squinting at a computer screen had amounted to more than the acquisition of a mere certificate. There was also, however, a more serious consequence. I was by now hopelessly hooked on teacher research, and this could mean only one thing: I was going to have to do a PhD.

I didn’t have to look far for a topic. Through my MA, I had become strongly persuaded of the importance of oracy – classroom talk – not just as a driver for learning, but as the very fabric from which our identities as learners is woven.

And I didn’t have to look far to find a forum in which to develop these ideas, either. It soon became apparent that this L2L malarkey was quite an incredible opportunity to do things differently. I had a mixed ability class of Year 7s for five lessons a week – five consecutive lessons at that – with no curriculum content to cover. What secondary teacher is ever gifted such an opportunity?

I should emphasise at this point that L2L is not a new idea, and we were not entering completely uncharted territory. Various iterations have come to pass over the years: the RSA’s ‘Opening Minds’ competency-based curriculum; the
Campaign for Learning’s L2L programme; the Assessment for Learning (AFL) based Learning How to Learn initiative; Building Learning Power.

But despite persuasive research literature around the importance of things like metacognition and self-regulation, large-scale evaluations of programmes such as these revealed that, to date, none had been consistently associated with improved academic attainment.

There were always pockets of good practice – isolated case studies with promising results. But despite a number of attempts over a number of years, the best conclusion some could arrive at was ‘well it doesn’t really seem to do them any harm’.

It seemed clear to me that here was a significant opportunity to build on what had gone before, and perhaps even take L2L a few steps further down the road toward respectability.

**How to bring it all together?**

From the outset, the L2L team set out to combine a number of areas of evidence-based practice in a complex ‘package intervention’. In particular, we were influenced by notions such as oracy, metacognition, self-regulation, growth mindset, AFL, and transfer.

**Oracy**

Oracy meant explicitly teaching and developing high quality speaking and listening skills in a range of ways – through paired and group talk, philosophical enquiry, structured debates, and public speaking.

**Metacognition**

Metacognition meant developing a whole-school culture in which we provided time and space for regular, purposeful reflection on the ‘how’, as well as the ‘what’ of learning.

**Self-regulation**

Self-regulation meant enabling students to become the drivers of their own learning – through setting targets and co-constructing success criteria, identifying strategies, monitoring progress, overcoming obstacles, resolving conflicts, adapting behaviours and so on; this was done mainly through half-termly project-based learning opportunities.

**Growth mindset**

Growth mindset meant embedding and reinforcing the notion of expandable intelligence, preferably without ever mentioning the words ‘growth mindset’ to the students.

**Assessment for Learning**

AFL – harking back to the original, Black Box version of AFL – meant providing plenty of rich, comment-based feedback for the students to respond to and build upon.

**Transfer**

Recognising the critical importance of transfer meant developing a whole-school, shared language of learning – as well as common pedagogical approaches, developed through a bespoke whole-school CPD programme.

And ‘what makes for good teaching’ meant that what some might view as ‘progressive’ ends were to be delivered through fairly traditional means: modelling, explaining, purposeful practice and plenty of rich feedback.

**Raising the bar, closing the gap**

When the first L2L cohort reached the end of Year 7, the curriculum expanded into Year 8, for three lessons a week. A year later it expanded again into Year 9, this time for five lessons a fortnight. The course changed as they progressed through the school; Year 8 focused largely on ‘personal effectiveness’, while Year 9 included a taught Level 2 course in thinking and reasoning skills.

Over the course of three years, the first L2L cohort received more than 400 lessons of L2L – as many lessons as they would have had for any other subject.

The impact of the L2L initiative has been evaluated over five years as the focus of my PhD, which is ongoing. It’s a mixed methods case study which incorporates data analysis (looking at attainment across all subject areas), observation data, student and teacher interviews, questionnaire data, and the students’ work.

In February I published an article in the *Curriculum Journal*, co-authored with my PhD supervisor Professor Neil Mercer, which presents the interim findings of this five-year longitudinal evaluation of the Praxis Curriculum.

Compared with the previous year group – who were comparable at entry to the school, and so served as a kind of control or comparison group – by the end of Year 9, a significantly higher proportion of students in the L2L hit or exceeded their target grade.

All students benefited from this approach – for example, non-pupil premium students fared better than their control cohort counterparts. But the gains were especially pronounced among pupil premium students: in the pre-L2L control cohort, at the end of Year 9 there was a 25% gap between the proportion of pupil premium and non-pupil premium students hitting or exceeding target; in the L2L cohort, the gap was just 2%.

The first L2L cohort sat their GCSEs in 2015. They achieved the best set of results in the school’s history; by some margin. They also had by far the biggest reduction in the Pupil Premium gap of any school in the city, in a year when the gap increased across the city as a whole.

Can you help?

We are currently looking to identify a small number of schools to work with, to see if we can replicate these findings more widely. If you work in a school that might be interested, or if you know of one, please drop me a line – jsw43@cam.ac.uk
Collaboration for CPD: what makes it work?

Collaboration sounds great, but how do you make it work in practice? LIZ WORTHEN explores some thorny questions and success stories from a teaching schools workshop session

Collaboration was a key theme running through the programme of the Optimus Education Teaching Schools Summit. There was talk about collaboration vs competition, partnerships with HEIs, collaborations between alliances and cross-regional networks.

For the afternoon session led by me and our Content Lead Owen Carter, our focus was on collaboration as a tool for professional development.

Case study questions
To stimulate discussion, we explored four case studies. The case studies outlined the approach to CPD currently being undertaken in a school, trust or alliance. The approaches ranged from very personalised or optional models to much more 'top down' models of development, strongly linked to standards and performance management.

Not surprisingly, the differing scenarios gave rise to some thorny questions.

- How do you get an appropriate balance between meeting whole school or organisation needs and individual needs?
- Are we clear and honest in our purposes? If it’s a top-down initiative, is it better to be up front about it?
- Offering choice may be good for staff engagement, but could ‘optional’ lead to ‘opt out’ for some people? How do you maintain motivation?

Shared practice
Groups moved on to talk about practice in their own schools and alliances. Observations remained a key theme for some, with participants sharing their journey ‘from clipboards to collaboration’. For example, teachers working in triads and observing each other, or NQTs conducting very short observations on a specific development point – an approach now being extended to other staff groups. Linking these observations to performance management or development targets has helped to maintain staff engagement.

Working across an alliance or group of schools extends opportunities for learning. One participant shared their experience of running a work shadowing programme for leadership development.

Staff seeking to develop their leadership career or skills can apply for a work shadowing placement; specifying the focus or development need means the member of staff is matched with an appropriate colleague in another school. With costs limited to staff release time, this has also proved to be a financially viable approach and the programme has been extended from senior to middle leaders.

Cross-phase collaboration also featured in discussions. For me this was a particularly interesting area to explore, as I believe that there is much to be gained from primary and secondary colleagues learning together and from each other.

Of course, there are many organisational differences between primary and secondary schools – but do children and how they learn magically change overnight in that transition from Year 6 to Year 7?

So, I really enjoyed hearing about how one alliance has taken a cross-phase approach to their NQT CPD programme. Their SLEs run the NQT training for nursery, primary and secondary practitioners. Since starting to plan the training together, both SLEs and NQTs have gained a deeper understanding of and insight into teaching across the three phases.

Key takeaways for successful CPD

- Involve support staff, TAs and admin staff: it’s not just about the teachers.
- Start by auditing needs and plan accordingly.
- Facilitate sharing across phases and departments where possible, rather than reinforcing divisions.
- If you want staff to work together on projects, make sure you plan in adequate time for it.
- Don’t assume that learning will get shared and embedded: structure follow up activity (e.g. from networking events).
- Be very clear about the link between whole-school and personal development needs.
Introduction

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

To start off, I’ve taken a look back at the challenges we’ve faced and the lessons we’ve learned this year. From creating new assessment models for pupils with SEN, to fighting the government over statutory PSHE, it’s been a busy year! ‘Transitions’ is very much the word of the month for this edition of Insight. We all go through transitions but for pupils with SEND transitions can open up a whole world of worry. For this transitions special we’ve looked at transitions from every angle to really get to grips with what the word means. Read about what happens when they go wrong (with a particular focus on ASD), how to ensure your school ticks all the boxes when planning for transitions, the big and the small, and practical solutions for the primary to secondary move.

Evie Prysor-Jones, Content Lead

Contributors in this issue

Gareth Morewood is a passionate SENCO and advocate of inclusive education. He has written extensively and regularly speaks at national conferences.

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Top tweets from @OptimusSEND

“We ask the parents to rate us on how well we’ve enabled their child to progress.” #SEN http://buff.ly/1rClG7q

Does your school deliver effective age-appropriate #SRE? #oeSRE #schools #teachers owl.li/4nvbnQ

Turning SEND assessment on its head  http://buff.ly/26O8Px9@ChaileyHeritage

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Looking back at 2015-16

EVIE PRYSOR-JONES reviews the big topics for SEN, safeguarding and pastoral in 2015/16, and looks ahead to what we can expect in the new academic year.

During every school year there are certain topics that rise and fall in status. Sometimes it is due to topics like exam revision being more prominent at certain times of year. Others, like legislative guidelines, will come back into the top ten when new guidance from the government is announced. Every year has its highlights and its low points and one thing is certain: no two years are ever the same.

SEN

SEND assessment

In September 2015 the assessment commission finally released its delayed report on life without levels. Schools had been anticipating these changes for a while but the lack of a detailed model to follow was still a disappointment. For SENCOs, the school year of 2015-16 had been taken up with trying to implement the SEND reforms – a huge challenge which required a dramatic cultural shift within the school community.

In her article on SEN assessment without levels, Jean Gross detailed the assessment and curriculum changes and explained how they might affect pupils with SEND. One of the main fears is that with higher expectations of what pupils should achieve at the end of each key stage, and more assessment based on tests and resits and less on coursework, pupils with SEND will continually be told they are working at ‘below national standard’ which will have a negative impact on their ability and desire to achieve. While elements of mastery and an increased focus on rote knowledge may benefit some pupils with SEND, there is an anxiety that many will fall into that ever increasing gap between what is now P8 and national curriculum programmes.

P scales

P scales have also been on the agenda this year, and we all waited with bated breath for the Rochford Review of statutory assessment arrangements for pupils working below the standard of national curriculum tests. However, the most we got is the confirmation that nothing will change for this academic year and ‘the review will consider whether P scales remain fit for purpose in the context of the new national curriculum as part of their longer-term recommendations.’ So we continue to wait.

Some schools, however, have taken these changes as an opportunity to try something completely different. Since November 2015 we have been following the story of Chailey Heritage Foundation, a special school based in Lewes. The headteacher, Simon Yates, wrote an article for our Special Children magazine on how, at his school, they were disbanding P scales for a completely pupil-centred system. For our SEND assessment conference in January 2016 (not surprisingly a very well-attended event!) I brought together several of our best articles, case studies and briefings (including Simon’s article) in a ‘SEND assessment toolkit’, downloadable from my.optimus-education.com

We’ve continued to follow the progress of Chailey Heritage School as Simon has reported the steps the school has taken over the year to continually improve their assessment model. All three blog posts can be found at www.blog.optimus-education.com

Taking control of your time and paperwork

With so much going on this year it’s not surprising that we’ve been hearing from SENCOs up and down the country that paperwork and time management are two of their biggest challenges. In order to combat these stress-makers, we’ve taken two very simple steps.

‘Reading this book has energised me and given me practical strategies that seem simple but so useful and I am eager to try them’
When the refugee crisis and Paris and Belgium attacks occurred

Managing challenging conversations

Though some have reported problems with campaigning by the English Defence League, as they are based in predominantly white communities – even those communities that the duty is a personal attack. Backing up this claim, schools and local authorities in the north of England have reported they didn’t think the guidance was applicable to them.

Regional and community differences. While the Government insists that the duty is designed to combat all types of radicalisation and extremism, there has been a feeling in Muslim communities that the duty is a personal attack. Backing up this claim, schools and local authorities in the north of England have reported they didn’t think the guidance was applicable to them as they are based in predominantly white communities – even though some have reported problems with campaigning by the English Defence League.

Managing challenging conversations

When the refugee crisis and Paris and Belgium attacks occurred emotions ran high and it can be increasingly difficult for schools to be that ‘safe space’ they need to be in order for pupils to feel comfortable talking through these issues.

We produced our ‘Prevent duty toolkit’ alongside our Prevent Children Update conference earlier this year. It contained a mix of articles, briefings and practical guidance on the Prevent duty. We also ran a webinar titled ‘Questions about extremism – learn how to respond’ which helped participants understand how to engage pupils in difficult conversations about radicalisation and extremism and gave teachers the skills to challenge certain responses without shutting down the conversation.

PSHE and SRE

This year we saw four reports, including one from the education select committee, calling to make PSHE a statutory subject. The reports got overwhelming support yet the government’s refusal was published in February. For many of us, this simply doesn’t make sense. There is a rising concern about the amount and severity of mental health issues in children and young people, yet the subject designed to target these issues is still not required teaching in the UK.

Sex and relationships education is usually included in PSHE and was a core part of the reports put before Nick Morgan. Even in 2016 SRE is still considered a controversial subject – especially with regard to the relationship between schools and parents. Yet with the exposure to sexual material online, the constant pressure on young people, and increasing awareness of LGBT bullying, it is vital not only that SRE is taught in schools, but that it is taught well.

2016-17

My hope for 2016-17 is that the Government will listen to reason and make PSHE and SRE statutory and compulsory for pupils to attend. In the meantime, we will continue to create resources for staff to gain confidence in teaching these subjects and foster good relationships with parents when discussing difficult topics. In July 2016 we are expecting updates to ‘Keeping children safe in education’ so look out for our report on the changes.
When transition goes wrong for pupils with ASD

Transitions for children and adults with autism spectrum disorder (ASD) often need particular attention. LYNN MCCANN explains how schools can ensure transitions go smoothly.

Transforming transitions
In this issue of the magazine, four experts examine transitions for pupils with SEND from different points of view: when it goes wrong, a checklist for schools, the big and small, primary to secondary.

These quotes are just some examples of the phone calls I receive as a specialist autism teacher. My job takes me into nursery, primary and secondary schools and it’s given me an insight into the ways and means of the different schools across our whole county. What these three enquiries have in common, is that as we investigated the circumstances and issues surrounding the pupil’s behaviour and anxieties, we discovered that all of them were the result of failed transitions.

Transitions can be scary for pupils with ASD
Transitions for children and adults with autism spectrum disorder (ASD) are often very scary. Some of the difficulties they have because of their ASD mean that change is unpredictable, stressful and terrifying because they may not be able to predict and plan what that change might involve. They may be fearful that all they find comforting is going to be stripped away from them and having to meet new people when you have a social interaction disability is extremely stressful. Children with ASD often cope best by controlling situations and keeping them the same, sometimes repetitively, and sometimes to an obsessive degree. Transitions need careful planning and support, taking into account the individual needs and preferences of the child. In all the cases referred to above, transition support did not happen at all.

Why did things go so wrong?
All these children were on the verge of exclusion. Behaviour had deteriorated so quickly and was impacting on their learning, relationships and ability to access school. The children were highly anxious, often not sleeping and, quite honestly, had been let down by schools who could have done much better.

No-one had bothered to put a plan in place, so the children were not given any preparation for a major move. Communication between the schools and parents was poor and staff did not have suitable ASD training to understand the children’s needs.

The biggest complaint I get from schools is that vital information is not shared. Records just don’t get passed on. Schools can spend months trying to get information from a previous school, to no avail. In the meantime, they are having to begin the whole support process from scratch. Parents have been ignored and left high and dry, trying to get the information they need. One set of parents were actually told ‘your child is no longer registered at this school so we have no obligation to give you any information.’ This is worrying and is clearly illegal.
All it would have taken for each of these pupils is a transition plan and sharing of information to help them settle into their new school and for the new schools to be able to assess their needs and prepare for them beforehand. What we had to do was to claw back the mistakes and start again.

Turning it round

Sam was taken off timetable for some of his most stressful lessons. In this time, he sat with a teaching assistant and the SENCO and together they asked him what he was finding stressful and difficult. He confessed that he wasn't sure about a lot of things, such as which way to get to all his classes, how to get organised (he carried every book to school every day) and found homework just torturous after a full day of stress at school. The school kept him off timetable for one subject a week for a term and put in place the transition programme that they would have done while he was still in primary school. This included walking around school with a TA to familiarise himself with the layout during quiet times of the day. A daily list of what to pack in his bag was given to his parents and they devised a colour coded book recognition system. He was helped with homework in school time so that he didn't have to do it at home. A social skills group and being able to go to the library at break times helped Sam stop getting into conflict with other children because of the overwhelming sensory stress at break times.

Helen needed some support to explore her anxieties around school and relationships with her peers and teachers. My SENCO and I put together a reduced timetable of her favourite subjects and met with the teachers and Helen to agree on what she could do if she felt overwhelmed. Helen had had no transition support as parents had won a place at the school on appeal and the school hadn't known she was coming. The SENCO put together a booklet about the school for her with photos and descriptions of the subjects, teachers and support available to her. To support this, I did a whole school ASD training session and gave subject teachers advice on supporting Helen in their particular subjects. The school found three girls willing to buddy Helen and the four of them built a good friendship and support group which made Helen feel much happier at school.

Dharma needed a full assessment of his needs. The school paid for an educational psychologist report and instigated the EHC plan process. With my support and working with parents we made a book about the new primary school for Dharma, set up a social skills group to help him get to know his classmates and did some autism awareness assemblies. A sensory diet was put in place and we began the process of putting in a good transition plan for Dharma’s transition to high school, with parents and Dharma himself fully involved.

What a contrast

Yesterday I went to a transition meeting for a girl in Year 6, called Asha. Around the table were the SENCO and Year 7 leader from the secondary school, the primary SENCO, her parents, me and the TA who has been supporting her this year. At the beginning of the year, Asha and I had drawn a timeline of the year and put on it all the important events from applying to secondary school, Christmas plays, school trips, SATS and the date she would know whether she had a place at her preferred school. She was happy to attend this meeting because she knew it was happening. The Year 7 leader had already met with Asha and she explained that Asha would have an induction day and as many extra visits as she needed. She would meet classmates and be given a school homework diary, a map of the school and a transition booklet to look at through the summer. She would be sent the timetable of the first day before term started and would be able to meet the main people that would help her once school started.

What a contrast! I fully expect Asha’s transition to go smoothly and for her to settle into secondary school well. I’ve seen that happen numerous times with other pupils. Transition, when done well makes the most enormous difference to a pupil with ASD. When it isn’t done well, or not at all, then Sam, Helen and Dharma show us what effect it can have on children who already have needs and anxieties far beyond those that most children have to deal with.

Now take a look at the checklist on page 56 to make sure your school is ticking all the boxes, then read on to see what other schools are doing with transitions.
NATALIE PACKER lays out a simple checklist so you can ensure transitions in your school run smoothly.

Download the checklist from the Knowledge Centre

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<tr>
<th>Name of child</th>
<th>Parents/carers:</th>
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<tr>
<td>SEN Information:</td>
<td>Date identified:</td>
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<td>Primary school contact</td>
<td>Secondary school contact:</td>
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<tr>
<th>Action</th>
<th>Relevant?</th>
<th>Comments / details</th>
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<tr>
<td>Initial discussion with pupil and parents about transition</td>
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<td>Transition meetings arranged between primary / secondary</td>
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<td>Annual reviews arranged with secondary attendance</td>
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<td>Reviews / annual reviews include transition arrangements</td>
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<td>Additional induction visits to secondary school arranged</td>
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<tr>
<td>Support in place for initial visits e.g. people, resources, photos</td>
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<td>Secondary staff visits to observe pupil in primary school</td>
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<tr>
<td>Sessions for developing pupil’s transition skills in place</td>
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<td>Pupil profiles / passports up to date and shared</td>
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<td>All other relevant information passed to secondary school</td>
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<td>Secondary staff CPD in place, as needed</td>
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<td>Support for travel arrangements in place</td>
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<td>Support for organisation in place e.g. maps, timetables</td>
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<td>Support for organising homework in place</td>
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<td>Curriculum support needs in place e.g. TA support</td>
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<td>Social / emotional support in place e.g. buddy, base</td>
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<td>Additional support for break and lunchtimes in place</td>
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<td>Communication support needs in place</td>
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<td>Any other support needs in place e.g. physical, medical</td>
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<td>Keyworker in place and relevant CPD provided</td>
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<td>All strategies shared and agreed with pupil and parents</td>
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<td>Initial review of transition in place (future needs discussed)</td>
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<td>Any other individual arrangements agreed</td>
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Transitoning to secondary school

ELIZABETH BURNS explains how transition support at St James’ Catholic High School is part of the whole school approach to aspiration, next steps and preparation for adulthood.

**Primary to secondary school**
The transition from a small primary environment to a large secondary school is daunting for both the child and the parents. Besides the school's planned open evening, we have telephone consultations with prospective parents and many arrange visits with their child in Year 5 or Year 6. Parents and prospective pupils are encouraged to visit when they can see the school at work – pupils in lessons, change over between lessons and a busy dining hall.

**KS2 to KS3**
Close liaison between feeder primary schools is essential. Our SEND department and head of pupil learning for Year 7 go on joint visits to primary schools to meet staff and pupils. A transition booklet is given to all pupils which contains information about the school and photographs of key staff members. The SEND staff also attend Year 6 review meetings.

If a pupil has a Statement/EHCP or is considered to be especially vulnerable, they are invited to spend two mornings with the SEND department to get to know the school and meet key staff. The mornings are designed to be fun, with art projects and language games. Pupils on the SEND Profile from across the school join us to welcome the new pupils and answer any questions. Some pupils may need more visits and these are arranged with the primary school and parents. This occurs before the Year 6 induction day.

This transition works well because when the most vulnerable pupils attend the induction day with the cohort of 180 pupils, they already know some staff names, some older pupils, and the school layout. This gives them added confidence.

The SENCO is available at the ‘New Intake Evening’ in July to answer any parental questions. Parents of Year 6 transfer pupils, who are on the SEND Profile, are invited to the ‘July Parents’ SEND Forum Meeting’. This gives new parents a chance to meet other parents and staff. This starts to build that important triangle of staff, parent and child relationships.

**Staff knowledge**
Staff know the needs of pupils and how to best support their learning by having pupil profiles on the school system which are updated termly. The profiles include a photograph of the pupil, details of the pupil’s needs, and strategies across the curriculum that work well for the pupil. Also important is the inclusion of parent and pupil views and aspirations.

In September all teachers of Year 7 attend a meeting with the head of student learning and the SENCO to discuss vulnerable pupils. Good staff knowledge is part of the key to successful transitions. Some of our more vulnerable pupils have a visual timetable booklet with pictures of teachers and the TAs working with them, and subjects and rooms. This ensures that pupils feel safe and secure.

**KS3 to KS4: choosing options**
Discussion about aspirations begins in Year 7. We meet termly with those on the SEND Profile and their parents. By Year 9, we have had six meetings and have already started the conversation about next steps. The head of student learning for Year 9, the senior leadership team, subject teachers and members of the SEND department meet with pupils to give guidance for option choices. We host an ‘Options Evening’ for parents and pupils where we can discuss the options and courses available. The SENCO and deputy SENCO are available for consultation or to make further appointments and an external provider is available to give impartial information, advice and guidance.

**KS4 to KS5: next steps**
Pupils in Year 10 and Year 11 have a taster day for KS5 subjects along with career guidance. Discussions about different pathways are held at the annual review meetings and at the termly review meetings in KS4 and 5. Pupils are encouraged to choose work experience in Year 10 and Year 12 which will help them think about next steps. Whole school mentoring for KS5 curriculum choices by the head of student learning for Year 11 and head of 6th form helps pupils with choices. Pupils who are leaving for college are given help to fill in the right forms and meet deadlines. Pupils and parents are accompanied on transition visits if appropriate and we liaise closely with the next education provider to ensure that all relevant information is passed on in a timely fashion.

Transitions in our school work because they are not an add-on. Every member of staff contributes to helping pupils and parents feel secure and prepared for the next steps.
Types of transitions: from big to small

GARETH D MOREWOOD examines how transitions can take many forms, but there are practical strategies schools can put in place to handle transitions big or small.

At this time of year there are lots of transitions for young people. In this article I have considered three categories of transitions.

1. Big transitions – school phase, into adulthood, moving house etc.
2. Medium transitions – from school to home, changing for PE, lesson to lunch etc.
3. Small transitions – from one activity to another, brushing teeth, dressing etc.

Big transitions

A good starting point when considering big transitions is the 2008 IoE report, ‘What Makes a Successful Transition from Primary to Secondary School?’ As part of the conclusions, the data analysis revealed five aspects of a successful transition for children that involved:

1. developing new friendships and improving their self-esteem and confidence
2. having settled so well in school life that they caused no concerns to their parents/carers
3. showing an increasing interest in school and school work
4. getting used to their new routines and school organisation with great ease
5. experiencing curriculum continuity.

‘To support transitions of phase it is very important to offer a combined approach, including personalised visits for some young people’

To support transitions of phase it is very important to offer a combined approach, including personalised visits for some young people and their parents or carers before the whole-school day and evening. This allows for a more personalised experience for parents/carers and young people prior to the Year 7 intake all being in school for the whole-school induction day and evening. We set out to ensure that everyone:

- knows about Priestnall School’s unique, inclusive approach to supporting young people
- knows they are joining an outstanding school and what this means
- hears from current and previous pupils and considers what the future holds.

It is always very powerful hearing current pupils talk about their experiences and share successes, whilst being able to dispel some of the myths that perpetuate around Year 6 at this anxious time. This, in conjunction with individual visits and taster sessions, along with the whole-school events provides a range of opportunities to answer specific questions and reduce anxiety during this significant stage of the educational experience.

Medium transitions

Transition between activities and from home to school can often be a significant challenge for young people. It is important to ensure the young person has opportunities to leave parents or carers and spend time with other adults and children. This can be through summer schools and other clubs specifically designed to support the engagement with different places.
It is very important to talk about school in a positive way and encourage independence by letting young people have a go at activities when they want to. Clear instructions on transitions such as changing for PE will help the pupil understand the processes involved. I always suggest it is important not to assume anything – explain each stage of a routine clearly and try using a visual support to reduce the risk of uncertainty.

Above all, when the pupil is changing from one classroom to another or getting used to a different structure of the day, maintain a positive attitude. Remember that explicitly teaching the new routines and supporting them with clear and consistent systems will help reduce risks with medium transitions.

Small transitions
Small transitions in school often hinge on quality first teaching. Good lessons have clear, consistent routines and objectives. This supports transitions between tasks and activities as there is clarity with regard to expectations and tasks.

If activities and tasks have a specific time then a visual countdown making this explicit can help pupils plan and consider how to use the time most effectively. It is often important to model good behaviour and expectations as clear structures and positive role-models allow for clarity in the learning environment.

Similarly at home, with brushing teeth and dressing etc., clarity, instructions, routines and consistency can support these events, but a stronger model is ensuring pre-learning can take place to support the routine.

The real measure of success
There are often differing discussions about what defines success at the end of secondary provision. For me, as a SENCO in an inclusive secondary school, a key measure is our NEETs figures. Ensuring appropriate pathways supports the key theme of preparation for adulthood and also supports out philosophy of ‘educating for life’. The best measure of success for me is that our NEETs figures have been zero for the last three years – surely that is what transition, and ultimately education is about?

Further information about transitions
On our Knowledge Centre we have many more resources on transitions. One to mention is a webinar from Gareth Morewood entitled ‘Seven steps to successful transition’. During this webinar, available at my.optimus-education.com/node/12595, Gareth describes how setting up transition events can dramatically reduce anxiety but also, when done properly, should inspire and enthuse new pupils.

Step 1: ensure parents and carers know who is who.
Before the transition from primary to secondary school takes place, perhaps as early as Year 5, parents should know who their contact is in the senior school. For the pupil, a fact sheet with photos and names can help them used to new contacts.

Step 2: provide an early visit of the school.
It’s important the pupil gets used to the school before experiencing it with all the other pupils, preferably at a time when they feel most relaxed. Creating a map and allowing them to take photos can also help.

Step 3: meet with LA/key professionals.
This is where information sharing is essential. You’ll need to have good working relationships and know who to go for the information you need.

Step 4: engage with early in house discussions.
Information about SEN should be taken into account when deciding on classes or form groups, and when thinking about provision planning, make sure parents are involved in the discussion.

Step 5: hold an additional transitions morning.
An additional morning can allow pupils and parents to get to know the school and teachers in a safe environment before meeting the rest of the school. Getting older pupils with SEN involved is a good way of relaxing everyone.

Step 6: consider unique transition events.
Make your day stand out by providing interesting activities such as arts and crafts. This will start the pupils thinking about what an exciting and interesting place school can be.

Step 7: evaluate your transition process. After a couple of months, perhaps at the beginning of November, ask pupils and their parents how they are finding their new class or school. This can help you iron out any problems for the next transitions period.
Self-harm: supporting pupils in recovery

Self-harm does not stop overnight and it’s important for schools to understand the recovery process. DR Pooky Knightsmith explains how in this In-House Training activity.

There has been a big increase in the number of young people being admitted to hospital because of self-harm. Over the last ten years this figure has increased by 68%.* School staff are well placed to spot the warning signs and provide support to lower-level cases but many school staff report a lack of confidence, little understanding of self-harm and a fear that they will do or say the wrong thing and make things worse.

This training course, ‘Managing Self-harm’, is suitable for staff who are involved on an ongoing one-to-one basis with pupils who are self-harming. Staff benefit from first completing unit 1 to gain a general overview, and going on to complete this unit, which provides specific strategies for one-to-one support.

This is not designed to replace external agency care where this is needed and available. These strategies are most likely to be used either with less serious cases or with pupils awaiting treatment or in-between sessions. Where a pupil is currently receiving external treatment, it’s important to liaise with their care provider in order to understand how best to support their ongoing care.

*A See article ‘100,000 children and young people could be hospitalised due to self-harm by 2020’ (YoungMinds, 2011)

Aims and outcomes
This unit will enable participants to understand:
- how to break the self-harm cycle
- ideas for tackling underlying negative emotions
- how to help pupils who self-harm to develop healthier alternatives
- how to address normalisation.

Who should present this training?
This may vary school to school, but usually it will be the head of pastoral, the SENCO or a head of year who already has the knowledge and understanding to deliver this training to other staff members.

Who should attend this training?
To enable whole-school support, there is no reason why all members of staff shouldn’t attend this training.

What do I need to run this training?
- Print out or write the self-harm cycle on a board for all participants to see.
- Write the statements from Step 2 on separate pieces of paper to give to different groups.
- Have pens and paper to write down ideas and discussion points.
- If you want to run the whole training course, available to Premium members online, then download the handouts, training notes and PowerPoint presentation.

How long will this unit take?
The steps outlined here will take 35 minutes but the entire unit will take up to 75 minutes and the whole course 2 hours and 30 minutes.

Example
Statement 1: the young person who self-harms because they want to feel in control.
Consider why they feel out of control and whether there is anything that can be done to help them feel more in control or have an increased understanding of issues which are triggering their feeling out of control.
Consider alternative ways of helping the pupil to feel more in control which are not detrimental to their health or wellbeing. For example, they might take on a role with some responsibility, or take control of their study timetable or take care of a pet.
If the issue is that the pupil feels everyone is controlling them and they have no time which is their own to fill, could they can scale down on any of their academic or extra-curricular activities and take up a hobby they enjoy instead?
Step 1: How to break the self-harm cycle (15 minutes)
Discuss with staff what methods of self-harm they are aware of. In primary, it might be things like banging their head or pulling their hair, while in secondary it is more usual to see things like burning and cutting.
Explain that we are using the self-harm cycle here to focus on how we break the cycle, which is much like the cycle of drug taking.
Explain that we can break the cycle by either addressing the underlying thoughts and feelings or by replacing the self-harm with a healthier means of coping so harmful responses are substituted with healthy ones.

Step 2: Tailoring support (10 minutes)
Below are some of the common reasons that young people give for harming themselves.

1. I want to feel cared for
2. I deserve to be punished
3. I want to feel real
4. I want to feel in control
5. I want to make myself ugly

Ask the question: ‘How might we tailor our support if a pupil expressed one of these specific reasons for self-harm?’ Ask the participants to get into pairs or small groups and assign one statement to each of the groups. Allow approximately 5 minutes for this activity.

The key aim here is to get everyone thinking about how we can tailor our response to the individual pupil and their specific concerns.

Step 3: Tackling underlying negative emotions (15 minutes)
Return to the self-harm cycle and explain that the next section is about exploring ideas designed to help pupils manage the feelings that underlie their self-harming behaviours. Some ideas include using art, or talking or writing about big feelings.

Ask colleagues to share ideas about how to get a pupil talking. Ask questions such as ‘what if a pupil won’t talk at all?’ ‘What if a pupil seems distracted or angry?’
Discuss how you might talk directly to the pupil about their self-harm. Some suggestions include showing you’re not afraid to talk about the specifics of self-harm as it can feel very supportive to the young person – it can also help to keep them safe. Also, as this quote below shows, focusing on practicalities like the possibility of the cuts being infected can be a way forward.

‘Within 10 minutes of telling her, I was showing her. SHE WAS SHOWING HER!!! She wanted to check it wasn’t infected. My cuts soon became a sort of side issue to what was really going on rather than being this shameful thing to obsess over.’

Step 4: Practical ideas (10 minutes)
Using play dough is one way to promote discussion with pupils.

- **Distraction**: having something to fiddle with and focus on can relieve the pressure on the pupil and make it easier for them to talk as the situation feels less intense.
- **Smash it**: if a pupil is angry, being able to smash or throw play dough can help them to relieve those feelings.
- **Mini me**: a blob of play dough can represent the pupil.
- **Size of ball**: the size of a ball of play dough can be used in place of a numeric scale.

Try using writing as a form of therapy. Talk participants through how writing can be used, such as making lists, journaling or writing poetry. Here are three ways of using art to support recovery of pupils.

- **Create something**.
- **Expression through creation**.
- **Create something to destroy**.

Ask participants to try to come up with a practical outcome using art therapy – is this something you want to try? What do you need to do in order to make this happen?

Get more from the course
There are three other steps in this unit, covering developing healthier alternatives, distraction techniques and addressing normalisation. The unit also comes with handouts, trainer notes and a PowerPoint presentation. Premium members can login and access the entire ‘Managing Self-harm course’ online.
A to Z of e-safety

At the speed the internet and technology evolves, it’s almost impossible to keep on top of e-safety. To make it easier, ALAN MACKENZIE takes it one letter at a time.

**A**
Anonymity
You can be whoever you want online, but so can everyone else. Think disinhibition.

**B**
Behaviour
We learn to be respectful and polite in the physical world, why should this be different in the digital one?

**C**
Child abuse
There are different forms of abuse; the protection of children from harm is paramount.

**D**
Digital footprint
Do you understand where your information goes when you put it online and what it can be used for? What are you really happy sharing?

**E**
Education
The most important aspect to being safe.

**F**
Friends
You can have lots of fun with your friends online, but how many of your online friends would you invite for tea?

**G**
Gaming
The internet isn’t always scary – it holds endless opportunities for education and creativity!

**H**
Hacking
How can people steal your information? How can you keep it safe?

**I**
Inappropriate
Be mindful that what you do online doesn’t hurt others or yourself and doesn’t break the law!

**J**
Jailbreak
A process of removing restrictions from a device.

**K**
Keylogger
The act of recording the keys struck on a keyboard.

**L**
Location
Extremely useful to stop getting lost, but remember, your location isn’t always secret.
Monitoring
One way of assuring there is no inappropriate behaviour.

Privacy
Make sure you know how to adjust your privacy settings on your apps and devices.

Nomo
(no mobile, similar to fomo)
Some people can feel anxious if they have lost or misplaced their mobile, and not due to the cost of replacement!

Online bullying
Comments made online will stay there forever, and it’s much easier to be make hurtful comments when you’re hiding behind a screen.

Reputation
What you put online stays online. Your reputation is very important.

Quiz
There are endless myths and false information online. Think critically, question yourself. If it sounds too good to be true it probably is.

Unencrypted
It can be easy to lose data; where possible encrypt devices such as laptops, USB pendrives etc.

Xbox
There are endless opportunities for fun and creativity with gaming, but as you can also make friends through gaming communities you need to be aware of e-safety behaviour.

YouTube
With adequate filters applied, YouTube is an excellent platform for finding educational videos.

Zzzzzzz
Take a break – if you use your mobile just before bed you won’t sleep as well.

Sexting
Never be pressured into taking, sending or putting something online. A sexually explicit image of a person under the age of 18 is illegal.

Virus
Malicious code designed with a specific function.

Trolling
Messages designed to provoke a reaction. Don’t feed the troll; block, report and ignore.

Web filter
Software designed to prevent viewing inappropriate and illegal data.

Privacy
Make sure you know how to adjust your privacy settings on your apps and devices.

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Looked After Children: roles and responsibilities

The role of the designated teacher can vary from school to school. In this Ask the Expert answer, DEBS WARD explains what to do if you’re new to the role.

**Question** I am currently the safeguarding manager at a secondary academy and am likely to be given the role of designated teacher for Looked After Children. Could you provide some guidance on the role and responsibilities here please?

**Answer**

Your new role is primarily in promoting the health, wellbeing and education of this group of young people, to be their voice, their champion and the person who is responsible for ensuring they achieve their full potential within your setting and beyond. It is vitally important that you have a detailed and comprehensive training package for your staff which makes specific reference to the risks and difficulties faced by LAC. In order to effectively safeguard these young people staff must have knowledge and understanding in areas such as child sexual exploitation, antisocial or youth offending and substance misuse.

**Finding out the details**

The first thing you will need to find out is the number of LAC in your academy. You need to find out whether these young people are in care to your authority or a different one and if they are registered on your system correctly. From this you then need to ensure that the teaching staff are aware of who they are. Furthermore, additional information may be worth sharing with the teaching staff about individual LAC in order for staff to meet very specific needs and for them to gain an understanding of the young person.

**Teacher training**

Staff skills, confidence and training, particularly for NQTs and staff who are new to your school, are all important. Have your staff had any training in issues such as attachment disorder, childhood trauma, mental health difficulties and how these manifest themselves and impact on behaviour, social interaction and learning?

**Educational progress**

You will be responsible for monitoring the educational progress of the LAC in your academy, setting aspirational targets for them, and identifying and challenging underachievement. One of the most useful links in providing guidance for you in this new role would be the Virtual School. All local authorities in England have a Virtual School Head whose duty it is to promote the educational achievement of the children it looks after regardless of where they are placed.

**Engaging external services**

It is worth finding out exactly what services, outside agencies and professionals are available to you directly and what is available through others e.g. health.

**LAC reviews**

Another important part of your role will be to attend LAC reviews and meetings for your LAC. You will be expected to share information about how the young person is getting on in school and whether there are any concerns. This information will need to be gathered from those who teach the pupil and it will be your responsibility to collect this.

**Pupil premium**

You will also be held accountable, at this meeting, for outlining the spending of the LACs Pupil Premium Grant (PPG) and the impact this has had. If you are not sure how much funding your LAC is entitled to you can make enquiries via your Virtual Head or refer to the online guidance document ‘Pupil premium 2015 to 2016: conditions of grant’.

**Personal education plan**

All LAC of compulsory school age should have an effective and high quality Personal Education Plan (PEP). You will be involved in this process along with carers and Social Care. You will need to provide SMART short-term, mid-term and long-term educational targets for the PEP and again you will be responsible for this.

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Including Prevent in your safeguarding policy

Some schools may choose to create an entirely new policy for how they are in keeping with the Prevent duty and the Counter-Terrorism and Security Act 2015. However, there is no legal requirement for a separate policy so you could save time and energy by incorporating it into your existing child protection and safeguarding policy.

There are pros and cons for this. Keeping it separate means you can focus all your attention on one particular topic and engage your staff with the policy without forcing them to take in everything all at once. The con here is that safeguarding your pupils from the dangers of radicalisation needs to sit within the whole school ethos of safeguarding and shouldn’t be bolted on the side – perhaps staff need to look at the bigger picture in order to understand the skills they have and the skills they need.

This template from Prevent expert and educational consultant, Abi Clay, can easily be adapted to your setting and slotted into your existing policy. An easy-to-adapt template is available to download in Word format from our Knowledge Centre at my.optimus-education.com/node/15525. On the right are the essential points that you need to include.

End of year report

In your end of year report it is good practice to include referrals that were made, what decisions were made, the structure and processes you have in place and what has worked well.

Mention cases that have been managed and what lessons have been learnt from those experiences. Note any training that has been undertaken and by whom. Finally, it would be helpful to detail any partnerships you have formed with external agencies when handling cases of this nature.

The Counter Terrorism & Security Act (2015) & the Prevent duty

Prevent is one of the four elements of CONTEST, the government’s counter-terrorism strategy. It aims to stop people becoming terrorists or supporting terrorism.

The Prevent strategy

• Responds to the ideological challenge we face from terrorism and aspects of extremism, and the threat we face from those who promote these views.
• Provides practical help to prevent people from being drawn into terrorism and ensure they are given appropriate advice and support.
• Works with a wide range of sectors (including education, criminal justice, faith, charities, online and health) where there are risks of radicalisation that we need to deal with.

The strategy covers all forms of terrorism, including far right extremism and some aspects of non-violent extremism.

The Counter Terrorism & Security Act (2015)

This Act places a duty on specified authorities including schools, further and higher education, to have due regard to the need to prevent people from being drawn into terrorism (the Prevent duty).

At XXXXX, we are committed to supporting vulnerable students through our safeguarding policies and procedures and recognise that this will support the school’s contribution to the Prevent duty.

At XXXXX, we build pupils’ resilience to radicalisation by promoting fundamental British values and enabling our pupils to challenge extremist views.

The school is represented at all levels within the local authority task groups: gold, silver and bronze.

The school has engaged positively with appropriate training to ensure all staff have the skills and knowledge to refer any concerns appropriately.

Referral for any issue concerning potential radicalisation to extremism should be managed as any other safeguarding referral. XXXXX provides the lead for the school on Prevent and can be contacted directly for any concerns or for clarification on process.

Include links to other policies / documents including your British values, which should be displayed on your school’s website, and documents that show the training your staff have had on the signs and indicators for radicalisation.
Once exams are over schools have precious time for sports days, trips abroad and celebrating the year’s achievements. However, for teachers it’s not the time of peace and sunshine that it might appear to the pupils – minds are already thinking ahead to September and if the school doors open in the morning then staff still have a job to do.

One of the most important jobs at this time of year is safeguarding. A long stretch of no school might mean no safe place, no access to friends or resources and no one who will notice when something is wrong. During the holidays schools cannot always be there to support their pupils, but there are things they can do to try and ensure the break is as safe as possible.

Forced marriage
An uncomfortable truth is that the summer holidays is the most common time for pupils to be forced into marriage. The family can take them abroad without having to inform the school, it is less likely neighbours or other members of the community will be concerned about the family’s absence and it’s a time when the family has the most control over the pupil – no teachers to turn to. In July last year, Carol Smith, Senior Vice Principal at Chingford Foundation School, highlighted a resource that schools and friends can give to pupils so they know how to get the help they need during the holidays. The card above can be given to pupils by teachers or friends if they are concerned. (Influenced by the work ‘Handling cases of forced marriage, Multi Agency Practice Guidelines’ by Eleanor Stobart.)

Neglect
One of the toughest challenges for schools is knowing whether the signs they’ve spotted signify neglect and when they should intervene.

The report, We should have been helped from day one: A Unique Perspective From Children, Families and Practitioners (September 2013) uses three levels of neglect, which were adapted from Southampton Local Safeguarding Children Board’s Really Useful Guide to Recognising Neglect.

1. Level two – families where the parents mostly met the child’s needs
2. Level three – where some needs were unmet; child lived in a family home that lacked routines; had parents with poor awareness of safety issues; child received limited interaction and affection
3. Level four – families in which adults’ needs were put before the child’s and where the child had low nutrition and scarce stimulation.

Being aware of these different levels means schools can identify neglect at the early stages and act accordingly.

One step to take is to ensure you’ve built up a good level of trust with the family so that if you do ask questions, they don’t feel attacked and pull away. If that hasn’t been possible, then equally important are positive relationships with other agencies – particularly social care. While CAFs are not always held in high regard by safeguarding professionals, making sure your school and external agencies have a simple and efficient way of communicating and sharing information about a pupil will make it easier to ensure you can all make the right decision.

Before the holidays make sure all pupils know local places they can go, numbers they can call and people they can trust. Leaflets about Barnardos or other local youth centres won’t appear like you’re concerned or offend any parents and can just seem like you’re raising awareness of fun activities for the summer.
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