Updates, guidance and resources for your whole leadership team

LEADERSHIP AND GOVERNANCE
Business basics for aspiring heads
Page 16

SCHOOL BUSINESS MANAGEMENT
Financial efficiency top tips
Page 32

TEACHING AND LEARNING
Saving time with collaborative feedback
Page 38

SEN AND SAFEGUARDING
Three years on: the state of SEND
Page 52
Wellbeing Award for Schools

Developed in partnership with the National Children’s Bureau to help promote emotional wellbeing and positive mental health of pupils and staff.

Following a process of self-evaluation, action planning for improvement and evidence collection, schools achieving the award can demonstrate to Ofsted and key stakeholders that mental health is a whole-school responsibility.

Register your interest today at oego.co/OE-WAS
## Contents

### TEACHING AND LEARNING

<table>
<thead>
<tr>
<th>Page</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>35</td>
<td>Introduction</td>
</tr>
<tr>
<td>36</td>
<td>Creating a resilient environment for learners</td>
</tr>
<tr>
<td>38</td>
<td>Working smarter: comparative marking and collaborative feedback</td>
</tr>
<tr>
<td>40</td>
<td>Why lazy teachers are the best</td>
</tr>
<tr>
<td>41</td>
<td>Subject leader self-evaluation form</td>
</tr>
<tr>
<td>42</td>
<td>Tracking progress: are we getting it right?</td>
</tr>
<tr>
<td>44</td>
<td>Bespoke CPD: the key to success</td>
</tr>
<tr>
<td>46</td>
<td>Using video to inspire professional dialogue</td>
</tr>
<tr>
<td>48</td>
<td>Expressive arts and design in the early years</td>
</tr>
<tr>
<td>50</td>
<td>Getting it right in the early years: pedagogy and policy</td>
</tr>
</tbody>
</table>

### LEADERSHIP AND GOVERNANCE

<table>
<thead>
<tr>
<th>Page</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>7</td>
<td>Introduction</td>
</tr>
<tr>
<td>8</td>
<td>Leading with vision</td>
</tr>
<tr>
<td>10</td>
<td>Creating the best boarding provision</td>
</tr>
<tr>
<td>12</td>
<td>Staff retention: keeping the right people on the bus</td>
</tr>
<tr>
<td>14</td>
<td>Internal promotion to the SLT: interview and selection</td>
</tr>
<tr>
<td>16</td>
<td>Business basics for aspiring headteachers</td>
</tr>
<tr>
<td>18</td>
<td>Governors: questions to ask your SBM</td>
</tr>
<tr>
<td>20</td>
<td>Headteacher skills audit</td>
</tr>
</tbody>
</table>

### SCHOOL BUSINESS MANAGEMENT

<table>
<thead>
<tr>
<th>Page</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>23</td>
<td>Introduction</td>
</tr>
<tr>
<td>24</td>
<td>Wellbeing, productivity and organisational success</td>
</tr>
<tr>
<td>26</td>
<td>Health check your staffing costs</td>
</tr>
<tr>
<td>28</td>
<td>Benchmarking: a practical guide</td>
</tr>
<tr>
<td>30</td>
<td>Premises checks schedule</td>
</tr>
<tr>
<td>32</td>
<td>Financial efficiencies in schools and MATs</td>
</tr>
<tr>
<td>34</td>
<td>All change: the new funding formula explained</td>
</tr>
</tbody>
</table>

### SEN AND SAFEGUARDING

<table>
<thead>
<tr>
<th>Page</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>51</td>
<td>Introduction</td>
</tr>
<tr>
<td>52</td>
<td>The state of SEND: three years on, what's changed?</td>
</tr>
<tr>
<td>56</td>
<td>SEND assessment: an SLT briefing</td>
</tr>
<tr>
<td>58</td>
<td>Continuous provision for sensory needs</td>
</tr>
<tr>
<td>60</td>
<td>Teaching the value of healthy lifestyles</td>
</tr>
<tr>
<td>62</td>
<td>RSE in a faith school</td>
</tr>
<tr>
<td>64</td>
<td>Safeguarding across a MAT: five-step approach</td>
</tr>
<tr>
<td>66</td>
<td>Responding to cyberbullying</td>
</tr>
</tbody>
</table>
GDPR for Schools: Clarity & Compliance

Understand the impact of GDPR, how to prepare and the key steps to be compliant

#oeGDPR

oego.co/GDPRManchester

Expert speakers include:

**Victoria Cetinkaya**
Senior Policy Officer, ICO

**Helena Wootton**
Partner, Browne Jacobson LLP

**Claire Hall**
Associate, Veale Wasbrough Vizards

**KEY BENEFITS**

**CLARITY**
Understand the steps to take to prepare for GDPR

**STAFF TRAINING**
Ensure all staff are compliant and understand their obligations

**DATA AUDIT**
Learn how to carry out a robust data protection audit

In association with:
Welcome to Optimus Education Insight

Dear Reader

Welcome to 2018! With every school facing the challenge of doing more with less, both in terms of budget and staff, our contributors are responding with suggestions and strategies drawn from their experience. In the leadership and governance section there’s a strong focus on talent management, with articles on retention, internal promotion to the senior team and how aspiring heads can get more business savvy. Value for money features highly in the school business management area, with step-by-step guides to benchmarking (page 28) and reviewing staff costs (page 26).

As an ex-English teacher, I’m very mindful of the workload that comes with marking. On page 38, Charlotte Goodchild draws on recent research and debate around the value of marking and shares how her team is saving time while improving pupil progress. Tom Fay then looks at the issue of tracking progress, posing a series of questions to use in reviewing and refining practice.

To face these challenges, we need to be healthy, resilient and mindful of the importance of wellbeing for both staff and pupils. On page 60 Joanna Feast reflects on the role of PSHE lessons in exploring healthy lifestyles and positive choices, while psychologist Bradley Busch highlights what we can learn from research about creating a resilient environment (page 36).

Get involved in the Optimus Education network

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

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

Got something to share?
We offer selected opportunities for relevant suppliers to share their services with our members, from conference sponsorship to magazine advertising. To find out more about these opportunities, contact Matt on 020 3325 0382.

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

Optimus Education Insight editors: Lisa Griffin, Jack Procter-Blain and Liz Worthen.
Optimus Education Insight is published by Optimus Education, a division of Optimus Education Limited. ISSN 2515-7469
Registered office: 1st Floor, St. Magnus House, 3 Lower Thames Street, London EC3R 6HD.
Reg. no: 05791519
©2018 Optimus Education Limited

Whilst every effort has been made to ensure that the material contained within this magazine is correct, the publishers cannot be held responsible for any inaccuracies that may occur.
Conference Calendar

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

January

**Data Use & Assessment to Support Progress**
TUESDAY, 16 JANUARY, LONDON
Assessment strategies, efficient data use and accurate target setting to drive individual and collective progress across your school.

**GDPR for Schools: Clarity & Compliance**
THURSDAY, 18 JANUARY, MANCHESTER
Gain guidance on the impact of GDPR, how to prepare and the key steps to ensure your school is compliant.

February

**Admissions & Appeals in Academies and MATs**
TUESDAY, 6 FEBRUARY, LONDON
Ensure compliance, explore your freedoms and maximise success when managing admissions and appeals.

**Developing Resilient Learners**
WEDNESDAY, 7 FEBRUARY, LONDON
Practical strategies to deliver a holistic, broad and balanced education to build resilience and prepare pupils for success outside of school.

**SEND Assessment: Measuring What Matters and Evidencing Outstanding Outcomes**
THURSDAY, 8 FEBRUARY, LONDON; WEDNESDAY, 28 FEBRUARY, MANCHESTER
Ensure you can accurately assess and support the progress of SEND pupils in your school.

March

**Practical Strategies for Safeguarding in Education**
THURSDAY, 22 FEBRUARY, LONDON
Gain the practical strategies and guidance to protect against dangers online, emerging threats and mental health issues.

**Achieving Efficiencies in Multi-Academy Trusts**
WEDNESDAY, 14 MARCH, LONDON
Develop innovative procurement strategies and centralise common functions to improve efficiency, while ensuring great educational outcomes for students across your MAT.

April

**PE & School Sports**
THURSDAY, 19 APRIL, LONDON
Get new ideas to motivate pupils, build staff confidence and support healthy, active lifestyles across your school.

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

May

**Positive Parental Engagement**
TUESDAY, 20 MARCH, MANCHESTER
Work with parents and families to build positive engagement and support pupil progress at home and in school.

**Annual SEND Update 2018**
TUESDAY, 22 MAY, LONDON
Find out about the latest research surrounding SEND, dispel neuroscience myths and take away strategies for meeting different types of need.
What’s in this month’s Leadership and Governance section?

Are you a senior leader planning your next step? If you’re aspiring to headship but finance and budgets aren’t your forte, check out our guidance on business basics and the support your SBM can provide (page 16). Both aspiring and current heads can use our headteacher skills audit to evaluate strengths and identify areas for improvement. Vision is a key element of leadership, and on page 8 we hear how a headteacher made her vision a reality, with the help of her team. Speaking of staff, do you know your owls and foxes from your donkeys and sheep? John Viner focuses on retention and keeping foxes at bay on page 12. For governors, being confident when challenging the SLT is vital for school improvement. Caroline Collins offers questions governors can ask about school finances. Finally, remember to look out for your weekly member email landing in your inbox every Monday!

Lisa Griffin, Content Lead

Contributors in this issue

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

John Viner is a former primary headteacher and current full-time writer, teacher trainer and consultant with Adept Education Associates. He has inspected for Ofsted for over a decade. @adept_education

Hilary Goldsmith is director of finance and operations at Varndean School. She is a champion for collaboration and experienced in leadership and strategic financial management. @sbl365

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

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

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

Top leadership and governance blogs

School leadership: for better for worse, till death do us part
oego.co/inspirational-leader

From headteacher to MAT leader: making my move
oego.co/head-to-CEO

What does Brexit mean for international students?
oego.co/Brexit-int

See more at blog.optimus-education.com

Be part of the Optimus Education network

Linkedin
Follow our LinkedIn page and join the education news group for the latest company and education sector updates
oego.co/Linkedin

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

Digital
Download a digital version of your Optimus Education Insight magazine by logging into your My Account area on my.optimus-education.com
Leading with vision

Creating a compelling vision is a key part of leadership. SUZANNE O’CONNELL hears how a headteacher got her staff on board to make the vision a reality and achieve an outstanding judgement

School information

School: Ambler Primary School and Children’s Centre
Location: Islington, London
Pupils on roll: 373
Headteacher: Juliet Benis
Category: primary maintained
Level of PP: above the national average
Level of SEN: average

Comments from Ofsted

‘The steely determination of the headteacher, with the strong support of the governing body, have secured rapid improvements in pupils’ progress. She, alongside the highly skilled senior leaders, inspires the whole school community to “achieve more”. Staff morale is very high and they feel valued by the school’s leadership.’ (Effectiveness of leadership and management)

Ambler Primary School and Children’s Centre is set in a deprived part of Islington in London. Headteacher Juliet Benis started there 23 years ago, as an NQT. ‘It’s a lovely school,’ explains Juliet. ‘Before being appointed to the post myself I’d worked with three different headteachers and seen the school pass through different stages of development.’

These different stages have not just been internal ones. Juliet has watched as Ambler Primary has been affected by the different education policies imposed over the past decades. ‘The education system is very different from when I set out as an NQT,’ she points out. ‘It has been an evolving journey for us.’

When Juliet knew that the last headteacher was going to retire, she decided to apply: ‘I could see what needed doing as a deputy,’ she explains. She’s now been in post for nine years and has taken the school from ‘good’ to ‘outstanding’ at their last Ofsted inspection. ‘It was a nice school but not great, I suppose it didn’t have the rigour that was needed.’

Building a team

After Juliet was appointed some staff left and one of Juliet’s main tasks has been to replace them with the best staff she can. ‘I will only employ the best,’ she is adamant. A task that is not easy to achieve in London with house prices so high. ‘I’ve had to get used to change. It’s difficult for young staff, they can’t afford to stay in London if they want to buy a house and start a family.’

Juliet’s strategy is to accept that this is the case and see change as an opportunity rather than a threat. She has embraced the challenge and was keen to bring existing and new staff together early in her headship. ‘I wanted to build a new team so I arranged a big Inset session at an outside venue during which we focused on purpose and developing our shared language.

‘Now, if a member of staff sees a problem and brings it to me, I expect them to already be thinking of what the solution might be before they get to my office. We’re all responsible for coming up with the solutions here.’

Juliet is more than happy with the group dynamic and positive staff. She has two fantastic deputies and a group of staff who don’t sit still. Eager they might be but Juliet is also keen to ensure that they don’t take on too many priorities. She is prepared to say ‘no’ when necessary if she doesn’t believe it is in the best interests of the school and its children.

An ethos of DREAMS

Ambler Primary School provides truly inclusive support in terms of both pupils and staff. ‘Every child has to get what they need,’ says Juliet. ‘We have regular progress meetings and we look at every angle and way in which they can be supported.’ This includes art therapy and interventions which operate throughout every year group and not just in Year 6.

‘Our school ethos is based around the notion of “Achieving More”, something which we agreed at an Inset day,’ says
Juliet. ‘With this phrase in mind we involved everyone, staff, children and parents, in considering what the different qualities are to fulfil our “Achieving More” ambition.’

The SLT looked at the community’s response and came up with DREAMS (determination, resilience, enthusiasm, ambition, motivation and self-belief). ‘This now runs throughout everything we do. The whole school is branded with it,’ explains Juliet.

This commitment and ethos were particularly useful during the changes to SATs last year. Year 6 were able to draw on the resilience they’d been taught and their sense of community. ‘Staff and children recognise that making mistakes is a part of growing,’ says Juliet. ‘We also emphasise the importance of persistent questioning and that everyone can help find a solution to a common problem.’

Shared language is key here and this is particularly evident in the day-to-day behaviour of the pupils. ‘Manners are particularly important,’ says Juliet. ‘During the inspection, the children showed this to the inspectors; holding doors open and asking how the inspectors are. This wasn’t a show for them, it’s what they always do.’

**Taking care of staff**

All staff are encouraged to grow within the school and can begin by taking a small teaching and learning responsibility to help them progress. ‘We organise bespoke training,’ says Juliet. She looks at the individual development needs of staff and tries to ensure that the training provided meets them. This can even include those delivering the training going into class with individual teachers and supporting them as they teach.

Juliet is keen to show that every member of staff is valued and this includes their wellbeing. ‘We try and help them achieve the work-life balance. One of our foci at the moment is marking. We want to make sure this is manageable and are developing a model that relies on feedback in lessons rather than taking books home to write extended comments.’

‘When Ofsted came, we were prepared for a toxic experience,’ says Juliet. ‘We had written down 13 reasons why we are better than good, for the inspectors. After the first day, we knew we had a good chance of moving to outstanding. We had the attitude of “Let’s show them” and we did. It was a fantastic spirit from everyone, including our parents. I felt so proud and we were all in this together.’

**What next?**

Ambler Primary School will not become complacent. It’s the most able that the inspectors left the school with as a priority, one they had already identified for themselves. Juliet is keen to look further afield for some of the solutions to the education challenges that remain. ‘I want to examine practice in other settings, in other countries and find out what models might work well for us too.’

---

**Premium and Unlimited members can head online for our In-House Training unit on ‘Creating a shared team vision’ at my.optimus-education.com/training/teacher-leader-middle-leadership-essentials/creating-shared-team-vision**
Creating the best boarding provision

Boarding schools are responsible for the care and wellbeing of pupils 24/7. SUZANNE O’CONNELL hears why a school upgraded its facilities and how they keep their pupils safe

ACS Cobham International School

is not short of facilities boasting, for example, six all-weather tennis courts, a six-hole golf course, multi-functional gym and dedicated performing arts centre.

It’s a big school on a large campus, with over 1,500 pupils from two years to 18 years of age. Boarding starts from 12 years old.

There are 80 different nationalities in the school as a whole and 42 nationalities within the boarding provision. ‘We welcome all nationalities and religions,’ explains Mark Venn-Dunn, head of boarding. ‘I believe that being an international school makes us so much friendlier. We have different nationalities sharing rooms and being the best of friends. There is a level of acceptance of one another and an openness and willingness to welcome,’ says Mark.

It doesn’t just happen by chance, however. The school has a very proactive approach to ensuring that pupils get on with each other and mix. They are not dominated by one nationality or one type of child. Parents send their children here for all kinds of different reasons. Some are from the local population who want their children to study the IB.

Others are high transition parents who want their children to have more stability, or those currently working in the UK who want an international education for their child.

A new boarding house

The school has recently upgraded its boarding provision, with ‘The Woodlands’ boarding house opening last month. The new house has been carefully crafted to reflect the aims of the organisation. ‘We could have had a TV in every one of the children’s rooms,’ explains Mark. ‘But then they would have stayed in there. Instead we have them in common rooms so they have to come out and talk to each other.’

Every aspect of the provision has been carefully thought through. The architecture is linked to the mission statement which is linked to the internal design. ‘Everything is designed with our aims in mind,’ explains Mark.

All the bedrooms are en suite, and have a desk space for study; round tables and sofas are used in communal areas to get the children talking and, at the top of the building, the cinema room has modular or ‘tapas’ furniture that the pupils can move around to suit their needs. ‘It’s their space,’ emphasises Mark.

The boarding house caters for 133 pupils and has six common rooms, a cinema room, a standalone kitchen, two meeting rooms and a foyer where pupils can meet. ‘They can easily find somewhere quiet to go,’ Mark explains. This includes some single-sex facilities for girls too. ‘They don’t always want to be with boys.’

According to Mark, boarding provision can be one of two things. It can be a bastion of tradition with an emphasis on doing what has always been done or tailored to what’s needed now. ‘Our basic premise,’ he says. ‘is creating provision around what boarding should be now and not what it was in the past. It’s built on the basis of marginal gains. To some they might seem like minor details, but they all add up to something significant.’

Developing independence

Mark is very aware of the confidence that parents have in the school. ‘Parents have trusted us with what’s most precious to them,’ he says. ‘We have a duty to make sure we fulfil that trust. We very much work in partnership with our parents. We make sure that pupils have as much access to their families as possible. The best in internet connections was a priority for us,’ says Mark.

It’s important that pupils learn the skills that will help them when they leave the school and start at university. ‘When they leave us we don’t want them to find the next stage of their lives difficult,’ he says.

‘We encourage them to be independent too and all senior-year pupils therefore have single rooms.

‘We have also developed a residential life programme and pupils can go to a variety of London seminars. The seminars help to enhance their CV if they are thinking of applying to one of the
'Each boarding house has a range of fully trained adults who are there to support the pupils and ensure that the school’s safeguarding policies are in place.'

main universities,’ explains Mark.

Pupils of 17 and 18 years of age are encouraged and supported in their transition to independent living. For example, they can go out for the evening after school in a group of three, but must sign out and be back in time for dinner. They can go into London at the weekend if they want and they can organise a trip to a restaurant for a birthday meal. The school also organises many trips and visits of its own, including on weekends.

Following recent terror incidents in the capital and other cities in Europe there have been periods when pupils remain closer to campus. The school is responsive and works in close conjunction with parents to ensure that they know what their child is doing and feel in direct control of it too.

‘We use online boarding software which enables us to seek permission for pupils from parents to go out of school,’ explains Mark. ‘There is also pre-sign permission at the beginning of the year for more general requests so we don’t have to ask parents about every minor decision.’

**Safeguarding**

Each boarding house has a range of fully trained adults who are there to support the pupils and ensure that the school’s safeguarding policies are in place. There is a head of boarding, two house parents and one assistant at each house. 12 resident tutors are in for two evenings a week and support pupils during that time. They each have a pastoral group and advise them on everything from academic issues to welfare.

An external counsellor and an independent listener are available and Samaritans-trained peer supporters provide an additional listening ear. ‘We are very aware of the importance and influence of the peer group,’ says Mark.

Recently theatre groups presented a carousel of workshops about different issues that young people face such as grooming, sexting, online abuse and consent. Evening sessions have focussed on personal safety for those who are about to go to university.

Pupil voice is important here and all pupils are asked for their views on what should be available and the courses and workshops they would like to do. ‘We take their views seriously,’ says Mark. No matter how well-crafted the provision might be, there will still be some students who find boarding a challenge. ‘Children do miss the normality of being at home,’ says Mark. ‘However, we know that what we offer here fulfils the trust that parents place in us and makes the very best of the important role that we have in these young people’s lives.’

---

Our Supporting Student Wellbeing in Independent Schools conference has just launched! Book your place at my.optimus-education.com/conferences/supporting-student-wellbeing-independent-schools
Let’s assume for a moment that an experienced and long-serving teacher comes to the headteacher and says, ‘I’m fed up with jumping through hoops – I’ve decided to go and work somewhere less stressful’.

It may, of course, be a complete surprise to the headteacher. The teacher is effective enough, knows what she’s doing and gets good results. He tries to persuade her but she says, ‘No, my mind is made up. I’m going at the end of term, in five weeks, and, because I’m not going to another school, I can.’

While the headteacher swings into action to find a replacement, in an office somewhere the school business manager starts to add up the cost of recruiting a new member of staff.

Recruitment costs: let’s do the sums
Perhaps we could work that cost out between us. Here are some items: you add the cost as it relates to your setting. Then tot it up and make a note.

- A meeting of the SLT and the governors’ personnel group. The meeting takes an hour. Coffee and biscuits are available.
- Since the vacancy will have to allow for normal notice periods, the cost of a supply teacher for a term less the savings from the resignation.
- Time taken inducting the supply teacher and monitoring their effectiveness for three weeks.
- A meeting of the headteacher, SBM and governors’ personnel group to sketch out a job description and person specification. Printing of these details for potential applicants requesting a hard copy.
- Placing an advertisement in the education press and online.
- Clerical time for receiving applications.
- Time for relevant people to read through the applications as they arrive.
- A two-hour meeting of key people to shortlist the applicants (and more coffee and biscuits).
- Sending out reference requests with stamped and addressed return envelopes. Sending invitations to interview (time and materials).
- An hour-long meeting of key people to plan the interview activities.
- Materials, personnel, admin time to run the interview process. This includes the cost of senior staff observing lessons. Assuming a one-day event and three to five candidates.
- Time for feedback to the successful and unsuccessful candidates.
- Admin time for setting up new member of staff and reproduction of key documents.
- Cost of the induction process.

It doesn’t take long to get to the wrong side of £10,000, does it? How many schools can afford that twice a year or more?

All aboard
Rerun the tape for a moment. Suppose the teacher had not felt she was jumping through hoops? The financial savings are important but so is the disruption to the school and the interruption of pupils’ education.

We worry about recruitment, but it’s the retention that we need to get right just as urgently

Staff retention means keeping the right people on the bus
A long and costly recruitment cycle is just one of the things a school has to endure if they can’t keep their eggs on the bus – and their foxes at bay, as JOHN VINER explains.

In 2001, Jim Collins published his landmark book, Good to Great. Although a study of businesses rather than schools, his model of ‘The Bus’ has become familiar to us all. The London Challenge made much of his injunction to ‘get the right people on the bus, the wrong people
off the bus, and the right people in the right seats.

This is the challenge for school leaders. As the driver, not only do they need to know where they are going, they also need to drive carefully. My dad drove a London bus for almost half a century and he used to frequently say that a good driver drove as if he had eggs, not people in the seats.

But what about the people who need to get off the bus?

Different beasts
As long ago as 1987, Simon Baddely and Kim James from the University of Birmingham gave us the four-axis diagram, ‘Owl, Fox, Donkey, Sheep’.

- Owls are wise – they know a lot and they are signed up to the mission.
- Sheep don’t know much – maybe NQTs – but they are signed up and want to learn.
- Donkeys, as the name suggests, don’t know a lot and don’t care much. Typically, they have been teaching for 20+ years and getting away, for most of this time, with the minimum.
- Foxes, on the other hand, know quite a lot; they are up to date with current thinking, they may be excellent subject teachers, but they don’t necessarily agree with the leadership and the strategic direction of the school. They are often the ones who undermine leadership in staff meetings.

The quandary is how to manage each of these four types. While it’s important to lead with compassion, staff retention may also mean that we retain the right people, not necessarily all the people.

Jim Collins pointed out that it’s not that people are our greatest asset; it’s that the right people are our greatest asset. Convention has it that the sheep can be trained and are likely to become effective so, for them, retention lies in the intrinsic reward of knowing they are part of something great.

The donkeys are a bigger problem – if they can be encouraged and rewarded for their contribution, they can convert to sheep and then to owls. If not, and if they cannot be worked around, then they probably have to get off the bus.

Compassionate exiting is often just what they are looking for: sometimes, by enabling access to the right training, they can move into an area where they are much happier than when they struggled in a job they did not realise they had come to dislike.

It is the foxes that present the greatest challenge. Most agree that they need to be neutralised so that they do not become sappers of collective energy. If that can be done by careful and compassionate nurturing – and many foxes’ discontent is rooted in not feeling valued – then they can join the wise owls.

However, many commentators also agree that, failing this, foxes need to be ‘shot’, whether that is to greater heights through promotion out or held to account for their negative impact.

A fox hunt
Staff retention is every bit as important as staff recruitment. Keeping the right people may exert pressures on school leaders that are greater than the headache of getting them in the first place.

With the current crisis of recruitment, it’s a seller’s market. What looks like an owl may just turn out to be a fox. Caveat emptor.

References
Collins, J C. (2001), Good to Great: Why Some Companies Make the Leap... and Others Don’t, William Collins.

Download our ‘Coach and keep: improve retention with a coaching culture’ guide for more advice on retaining talent my.optimus-education.com/coach-and-keep-improve-retention-coaching-culture
Promotion to the SLT: interview and selection

What does an internal interview for a senior leadership role involve? JOSEPHINE SMITH offers advice on the process and example interview questions to ask.

There are several reasons why schools might look internally to fill senior leadership roles.

- Succession planning and in-school programmes designed to develop the school’s next leaders.
- CPDP deliberately designed to help aspirational colleagues prepare for senior leadership in their own school.
- Wider pools of internal recruits due to collaborative or multi-academy trust working.
- More financially savvy schools with unpaid senior team secondment opportunities that produce obvious candidates for salaried promotions.
- Reduced school budgets mean there are often fewer internally or externally advertised opportunities.

Moving to senior leadership

As a candidate wanting to join an existing school’s senior team, much of the preparation for this promotion will be done over time. Willingness to go above and beyond an existing named role or the demonstration of a set of skills currently lacking in the existing team will have been demonstrated for several months before the point of the selection process.

Nevertheless, there may be several internal candidates vying for the chance to join their school’s senior team and therefore a transparent and fair selection process will be necessary. The whole process will be designed to test a candidate’s ability to move from middle leadership to senior leadership in the same school (or same family of schools), focusing on areas such as strategic direction, school improvement, leadership of larger groups of teaching and support staff (including appraisal, accountability and professional development), extended data use and monitoring of progress and collaborative working.

Below are suggested tasks and interview questions particularly applicable to an internal selection process.

Interview tasks

There will most probably be an emphasis on whole school data (rather than just subject level data) and whole school strategic planning or review (rather than topic specific).

If the advertised role is to lead on specific areas of school development, the leadership of the curriculum for example, the interview process should include tasks that investigate potential in that area.

The presentation task

Tests communication skills, knowledge of current educational research and ability to prioritise key information.

The main decision here is how far in advance of the presentation to reveal the title to the candidates. Most presentations now ask for no use of slides to take away the crutch of a script for the presenter.

It’s common to ask candidates to present on a theme that asks them to research or show an understanding of a current issue in school or in education more widely. The more research expected, the further in advance the candidates should have the title.
The best presentations are quite short (5-10 mins) and it is the developing conversation afterwards, prompted by a set of questions, that tends to be most revealing. Possible presentation titles might include the below.

- ‘How might school X deal with the ongoing challenges of decreased funding and still continue to improve outcomes for its pupils?’
- ‘Ofsted cited X as an area for development for school X in its most recent visit. How well do you think the school has tackled this issue to date and what would your next priorities for development be?’
- ‘It’s apparent that our already successful departments keep getting better, while it’s proving harder for those showing trends of underperformance to improve at a similar rate. What would you do to reverse this trend?’

The data task
Tests numeracy skills, analysis and deduction, data interpretation and strategic planning, ability to prioritise key information and draw conclusions from presented evidence.

A good challenge is to present data that may have been previously unseen by the candidates and ask them to analyse it, draw conclusions regarding its usefulness and reliability and use that information to plan next practical steps.

Using real school data enables you to see what conclusions are drawn by fresh sets of eyes. However, if you don’t want to use your school data, you can find examples online.

Whatever data you choose, ask candidates to spot patterns, identify pupils likely to need prompt intervention and suggest a whole school focus.

Set a series of questions which interrogate the data and lead to the next stage of the process.

The group task
Tests communication skills, listening skills, ability to work as a team member and processing skills.

It will be crucial to appoint a member of the team who will work productively alongside existing team members and won’t be afraid to challenge them professionally. You’ll look for someone who will join the discussion while also being emotionally intelligent enough to reflect on others’ contributions and consider alternative viewpoints.

A group task might follow on well from the data task, with the analysis informing a debate about next steps to be taken in school. A task you might set could be the following.

‘Using the data provided, conduct an observed discussion which culminates in an action plan being produced for the next 12 months.’

Alternatively, you might present the group with a series of scenarios (with problems to consider and suggest solutions to) or controversial topics to debate.

Placing each of up to five scenarios individually in an envelope and inviting each member of the group to read one aloud and lead the discussion on is a successful way of testing each applicant individually as well as their team skills.

The ‘separate the candidates’ task
Tests potential, ability to manage difficult conversations and leadership skills.

A transparent internal process will seek the views of decision makers from outside of the school, as well as the current SLT, to prevent accusations of favouritism or pre-decided outcomes.

This could be a governor or senior team partners/educationalists from other schools. As well as providing an objective view, such contributors are helpful in challenging a headteacher to see beyond the current strengths or areas for development of a known candidate and seek out their potential instead.

A role play activity such as dealing with a disgruntled parent or a lesson observation feedback session would fit the bill here. Both test ability to interact face to face with others from a position of accountability and both are potentially difficult conversations, a common leadership responsibility.

Example interview questions
- Why are you applying for this role now?
- What makes you feel you are ready for this role?
- What have been your biggest successes at this school to date?
- What have been your biggest frustrations?
- What do you think are the top three priorities for this school? How do you know?
- How will you play your part in achieving them?
- What support will you need to perform this role well and from whom?
- What do you see as the biggest opportunities for this school currently? In the next five years?
- What are the threats? In the next five years?
- How do you think this school can make the most of the collaborative opportunities available to it?
- What makes you the best candidate for this position?
- If you don’t get this position what’s next for you?
LEADERSHIP AND GOVERNANCE
Cross Phase I Headship

Business basics for aspiring headteachers

If you’re looking for a headship role but finding the fear of finance a barrier, look no further than your SBL. HILARY GOLDSMITH highlights the support SBLs can provide to heads

We all know about the teacher recruitment crisis - young professionals just aren’t entering the teaching profession in sufficient numbers, and many existing teachers are leaving the profession. But there is also a crisis in headship across the board.

As the pressures of the job outweigh the pleasure, aspiring senior leaders appear to be stopping short of taking on the ultimate post of headship and there are a number of theories why.

1. Increased accountability measures
2. Changing government agendas
3. Workload and wellbeing
4. Inspection frameworks
5. Lack of training
6. Accountability complexities in MAT set-ups
7. The breadth and scope of the job

Meet your school business professional
The headteacher’s job description is enormous. The role has responsibility, one way or another, for absolutely everything that happens inside a school, so it’s not hard to see why few are willing to take on the responsibility. A great teacher on the path to leadership will almost certainly have had some experience and skills in school development plans, the curriculum, leading and managing teams, timetabling, safeguarding and policy implementation, but what about all those other parts of the job that the new or aspiring head would have to take on?

'Don’t be put off by the scope of the role or feel under-skilled in the non-teaching elements'

Budgeting, HR, insurance, compliance, catering, premises management, IT, administration, marketing and health and safety, to name a few.

Where would a teacher, having followed the traditional route of subject or pastoral lead, to assistant and then deputy head, even start to pick up that kind of experience? Could that be the reason so many are avoiding trying for the top seat at the table?

Prospective heads, did you know there’s someone in your school with a huge amount of skill and experience in all of those areas, whose job it is to support headteachers with those specialist skills? This person is also already leading all of those disciplines for your own headteacher. Meet your school business professional.

With great power comes great responsibility
Whether you call them the school business manager, school business leader, finance director or operations manager, most schools will have someone doing this vital role. To the aspiring head, they hold the key to the netherworld of non-teaching areas. Spending time with a school business leader (SBL) will almost certainly help aspiring heads prepare, not only for interview, but for understanding the complexities of the role itself.

With the diverse range of setups in today’s schools, headship responsibilities vary widely across maintained, faith, free school, academy and MAT set-ups, but all headteacher roles will come with a large assumption of establishment-wide responsibility. Did you know, for example, that as a headteacher you would almost certainly be ultimately responsible for legionella testing, the budget, VAT returns, medical treatment of pupils, the annual workforce census, fire safety testing and evacuation, all employment issues, ensuring your school is adequately insured and all matters regarding health and safety of staff, pupils and visitors, to name a few?

Fight the fear
If that scares the heck out of you, it shouldn’t. Yes of course you will need to take those responsibilities seriously, but as in all other areas of headship, you’ll be leading them by delegation, to trained professionals.

Your SBL will already be doing all of this and will be able to walk you through all of these non-teaching specialisms with relative ease.

It’s rare to find any of these areas appearing in teacher CPD, so it’s no wonder that many deputies and assistant heads feel that headship is too far outside of their immediate skill set. The National...
Professional Qualification for Headship (NPQH) used to have compulsory modules on school finance, but as this is no longer a mandatory requirement for headship, new and aspiring heads should ideally be seeking out training in these areas as they move up the career ladder, rather than on their first day in their new job.

Why not include school business leadership skills in your senior leader training programmes? Most SBLs would jump at the chance of supporting other SLT colleagues in preparing for headship, and in doing so, blurring the teaching/non-teaching lines of leadership across the senior team.

Many SBLs will have been faced with a frantic deputy, the night before a headship interview, desperately clutching the finance task they’ve just been asked to present on the following morning, hoping to ‘learn’ school finance in a 10-minute tea break. So how can the prospective candidate prepare themselves for headship interviews?

**Interview questions**

If you could smuggle a miniature SBL into your pocket on interview day, which questions would you like them to whisper the answers to in your ear? Try these sample questions.

1. How would you go about identifying 5% savings in staffing costs over a two-year period?
2. How would you ensure that the school had met its legal obligations with regards to the health and safety of its employees?
3. Tell us about how you have maximised the use of the facilities at your school. What challenges did you face?
4. What do you foresee as being the key funding issues over the next three years in education and how would you go about preparing our school for them?
5. How should the governing body challenge you effectively and hold you to account?

There are no right or wrong answers to any of these questions, but the employer will be trying to draw out the depth of your wider educational knowledge, the current trends in education, your awareness of your legal responsibilities and your accountabilities.

Some senior leaders will have these answers down pat, but if these are areas you’ve never really ventured into, make sure you firstly give some thought to them and secondly, talk the issues through with your SBL to gain their specialist perspective and how it applies to your school and your local area.

Ask your SBL to look at your prospective school’s profile with you to identify any issues that could be pertinent, such as class sizes, deprivation levels, staffing numbers, Ofsted findings and so on. A good SBL will be able to highlight key funding factors for a school and foresee problems they might be facing in the future just by looking at their data.

**Future leaders**

If you are considering headship now, or in the next few years, but are put off by the scope of the role or feel under-skilled in the non-teaching elements, don’t be. School business professionals are employed to support teaching staff at all levels, not just the headteacher, so make use of the skills and expertise they offer.

If your school doesn’t have an SBL, contact your local teaching schools, many of whom have school business SLEs who can be deployed to support leadership in a number of creative and flexible ways.

The headteacher shortage is a concern for all of us, and the education industry, in all its sub-divisions, must work together to develop and equip our future leaders now, so they are ready to take on the challenges of system leadership seamlessly, confidently and naturally.

---

For an answer to interview question 1, turn to page 26 for Hilary’s guide to health checking staffing costs.
Governors: questions to ask your SBM

Governors and SBMs should work closely together to ensure robust financial management of the school budget. CAROLINE COLLINS provides questions governors can ask to hold their SBM to account.

As the person responsible for school finances, premises, health and safety and HR issues, the school business managers should be presenting written reports to governors at governing body meetings. Governors should be holding the SBM to account by asking relevant and challenging questions such as the ones below and overleaf. Most of these questions will be asked at the end of the financial year, but those marked with an asterisk* should be asked throughout the year.

The list of questions is not exhaustive and the questions given are examples. You may find that other questions need to be asked depending on the financial reports provided by the SBM.

### Financial efficiencies

Financial efficiencies are key in good financial management. The SBM should be checking the DfE’s financial efficiencies metric tool and carrying out annual financial benchmarking. Governors should ensure this is done and reported to them.

<table>
<thead>
<tr>
<th>Question</th>
<th>Follow up questions</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>&quot;What is the school’s rating on the DfE financial efficiencies metric tool?&quot;</td>
<td>[If the rating is lower than expected] <em>What areas can the school improve on to make this decile higher?</em></td>
<td></td>
</tr>
<tr>
<td>What are the greatest areas of concern from the financial benchmarking exercise?</td>
<td>[If there are significant overspends] Have you spoken to the neighbouring schools? What are your plans to improve on this?</td>
<td></td>
</tr>
<tr>
<td>What contracts did the school renew this year?</td>
<td>How many were renewals with the same company? How many were new companies?</td>
<td>Responses could lead to further questions around how the SBM selected the companies, which should also satisfy the governors’ need to ensure value for money has been achieved.</td>
</tr>
<tr>
<td>Are there any other contracts due within the next six months that could be assessed?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>&quot;What percentage of the budget is spent on leadership?&quot;</td>
<td>If the percentage is high governors should be questioning whether the SLT size is appropriate in relation to the context of the school.</td>
<td></td>
</tr>
<tr>
<td>&quot;What percentage of the budget is spent on staffing?&quot;</td>
<td>What percentage of the overall salary is spent on teaching staff? What percentage of the salary cost is spent on classroom-based support staff? What percentage of the salary cost is spent on administrative staff?</td>
<td>Money spent on staffing should be between 70% and 80% of overall budget.</td>
</tr>
</tbody>
</table>

Questions about leadership and staffing will give governors a clear picture of how the salary budget is broken down. If a high percentage is spent on teaching staff but outcomes are lower than expected, governors should be speaking to the headteacher about the quality of teaching and professional development. If costs on classroom-based support staff are high, governors could challenge the number of teaching assistants and the necessity for these. If costs on administrative staff are high, governors should challenge why the school needs this and whether workload can be redistributed to reduce costs.

### Budget

Governors should be receiving a termly budget monitoring report. If so, some of the questions below may not be needed.

<table>
<thead>
<tr>
<th>Question</th>
<th>Follow up questions</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>How were the costings in the school improvement plan (SIP) calculated?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

Caroline Collins provides questions governors can ask to hold their SBM to account. Governors and SBMs should work closely together to ensure robust financial management of the school budget. Financial efficiencies are key in good financial management. The SBM should be checking the DfE’s financial efficiencies metric tool and carrying out annual financial benchmarking. Governors should ensure this is done and reported to them. Financial efficiencies are key in good financial management. The SBM should be checking the DfE’s financial efficiencies metric tool and carrying out annual financial benchmarking. Governors should ensure this is done and reported to them.
How are you ensuring that there is sufficient money in the budget to meet the priorities in the SIP?

How often are you formally reporting the financial position to the head and budget holders?

What is the predicted end of year outturn?

*Do you have any concerns about significant over- or underspends?

Has there been a major priority this year leading to an overspend? Has a supplier been changed leading to an underspend?

If there are significant over- or underspends governors should be challenging why.

Have you noticed any specific trends that can help the school and board plan for the future?

Governors should receive an overall cost of overtime and a breakdown of reasons for overtime at least once a year.

**Income and expenditure**

Governors should be receiving termly income and expenditure reports and scrutinise the report to identify areas that raise concerns.

<table>
<thead>
<tr>
<th>Question</th>
<th>Follow up questions</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>What was the final income received this financial year and how does that compare to previous years?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>What was the final expenditure this financial year and is it in line with the school’s anticipated expenditure?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Where do you anticipate being able to make savings?</td>
<td>This question may or may not be relevant, depending on whether savings are needed.</td>
<td></td>
</tr>
<tr>
<td>What has the school done to generate income?</td>
<td>How can we improve on that?</td>
<td></td>
</tr>
</tbody>
</table>

**Procurement**

Governors should already be familiar with processes in place for procurement. If that is not the case they need to ask the SBM to explain the procedure. If the procedure appears to be sufficient no more questions need to be asked. If there are concerns about the robustness and/or transparency of the process they should be asking how the procedure was agreed and what the school can do to improve it.

<table>
<thead>
<tr>
<th>Question</th>
<th>Follow up questions</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>What percentage of the budget was spent on learning resources?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>What percentage of the budget was spent on ICT learning resources?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>How do you ensure that the school is achieving value for money when purchasing resources and services?</td>
<td>Benchmark against other schools so you can see if your purchases are in line, above or below their spend.</td>
<td></td>
</tr>
<tr>
<td>Have you considered collaborative purchasing with other schools?</td>
<td>If yes, ask for examples, costings and savings. If no, ask for the reason why.</td>
<td></td>
</tr>
</tbody>
</table>

Find more questions for your SBM at my.optimus-education.com/governors-questions-ask-your-school-business-manager
**Headteacher skills audit**

**JOSEPHINE SMITH** provides a template to evaluate the skills and knowledge needed to fulfil the responsibilities of headship.

This audit will help to evaluate the skills and knowledge you have under the headings of the four domains of the national standards of excellence for headteachers:

- **qualities and knowledge**
- **pupils and staff**
- **systems and process**
- **the self-improving school system.**

<table>
<thead>
<tr>
<th>Standard</th>
<th>Key Characteristics</th>
<th>Expertise and/or experience (Place a tick in the most relevant box)</th>
<th>Provide examples of when you have demonstrated this (in the past 12 months) using the following prompts (Examples provided below for illustrative purposes only)</th>
<th>Measurable outcomes for the school as a result of your work/contribution (Examples provided below for illustrative purposes only)</th>
<th>Any other comments</th>
</tr>
</thead>
</table>
| Qualities and Knowledge | Hold and articulate clear values and moral purpose, focused on providing a world-class education for the pupils they serve. | Experienced in this area | • School development plan  
• Headteachers report to the governing body  
• School website content and redesign | Oversubscribed and popular school  
High parental satisfaction rates  
Ofsted outstanding | Kirkland Rowell survey results  
Low turnover of staff |
| | Demonstrate optimistic personal behaviour, positive relationships and attitudes towards their pupils and staff, and towards parents, governors and members of the local community. | Area for self-development | • Assemblies  
• Staff meetings/briefings  
• Senior prize giving address | 360° review findings | |
| | Lead by example – with integrity, creativity, resilience, and clarity – drawing on their own scholarship, expertise and skills, and that of those around them. | Support needed to develop | • Headteacher reports to governors  
• Staff briefings  
• Open evening presentations  
• Annual prize giving | 360° review findings | |
| | Sustain wide, current knowledge and understanding of education and school systems locally, nationally and globally, and pursue continuous professional development. | Area to foster in the leadership team | • Membership of teaching school alliance  
• Participation in establishment of local consortium group  
• Member of strategic teaching school board  
• Take ownership of own CPD | | |
| | Work with political and financial astuteness, within a clear set of principles centred on the school’s vision, ably translating local and national policy into the school’s context. | | • School development plan  
• Partnerships with… | School accounts | |
| | Communicate compellingly the school’s vision and drive the strategic leadership, empowering all pupils and staff to excel. | | • Assemblies  
• School newsletter/headteacher blogs  
• SLT minutes | | |
| Pupils and Staff | Demand ambitious standards for all pupils, overcoming disadvantage and advancing equality, instilling a strong sense of accountability in staff for the impact of their work on pupils’ outcomes. | Tracking and target setting systems  
• Policy revisions  
• Pupil premium website information  
• QA programmes and feedback to staff  
• Appraisal process  
• Closing the gap initiatives | Tracking data  
QA reports on quality assurance of teaching and learning  
Pay progression recommendations to governors  
PP/SEND data against other national data |
| Secure excellent teaching through an analytical understanding of how pupils learn and of the core features of successful classroom practice and curriculum design, leading to rich curriculum opportunities and pupils’ wellbeing. | Curriculum review to ensure breadth and depth  
New curriculum pathways | Student voice survey results  
Ebacc % data  
Exam results |
| Establish an educational culture of ‘open classrooms’ as a basis for sharing best practice within and between schools, drawing on and conducting relevant research and robust data analysis. | CPD programme  
• Staff coaching programme  
• QA schedule  
• Collaboration with other schools | Staff surveys  
Coaching pair feedback  
Practitioner enquiry reports |
| Create an ethos within which all staff are motivated and supported to develop their own skills and subject knowledge, and to support each other. | CPD programme  
• Audit of staff strengths  
• Twilight programme  
• ITT/NQT induction programme  
• Regular 1:1 meetings | |
| Identify emerging talents, coaching current and aspiring leaders in a climate where excellence is the standard, leading to clear succession planning. | Middle leader programme  
Leadership development provision | % of internal promotion posts |
| Hold all staff to account for their professional conduct and practice. | Appraisal documentation  
• Minutes of meeting held between staff and managers | |
| Systems and processes | Ensure that the school’s systems, organisation and processes are well considered, efficient and fit for purpose, upholding the principles of transparency, integrity and probity. | Staff review of whole school communications  
• Governors’ minutes  
• Education and skills funding agency returns | |
| Provide a safe, calm and well-ordered environment for all pupils and staff, focused on safeguarding pupils and developing their exemplary behaviour in school and in the wider society. | Policy revisions  
• Annual safeguarding training update register  
• Safer recruitment training certificates  
• Health and safety reports to governors | |
| Establish rigorous, fair and transparent systems and measures for managing the performance of all staff, addressing any under-performance, supporting staff to improve and valuing excellent practice. | Appraisal system  
• QA activities  
• Staff working party agendas  
• Pupil progress meeting schedule | |
## LEADERSHIP AND GOVERNANCE

### Cross Phase I Headship

**Welcome strong governance and actively support the governing board to understand its role and deliver its functions effectively – in particular its functions to set school strategy and hold the headteacher to account for pupil, staff and financial performance.**

- Headteacher report to governors
- Governors training programme and resources led by staff
- NGA training accessed
- School visits by governors
- New governor training

**Exercise strategic, curriculum-led financial planning to ensure the equitable deployment of budgets and resources, in the best interests of pupils’ achievements and the school’s sustainability.**

- Capitation formula introduction
- Review of school site along with finance director and review of curriculum offer
- Revenue stream considerations
- Curriculum review including partnership curriculum

**Distribute leadership throughout the organisation, forging teams of colleagues who have distinct roles and responsibilities and hold each other to account for their decision making.**

- Staffing structure review
- Middle leadership skills focus on training days
- Senior team secondments

### The self-improving school system

**Create outward-facing schools which work with other schools and organisations - in a climate of mutual challenge - to champion best practice and secure excellent achievements for all pupils.**

- Peer review process as part of triad of schools
- Teaching school partner for local application
- Lead school for School Direct Programme
- EEF research project participation

**Develop effective relationships with fellow professionals and colleagues in other public services to improve academic and social outcomes for all pupils.**

- Teaching School partnership
- Work with mental health organisations
- Drugs awareness programme in partnership with Amy Winehouse Foundation

**Shape the current and future quality of the teaching profession through high quality training and sustained professional development for all staff.**

- CPD focus
- Appointment of assistant headteacher in charge of CPD
- Lead school for School Direct

**Model entrepreneurial and innovative approaches to school improvement, leadership and governance, confident of the vital contribution of internal and external accountability.**

- Peer review participation
- Limited Liability Partnership (LLP) membership
- Joint appointments to senior team made across MAT schools
- Appointment of trustees with primary experience on board

---

Download the template with links to resources at [my.optimus-education.com/headteacher-skills-audit](http://my.optimus-education.com/headteacher-skills-audit)
What’s in this month’s School Business Management section?

As you’d expect, finance and saving money is a dominant theme in this issue. John Viner has been summarising what we know so far (or at least at the time of going to press!) about the national funding formula and what it actually means for schools. Hilary Goldsmith provides a useful guide to health checking staffing costs, while Caroline Collins takes us through the benchmarking process – an invaluable tool for assessing value for money and making a business case to governors or senior leaders. CFO Andy Collings tells us what it’s like to make the transition from the corporate world to education, and shares his top tips for financial efficiency. For a welcome change from balancing the books, turn to page 30 for an extract from our premises checks schedule. Finally, Nickii Messer has been continuing her investigations into what wellbeing really means for the workplace. See overleaf for her findings.

Liz Worthen, Head of Content

Contributors in this issue

Andy Collings is a finance and operations consultant with more than 20 years’ experience, including a Big 4 pedigree. He’s currently consultant CFO and COO at the Challenger Multi-Academy Trust.

Caroline Collins is the head of school business strategy and resources at Miles Coverdale Primary School. She is an ISBL fellow and keen champion of the value of SBMs as leaders.

Hilary Goldsmith is director of finance and operations at Varndean School. She is a champion for collaboration and experienced in leadership and strategic financial management.

Russell Dalton is finance and business director at Pershore High School and an ISBL fellow. He uses experience in leadership and teamwork from his military career to motivate others.

Top school business management blogs

School funding reform: welcome relief or wishful thinking?  oego.co/school-funding

When finance met fine dining: modelling efficiencies in MATs  oego.co/finance-MATs

Ofsted is coming: how SBMs can prepare  oego.co/OfstedSBM

See more at blog.optimus-education.com

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

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

Be part of the Optimus Education network

Linkedin
Follow our LinkedIn page and join the education news group for the latest company and education sector updates  oego.co/LinkedIn

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

Digital
Download a digital version of your Optimus Education Insight magazine by logging into your My Account area on my.optimus-education.com

www.optimus-education.com  OPTIMUS EDUCATION  INSIGHT
Wellbeing, productivity and organisational success

NICKII MESSER explores why wellbeing is about more than fruit and exercise classes and requires a strategic approach

'Improving worker wellbeing leads to improved productivity, higher quality outputs and higher quality services'

Quite rightly, there is much written and talked about regarding staff wellbeing. But there’s a risk that if we talk about it enough without getting to the nub of what it means, and exactly why it’s important, then it just becomes rhetoric – and we miss the whole point of wellbeing.

School staff often complain that, at best, they feel their schools simply pay lip service to wellbeing. Inset days can be a hotbed for mixed messages with any mention of wellbeing quickly, and unrelentingly, followed by repeated demands on everyone’s time and depleting energy levels.

I want to look more closely at wellbeing and understand what it means and why it is important, especially in terms of business leadership and management. We need to understand the likely impact of not ensuring wellbeing in our workplace. With so many pressures on school leaders, there is little point expending time and energy on anything unless you are sure why it ultimately has a positive impact on the children.

Connecting wellbeing and productivity

In 2014, the Department for Business, Innovation & Skills published a report entitled ‘Does worker wellbeing affect workplace performance?’, which highlights how improving worker wellbeing leads to improved productivity, higher quality outputs and higher quality services. With schools needing to wring every ounce of value from every penny they spend, the savvy business manager will recognise how essential staff productivity and quality of service are. It is also reasonable to conclude that school leaders have an ethical and moral duty to ensure the wellbeing of all stakeholders, including their workforce.

There is a duality to wellbeing that the SBM needs to understand. Wellbeing in the workplace involves both personal and organisational wellbeing. Although nominally different, the two are intrinsically linked and I would argue that personal wellbeing is almost impossible to achieve unless organisational wellbeing is in place. And the SBM is ideally positioned to influence both.

Generally, we are more aware of personal wellbeing. Many schools provide fresh fruit for staff, as well as facilitating subsidised gym membership, theatre trips and so on. But personal wellbeing is more than physical factors. There is significant evidence to suggest that job satisfaction is a major contributor towards personal wellbeing and this, in turn, leads directly to improved results. Conversely, the ‘Does worker wellbeing affect workplace performance?’ report finds that job dissatisfaction leads to deterioration of performance.

Subjective wellbeing

‘Subjective wellbeing’ is a crucial element of personal wellbeing and productivity. Subjective wellbeing is how people feel about themselves and is, to some extent, influenced by the person’s characteristics.

For example, are they generally a positive, cup half-full type of person? These characteristics need to be explored during the recruitment process. Appointing somebody who tends towards a default negative disposition means that anything the school does to promote wellbeing could be an uphill struggle. Furthermore, such negativity can have a ripple effect throughout the school. On the other hand, a person who is generally positive and can-do, is likely to embrace and support the school’s wellbeing initiatives and influence positive behaviour in others.

For the school to improve subjective wellbeing in the workforce, it is necessary to first understand contributory factors. Some of those listed in the worker wellbeing and workplace performance report are:

- autonomy over your job
- variety of work
- clarity of role and performance feedback
- opportunity to use and develop skills
- positive interpersonal contact, including with managers
- a belief that there is fairness at work
- a sense that your job matters.
"Taking the time to say ‘thank you’ can make all the difference to a colleague’s sense that what they do matters"

Although pay features, generally people want fair pay rather than a higher salary.

Meaningful performance management can help address many of these factors and should be an essential SBM responsibility, with support staff included in the target and feedback process. Holding regular team and individual meetings, where ideas and challenges are shared, delegating appropriate tasks, coaching staff to take on additional responsibilities, conducting skills and aspiration audits and so on can help staff to feel better about themselves and their managers. Taking the time to say ‘thank you’ can make all the difference to a colleague’s sense that what they do matters. While such things take time, not doing them means that productivity is likely to be reduced, and any business manager worth their salt will balk at the very thought of that!

**Organisational wellbeing**

Organisational wellbeing is very much about a school culture where staff are encouraged to understand the bigger picture and their contribution to the organisation’s success. A culture where staff believe they are listened to, and their opinions valued.

In their booklet ‘Wellbeing and the Importance of Workplace Culture’ (2016), Great Place to Work advise that organisational wellbeing should be a conscious business decision and part of the overall strategy for success. ‘Organisational culture is critical to wellbeing as a culture where people feel trusted, valued and respected and will in itself engender feelings of wellbeing.’ Without organisational wellbeing, staff may feel marginalised and inconsequential, with a resulting negative effect on personal wellbeing.

The Great Place to Work research concludes that the following are key drivers for organisational wellbeing:

- values aligned and ethical behaviour
- teamwork
- work environment and processes
- recognition.

**Core values**

Understanding, sharing and articulating the schools core values and vision is a major contributor to the health of the school. From an employee point of view, knowing why you do something, and why it matters, is a critical catalyst for wellbeing. It’s not enough for the school to paste their values around the building. Core values need to be explained, within the context of the work that each person does, and included in performance management and team conversations. You can’t expect all staff to pull together if they are not starting from the same point or moving in the same direction. And when our backs are inevitably against the wall, we need to be sure it’s the same wall for everyone!

I have found The Little Book of Values an invaluable reference point when explaining values. Written by headteacher Julie Duckworth, it explains how our guiding principles and beliefs impact on daily lives and the importance of values within the context of our schools. I especially appreciate that values are explained, as well as being described from a child’s perspective, meaning that conversations around values can start from an objective ‘these aren’t my words, what do you think’ point of view.

To provide a framework for a more ethical working practice, it is important for the SBM to scrutinise systems, processes and policies to make sure they take account of the impact on the workforce. Recognising impact, as well as contribution, is vital for organisational wellbeing and when shared across the team can also promote cohesion.

**Small changes, big difference**

Financial constraints make improvements to the work environment appear difficult, even impossible. But even a lick of paint and some comfy chairs in the staffroom can make a difference. I visit many staffrooms where the first thing you see are cluttered notice-boards and busy walls – not conducive to relaxation, especially when staff are faced with constant reminders of work demands. When you next visit the staffroom, take an objective look around and see what small changes might create a big difference in staff morale.

Personal and organisational wellbeing are complex, but the bottom line is that both are critical to the success of the organisation, and the SBM ignores them at their peril! The effective SBM can be instrumental in helping everyone understand the relationship between wellbeing and productivity and how to make wellbeing part of the school’s improvement strategy. Fruit and exercise classes have their place, and can do much to support the physical wellbeing of staff. But wellbeing is much broader and far ranging than that – from employing the right people through to providing systems and processes that scaffold a positive working environment. Ensuring the wellbeing and happiness of staff can be one of the more rewarding aspects of the SBM role. Enjoy!

---

Wellbeing is the responsibility of all members of the school community. The Wellbeing Award for Schools (WAS) provides a framework for schools to evidence good practice. Find out more at oego.co/OE-WAS
SCHOOL BUSINESS MANAGEMENT    @OptimusEd

Cross Phase | Teams and Structures

Health check your staffing costs

Staffing costs are the largest element in any school's budget. How can you be sure you're getting maximum value from this spend? HILARY GOLDSMITH shares key principles, tips and calculations

Most school leaders will be acutely conscious of the impact of reduced funding on school budgets, and will also be aware that the vast majority of their school expenditure goes on staffing. So when funding cuts bite, the obvious answer is to take a long hard look at your staffing costs to try and find savings. That doesn't mean just looking for whole posts that can be removed, but ensuring that your staffing levels are healthy and efficient.

If left untended, staffing costs can suffer from 'creeping spread'. Make sure you keep yours trimmed and weeded with regular gardening visits.

Benchmarking

There are a variety of ways to calculate your staffing costs. Some schools include cover and supply costs, others don't, or some might include the income from a sickness absence insurance scheme, which not everyone has.

It's always useful to benchmark your own school's staffing costs with others to see how you compare. You can use local data from your local authority, or by comparing data from other local friendly schools who are happy to share. Or you can use national data if your context means that there aren't many comparable school nearby.

The schools financial benchmarking website (see schools-financial-benchmarking.service.gov.uk) will choose statistical neighbours based on pupil demographic. This might not be relevant to staffing, so be sure to handpick your comparable schools with those whose context you understand. Whichever you use, be sure to select a benchmark set that most closely matches your own context. But remember: not all your comparison schools will have the same set-up as you.

Look to see if those other schools have in-house or contracted cleaning, catering or grounds contracts – all of these will skew staffing benchmarks disproportionately, as the staff included in those contracts will not appear in your staffing budget. If you don't already know their context, a check on the school's website, or a quick phone call can determine whether your similar schools have such contracts in place.

Remember to check regional variations. Urban schools will have London weighting costs included, rural schools will not. Choose your geographical neighbours with this in mind.

'Don't forget to budget for increments and cost of living increases'

Avoiding pitfalls

When setting your budget, remember to check for potential pitfalls. For example, have you planned for maternity cover and the maternity itself? Maternity plus the related cover costs more than the single post and you probably won't know your maternity commitments when writing your budget. Check your staff profile and remember to include a costed maternity/paternity/adoption leave provision.

Don't forget to budget for increments and cost of living increases. Check your pay policy to see if it allows for 'double-jumping' up the pay scale for exceptional teaching staff. Do you know who they might be?

You might plan to recruit NQTs, but what happens if a UPS 3 teacher is appointed? Teacher recruitment is a tough game and you might not have the luxury of choice. If you can, leave some slack in your recruitment budget: many schools are having to re-advertise key posts, which sends supply and advertising costs rocketing.

If you're in a position where you think restructure might be necessary, don't forget to include a provision for redundancy or termination costs in your budget.

Sustainability

Even if you think your staffing will stay reasonably stable, don't forget to include pay progression, cost of living and promotions. Always use a three or five-year budgeting spreadsheet, or a piece of budgeting software that allows you to factor those aspects into your calculations. Most LAs will provide one or there are several available online.

And remember, do scenario planning. Create three or four 'what-if' projections to include higher-than-anticipated national pay agreements and other worst-case scenarios. Your actual position is likely to be midway between them all.
Curriculum slack
School business managers and finance directors don’t always delve into the twilight world of the curriculum plan, but it’s essential to understand how your curriculum links to your staffing model.

Your curriculum plan will outline how many lessons are needed in each subject or across each year group to deliver the curriculum. By that, you can work out how many staff you will need to teach it. But it’s never an exact fit.

There are a number of excellent tools to calculate effective timetable modelling, but you can start by using a straightforward calculation (see the box below).

Modelling this to your senior team will allow you to work together closely to identify ways of reducing that difference. It can be very substantial. It should also quickly assuage any hint of ‘how can a non-teacher understand the curriculum’ nonsense.

Collaboration
Perhaps the biggest opportunity to maximise your staffing savings is to take advantage of the changing educational context and collaborate with other local schools.

- Could staff work across sites where there is excess capacity in one school and demand in another?
- Could a group of schools employ supply teachers collectively to avoid agency fees and ensure quality of delivery?
- Could recruitment costs be reduced by collective advertising?
- Rather than deciding to cancel minority GCSE or A level courses where they are not cost-effective, could schools join together to offer shared delivery of those courses to pupils from across a local area?

Value staff input
Your staff are by far your biggest expense, but they are also your biggest resource. It’s easy to lose track of the people behind the numbers when you’re having to reduce costs, so remember to invest in wellbeing, quality CPD and to communicate regularly with staff.

Curriculum financial slack calculation
1. Find out how many lessons each teacher can teach per week, add PPA time, then multiply this by your teaching FTE. This will give you your optimum number, if all teachers were fully deployed to their contractual max. We’ll call this A.
2. Find out the average cost of a teacher period in your school. That’s the average cost of a teacher, divided by the number of teaching periods in an academic year. Let’s call this B.
3. Multiply A by B to get your ideal staffing budget cost: C.
4. Work out how many lessons are actually timetabled in your school (including PPA and management time). We’ll call this D.
5. The difference between A and D will tell you how many unused periods there are hidden in your timetable. This can be E.
6. Multiply E by the average cost of a teaching period (B) to work out how much financial slack there is in your staffing budget.

Many middle managers and senior staff will have worked in a number of schools with varying approaches through equally challenging times. Ask them for solutions and ways of working differently and more creatively. You’ll be surprised how understanding and supportive staff will be if they are allowed to be part of the solution and not feel like they themselves are the problem.

Value their input and be prepared to change your approach along with them.

Download a pay model policy from my.optimus-education.com/pay-policy
Benchmarking: a practical guide

Benchmarking is a valuable tool in decision-making and ensuring value for money. CAROLINE COLLINS shows how the process works

If you’re responsible for financial management, benchmarking is a valuable tool in your armoury. It will help you make decisions, prepare business plans and be confident that your school, organisation or trust is achieving good value for money.

This resource is designed to help school business and finance managers work through the stages of benchmarking and presenting to senior leaders and governors.

What is benchmarking?
Benchmarking is a tool used to compare income and expenditure against similar sized organisations. In schools, it is used to look at where savings can be made or to prepare a business case. By having access to data from schools of a similar size and context, staff members responsible for financial management can identify areas of overspend and investigate potential reasons. Schools are expected to achieve value for money and comparing their spend to other schools helps facilitate this.

To carry out a benchmarking exercise, all you need is:
• an understanding of what you want to find out
• access to websites
• some knowledge of Excel
• an ability to interrogate data
• communication skills.

Benchmarking data is available from the schools financial benchmarking website at schools-financial-benchmarking.service.gov.uk

The website was updated in the summer of 2017 and is now much more user-friendly. The published data comes from schools’ consistent financial reporting (CFR) returns and is updated annually, usually late autumn to early spring. It should be available in time for governors’ spring meetings.

Carrying out your benchmarking exercise

1. Select your data
Once the data is available on the schools financial benchmarking website, the person responsible for the task (usually the SBM or finance manager) can retrieve data based on specific criteria. The website uses a wizard facility to make it easy for you to navigate through.

You can choose between quick comparison, where the website uses your school’s characteristics to find similar schools (statistical neighbours), or advanced comparison, where you can select your own characteristics.

Quick comparison is the simplest and captures schools that have a similar context to your own. This is the option usually used to get an accurate benchmarking set because it includes important contextual data such as the number of FSM and SEN pupils. If you try to benchmark using the advanced comparison this type of data can get overlooked.

You can choose the number of schools you want to compare with, as well as the type of school. The default number of schools is 15. The final stage of the wizard allows you to choose which characteristics you want to base your benchmarking on. Unchecking the default boxes would result in the data not being an accurate benchmarking set.

2. Review the results
On completing the wizard, the website produces a number of bar charts showing the chosen schools’ data, giving a clear picture of where your school is in the set.

The first set of results shows the total expenditure. Each school in the graph has a hyperlink which leads to more detailed financial information and graphs. At this point you can

<table>
<thead>
<tr>
<th>School</th>
<th>Total Expenditure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coppetts Wood</td>
<td>£8298</td>
</tr>
<tr>
<td>Miles Coverdale Primary</td>
<td>£8100</td>
</tr>
<tr>
<td>John’s Angell town CoE</td>
<td>£7445</td>
</tr>
<tr>
<td>Savile Park Primary</td>
<td>£7091</td>
</tr>
<tr>
<td>St Mary and St Pancras CoE</td>
<td>£8887</td>
</tr>
<tr>
<td>Christopher Hatton Primary</td>
<td>£6819</td>
</tr>
<tr>
<td>Christ Church Primary</td>
<td>£6586</td>
</tr>
</tbody>
</table>
do more investigations on a particular area of spend if you need to. The drop-down menu at the top of the screen leads you to specific areas of spend. You can also change the values so rather than looking at spend per pupil, you could choose spend per teacher.

A useful option that you can select from the drop down is percentage of total. When you are reporting to governors it is always good to refer to the percentage of total as it tends to carry more meaning.

3. Transpose the data
The website offers you a CSV download so all the data will go into a spreadsheet, but it's a difficult document to use. Instead, prepare a template which has the various characteristics and comparison columns for you to transpose the data into.

One sheet in the workbook would contain the bar charts, which will automatically update as data is entered. You could also include a comments or action worksheet to record your findings and the outcome of any investigations. (You can download an example spreadsheet template from my.optimus-education.com/benchmarking-practical-guide).

4. Look at trends in your own school
To look at trends across specific periods in your own school, go back to the website data set and click on the relevant link. The benchmarking data for your school will show line graphs for the past five years. Hover over the line graph for each year to show the total.

To save this, either enter the data into a new worksheet to create the same line graph, or copy and paste the line graph as an image.

5. Report the findings
Once the data is in place, the charts are populated and investigations have been conducted and logged, prepare your report. (Download a report template from my.optimus-education.com/benchmarking-practical-guide).

The report should include charts and graphs with commentary, and contextual as well as financial data.

Don't just show total spend. Drill down into the relevant areas using data from the benchmarking website. For example, rather than giving staffing costs as one figure, break down the different aspects to include:

- total cost of staffing
- percentage of budget
- cost of teaching staff
- cost of supply staff
- cost of admin staff
- cost of premises staff
- cost of other staff.

Ensure that you include information about investigations you have conducted, and conclude the report with a summary of findings. Try to pre-empt questions that staff and governors might raise so that you can answer them immediately.

The report should be presented to the senior leadership team and governors. Ensure you are familiar with the benchmarking data and findings so that you can answer any questions that might come your way.

Finally, remember: benchmarking shouldn't be a chore. If you have the spreadsheet and report template in place you're halfway there.

How does benchmarking help?
How much do you spend on energy costs? Is it a reasonable amount? By comparing it to your statistical neighbours you might be surprised with the results.

To look at this you would choose occupation from the drop down box and scroll down the page to see the comparison. If you find that your spend is higher than expected, try contacting some of the other schools and asking some further questions, such as the ones below. Keep a note of any responses for your report.

- What supplier do you use?
- What tariff are you on?
- Do you have LED lighting?
- Have you done anything to reduce costs?

The same approach applies to other areas. For example, you want to employ an additional member of staff, but the governors have questioned a potential overspend. You could use benchmarking data to demonstrate that you’re not overspending in comparison to other schools, as part of a business case for the governors.

The Effective School Governance Award provides schools with a framework to demonstrate the impact of their governing board. Find out more at oego.co/OE-ESGA

Top tips
- Prepare your spreadsheet and report in advance.
- Take time to scrutinise the data.
- Pick up the phone and speak to the schools that you want to question.
- Be honest in your report.
- Have as much information as possible to present the data.
- Make use of visual aids such as graphs and charts.
- Be thorough but keep it simple.
Carrying out regular premises checks is a vital part of the school business or facilities manager role. **RUSSELL DALTON** shares a checklist for key tasks.

**Keeping staff and pupils safe on the school premises is a key school business management responsibility.** Carrying out regular premises checks enables you to identify any issues early and maintain a clean, safe environment for work and learning. But what needs to be done and when?

This extract from the premises checks schedule lists checks that need to be made on a weekly, monthly and termly basis. Download the full schedule, which includes daily and annual tasks, from [my.optimus-education.com/premises-checks-schedule](http://my.optimus-education.com/premises-checks-schedule)

### Weekly

<table>
<thead>
<tr>
<th>Tasks</th>
<th>Responsibility</th>
<th>Comments/actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check intruder alarm and report faults.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check internal lighting and report faults.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check external lighting and report faults.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check CCTV system and report faults.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Run any infrequently used taps and showers to reduce legionella risk.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Test full fire alarm system before or after school by testing fire alarm call points (a different call point to be tested each week on a rotational basis).</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check any highly combustible materials are correctly stored and secured.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check all windows, including window locks and glazing, for damage.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Conduct a maintenance check of grounds, fences, boundary walls and gates.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Monthly

<table>
<thead>
<tr>
<th>Tasks</th>
<th>Responsibility</th>
<th>Comments/actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inspect boiler pipes, valves, insulation and general surfaces in boiler house.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check flow and return water temperature for hot water calorifiers (flow temperature should be at least 60°C, return temperature should be at least 50°C).</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check water temperature at hot water sentinel outlets (and a selection of other points rotationally) to ensure a temperature of at least 50°C within one minute.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check water temperatures at point of use (POU) and that combined water heaters are between 50-60°C.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check water temperature in cold water storage tanks and cold water sentinel outlets (and a selection of other points on a rotational basis) to ensure a temperature below 20°C within two minutes.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Record meter readings for electricity, water, gas and oil.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Inspect fire extinguishers.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check condition and operation of fire doors.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Ensure safety and hazard signs are visible.
Test emergency lighting.
Safety-check automatic doors and all lifts.
Check and clean kitchen ventilation systems.

| Termly |
|-----------------|-----------------|-----------------|
| **Tasks**       | **Responsibility** | **Comments/actions** |
| Health and safety inspection to be conducted by governor with responsibility for health and safety, site manager, business manager, and, if customary, a union representative responsible for health and safety; report to be made to relevant governing body committee. |  |  |
| Check names and contact details of keyholders are up to date. |  |  |
| Heads of department to review department health and safety arrangements. |  |  |
| Check for and record any outstanding maintenance issues. |  |  |
| Conduct whole-school fire drill; check that issues identified are resolved. |  |  |
| Clean out kitchen grease traps. |  |  |
| Check that fire risk assessment and procedures are up to date. |  |  |
| Check that regular tests of fire alarms and emergency lighting have been conducted and recorded. |  |  |
| Ensure new members of staff have received fire precaution briefing. |  |  |
| Clean and de-scale taps, shower heads and hoses. |  |  |
| Inspect ladders and review ladder register and checklist. |  |  |
| Conduct detailed inspection of floors, stairs and corridors. |  |  |
| Check that any removal or treatment of asbestos has been recorded on the asbestos management plan. |  |  |

| Every 6 months |
|-----------------|-----------------|-----------------|
| **Tasks**       | **Responsibility** | **Comments/actions** |
| Inspect and repair gutters, roof outlets, rain pipes etc. |  |  |
| Contractor to service security alarm. |  |  |
| Contractor to test and service emergency lighting. |  |  |
| Safety-check hot water blending valves. |  |  |
| Contractor to service all lifts. |  |  |
| Check waste pipes and above ground drainage for blockages. |  |  |
| Clear debris and silt from traps below drain covers; this to be done more frequently if puddles are forming around the covers or if heavy rain is expected. |  |  |
| Test and service workshop machinery. |  |  |
| Conduct a visual inspection of frequently-used portable electrical appliances. |  |  |
Financial efficiencies in schools and MATs

CFO and COO ANDY COLLINGS talks bubbles, rollercoasters and no surprises, sharing his top tips for efficient finance management

'Education is a much tougher gig because your product is people'

You've worked in a variety of industries. What's been the biggest change or challenge for you in coming to the education sector?

One of the main things I notice is that there's rarely time to take a step back and reflect in terms of the wider picture. This is partly because everyone's working to very short deadlines. Also, in the education world, issues crop up on a regular basis. You get to school at 8.00am, have your plan and to-do list for the day, and then suddenly you find out that school A has just spent X amount of money which no-one was aware of, and you have to sort it out.

You end up living in a bubble, without much time to think 'why am I doing it like this?'. You carry on doing things the same way, often because it worked last year, and don't take the time to consider alternative options which might be just as good – and more cost effective.

I've noticed that there can be a mentality of 'the money will be there somewhere', or 'something always turns up'. So people aren't always as concerned as they should be about the carry forward or spending rate which means they'll run into financial trouble. I think the mentality has to change to 'the money won't be there unless you do something about it'.

I've worked in lots of institutions, and education is a much tougher gig because your product is people. If your product is disc drive distribution, there's a lot less emotional investment, and there are clear processes involved. It's not about how we get child A, B or C to progress from here to there, or if we don't get this risk assessment done by X date, the pupils can't go on the trip. The impact is so much higher, the emotions run higher, and things can take much longer than they would in another industry.

There's no substitute for timely management information. Close your books within a good time scale so that you can give not only yourself, but also the SLT, headteacher, CEO etc., the right information, at the right time, to make the right decisions.

Do accruals accounting, not cash accounting. This will be normal practice for many SBMs or finance managers, but I have come across some schools who are having problems because they aren't thinking about their financial commitments. If you close your books and you've got £20,000 in the bank, which you need to cover your teacher salaries, but you've forgotten that you've written £30,000 worth of cheques which haven't yet been cashed…you will be overdrawn.

Stay close to the headteacher and SLT. You need to be in the meetings, because things will be discussed that have a cost impact. Be the right-hand person to the head, so that when things come up, such as an unexpected resignation, you are on hand to say what's in the budget and what you can do. Which is good, because...

...You don't want surprises. 'No surprises' is what the finance manager has to aspire to, because then it's no surprises to the head. You don't want to receive an email with an invoice for £10,000 and your...
'Be flexible in thinking about how you structure your team, because it will bring efficiencies'

response to be: ‘I don’t even know who ordered this, it wasn’t in my budget.’ Then you have to scramble around to find the money to pay it, and deliver the bad news to the head that while you thought the cash flow was ok this month, it’s actually not. Which leads onto my next and somewhat draconian tip.

All orders should go through the finance team, and should always be aligned with people’s budgets. Make sure your budgets are up to date so people know how much they have left to spend. The moment you have orders being processed outside the normal route, you lose control. And end up with surprises.

Plan ahead. If possible, work to a three-year forecast plan. That means you need to be close to the SLT, the governors, the LA or borough – because you need to know about likely pupil numbers for the next two to three years. If you’re going to model, you need accurate data. Caveat carefully if you don’t have accurate data, or present different scenarios.

Don’t be afraid to give bad news – and give it early. It’s better to warn the head in January 2018 that you have a problem from September 2018, rather than waiting until July 2018 to tell them. If giving bad news, be constructive about it. If you tell the head that you’ve got a £50,000 shortfall, the next question will be: what are we going to do about it? Be ready with solutions.

Be fully abreast of your fixed cost base. Everybody will focus on the salary side, but you’ve got to remember all those licence costs that you’re tied into for three years. Be aware of those ‘one off’ costs that miraculously turn up four or five times a year.

Make your cost base flexible. If you need someone to teach ‘A’ level history, but you’re not sure what next year’s curriculum will look like, make it a one year fixed contract. Both sides are fully aware and have their notice periods clear. Then if you change curriculum in 12 months’ time, you’re not carrying that cost.

Watch out for TLRs. There are a lot of them around. Sometimes they seem to be given to people to make them go away when they’re asking about a pay rise. Remember that a lot of TLRs have three years’ pay protection, so even if the post is no longer needed in year two, you still have to pay for it. Yes, you want loyal and experienced teachers who stay in your school many years. But having some churn helps keep things fresh.

Avoid initiative overload. Initiatives not only come with a cost element but also an impact on the resource time of the teachers and senior leaders who deliver them. Of course, there will be great ideas with the potential to benefit your pupils, so lead discussions along the lines of: ‘Which of these initiatives fits best with our top three priorities for the year? What criteria shall we use to prioritise these projects?’

Take opportunities to get out and meet with other school business management professionals. Attend conferences if you can. Getting out of your school ‘bubble’, even for one day, can help clear your mind and give you space to think – as well as enabling you to meet like-minded people who are going through similar problems.

Never get too depressed if you’ve had a bad day, because tomorrow will be better. And never get too excited, because there will be some issues coming. Accept that education is a rollercoaster. It’s not an industry where you can smooth out all the problems and never have to worry. Things are changing all the time in the micro and the macro climate.

Q Any particular advice for finance managers or directors within a MAT?
If you’re an SBM or finance manager within a MAT, remember that you’re not in competition with the other academies. It’s one set of money, one set of rules – you’re working together. Don’t keep your good ideas to yourself. It doesn’t matter if you tell the academy down the road what you’ve been doing for recruitment, and they then get 10 more students than you. You’re sharing best practice and the trust is better off overall.

The biggest piece of advice I would give to a chief finance officer in a MAT, is that you’re only as good as the quality of the staff in your schools or the people in your regional team. Give people a fair crack of the whip. But if you have persistent concerns about a person’s suitability for a role, then rest assured – it won’t get better. You’re going to have to fix it, and it’s better that you fix it sooner rather than later.

Don’t be scared to run schools without anybody from finance actually sitting in the school. It’s a big change, but your finance team can be accessible and responsive via phone, email, webinar, Skype and so on.

Be flexible in thinking about how your structure your team, because it will bring efficiencies – which means more money for teaching and learning.
All change: new funding formula explained

JOHN VINER explores what we know so far about DfE plans for national funding reforms

Since the new national funding formula will impact on schools in every parliamentary constituency, MPs have received a detailed briefing. This summary is based on that Commons briefing paper.

A new formula

The government’s plans for major school funding reforms apply only to England. There will be a new schools national funding formula (NFF) and another formula for high needs funding for special educational provision.

Responding to the lessons of the general election, the government has changed the proposed funding reforms and promised an additional £1.3 billion across 2018-19 and 2019-20. The NFF will operate as a ‘soft’ formula in these two periods, to work out notional individual school budgets only. These will be aggregated so that local areas will then be able to determine how to distribute the core funding between schools.

The formula will not, then, be introduced in full to begin with. There are transitional arrangements for 2018-19 and 2019-20, which will include caps on gains for those schools hitherto considered as underfunded and minimum per-pupil increases for all schools – the new funding yet to be identified by the secretary of state for education, Justine Greening.

Most pupil premium funding and funding for new school premises (or expansion of current ones) lie outside the scope of the current reforms.

How will it affect my school?

The DfE has published provisional funding tables to enable schools to get a better handle on the figures. Within these tables, note that the final ‘in-full no transition’ figures are not actual allocations for any specific year. They have been produced to help people better understand the NFF outside of the transitional protection in the first two sets of figures. The DfE has pointed out that ‘actual allocations for future years will reflect updated characteristics and pupil numbers and will be subject to future spending review decisions’.

Where will the additional money come from?

Greening has already admitted that the post-election promise of more money will be hard to find as it will not really be new money at all. Most, it seems, will be found from an unidentified £600m in new cuts to the central DfE budget.

£200m is likely to come from toplicing the free schools building budget and the balance from raiding the capital budget for building and repairs, largely by cutting spending on sports facilities and wellbeing.

None of this is especially welcome news since, for example, if a school wanted to create a wellbeing programme, it would no longer have access to supplementary funding but would have to pay for it all itself. However, the main headline is that, under the new formula, all schools will gain in the two transition years. Under the original school funding proposals, which were the basis of DfE consultations, there would have been winners and losers’ in the first year, even with transitional protection.

This gap would have widened still further when the NFF was fully implemented. Now, we are told, the final arrangements will provide for up to 6% gains per pupil for underfunded schools by 2019-20 and, as a minimum, a 0.5% per pupil cash increase in 2018-19, and a 1% increase by 2019-20 compared to their baselines, in respect of every school.

The caps on gains and the new minimum increases compared to baseline are a way of balancing the protection of some schools from incremental reductions while ensuring that there are gains for those schools considered ‘underfunded’ against the NFF.

In hard figure terms, the government is promising all primary schools that they would attract a minimum funding level of £3,300 per pupil in 2018-19, and £3,500 per pupil by 2019-20. Secondary schools would attract a minimum of £4,600 by 2018-19 and £4,800 by 2019-20.

However, the DfE is quick to point out that, ‘this does not necessarily mean that all individual schools currently receiving less than these minimum thresholds will be necessarily be allocated these sums’.

It’s possible that since publication of this magazine there will have been further news on the funding formula. Keep an eye on our blog to stay up-to-date!
Not surprisingly, marking was a hot topic at last term’s Wellbeing and Workload conference. Marking policies were compared and strategies for reducing marking time shared. In this issue, Charlotte Goodchild explains how her team has used comparative judgment and collaborative feedback to lighten the load and improve pupil progress. Meanwhile, turn to page 40 for John Dabell’s blog post in praise of ‘lazy teachers’. Getting pupils working harder than their teachers is key, John argues. For psychologist Bradley Busch, resilience is another key factor for classroom success. On page 36 he shares research findings on what a ‘resilient environment’ might look like and how we can apply that for pupils.

Being part of the Optimus network means access to sustained professional development. This issue includes case studies from two member schools, one about growing a range of CPD programmes, designed to meet the needs of staff at different stages in their career, and the other about how putting joint video observation at the heart of an Inset day led to revitalised professional dialogue.

**Liz Worthen, Head of Content**

---

**Contributors in this issue**

**Bradley Busch** is a psychologist and director of InnerDrive. Based on work with elite athletes, he runs workshops that help pupils develop a successful mindset and perform under pressure. @Inner_Drive

**Charlotte Goodchild** is English KS3 team leader at Wilmslow High School. She has worked in education since 2010 as an English teacher, literacy lead teacher and teaching and learning coordinator.

**Elizabeth Holmes** is a writer and researcher in education. She has taught in secondary schools in London, Oxfordshire and West Sussex and written many books, particularly for NQTs and on wellbeing. @EA_Holmes

**Tom Fay** is vice principal for teaching, learning and assessment at Rochdale Sixth Form College. He is heavily involved in school improvement work, with particular expertise in leading teaching and learning.

Forgotten your log-in details or want to add more members from your school or organisation? Email our customer services team at customer.services@optimus-education.com or call us on 0845 450 6404.

---

**Top teaching and learning blogs**

- Should education be secular? oego.co/secular
- How to stretch the more able: go off-piste, define differentiation and avoid time-wasting marking oego.co/more-able
- NEU horizons for ATL and NUT oego.co/neu-union

See more at blog.optimus-education.com

---

**Be part of the Optimus Education network**

- [Linkedin](https://www.linkedin.com)
  Follow our LinkedIn page and join the education news group for the latest company and education sector updates oego.co/Linkedin

- [Twitter](https://twitter.com)
  Want to get engaged in discussion and connect with your peers? Follow us on Twitter @OptimusEd

- [Digital](https://www.optimus-education.com)
  Download a digital version of your Optimus Education Insight magazine by logging into your My Account area on my.optimus-education.com
Creating a resilient environment for learners

Learners who can bounce back from adversity, manage pressure and overcome setbacks are likely to achieve more. BRADLEY BUSCH explores how we can promote resilience in school.

Nothing in this world can take the place of persistence. Talent will not: nothing is more common than unsuccessful men with talent. Genius will not; unrewarded genius is almost a proverb. Education will not: the world is full of educated derelicts. Persistence and determination alone are omnipotent. (Calvin Coolidge, 30th President of the USA)

While Coolidge might have been slightly over-egging the importance of resilience, the desire to help students improve these skills is probably more popular now than ever.

Why resilience?
The Education Endowment Foundation (EEF) defines resilience as a ‘positive adaptation despite the presence of risk’. In their report ‘The impact of non-cognitive skills on outcomes for young people’, they note that resilience and coping skills have high malleability (meaning that they can be improved and developed).

Research has also demonstrated that setbacks are not always a bad thing, with those who have experienced some adversity going on to perform better under pressure than those who have been wrapped in cotton wool (see the study on ‘Adverse life events’ in the research reports list at the end of this article). Experiencing failure has also been associated with higher levels of empathy, motivation and determination.

Juggling the ever-pressing need for good exam results and short-term wins with long-term gains that might require setbacks along the way is difficult. So, what can we do to create an environment that helps develop long-term, resilient learners, as well as helping pupils to thrive in the present?

Student views on resilience
The 2017 study ‘Not drowning, waving. Resilience and university: a student perspective’ interviewed students to explore how they felt they develop resilience and what they think academic institutions can do to help. They found three consistent attributes that help make resilient learners: keeping a sense of perspective, staying healthy and social support.

Perspective
A sense of perspective was defined as the ability to manage one’s emotions, concentrate on the things that you can control and that matter, and choosing the correct strategy for any given situation. Central to maintaining a sense of perspective was the importance of self-reflection, which allowed students to manage new or uncomfortable situations. Other skills that helped keep a sense of perspective included a mixture of both short-term and long-term goals, as this helped maintain focus and motivation after a setback.

Staying healthy
Being physically and mentally healthy helped students respond well under pressure and during adversity. Ways to do this included doing physical activity as well as taking part in team sports, which allowed for social interactions and self-reflection. Identifying and celebrating successes and adopting helpful and constructive self-talk helped improve mental wellbeing and resilience. (For more on self-talk, see the InnerDrive blog ‘6 ways to improve how you talk to yourself’.)

Social support
The more we isolate ourselves, the more we brood over bad decisions which increases our stress and frustration. As well as making ourselves feel better, research suggests that social support can be a powerful predictor of resilience to stress (see the report ‘Social Support and Resilience to Stress’, listed below).

Social support and maintaining good relationships with friends, family and teachers helped students either feel better about their setbacks or provide suggestions on how to overcome them. Finally, the study found that academic institutions could help students develop resilience by:

• helping them experience and learn from failures in a safe environment
• providing high quality feedback that focuses on strategies and next steps
• providing access to extra-curricular activities.

How schools can help
Balance challenge and support
A 2016 study on mental fortitude training by leading resilience researchers highlights that for an environment to facilitate resilience, it needs to be both high in challenge and support. Too much challenge and no support results in excessive stress, burnout and isolation.
Too much support but not enough challenge can lead to complacency and boredom. When pupils are struggling, the temptation is to reduce the level of challenge in the task. However, low expectations often lead to low results. To help develop resilience, instead of reducing the difficulty, consider increasing the individual support.

**Fail better**


Research by psychologists over the past two decades has supported Beckett’s assertion, finding that the way you explain your failures can have a profound impact on your future behaviour. We do not necessarily want our pupils to fail more. The whole point of education is to better the lives of each individual and the society they live in. However, some failure along the way is inevitable and is a key part to learning. Therefore, we want students to fail better.

How can they do this? Viewing setbacks as opportunities for learning is a good start and is central to developing a resilient and growth mindset. Other techniques to help pupils fail better include asking themselves ‘what would I do differently?’ and ‘what have I learned from this experience?’.

These sorts of questions will not only help improve resilience, but will also help improve metacognitive skills, which research has found to help increase pupil grades in maths, science and English (see references below).

**Give high quality feedback**

*If you want to go fast, go alone. If you want to go far, go together.* (Al Gore, Nobel Peace Prize winner)

All too often, and especially so for teenagers, we think that asking for help is a sign of weaknesses. In fact, the opposite is true. Asking for, and actually using feedback is the hallmark of a persistent learner. But what does high quality feedback look like? Suggestions from research include:

- avoid delaying feedback, as people often forget the nuances of the event if they wait too long
- avoid lavish praise
- provide concrete, actionable steps.

This last point was a prominent feature in the Sutton Trust ‘What makes great teaching?’ report. For feedback to be effective, learners must know what they would do differently next time.

**Develop Olympic resilience**

Educators can also learn a lot about resilience from the world of sport. Resilience in Olympic gold medallists has been extensively researched (see the InnerDrive blog post ‘9 ways Olympians develop resilience’ for more detail), and psychologists have found that the techniques athletes use can be applied to other settings. These techniques include:

- being open to new experience
- being optimistic
- viewing decisions as active choices not as sacrifices
- taking personal responsibility for their thoughts, feelings and behaviours
- focusing on developing skills instead of comparing themselves to others.

This may look different depending on the student, context and their environment, but offers a good starting point and guidelines on how to help students flourish during a setback.

**Final thoughts**

Resilience is a difficult thing to quantify and measure. It is important that pupils can bounce back from adversity, manage pressure and overcome setbacks. This is true both when they are in school and for later on in life. Developing resilience is something that can be done by both the learner and their school.

By viewing decisions as active choices, learning from mistakes, having a healthier relationship with feedback and keeping things in perspective, we are helping to give pupils the tools they need to deliver their best when it matters most. It means they won’t just survive their school experience, they will thrive in it.

To find out more about failing better, asking for feedback and developing Olympic resilience, visit the InnerDrive blog at blog.innerdrive.co.uk

**Research reports for reference**

‘The impact of non-cognitive skills on outcomes for young people’, Education Endowment Foundation (2013)


Comparative marking and collaborative feedback

Recent reports de-bunk the myth that there is a link between marking quantity and pupil progress. Charlotte Goodchild shares how to reduce workload without sacrificing standards.

Feedback is a vital element of teaching. However, if your marking policy means that teachers are walking into school on a Monday morning bleary-eyed and miserable, then it’s perhaps time to reconsider your ‘effort: impact’ ratio.

Here I’ll explain how teams can use comparative judgment and collaborative feedback in order to ensure maximum impact with minimum effort.

Comparative judgement

Using comparative judgement software like No More Marking (see www.nomoremarking.com for details) can provide a quicker, more reliable method of assessment that significantly reduces the burden of marking.

In a nutshell, No More Marking allows you to upload pupils’ essays onto a computer system, distribute the marking across your department, and rank order and assign standardised scores.

The key selling point is that it can significantly reduce teacher workload as one teacher can mark a whole cohort’s scripts in approximately two to three hours.

As a curriculum team leader, utilising comparative judgement also allows you to identify common errors or misconceptions across a whole cohort that teachers can then address in class. More on this later.

Joint feedback planning

Once a comparative judgement session has been completed, use curriculum team time to discuss the strengths and weaknesses of the pupils’ responses.

During the comparative judgement session, teachers should note down any common misconceptions or ways that pupils’ responses could be improved (‘line of argument’, ‘lots of students not using the possessive apostrophe’, ‘need to address the question more clearly’) and then share these with colleagues.

Once these key areas have been identified, work collaboratively as a team to plan ways to re-teach or address these issues. This could mean designing a one-off feedback lesson or might perhaps lead to the introduction of a new series of lessons that address a key issue or misconception.

Thus, time spent marking books becomes time spent strategically planning, teaching and raising pupil attainment.

‘Time spent marking books becomes time spent strategically planning’

Fewer scores, more feedback

Since our school’s move towards awarding pupils with a standardised score twice a year as opposed to half termly, teachers have been freed from spending time puzzling out where pupils’ work sits within a given rubric or mark scheme. Instead, teachers can focus on providing pupils with meaningful feedback that drives the quality of their thinking forward.

Much of this feedback is given verbally as the teacher circulates in class and ‘live marks’. (‘Well done, you’ve chosen a powerful quotation! What about a better word for ‘shows’?’ Or, ‘Look back at the model – is yours doing the same?’) Pupils are given quick, meaningful feedback that is personal to them, without a red pen in sight.

Self and peer assessment

Teach your pupils to peer and self-assess effectively and you will see the quality of their work improve, while saving valuable time. That said, simply asking pupils to give their partner ‘two stars and a wish’ is never to going to have much impact if pupils don’t...
really know what they’re wishing for!

Instead, try giving pupils a list of key vocabulary that they should use in their answer. Get pupils to read each other’s work and tick these words when their classmate has used them effectively. When a teacher collects in books, pupils have done most of the work and the teacher can simply scan over the pupils’ writing to check that they’ve used the vocabulary appropriately and ‘got it’.

Another way to improve self-assessment is to make sure that pupils have a clear idea of what they are aiming for. Using a model on the board is a quick and impactful way of doing this. Mark the answer with the class, getting them to annotate the same model in their exercise book so that they have a clear benchmark. Once pupils have written their own answer, ask them to mark it in the same way.

Finally, make sure pupils have a clear success criteria before starting their work. Get them to tick it off before submitting their work and don’t accept work in that hasn’t been appropriately self- assessed beforehand!

Example self-assessment grid

1. Start with your AO1 thesis: in both ‘Ozymandias’ and ‘London’ the writers explore ideas about power and its consequences and are critical of establishments such as the monarchy and the church. In ‘Ozymandias’, Shelley demonstrates that tyrannical power can be damaging and does not last forever, whilst in ‘London’, Blake excoriates the establishment for abusing their power and causing human suffering.

2. Analyse eight ‘jackpot’ quotations – alternate between each poem.

3. Linguistic terminology used to analyse each quote.

4. Layers of meaning (literal, deeper, symbolic). (AO2)

5. Zoning in and connotations of key words – every quote.

6. 3 x contextual facts about Shelley and Blake; use these to inform your interpretation. (AO3)

7. 2 x alternative interpretations. (AO1/3)

8. 1 x point about structure – sonnet form, reflecting Ozymandias’ control over his subjects, ABAB rhyme scheme in London. (AO2)

9. Use 8 x sentence stems and highlight/underline them in colour. (AO1)

Quizzes and tests

Much has been written about the importance of retrieval practice with regards to committing knowledge to long-term memory. However, quizzing or ‘low-stakes’ testing is also a really useful assessment tool that requires little time and effort on the teacher’s part.

Rather than spending time marking long, open-ended questions, introduce effective multiple choice questioning that makes pupils think hard and allows teachers to quickly identify misconceptions. It will quickly become apparent which pupils are getting it, those pupils who are not getting it, and the pupils who just need to do a bit more work!

A clear feedback policy

For a long time now, it has become common practice for teachers to provide extensive written feedback on every piece of work when, in fact, there is little evidence that this improves pupil outcomes. Indeed, many teachers find it hard to let go of this expectation, equating being a ‘good’ teacher with the hours spent planning lessons and marking.

The creation of a simple and clear feedback policy will ensure that your staff know what is expected (or not expected of them, as the case may be!) and can help prevent conscientious teachers from feeling guilty when their workload eases. Just remember, impact outweighs effort!

Suggested reading

For background reading on marking research, workload, comparative marking and developing a feedback policy, search for these blogs or reports online.

Shaun Allinson, ‘Workload matters’

Michael Tidd, ‘Why we’ve got planning and marking all wrong (part 1)’

DfE, ‘Teacher workload survey 2016’

Daisy Christodoulou, ‘Comparative judgment: 21st century assessment’

David Didau, ‘10 misconceptions about comparative judgement’

Doug Lemov, ‘Reducing teacher workload by re-thinking marking – the Michaela files, part 1’

Jo Facer, ‘Giving feedback the “Michaela” way’

Joe Kirby, ‘Why use multiple-choice questions?’

Michael Tidd, ‘A policy for feedback, not marking’

Why lazy teachers are the best

Working hard or hardly working? JOHN DABELL explains why putting the power in pupils' hands is the best way for teachers to look after their own wellbeing

I'm a lazy teacher – a really lazy teacher. Many of my colleagues are too. We don't mind admitting it either. In fact, we're very proud.

You see, being a lazy teacher is really the best way to be. Some of our other colleagues have got it all wrong. They run around like headless chickens and it isn't a pretty sight. They have that many plates spinning at once, you will often hear the sound of smashing crockery coming from inside their classrooms.

Step inside and you'll be confronted by a teacher treading water, surviving not thriving. These teachers are on the brink of burnout, on their knees and in need of life support. Putting it simply, these poor souls have their priorities in the wrong order: 'pupils first, me second'. That's a dangerous way to work.

The reason lazy teachers will tell you to 'get a life' is not to be vindictive, but because they recognise that wellbeing is a priority, not a luxury. They don't mark, plan and teach themselves into an early grave. They work smarter, not harder.

It's not fair

Teaching is not fair. It's a career plagued with injustice and hardship. Unreasonable, unsurmountable pressure takes over our lives like Japanese knotweed, never letting us go. Why anyone would willingly become a teacher these days is bewildering…

Or at least, we're accustomed to thinking so. But lazy teachers don't see things this way. Lazy teachers know that the spiky outer shell of the teaching conker contains a soft centre. Despite all the craziness and change, teaching is still the best job in the world.

'Despite all the craziness and change, teaching is still the best job in the world'

This isn't to say that lazy teachers are delusional. They know what workload and wellbeing are all about which is why you'll find a fair few working in a 'Fair Workload Charter' school. These schools help teachers improve physically, mentally and pedagogically. They adopt schemes such as the 'five-minute lesson plan' and make sure marking isn't the be-all and end-all.

What is a lazy teacher?

Try not to confuse lazy with being idle. Lazy is far from being work-shy or slothful. Lazy teachers are intelligent, astute and proficient in classroom management and time management. They work hard, but get their pupils working harder. Their work-life balance is finely tuned.

The lazy teacher is in fact the superhero moniker of Jim Smith, headteacher and author of The Really Lazy Teacher's Handbook. Jim defines laziness as 'masking your work by setting up highly personalised, creative learning experiences that progress pupils' learning without them necessarily noticing'. In other words, lazy teachers teach on the edge. We can occasionally teach from the front, the back and the middle too, but the edge is where you'll find us most of the time.

Why? Being on the perimeter of teaching and learning means that you aren't centre-stage, distracting pupils from their learning. Pupils don't come to school to sit and watch their teachers work. They have to work hard to learn and learn to work hard.

Lazy teachers don't give pupils answers or too many hints but they do provide opportunities for creative, critical and independent thinking. They flip teaching, learning and assessment on its head by showing pupils that they don't need as much help as they think. They know when to back off, when to advance and when to shut up.

Be unprepared

It's every teacher's worst nightmare and one of the greatest pedagogical sins: being unprepared. But not having much of a plan can be a great way to teach.

Project-based learning in a self-organised learning environment (SOLE) is great for requiring very little planning on the teacher's part. The approach was pioneered by Sugata Mitra, whose research found that in a SOLE, pupils use the internet to answer test questions well ahead of their time, achieve good scores and remember information further down the line.

In other words, giving pupils the space to learn at their own pace will result in 'intellectual amplification'. This is a philosophy I can get behind – and you can too. Pupils learn best when left to their own devices, and teachers teach best from the sidelines. That's the lazy way!
A SEF for subject leaders highlights key strengths, evidences achievements and identifies areas for development. **TREVOR DAVIES** provides a completed example to adapt

### Subject: (e.g. humanities)  
**Leader:** (insert name)  
**Date:** MM/YY

#### Future subject areas for whole school improvement (in context of school LIP)
- Ensure that standards and progress in writing are consistently strong across the school with a focus on extended writing in history and geography, high quality presentation, punctuation and spelling.
- Maintain the consistently good teaching and increase the proportion of outstanding teaching by providing high levels of challenge and expectation in history and geography, and active learning.
- Sustain and develop further good practice in history and geography, providing greater opportunity for active and practical tasks in and out of the classroom and application of key skills across curriculum.

#### Subject progress towards learning improvement plan actions
**Key actions for subject**

<table>
<thead>
<tr>
<th>Progress</th>
<th>Initial review of themed history, geography and citizenship topics with a view to proposed national curriculum changes. No immediate plans to change topics but exploring chronological approach to history and building locational knowledge into geography. Ensuring that opportunities for extended writing and investigational learning in humanities are promoted and embedded. Training and CPD to support the promotion of extended writing across the curriculum and investigational learning built into academic year.</th>
</tr>
</thead>
</table>

**Areas for development**
- Monitoring of history and geography standards are rigorous and thorough (provide examples).
- Subject leader is a humanities specialist and pupils' enthusiasm reflects passion for subjects.
- Strong partnerships with English Heritage (Kenilworth Castle) and Swanage Centre (geography field-work).

#### Leadership of subject
**Strengths**
- Review of the new history and geography proposals and report to staff and governors.
- CPD/training for staff on using primary sources and developing pupils' key history/geography skills.

#### Teaching
**Monitoring impact on learning, assessment and the curriculum**

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Areas for development</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teaching has improved and is now good. There are examples of outstanding practice, including living history/role play.</td>
<td>Ensure that all teachers' expectations are high enough. Differentiation and feedback.</td>
</tr>
<tr>
<td>Strategies to improve pupils/literacy skills in history and geography are well focused.</td>
<td>Develop further use of ‘Mantle of the Expert’ role play in history/enterprise in geography.</td>
</tr>
<tr>
<td>Our four curriculum drivers (independence, IT, SEAL and writing) embed core skills and excite, enthuse and engage active learners in humanities.</td>
<td>Improved provision for lower KS2 pupils by ensuring consistently good teaching and reviewing topic choices and resources.</td>
</tr>
</tbody>
</table>

#### Subject status
**Including attitudes to learning, CPD, special events, parental engagement and projects for change**
- History and geography themes are well established in our curriculum map for all year groups.
- Regular opportunities for CPD in curriculum staff meetings and training days to discuss most effective strategies for promoting humanities curriculum and linking to SMSC.
- Regular visits and field trips enliven pupils’ learning.

#### Future development
- Expanding history and geography topic resources, particularly selection of different maps.

#### Achievement
**How well pupils & different groups achieve and make progress from their starting points**

<table>
<thead>
<tr>
<th>Strengths of subject</th>
<th>Areas for development</th>
</tr>
</thead>
<tbody>
<tr>
<td>History and geography skills are well developed and reinforced through our well-planned thematic curriculum.</td>
<td>Ensuring that more able pupils are challenged sufficiently in developing higher order skills in history and geography.</td>
</tr>
<tr>
<td>We make excellent use of primary sources within the local area to support enquiry and research in history and geography.</td>
<td>Levelled assessments of work in each year group to ensure pupils are responding to planned tasks and are working at least at age-related expectation.</td>
</tr>
</tbody>
</table>

#### Impact of change
**In terms of pupil achievement and subject profile within the school**

By linking our key priorities for development in humanities to wider school priorities such as writing across the curriculum and investigational learning, we are promoting key skills and enquiry while enlivening the teaching of history, geography and citizenship. This is clear in the impact on pupil’s learning, as identified in improved standards, work scrutiny and pupil surveys.
Tracking progress: are we getting it right?

Tracking progress can be a complex business. **TOM FAY** looks at the purpose and principles of tracking and shares key questions for reflection.

*The most important single factor influencing learning is what the learner already knows. Ascertain this and teach him/her accordingly.* (David Ausubel, *Education Psychology: A Cognitive View*)

**Progress: some presuppositions**

Progress measurement is often subjective, messy to evidence and fraught with over-complication. What are the secure indicators of progress per pupil? If a pupil is suddenly making better than expected progress how do we manage predicted grades? If progress was better than expected does that mean we had lower expectations of that pupil in the first place?

In my experience, the pupils who make the best progress have the most inspiring teachers. These are the people who know how to get the best out of the young people in front of them. They also understand how to decode the curriculum and ‘up skill’ the pupils to cope with the demands of the written and practical assessments.

These people need to be consulted. Up to 40 per cent of teachers in online opinion polls have indicated that they are unsure how to assess and track progress in the new examination system. Worrying times: if we don’t know, who does?

Schools have set brave targets and ‘flight paths’ in response to government expectation. We can only hope that teachers do not resort to the ‘treadmill effect’ and get through curriculum at the expense of depth and differentiation at the top and bottom ends of ability. We must also hope that creativity is not stifled at the expense of target setting agendas.

We have to accept that progress occurs at different rates, at different times, for different pupils. There are just two big questions we have to ask ourselves.

- When we track progress are we doing it the right way?
- What are the best strategies to produce valid data?

### Tracking: some presuppositions

Tracking systems should be simple and easy to interpret. They should also use language that is sensitive, especially for those pupils who are not making expected rates of progress. Pupil confidence, wellbeing and status among peers can be affected by negative reporting measures.

Tracking data can be misleading. For example, some pupils make greater rates of progress towards the end of an academic year compared to the beginning. We must strive to work in an environment where making mistakes and getting things wrong on route to a predicted grade profile is OK. This is part of the learning process, and often the most valuable part. Should we all make the same rate of progress, in the same time frames based upon our previous attainment? Of course not, so why should we expect anything else in our classrooms?

Learning and evidencing progress, for some, simply requires more time, patience and the right type of feedback and intervention. All we can do is:

- teach the curriculum content
- assess where pupils are at using the right assessment strategies
- intervene and plug gaps in skills and knowledge as they arise
- get pupils ready for the exams.

### Tracking strategies

Rule number one: all tracking systems should serve the pupil! It should not involve complex drop-down menus, complex data or information that requires a master’s degree in logistics to decode.

Tracking strategies should:

- be simple to understand at all levels (parents, pupils, teachers, leaders, governors)
- support the planning and learning process
- reflect true progress
- provide information about intervention and its impact
- treat a young person as an individual.

A good tracking system should not undermine a school’s ethos or values. If every pupil is to be valued and nurtured then the tracking system should do the same. A tracking system should fit the school’s vision rather than be created to please external agencies like Ofsted.
Effective progress tracking

In a linear world, effective teachers...

- Create real understanding of content – ‘depth before breadth’.
- Identify misconceptions through their AFL strategy and use them as springboards for learning.
- Possess feedback strategies that facilitate further learning and processing of information.
- Do not predict exam questions. Instead, they teach skills that enable pupils to cope with the new exam rigour.
- Use assessment and testing as opportunities for learning.
- Teach pupils how to learn and to reflect upon their own progress.
- Have credibility in terms of their own subject knowledge and their understanding of the assessment criteria.
- Do not teach mark points – they coach their pupils to think.
- Promote higher levels of thinking and problem solving in a seamless manner.
- Involve the pupils in the lesson delivery and evaluation.
- Encourage pupils to connect their learning in a wider context.

To support tracking, effective curriculum development means...

- Tests are designed at timely intervals to assess depth of learning.
- Homework, and simple tasks, reinforce and deepen core learning.
- Teachers and managers plan assessment that reflects the full range of abilities.
- Every assessment point has a timely follow up planned to close knowledge gaps, reinforce weak learning and to intervene where appropriate.
- Pupil grades at any specific time ‘are what they are’. Leaders do not take a best fit approach to learning and leave no stone unturned.
- A review of the curriculum is made at designated points throughout the year to ensure that depth of coverage is occurring.

For effective assessment, we need to consider...

- Have we got the right assessment/testing strategy for linear qualifications? Can it be improved in any way?
- How do we decide when it is right to assess or test?
- Are we building in enough independent application of knowledge in unfamiliar contexts?
- Are assessments planned using content pupils have previously found difficult?
- What are the subtle differences between a grade 4/5, 6/7, 8/9?
- Are we confident that we have taught the pupils the necessary skills to cope with the expectations of the different levels?
- Do we use assessment/testing scores as indicators of the quality of our teaching?
- How confident are we that the pupils have retained the key knowledge from our subjects and will be able to demonstrate this in an exam?
- Have you validated your curriculum and assessment; can you demonstrate the strength of your curriculum and assessment in comparison with other schools?
- Are progress grades used for inspiration or perspiration?

For synoptic assessments to be effective in informing progress...

- They should be cumulative by nature and design.
- It is up to subject teams to create accurate, weighted assessments.
- Only assess what the pupils have been taught.
- Use the specification to plan difficulty levels.
- Design the assessments to differentiate the true potential in your class.
- Set appropriate grade boundaries.
- Teach the skills pupils need to compensate for the more difficult questions. Are these skills explicitly planned for?
- Do we risk assess questions, and if so, how?
- How do we use previously assessed material to plan for the examinations?
- Do we make pupils fully aware of their synoptic ‘flight path’?
- Once assessments are marked, do we establish ‘red flags’? Select appropriate interventions? Identify mastery thresholds per pupil? Develop future formative assessments? Monitor plans for impact?

Until we see tests as aids to enhance teaching and learning and not primarily as thermometers of how much a pupil knows now, on this day, on this test, then developing more tests will add little and will remain an expensive distraction.

(John Hattie, Visible Learning)
Most teachers have experienced sitting in a room of weary-eyed delegates on a course they've been signed up to by their senior leadership team and not understanding why. Because of this, the lessons learned are often soon forgotten once they are back at school or remain unsupported by the rest of the team.

Healing School takes a very different approach to its professional development programme. The training they provide is individually focused with staff acting upon feedback and improving their areas of development through regular drop-in training sessions.

Teaching and learning champions
Teaching and learning champions (TLCs) are at the heart of the training and development programme Healing School offers. Their role is to develop and deliver bespoke training sessions for all staff which will help them to excel in their classroom. They demonstrate and share excellent practice, ensuring that all members of staff have the CPD opportunities they need to challenge and support quality teaching and learning.

‘Working collaboratively with our TLCs and staff, we are able to offer a wide range of CPD opportunities throughout our academic year,’ says Richard Burrows, assistant head and CPD lead at Healing School.

‘Every staff member has a five-hour training entitlement, used within the individual’s areas of development. Staff receive training, support and guidance from their line managers and our TLCs.’

The five hours of CPD time is split into two hours of TLC CPD, two hours of an Optimus CPD session (a TLC mentor is available should the support be required), and the final hour is focused on faculty development.

Each member of staff is expected to keep a log of the training they have completed, reflect on what they have learnt and modify ideas to suit their practice as well as challenging pupils of all abilities. CPD is not only about improving practice within the school, but also about ensuring that all staff are ready for possible career development.

Professional learning groups
There are four main professional learning groups at Healing School:

- a newly qualified teacher (NQT) group
- a newly employed teacher (NET) programme
- a recently qualified teacher (RQT) programme
- a lead practitioner (LP) group.

The NQT group focus on ‘securing good’. They access a range of quality bespoke CPD and are ready and aware of the challenges they face when they become an RQT. Healing also run an NQT CPD/QA programme through The Humber Teaching School for a large number of local schools.

The NET programme is aimed at staff new to Healing School as part of their extended induction programme. It ensures they understand what outstanding teaching and learning looks like.

The RQT programme identifies the strengths of staff, as well as develops their skills. The main focus is to continually improve teaching and learning and be consistent in all of the teacher standards.

The LP group is for staff who have completed the RQT programme. The aim of LP training is to develop skills for staff to become highly effective mentors to ITT/NQTs as well as gain skills to move to the next stage in their respective careers.

Sharing best practice
With a wealth of expertise within their teaching staff and partner, The Humber Teaching School, Healing have excellent practitioners to draw from. All members of staff are clear
about the criteria that constitutes good/outstanding teaching which is shared through a ‘best practice grid’ with key elements of teaching and staff who are confident in a particular area highlighted.

‘These are the people who other teachers can approach to improve their own teaching,’ explains Richard. ‘The names aren’t just plucked from the air; we have a triangulated approach to identifying best practice in each area.’

To achieve this, teachers are asked what they think they are good at. From there, the results of observations are considered as well as feedback from their faculty areas. It is only when all these sources of information correlate do the TLCs feel confident in recommending a specific teacher as a model practitioner.

There are two dedicated ‘faculty showcase’ sessions during the academic year. During these sessions, a faculty leader, in conjunction with their faculty, will bring together examples of best practice from their department.

The first session focuses on independent learning, a priority for the whole school, with a second showcase focusing on displays. This second session might be considered an unusual priority but is an area which impacts on teaching and learning in everyday lessons, on pupils/staff/visitors moving around school and is important in the transition from primary to secondary school.

‘Every department must update their displays regularly,’ says Richard. ‘This is another area in which we are keen to share best practice and each department carefully selects their contribution.

Including the teaching assistants

Healing School doesn’t leave expertise to chance: all staff are given the same CPD opportunities, including cover supervisors. The school has embraced the cover supervisor role as one way of ensuring continuity and quality throughout teaching and learning. ‘We prefer to employ cover supervisors who know the pupils and staff, rather than using supply agencies,’ says Richard.

‘We train our cover supervisors in the same way as everyone else to maintain quality assurance throughout.’

A TLC is assigned to ‘look after’ the cover supervisors, a newly developed role which ensures that the CPD is carefully tailored to the needs of each cover supervisor.

One TLC is also responsible for the development of teaching assistants (TAs), guaranteeing that all TAs undertake the bespoke training required, and that they are utilised effectively in lessons. It is important that the role of the teaching assistant is taken seriously by all, to ensure pupils of all abilities get the best possible chance to achieve their potential in a safe and challenging environment.

Recent research studies* have suggested that TAs are not always used effectively within secondary schools. Healing School’s approach to CPD for TAs is to prioritise training and development. To expand their range, knowledge and skills, each TA is assigned to a faculty which rotates throughout the academic year. TAs have their own career structure, can take their role further and there are opportunities for TAs to train to teach through The Humber Teaching School, an option which many TAs from Healing School have chosen in the past.

Based in research

In line with Healing’s approach of using staff expertise and bespoke training is that of developing their own research. Schools can often find themselves circulating the same ideas internally without looking for external stimuli. Healing uses research as one of the ways in which they can generate new ideas and develop outstanding teaching practice.

All members of staff are expected to take part in classroom-based research and are allocated a mentor who supports them. Extends throughout the workforce to NQTs, who are also expected to take part in this research. Topics which have been previously covered include: marking and formative assessment; mastery teaching and statutory safeguarding responsibilities.

Having an impact

Richard and his team are passionate about the importance of impact when it comes to training. Through observations and analysis of results, the success of their approach to CPD is clear.

At Healing School, there is no barrier between the conference room and the classroom and this outstanding school understands the importance of CPD. By using a range of resources (including their Optimus membership), the TLCs at Healing School help others to choose the right resources to produce outstanding results in all areas.}

*‘The Special Educational Needs in Secondary Education (SENSE) study: Final Report’ by Rob Webster and Peter Blatchford, June 2017
Charles Beckerson has been headteacher of St Bartholomew’s Church of England Primary School (St Bart’s) for six years. Seeking ways to continue to improve teaching and learning and promote pupil progress is a vital part of his vision. As Charles puts it, ‘we have a moral imperative to be constantly focusing on whether our pupils are making the best progress’.

In October 2017, he attended the Optimus Education Stretch and Challenge the More Able conference, and was particularly inspired by Bob Cox’s work on ‘opening doors’ – using quality texts to promote quality writing (see my.optimus-education.com/quality-text-quality-writing-access-strategies for some examples).

Charles took the concepts and resources shared by Bob Cox back to school, and used them to plan a Year 3 lesson, using the Robert Louis Stevenson poem ‘A Child’s Thought’. He then invited their chair of governors to come in and film him teaching the lesson. The video focused on what the pupils were doing, rather than the actions of Charles as the teacher.

At the next staff Inset session, Charles took the potentially brave move of showing the video to staff. He even gave them paper with Ofsted headings to make notes, posing questions such as:

- what had they seen that worked well?
- what had they seen that didn’t work so well?

The risk was worth it. The dialogue that followed was rich and reflective, causing teachers to discuss different elements of the lesson in detail, pick out areas for potential improvement, and consider whether they were using such strategies in their own teaching practice. Cathy Lynch, a teacher at the school for 17 years, described the day (which included further presentations on greater depth teaching) as ‘the most enriching Inset in a long time’. What made this experience so powerful?

Homegrown video
Charles pointed out that as a school they have used video in Inset plenty of times, but this was different. Seeing a lesson videoed in their own school (and taught by their own headteacher), made it more appropriate. No one could say: ‘but these pupils aren’t like ours’ or ‘that wouldn’t work here’. As Cathy puts it: ‘it was so much more meaningful to have observed a lesson from within our school than to observe one by a stranger.’

Charles was also careful to position the lesson as an example, not a model. As with any lesson, there would be things that were successful and things to improve on. Staff could learn just as much from the parts that didn’t work so well as from those that did.

Leading by example
The fact that Charles, as headteacher, was prepared to put new strategies into action, and be made vulnerable by exposing his teaching, was something that staff responded to very positively.
'It takes a lot of guts to video yourself teaching,' comments Simon Avenell, deputy headteacher at the school. 'I feel it sparked a unity in purpose because he was directly faced with the challenges we are faced with daily instead of just talking to us about them,' adds Cathy.

The discussion that followed the video observation was also an opportunity for Charles to act as a role model in taking on board feedback – even criticism. He demonstrated a viewpoint where the discussion and feedback was about the learning, the children and the lesson – not about him as teacher.

The result was respectful, professional dialogue, and a valuable model for those teachers who previously have found it difficult to take on board what has been perceived as criticism.

'By putting himself out there the discussion that followed was positive and reflective instead of defensive as it can sometimes be when a teacher feels they are being criticised in a feedback. I admired him for doing it and I felt that there were many good ideas that came out of the discussion. It put us all on common ground and therefore enabled a richer exchange of ideas. That made us feel more like a team instead of teachers and headteacher,' shares Cathy.

Group discussion
Research around the use of video for professional development (see ‘further reading’ suggestions at the end of this article) indicates that group viewing and discussion may be key elements in its effectiveness. Certainly, in the case of St Bart’s, that group discussion seems to have been a contributing factor to the value of the Inset.

Mel Redman, who is in her second year of teaching, recalls the detailed dialogue. ‘We had some excellent discussions about what was going well, such as the pace, opportunities for oral rehearsal, shared writing, very clear steps to success and the engagement of the children being high throughout the lesson. We were also able to pick up on areas which perhaps could have been approached differently and we were also able to observe what the children were doing which was really interesting, such as writing individually rather than talking in pairs as they’d been asked.’

Impact on staff
The true test of the effectiveness of any professional development session is what gets put into practice as a result. What did the participating teachers take away from this experience?

Cathy: ‘What I took away from the lesson was a renewed belief in some of the things I do as well as some of the things I have been trying. I also felt empowered by the exchange of ideas and the desire we all have to face the challenge of reaching every child. I have already used some of the ideas from the lesson myself and have also tried to be even more aware of those who may not be engaged.’

Mel: ‘The lesson was hard but all children achieved without adult support bar Charles circulating, so it showed me how we can have high expectations… We also talked about presenting a brilliant example first so immediately you have set a high standard and have something to aspire to.’

What next?
Staff at St Bart’s, led by Simon, will now be embarking on a lesson study project. Groups will be planning lessons together, observing them, reviewing, reflecting and amending them. The intention is for the project to culminate in a poster-style presentation to staff about the group’s research findings. We look forward to hearing more!

Further reading
If you want to know more about the ‘opening doors’ strategies, lesson study or the role of video in professional development, take a look at these resources.

‘From quality text to quality writing: access strategies’, Optimus Education Knowledge Centre
‘Using challenging texts to support the transition from KS2 to KS3’, Optimus Education Knowledge Centre
‘Classroom observation for impact: Research Lesson Study’, Optimus Education Knowledge Centre
Lesson study training unit, Optimus Education In-House Training (Unit 5 of the Developmental Lesson Observation course)
Being imaginative is one of the two aspects of expressive arts and design, one of the four specific areas of learning in the EYFS. At the end of the EYFS in the Reception year at primary school children are expected to reach the following early learning goal.

‘Children use what they have learnt about media and materials in original ways, thinking about uses and purposes. They represent their own ideas, thoughts and feelings through design and technology, art, music, dance, role play and stories.’

All staff need to be confident of their role in developing children’s understanding of this area of learning and development whatever the age of the children they work with. It is important to remember that different approaches are appropriate for different ages of children and different children will progress in their understanding at different rates.

The following three scenarios describe the early years practice which exists in a nursery offering early education and full day care for children from three months to five years of age. The values and pedagogy of the owners, managers and practitioners of the nursery have been influenced by the Reggio Approach in northern Italy and by the Forest School Approach in Denmark. Creativity, in the truest sense of the word, is fundamental to the practice in the nursery.

**Under twos**

The indoor environment within the nursery provides a safe, secure but challenging space, even for the youngest children. There is an emphasis on how children explore light and dark along with reclaimed and natural materials, across the age groups.

In the baby room there are several different types of mirrored equipment and a large light box for the babies to access and explore independently. They use the mirrors to explore themselves and what they look like as well as the toys and resources which are provided in the room. The windows in the room are large enough and low enough to allow the babies to experience the natural light which is essential to their wellbeing, but an excellent blackout system allows the practitioners to change the light levels so that those babies who choose to do so can explore the light box and the patterns, colours and designs created by the different transparent, translucent and opaque resources.

The older babies and toddlers have free access to baskets of natural and reclaimed materials, which are placed on the floor to make them accessible to all children. Very few toys are provided in the nursery as the practitioners prefer to spark the children’s imagination and exploratory drive by providing open-ended materials for them to discover.

The owners of the nursery employ a member of staff with an arts background to work with the staff and children across the nursery. The babies and toddlers are no exception and they have been involved in many projects which support their artistic and design capabilities. Paintings on canvases which the babies have produced unaided add beauty to the baby and toddler rooms and to the nappy changing area.

**Two to three year olds**

The two and three year olds explore light using an overhead projector and light boxes. A cosy, dark space under the stairs is a favourite place for the children to reflect and play quietly. A small light box provides an interesting medium for the children to explore colour, shape, pattern, form and line using everyday resources.

The visual artist and the practitioners support the children’s creativity and imagination in many different ways using light as the medium. In a darkened room, the children are encouraged to make large-scale movements using torches and fibre optic lights. The children and practitioners make pictures and patterns by placing a battery-operated light in a
shoe box, covering it with black paper and creating light pictures and patterns by puncturing small holes in the black paper for the light to shine through.

Wherever possible the practitioners provide real life objects for the children to use in their role play. Real pots and pans, kitchen tools, a very old mixer, kitchen scales, telephones and ornaments are collected by the practitioners. Not only are these resources either free or inexpensive, they put a value on the children’s imaginative play which is often difficult to achieve using cheap, plastic imitations. Hats, bags, cloaks, gloves, shoes, umbrellas and even glasses and a walking stick are favourite items of choice and inspire the children to be different characters in their play.

**Four to five year olds**

The oldest children have access to a large studio space in which they can explore a wide range of media and materials, choose to listen to, or make, music or spend time designing and making things which interest them.

The studio is furnished with industrial metal shelves that contrast interestingly with the beautiful assortment of baskets and boxes in which resources are stored – reclaimed and natural resources, a rich variety of pencils, crayons, pastels, inks, paints, fabrics and papers as well as a range of tools and equipment which the children might need to express their thoughts and ideas.

The artist and the practitioners will often introduce a ‘provocation’ or stimulus to fire the children’s interest and imagination. These might range from a collection of old cameras, the caretaker’s python’s skin or a visit to a local art gallery. The practitioners then build on the children’s interests and fascinations to inform what they plan to offer them next to nurture their interest and develop their skills.

This approach is furthered when the children go for weekly visits to a local forest where they are taught the necessary skills to enable them to ‘imagine what might be’ in the context of the risky freedom they enjoy in the woods. The stories which are told and the adventures which ensue encourage the children to be imaginative as they build, draw, sing, dance, act and story-tell in the exciting environment of the forest.

In order for the children to be imaginative the practitioners must first have the imagination themselves to see the potential for developing children’s creativity across all areas of learning.

**Environment audit: do we have these spaces or resources?**

<table>
<thead>
<tr>
<th>Spaces and opportunities for children to explore light and dark using:</th>
<th>Available</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>• light boxes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• torches</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• fibre optic lights</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• overhead projector</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• dark den.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Mirrors and mirrored equipment for children of all ages to access and explore independently. | | |

| Open-ended materials – natural and reclaimed – for children to express their ideas, thoughts and feelings through placing and arranging. | | |

| Studio spaces, small or large, where children can design and make things which interest them. | | |

| A rich variety of pens, crayons, pastels, inks, paints, fabrics and papers for children to use to express their thoughts and ideas. | | |

| Collections of interesting ‘provocations’ to inspire children’s imaginative thinking and expression. | | |

| A wide range of small world play for all age groups including babies and toddlers. | | |

| Good quality, well presented and stored, role play outfits and props. | | |

| Space and time for children to express themselves through music, movement and dance. | | |

| Appropriate space and equipment for children to develop their abilities and skills in design technology safely including: | | |
| • size appropriate tools | | |
| • protective clothing and goggles | | |
| • resources for cutting, shaping and joining a range of materials. | | |

| ICT programmes which encourage children to express themselves through art and design. | | |

---

Download the full training unit from my.optimus-education.com/training/expressive-arts-and-design-being-imaginative
In the early years, teaching and learning has an ‘otherness’ about it. Too often this is overlooked as we debate how younger children learn best in our schools.

National director of Early Excellence, Jan Dubiel, is a leading expert on the development of pedagogy of early childhood. I caught up with him to find out what excellence in the early years looks like and what changes we can expect in the near future.

Q The Hundred Review has given a clear picture of what effective practice in Reception looks like and the challenges practitioners face. Tell us more about that.

Something that became obvious to us when we did ‘The Hundred Review’ (download from earlyexcellence.com/hundredreview) was that there is no clear consensus on what good practice looks like in the early years. But we do need to understand that early childhood education is significantly different from what happens next as children get older. It’s crucially important that we don’t look at early years through an inappropriate lens.

What we know about neuroscience tells us that significant things happen in the development of children around the age of seven. Up to the age of seven, children need concrete learning opportunities, as this will help them understand abstract ideas.

The type of pedagogy that works best for young children is a mix of adult-directed and child-initiated learning. This is widely misunderstood. The role of the adult needs to be thought about. This blend of adult-directed and child-initiated learning is dynamic and complex.

Q We need a greater awareness of what has to be in place for children to secure competent literacy and maths skills. How can we understand those developmental processes more widely?

The Ofsted explanation of teaching in the early years is clear that it should not be a top-down or formal way of working and that it includes the interactions with children during planned and child-initiated activities. These are the foundations of learning.

You do need to teach children things through direct instruction, but in order for them to understand what they have been taught, they have to work on their own to make sense of ideas. Being literate and numerate is vital. These are crucially important skills. But in the early years, in order to be good at literacy and maths, it’s not just a case of doing loads of literacy and maths. There’s a whole host of other things that really matter, such as language development; personal, social and emotional development; self-regulation; executive functioning; physical development. All of this has to be prominent up to age seven.

Q Are there any imminent changes to early years education that will help to ensure that this is more widely appreciated?

There are some proposals for a new baseline assessment in the early years, based on a very narrow assessment of literacy and maths. This is likely to give inaccurate data, especially as it will be collected via a computer-based model. It appears from the documentation that teachers won’t know the scores that the children achieve as the results will only become relevant when the children reach Year 6. This is due to be implemented for children in Reception year in 2020.

There will also be a review of the early learning goals to bring them more in line with Key Stage 1 goals and the increased emphasis on literacy and maths.

Q What’s the most important thing we need to remember about teaching and learning in the early years? How can we make sure we get it right?

Reception teachers are working with a tsunami of motivation. Young learners are full of ideas for utilising what they learn. We need to get it right in these early school experiences so that when they move up the school system they can build on their early development. If policy, curriculum and assessment changes support that, great. But if they don’t support understanding of the complex nature of teaching and learning in the early years, and the need to balance literacy and maths with the wider development of young children, we’ll be taking a backward step.

We know what we need to do in early years. We just need the opportunity to do it!
What’s in this month’s SEN and Safeguarding section?

The times, they are a changin’. Come April, local authorities will be expected to have transferred all Statements of SEN to EHCPs, but the jury is still out on the reforms to SEND provision that were introduced in 2014. We asked a number of parents, practitioners and professionals for their views, which you can find overleaf. The DfE has accepted the Rochford Review’s recommendations for the statutory assessment of pupils not working at the national curriculum standards. Use our SLT briefing on page 56 to get up to speed. There’s currently no framework for inspecting safeguarding across a multi-academy trust, but it’s vital that procedures are consistent. Read our five-step approach on page 64. Relationships and sex education is to be made statutory in 2019, but in the meantime, there’s no reason why faith schools can’t teach a meaningful curriculum that fits with their values. Suzanne O’Connell found out what one academy offers and why on page 62.

Jack Procter-Blain, Content Executive

Top SEN and safeguarding blogs

SEND: the S is not for special
oego.co/SEND-special

Sensory circuits: the right track, but not a shortcut
oego.co/sensory-circuits

Help, I’m a new SENCO and I don’t know where to start!
oego.co/new-SENCO

See more at blog.optimus-education.com

Contributors in this issue

Joanna Grace is an inclusion and sensory engagement consultant, founder of The Sensory Projects and author of Sensory Stories for Children and Teens.
@jo3grace

Gareth D Morewood is director of curriculum support at Priestnall School, and honorary research fellow in education at the University of Manchester.
@gdmorewood

Joanna Feast is senior associate consultant and regional manager for Jigsaw PSHE. She specialises in promoting PSHE, mental health and wellbeing in schools.
@cleanwellbeing

Jack Procter-Blain is content executive for SEN and safeguarding. He is interested in all things SEN, safeguarding and pastoral. He also manages the Optimus blog.
@OptimusSEND

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

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

Be part of the Optimus Education network

LinkedIn
Follow our LinkedIn page and join the education news group for the latest company and education sector updates
oego.co/LinkedIn

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

Digital
Download a digital version of your Optimus Education Insight magazine by logging into your My Account area on my.optimus-education.com
The state of SEND

Three years after sweeping changes to the SEND system became law, what has been accomplished and what challenges remain? JACK PROCTER-BLAIN reports

The introduction of the Children and Families Act in 2014 overhauled provision for SEND in schools. Yet with the implementation period due to conclude, opinion remains divided on the extent to which outcomes for our children, young people and their families have improved.

We asked a number of professionals and parents for their judgement on the progress made in education, health and social care, and the future they hope to see for SEND.

‘Support remains a postcode lottery’

I cheered when the green paper, ‘Support and Aspiration’ was published in 2011. At the very heart of it was co-working between families, professionals and the young people themselves, ‘to end the frustration, complexity and confrontation inherent in today’s system, which in itself can undermine family life’.

Five years on, I receive daily calls from parents angry at the bureaucratic and often infuriatingly slow process they need to navigate to get the support their children need. They do not feel their voices are heard. They are unhappy about what is provided and have little opportunity to change it.

Co-production of plans

Coming at a time of increasing austerity measures and cuts to local authority funding, it should not come as a surprise that the EHCP process has not always been implemented as planned. Too often schools are asked simply to transfer the SEN Statement to an EHCP, with little or no involvement from other agencies, or the process takes months instead of weeks. Crucially, the co-production of plans rarely gets past the writing of the EHCP. To have impact, this approach needs to be embedded throughout the school years and beyond, and implemented by every agency.

Why does it remain a postcode lottery whether your child gets the support he or she needs to make great progress in health, wellbeing and educational progress? When money is tight, SEND may not be top priority. Cuts to local authority funding means that the default position for applications for statutory assessment is too often ‘No’, and parents have to fight to get the provision their child needs.

What SENCOs can do

SENCOs can make a difference by meeting all pupils with SEN and their parents every term (not just those with an EHCP) and listening to their views, concerns and aspirations.

The co-produced plans that emerge from these meetings will improve outcomes. Even in these bleak days of real terms educational cuts, we can stand up for children with SEND and together have a real impact on children’s outcomes and their futures.

‘Things are falling into place’

It’s safe to say that the implementation of the new SEND Code of Practice and the shift to EHCPs filled most SENCOs with trepidation. The paperwork, the reading and courses amassed to produce a tunnel with very little light, and knowing that there was a staged period of time to implement all the changes did little to alleviate anxieties.

Initial challenges

Initially, the first challenge for Patcham High School was deciding who is responsible for what. We knew the SENCO needed to work closely with casework officers and specialists to make transitions work. Once this was agreed, it was easier to include pupils and parents in the process. The second challenge was overcoming the fear that moving from three to two tiers of SEN would not see those pupils formerly on School Action (SA) removed from the SEN Register. We hoped that all pupils would be placed and supported appropriately. The final challenge was positioning the SEND department as something to support teachers in differentiating lesson content, as opposed to holding the school’s entire responsibility for SEND.

Three years on, things are falling into place. With numerous versions of EHCP conversion documents under our belts, we seem to have found a system that
works: all but one of our pupils has had their Statement converted. I was very fortunate to have some parents involved with our SEND parent forum, through which we have delivered information evenings – supported by local community group AMAZE – and individual drop-in sessions.

**Better outcomes**

Has the switch supported inclusion? In our situation, we feel it has. The swap from hours to cost has enabled us to provide more flexible and bespoke curriculums for both individual and small groups of pupils, tailored to meet specific needs. We have shared resources with other schools and provided a range of curriculum activities. The ‘assess, plan, do, review’ approach to interventions has helped us gather a greater quality of evidence to support requests for further assessments, as well as prompting targeted interventions that have improved outcomes for SEND pupils year after year.

Teachers have embraced new ideas and there is a greater level of collaboration throughout the school, with teaching assistants leading on some training initiatives.

Looking to the future, we are planning to further our collaborative working to meet pupils’ needs. We are working more frequently with local organisations to meet the underlying needs of pupils with SEMH, and reaping the rewards of being part of a bigger picture. My only hope is we can at least see the system through without feeling the winds of change once again.

Linsey McGill is SEND provision specialist and teacher at Patcham High School in Brighton.

‘It was good to take stock’

My son’s EHCP was in the first wave of transformations back in 2015. At the time, I was completing the SENCO qualification, so

didn’t think I represented a ‘typical’ parent. However, I do know that our experience of the system reflects the experience of many children and families like ours. It gave us the opportunity to review our aims and aspirations for our son, and as his original Statement was put into place when he was just four years old, this was well overdue. It was good, albeit upsetting, to take stock and see where we had got to, and where we hoped to go.

Physically filling in the form was difficult. As I was on the SENCO course, it happened that I knew to download the template via my local authority website. Without that knowledge, thanks to the small size of the boxes, I might have assumed there was a limit to the amount of information I was being asked to include. It never ceases to amaze me how much of a detective you have to be as the parent of a disabled child.

Hopes for the future

When my son was born, and we found out that he had Down’s syndrome, the future became a very scary place. When you get a diagnosis, you are handed a load of leaflets with very dated and frightening information. At first, I was stumped by the questions about our hopes for the future. I learned to live in the moment, so that my fear of the future would not poison my present. Answering these questions when he was very young would have been extremely difficult and distressing, not unlike applying for disability living allowance.

To counter this, I split them up into hopes for the school year, and for the longer term – which I found, when it came down to it, were exactly the same as my hopes for my younger, typically developing children. That he will grow up with the self-confidence to take on whatever life throws at him. That he will find someone to love, who loves him in return; that he will treat other people with kindness. I hope that, as he grows into adulthood, he has choices and opportunities to fulfil his own dreams and desires, and that there are people around him who will help him, rather than impose their own expectations.

I understand the pressures that schools and LAs are under. I’m a teacher myself, after all. But it struck me then, and it strikes me now, that we mustn’t forget
who it’s all about and put them, and their wellbeing, at the centre.

Nancy Gedge is a consultant teacher for the Driver Youth Trust, a charity working to improve education for children with SEND.

‘The onus is on the parent’

The SEND reforms received two very different receptions from parents. Some were relieved that things were going to change for the better. Others, especially those who’d been dragged through SEN tribunals once or more, just didn’t believe that those working in LAs were capable of positive change.

As the founder of the Special Needs Jungle website, I was somewhere in between the two. I believed that battle-weary parents would never trust their LA to do the right thing and it was the next wave just coming into SEND who would be open to the benefits of the new system. I was right about the first part of that statement and wrong about the second. Many new parents have come into a system that is chaotic and cash-starved, where LAs have developed their own policies around the new system that are not legally compliant and the onus is on the parent to discover this, or risk their child not getting the help they need.

Chaotic and cash-starved

It’s impossible to look at the reforms without looking at funding. Nationally, the shortfall in the education budget has led to schools asking parents to donate money, pens and toilet rolls, and support staff being made redundant. These are the same teaching assistants who helped children on SEN Support or with EHCPs in mainstream schools.

Far from parents being less likely to feel the need to apply for an EHCP for their child, they are more likely to feel the need to get support enshrined in a legally enforced plan. That’s if they can get one. If the child is granted a statutory assessment, the production of a plan can take up to a year to produce an EHCP that is neither specified or qualified – in other words, not worth the paper it’s written on.

A long way to go

Ofsted is slowly getting around the 152 LAs in England and has demanded that a number of them rapidly improve. None have so far been given a resoundingly positive inspection of its SEND. For one LA I work with, a dreadful Ofsted SEND inspection has helped to change hearts and minds in the SEND department and things are beginning to change for the better. But there is a long way to go before the 2014 reforms can be said to be a success.

Tania Tirraoro is the founder of Special Needs Jungle, a member of the Ofsted SEND advisory group and the parent of two young men with ASD.

‘The road to justice is long’

There appear to be two camps when it comes to interpreting the SEND reforms. In one camp are those who continue to ‘allow’ time for a culture shift to eventually set in, thereby transforming outcomes for young people and their families. In the other are those whose critical appraisal of the current system is that it cannot cope, and outcomes are worse now than before the reforms.

Like many others, I had high hopes in 2014. Indeed, I would still maintain that even a poorly-constructed EHCP is better than an old Statement. As a SENCO, I’ve found first-hand identification of aspirations and outcomes by young people and their families far more useful than a fixed statement of need. However, securing the appropriate provision is an ongoing struggle.

The law trumps all

I often comment that ‘the law trumps all’, and it can still be our most powerful ally. However, the road to justice is long. Last year saw a 43 per cent rise in appeals from 2015. This protracted process isn’t what the reforms promised, nor is it what our young people deserve. Far too many SEND hearings are being postponed, creating a considerable delay before any real change to provision.

The reduction of proactive social care and CAMHS is an additional strain on the SENCO. When asked to do a lot more for less, quality inevitably suffers. Class sizes increase, specialist staff are made redundant and families reckon with dwindling community support.

Corporate responsibility

The report of the Lamb Inquiry (2009) recommended a clearer focus on outcomes, greater input from parents, and local and national frameworks that keep in tune with children’s needs. Over the last eight years, progress has been made in some of these areas. However, we can only drive significant positive change with strong corporate responsibility. Three and a half years ago, I hoped that we were adopting a model that would put young people at the heart of decision-making. Such hopes now feel misguided. Fortunately, some excellent independent supporters and parent/carer forums are on hand to help families and schools across the country. We must lobby to keep these advocates, many of whom are propping up an increasingly fragile system.

Unless assessment and provision are adequately resourced, school places match needs and school budgets support a basic entitlement to a broad and balanced curriculum offer, the idea of an inclusive school will soon be consigned to history. Gareth D Morewood is director of curriculum support (SENCO) and leader of education at Priestnall School in Stockport.

‘SENCOs are still SENCOing’

The Code of Practice introduced a small number of changes to the role of SENCO. However, such changes did not necessarily reflect the impact that the reforms...
have brought to the role. The SENCO has been at the heart of narrating, prioritising and implementing the principles and related actions of the SEND reforms within their schools. Typically, this has included a greater focus on priorities such as parental engagement and pupil voice, with SENCOs reporting better collaboration between all parties. SENCOs have also played an essential role as a translator and informer of change for parents and staff. Communication and mediation skills have never been more vital.

The existing barriers to the effective execution of the SENCO role are well documented. Such issues were exacerbated following the introduction of new policy. SENCOs have responded well, seeking ways to lead without traditional notions of authority, doing more with less and ‘filling the gap’ of reduced services or seeking alternative avenues of support. In doing so, they have demonstrated not only leadership but also problem-solving skills.

Current challenges

Three years on, and we are still implementing – SENCOs are still SENCOing. Perhaps one of the most significant challenges they currently face is the need to navigate the shifting educational landscape, and how such wider policy changes impact on children with SEND. The growth of multi-academy trusts (MATs) is central to this change, something for which current legislation does not account. While schools are still required to have a qualified teacher as a SENCO, the cultural and structural changes that come with the formations of MATs are likely to have their effect on the role, particularly in terms of ethos, leadership, autonomy and access to resources. In addition to this there have been, and continue to be, wider changes to the curriculum, assessments and exams. Such changes all directly impact on, and some would say contradict, the underpinning principles of the reforms. The last three years have illustrated that despite the known and increasing challenges besetting SENCOs, the role has never needed to advocate for children and families more.

Dr Helen Curran is a senior lecturer in SEND at Bath Spa University, having previously worked as a SENCO and LA adviser.

‘Time for a formal review’

The jury is still out on the impact of the reforms. The government’s view is that, despite some challenges, the overall impact of new policy is positive and the changes have been welcomed. Welcoming the reforms is one thing, but it isn’t the same as saying they have made a positive difference to children, young people, parents and the professionals who work with them.

The identification and assessment of children and young people with SEND needs to be more consistent across the country. ‘Good practice’ in the early years is not always replicated in later phases of education. Schools and further education providers need better support from area assessment and advice services so that they can accurately meet pupil needs.

More needs to be done to improve core academic and wider outcomes for pupils at the SEN Support level (11.6 per cent of the school population). Inclusive approaches to assessment must go beyond ’narrowing the gap’ and recognise a wide range of achievement. The Rochford Review’s recommendations for assessing pupils not engaged in subject-specific learning are being piloted [see page 56]. It’s important that its approach does not become formulaic, and emphasises the centrality of communication in early learning.

Limited success

The push to ensure that local area services provide seamless support for children, young people and their families has had limited success since 2014. Good examples of policy and practice have been outweighed by evidence of shortfalls in provision. Too often the rush to transfer Statements to EHCPs has led to corner cutting. Inclusive planning cannot be tacked on to old-style approaches to assessment; it requires time and new types of dialogue. 43.8 per cent of pupils with a Statement or EHCP attended a maintained special school in 2017, while only 38.2 per cent of pupils with a Statement attended a maintained special school in 2010. The reforms have not led to the development of inclusive mainstream provision.

Revising reform

Frontline professionals are not doing a bad job. However, they are frequently implementing reforms with hands tied behind their backs. Unless funding concerns are addressed, schools will continue to engage in a tug of war with local authorities over ‘notional SEN budget’ allocations and ‘high needs’ top-up funding. The time has come for government, in consultation with LAs and families, to carry out a formal independent review of the 2014 reforms. In turn, this must lead to a revised reform agenda. If this does not take place we will be stuck with a ‘glass half full’ policy.

To end on a positive note, there is an example of how SEND reform has worked very effectively. Working with the voluntary sector, the DfE and social services have, in recent years, radically improved access to short breaks for children and young people with SEND and their families. This has been achieved through effective lobbying, the government genuinely listening and responding (with funding), and local area services co-planning and delivering services that families want. We need more policy initiatives of this kind.

Christopher Robertson recently retired from being a lecturer in inclusive and special education at The University of Birmingham.
The government has accepted the Rochford Review recommendations for statutory assessment. Here’s what your senior leaders should expect and how they can prepare.

**What’s changed?**
The government has published its response to the consultation following the final recommendations of the Rochford Review. P scales no longer align with new assessment systems which replace levels. The interim key stage standards are to become permanent and are to be used for assessing pupils engaged in subject-specific learning. The government is piloting the assessing of pupils not engaged in subject-specific learning against the seven areas of engagement recommended in the Review.

Accountability for assessment will change. Schools will not be expected to provide assessment data for pupils not engaged in subject-specific learning, but they will have to be able to evidence attainment and progress through appropriate discussions with key stakeholders. Schools will continue to use P scales to assess all pupils, engaged in subject-specific learning or not, until any final decisions are made after the pilot year. However, you must be prepared to decide your own approach to using the seven areas of engagement to assess pupils with more complex needs.

**No longer fit for purpose**
The government’s response signals its intention to remove the requirement for teachers to use P scales to assess pupils engaged in subject-specific learning. This will take effect from the start of the 2018 to 2019 academic year. The interim pre-key stage standards will be made permanent, and extended to cover all pupils engaged in subject-specific learning (who had previously been assessed using P scales). This is to avoid a loss of ‘common framework and language’ between schools.

**Seven areas of engagement**
Statutory assessment of those pupils not engaged in subject-specific learning (for example, those with profound and complex needs) should be consistent with all four areas of need described in the SEND Code of Practice.

The aim of the pilot year is to determine whether or not schools are able to apply the engagement profile method in their own assessment models.

The engagement profile should not be regarded as a hierarchical assessment framework because the various aspects of engagement occur dynamically over the course of any learning experience and need to be given equal status when assessing pupil engagement for learning.

**Progress-based assessment**
There will be no statutory duty for schools to submit to the DfE data collected from assessing pupils against the seven areas of engagement. However, they will need to provide the number of pupils who are not engaged in subject-specific learning. When reporting the progress that pupils are making in the area of cognition and learning, school leaders are advised to consider what progress pupils are making in the other three areas of need: physical and sensory functions, communication and interaction, and social, emotional and mental health.

**What does this mean?**
You need to continue using P scales to assess pupils not engaged in subject-specific learning until the 2019-20 academic year. At the same time, you should consider how you can keep the needs of pupils at the heart of your assessment methodology.

Think about the different stakeholders who have an interest in assessment data, and what would benefit them from knowing about progress. These include pupils and their parents, teachers and support staff, governors, local authorities and Ofsted.

Ultimately, be prepared to change your assessment system when the pilot review concludes, and seek further guidance from other schools if possible.

**Key questions**
1. How will you ensure your school can provide two different assessment models, one for pupils engaged in subject-specific learning and one for those who aren’t?
2. How will you retain a common language when reporting progress to parents?
3. How will changes affect inspection of your SEND provision under the new common inspection framework?

SEND assessment SLT briefing

The SEND Assessment: Measuring what matters and evidencing outstanding outcomes conference will help you accurately assess the progress of SEND pupils in your school. Register your place at oego.co/SEND2018
SEND: the S is not for special

Labelling for the sake of convenience has profound implications for young people. GARETH D MOREWOOD thinks all schools should ditch the deficit model

When I was appointed as SENCO 15 years ago, one of my first actions was to remove all references to SEN from our faculty, my job title and our day-to-day conversations. We became the curriculum support faculty, supporting both the academic and hidden curriculum, while I became the school’s director of curriculum support. This was a very important decision as we moved away from a discourse of ‘special’ and the deficit of labels to something more holistic.

What’s in a name?
Frustratingly, we give insufficient attention to the idea that certain labels can imply deficiencies and shortcomings in children, meaning the surrounding discourse is one of deficit. A good example of this is the ASC/ASD debate, as covered well in the blog post ‘What’s in a name?’ by Lynn McCann. Needless to say, ‘disorder’ is a pejorative term with too great a focus on the problems. Language used to label does have a significant impact on our thinking.

Some might argue that language in itself is not the problem, but the problematic belief system that it reflects. This isn’t the first time in history that differences and disabilities have been singled out. In the Middle Ages, giving birth to a child with a disability was one of many potential signs of witchcraft. In 16th-century Holland, sufferers of leprosy were cast as sinners and had their belongings confiscated by the state. And in British folklore, disability is commonly associated with evil and figures of ridicule. The list is endless.

Time to move on
Changing the nomenclature hasn’t stopped people from lowering their aspirations and perceiving young people with disabilities as less than or different to the norm. Duncan-Andrade and Morrell describe young people as being ‘plugged into the current educational system and expected to function’ (Duncan-Andrade and Morrell, The Art of Critical Pedagogy). The SEND reforms should have addressed this very issue. Sadly, as many have reported, this is most certainly not the case. Most of the historical debates around inclusion have focused on notions of human and equal rights – it’s time to move forward.

Debate continues to surround the discourse of inclusion; ‘special education’ is sometimes referred to as a discourse of exclusion, while empowerment is often dismissed as ‘impractical’ and ‘ideological’.

However, now is the time to move away from a discourse of deficit towards something more positive and outcome-led.

What can you do?
If you are a SENCO, teacher, teaching assistant, school leader or anyone in a position to lead discussions, your first step should be to look at what you call your department, and what language the school uses in correspondence. Consider the mindset this all contributes to, and the impact your terms and definitions have on young people and their families. Having discussed, reconsidered and rebranded, it’s important that you keep looking for solutions as opposed to propagating the myth that young people can be ‘fixed’.

There have been some innovative efforts that put taxonomy at the start of a shift in focus. This year, why not give yourself time to assess the impact of labels on the accurate identification and provision for needs? Is it time for change?

To read the other three posts in Gareth’s ‘SEND is not for…’ series, head over to the blog!

Normal and abnormal

“The term ‘special educational needs’ (SEN) refers to a set of systems for organising educational processes and allocating resources (Terzi, 2010). Although we, as a community of scholars, may recognise these systems as problematic for the ways in which they create and reinforce a separation between “normal” education for children and “special” or “abnormal” education for disabled children, the launch of “new” policies for “SEN” reinforces an acceptance of disabling approaches to education.’

(Penketh, ‘Invention and repair: disability and education after the UK Coalition Government’)
Continuous provision for sensory needs

Minimising barriers to achievement for pupils with sensory and physical needs should be a day-long priority. **JOANNA GRACE** provides examples of activities you can use

A programme for sensory inclusion relies on a good start to the school day, coupled with continuous efforts to support sensory processing in the classroom. This means personalising experiences to pupils with more profound disabilities, and ensuring that the activities you run – in a sensory circuit or at other times in the day – will reinforce auditory, visual, olfactory (smell), taste, touch, vestibular and proprioceptive development.

In this guide, you will find a brief guide to two of the main senses: sight and smell. For each sense, I’ve provided suggestions for designing a sensory circuit to target these specific senses, and suggestions for providing continuous support for sensory needs.

**Introduction to sight**

Not all pupils will process visual information the way teachers do. The implicit assumption therein is that all teachers are neurotypical, but you may not be. Anyone who knows how visually overwhelming a patterned carpet or boldly-decorated room can appear will understand why this can affect the behaviour of a pupil with autism, for example.

For some senses, you would use a sensory circuit or classroom activity to provide an experience where previously there was none. Sight is an exception. The background to the stimulus is integral to how successful the stimulation itself proves.

For example, if you ask pupils to look at an object and focus on it, think about how you present it. Do you hold it up against a background of other visually stimulating items, so that pupils may pick it out? Or do you display it against a plain background that wouldn’t place as great a demand on their visual processing?

**Including visual experiences in a sensory circuit**

Visual experiences are often left out of sensory circuits. Practitioners typically assume that the bright colours of the materials and equipment will be enough. But for the more ambitious, tunnels and parachutes provide pupils with opportunities to move from light to darkness: a valuable visual experience. Similarly, running or crawling under a multi-coloured parachute canopy offers the opportunity to be covered in colour.

During the circuit sessions, give visual instructions as well as verbal ones: ask all pupils to move so they are standing under a yellow section of the parachute or under a red section, for example. Contrast these sight experiences with challenges that ask pupils to process visual information in a more focused way, for example simple target activities. Make sure the target stands out visually from its background, and the object being propelled towards the target is easy to identify.

**Continuous provision for visual needs**

Is your classroom visually overwhelming or does it support visual focus? There is no right or wrong way to lay out a room, but visual information needs to be presented so that it is accessible to all pupils. A responsive teacher will change the classroom environment to match the needs of pupils, not present things strictly in their own preferred style.

Brightly coloured wall displays are often thought to be the mark of a good classroom. However, don’t have displays on every wall. Even those pupils who are resistant to visual overload will stop processing new information at some point. Carefully crafted displays take hours of your time but they won’t necessarily be a benefit to your pupils. Consider having just one or two display boards for pupils, perhaps on adjacent walls. Make displays of essential items, such as your break duty rota, muted in tone. Matt paper will not reflect light and become unduly distracting.

Using Velcro dots across a wall is a great way to create an interchangeable display: a ‘word wall’ one week and a ‘times tables wall’ the next. Pupils could create these displays over...
the course of a lesson, velcroing on their contributions. If you are worried about pupils who may rely on seeing key words on display for their spelling during independent writing, find another way to provide this information. A desk tidy with a hundred square and a list of key words could be a good start.

Think about where you stand when talking to your pupils and what you wear. Create a background for your teaching rather than a display that detracts from it. Natural colour tones are good to use as we are all programmed to find these soothing.

Introduction to smell

While our other senses are processed by the thinking brain (thalamus), our sense of smell is processed by the emotional brain (limbic system). This creates some useful opportunities to create sensory experiences for pupils. If you ask pupils to describe what they can see or touch, they have the vocabulary at their disposal. They can describe its shape, texture or colour. Scents are far more difficult to describe, a peculiarity which could form the basis of a creative writing challenge.

Smells can support our long-term memory. When including aromatic experiences in sensory circuits or classroom activities, be sure to check that no pupils are sensitive or allergic to certain smells.

Including olfactory experiences in a sensory circuit

When running sensory circuits, staff may instinctively prioritise physical activities. However, a dehydrated pupil will have an impaired ability to smell. Make sure that pupils are well hydrated, as the process of smelling involves the dissolving of scent molecules in the nose.

At the start of the circuit, offer an awakening smell: something zingy and bright, such as lemon grass or peppermint oil. Put a few drops of the liquid on a cotton pad in a sealed plastic container. This infuses the air and amplifies the smell.

At the end of the circuit, include a calming smell. Lavender and camomile are recognised for their soothing aromas. Each pupil could hold a lavender flower and gently manipulate it to release the aroma. Lavender oil or a hand lotion could be used as alternatives.

Continuous provision for olfactory needs

You may have considered the light and noise levels in the classroom. But have you thought about what it smells like? When the pupils have gone home stand in your room and breath in slowly and steadily through your nose (don’t sniff). How does your room smell? Consider keeping the classroom door and windows open to keep the air refreshed.

The processing of smells is critical to our mental wellbeing: engaging with the right smells at the right times can help us deal with stress, anxiety or depression. Be aware that for pupils who are struggling with poor mental health, ordinary smells may not be enough. For these pupils, you should look to include bright, bold smells in all manner of activities.

Top tips for sensory inclusion in the classroom

- Begin your lesson with something to capture pupils’ attention: a taste, a smell or some music.
- Offer low-level sensory experiences throughout your lesson, especially to those who need them most.
- Make use of everyday resources, such as blue tac or textured pen pots.
- Offer intervals in your lesson: movement is the best way to stimulate our proprioceptive and vestibular senses.

Classroom activity

1. Place different fresh herbs into pillow cases.
2. Invite pupils to scrunch up the cases, releasing the scent, and smell.
3. Ask them to write a description of their favourite smell. Discourage them from simply identifying what they can smell, and encourage them to think of good words to describe the fragrance.
Teaching the value of healthy lifestyles

Teachers are uniquely placed to help young people make informed lifestyle choices. JOANNA FEAST offers some tips for embedding healthier mindsets.

According to the PSHE Association, PSHE is a planned, developmental programme of learning through which children and young people acquire the knowledge, understanding and skills they need to manage their lives now and in the future.

‘As part of a whole-school approach, PSHE develops the qualities and attributes pupils need to thrive as individuals, family members and members of society.’

PSHE has quite the job to do in today’s schools. Not only does it need to equip children and young people to live healthy, safe, productive, capable, responsible and balanced lives, but it also needs to encourage them to be enterprising. It needs to support effective transitions, inform positive career choices and help maintain economic stability. Add to that the importance of providing opportunities for children and young people to reflect on their own values and attitudes, and explore the complex and sometimes conflicting range of values and attitudes they encounter now and in the future. Simply put, PSHE is no easy feat.

Nevertheless, effectively-taught PSHE will help pupils to build their confidence, resilience and self-esteem, and to identify and manage risk, make informed choices and understand what influences their decisions. It will enable them to recognise, accept and shape their identities, to understand and accommodate difference and change, to manage emotions and to communicate constructively in a variety of settings.

Looking for impact

Teaching the value of healthy lifestyles in PSHE brings up an age-old question: how do we know if it’s working? In many cases, teachers won’t know if their emphasising healthier, informed choices has had any impact on pupils, as the implications will not take form until after they have left school. Growing up in today’s world can be challenging; indeed, adolescence is a time of massive change and young people need to be supported throughout. So how can you get it right? Below are some tips for helping pupils make healthier choices now, and preparing them for the future.

Acknowledging values and needs

What is important to you and your health? Would this also be important to the pupils you teach? Probably not. You’re at different points in your life, with different priorities and needs. It’s also unlikely that you will share the same values. Therefore, trying to impose your values on someone else (well-intentioned though it might be) is not particularly helpful, nor indeed is it very respectful – ‘my way or the highway’ attitudes do not promote acceptance of others.

What are the needs of your pupils?

If you are teaching to meet their needs, PSHE becomes streamlined and relevant. Take time to find out what their needs are by doing a bit of research on the catchment area. On a macro level, discover the pressing health issues of your pupils using public health data on mental health, sexual health, and so on.

At the same time as teaching to need, ask pupils what they would like to learn. This follows on from the point about values. If you are teaching things that pupils consider irrelevant to their lives, the information will be wasted. By association, even things that are relevant will be ignored if the original information was poorly received.

Healthy or healthier?

It’s important to consider what is ‘healthy’ and who decided it was so. What is healthy for some may well be less healthy for others. Good enough health is usually fine for most people. Therefore, it is usually easier to refer to ‘healthier’.

Think about the curriculum. What you teach and when is vital to pin down. This is where publications like the PSHE Association’s programme of study (oego.co/PSHE-study) come in handy. It was written to sit alongside the 2014 National Curriculum and has been updated to reflect the rapidly changing world in which young people live and learn. It covers key stages 1 to 5 and is based on three core themes within which there is broad overlap and flexibility: ‘Health and wellbeing’, ‘Relationships’ and ‘Living in the wider world’. This is very comprehensive and contains guidance about everything to do with PSHE, from key stages 1 to 5, but it is still vital to teach to need. Otherwise, PSHE lessons become too busy, where information is ‘downloaded’ – yet because there is too much content, nothing is ‘uploaded’.

A coherent scheme of work is crucial. PSHE can often be rudderless as well as anchorless, so having a scheme of work which demonstrates clear progression throughout can solve many problems. There are several available for primary schools, but...
very few for secondary schools.

**Take a multi-agency approach**

Consider your staff and how they teach PSHE. It might be that you have an enthusiastic bunch of well-trained and well-informed specialists. But if those teaching PSHE are reluctant (for whatever reason), this will likely come across in their delivery. Training staff members in PSHE is always time and money well spent. Ensure you refer to high-quality external services when needed, which will be whenever your scheme of work strays from universal provision into targeted need. This is particularly relevant for sexual health services, many of which can usually offer in-school support when needed. This can negate the need for school staff to provide condom demonstrations, for instance. Make sure you are clear what the targeted service will do to support your teaching. It must not be a poor substitute.

**Practise what you preach**

Is your school a healthy environment? If healthier lifestyle choices are readily available at all times of the school day, this will enable curriculum messages to be reinforced more easily, and pupils will find making healthier choices simpler and more obvious. If the school isn’t practising what it preaches, perhaps it’s time to think about all aspects of school life on which health has an impact. A complex task, but worthwhile in the medium- and long-term. Are you offering choice in school?

If young people are to make healthier choices in later life, there needs to be ample opportunity for them to rehearse this at school. The choice does not have to be life-changing, but the occasion needs to be there.

**Create memories**

Teaching PSHE can be the best job in the world, and for many, it is the most important job too. You may not be doing everything that you would like, but doing a few things well is surely better than doing many things poorly and haphazardly. It may surprise you that, in years to come, your PSHE lessons will be one of the more memorable aspects of school life to many pupils. If so, it’s a job well done.

Get more practical guidance to helping your pupils meet the challenges of today’s world at our Developing Resilient Learners conference. Find out more at oego.co/Resilience18

'If you are teaching things that pupils consider irrelevant to their lives, the information will be wasted'
SEN, SAFEGUARDING AND PASTORAL
Secondary Focus | PSHE and SMSC

CASE STUDY

RSE in a faith school

Faith schools can provide appropriate relationships and sex education that fits with their core values. SUZANNE O’CONNELL finds out what one academy offers and why

School: St Peter’s Collegiate Church of England School
Location: Wolverhampton
Pupils on roll: 1052
Headteacher: David Lewis
Category: secondary academy
Level of PP: below the national average
Level of SEN: average

Comments from Ofsted
‘Pupils’ attitudes reflect the Christian ethos of the school.’
‘Pupils’ personal, social and health education is comprehensive and effective. Pupils have good levels of understanding about how to keep themselves safe.’
(Personal development, behaviour and welfare)

‘Our school recognises the importance of RSE while maintaining core Christian values at the heart of its delivery,’ explains Aman Rai, assistant headteacher and PSHE coordinator at St Peter’s Collegiate Church of England School, Wolverhampton. She is relatively new to the role, but has been actively involved in ensuring that provision fits with the ethos of the school, while also providing what their students need to know.

The school’s relationships and sex education model policy is firmly rooted in Christian teaching on marriage, the family and the sanctity of human life. It reflects the academy’s intention to provide a caring Christian community.

The school has recently reviewed its provision of PSHE. Previously it had been taught on a rotational basis by specialist teams. Form tutors will now include PSHE in an extended registration period on Monday mornings. It is also being incorporated in the school’s science and religious education curriculums as appropriate.

‘Adjusting what we had taught previously to fit a new schedule, and varying degrees of staff experience, has proven challenging,’ admits Aman. The school’s delivery model is the same as that set out in the government’s review of sex and relationships education in schools (2008), and those identified in the Church of England’s Archbishops’ Council Education Division document, ‘Valuing All God’s Children’.

‘These documents make the case that to be effective, it’s best to teach a series of lessons rather than “one-off days”,’ explains Aman.

The teaching programme at St Peter’s focuses on developing three core objectives, namely attitudes and values, personal and social skills and knowledge and understanding.

They aim to develop critical thinking skills as part of the decision-making process, and hope students will learn to make choices that are based on an understanding of diversity and prejudice. This means equipping students with the tools they need to thrive in the modern world, while at the same time maintaining Christian principles.

The RSE programme
The RSE programme sits alongside and supports the pastoral, mentoring and PSHE programmes.

Year 7
In Year 7, RSE is delivered by the science department. It covers:
• the beginning of a new life
• the development of a human foetus
• reproduction
• the human life cycle
• puberty.

Year 8
In Year 8, form tutors allocate a PSHE slot to discussing:
• the fundamentals of a healthy relationship
• sexual intercourse
• pressure to have sex
• an introduction to contraception
• sexually-transmitted infections
• risk management.
Year 9
In Year 9, form tutors allocate a PSHE slot to discussing:
- the main methods of contraception
- sexually-transmitted infections
- taking responsibility in a relationship
- the influence of drugs and alcohol on sexual activity.

These are also taught through GCSE RE.

Year 10
In Year 10, form tutors allocate a PSHE slot to discussing:
- the nature of love
- sexuality
- first sexual experiences
- long-acting reversible contraception
- the difference between healthy and abusive relationships.

Staff training
Ensuring staff have the confidence to teach all this content remains a priority for the school. 'Teachers new to delivering RSE will receive the relevant training and support,' says Aman. 'Time has been booked in the new year for this, allowing new staff to build a rapport with the students and ensure that they are all comfortable talking about sensitive and personal topics such as this.'

One of the aims stated in the RSE policy is to ‘ensure that the delivery of the course is undertaken by a specialist team of staff who feel confident and comfortable with both the content and style of delivery necessary.' To this end, specialists are brought in to provide weekly training on Thursday afternoons.

Alongside the bespoke training to meet the needs of their changing timetable, the school keeps up to date with new information and publications from the DfE. 'We welcome the release of the Internet Safety Strategy green paper,' explains Aman. 'We will use this to help us reduce the risks posed by the internet to children.'

Morals and values
The academy believes that students are entitled to clear, accurate information on sexual matters. Their questions must be answered honestly and directly and at a level appropriate to their age and maturity. This must be delivered in an atmosphere of trust and openness, without fear or embarrassment. Discussions take place within the parameters of the academy’s confidentiality policy.

It is foremost a Christian community, and all staff believe that students have a grounding in Christian moral values so that informed choices can be made. ‘We hope that because of such teaching they will be able to develop responsible, caring relationships based on mutual respect, love and a commitment to stable family life,’ says Aman.

Changes on the way
Earlier this year, the Children and Social Work Act set out proposed changes to relationships and sex education. The most significant of these changes is that it will become a part of the basic school curriculum that all schools are required to deliver.

Many of the expected changes have already been anticipated and recommended as good practice. These include teaching RSE as part of a planned PSHE course with timetabled lessons, and ensuring that those lessons focus on safe and healthy relationships.

Effective RSE will continue to rely on partnership with parents and carers; informing them about what their children will learn and encouraging them to contribute to learning.

The following changes are likely to come into effect in 2019.
- A new designation, relationships and sex education (RSE), is likely to replace sex and relationships education (SRE). This is to emphasise the important role of relationships in lesson planning and the curriculum.
- At primary level, the focus will be on relationships education. There will be no opt-out choice for parents.
- At secondary level, parents will continue to be able to withdraw their child from sex education elements within RSE (other than the sex education that sits in the National Curriculum as part of science).

With regard to older students, the DfE will undertake a consultation. This will be to clarify the age at which a young person may opt themselves out of the sex education elements. The new regulations and guidance will reflect the outcome of this consultation.

Optimus has recently updated its template letter for explaining your school’s RSE curriculum to parents. Find it on the Knowledge Centre at my.optimus-education.com/rse-template-letter-parents.
Safeguarding across a MAT: a five-step approach

Shared safeguarding procedures ensure consistency across a multi-academy trust. DAI DURBRIDGE provides a guided approach

Safeguarding is the initial and main focus of every inspection, whether it be carried out by Ofsted or ISI. As in any single school or academy, the management of safeguarding across a multi-academy trust (MAT) is a matter of good practice and good governance. If an incident occurs and safeguarding ‘goes wrong’, the reputational damage for the academy and the MAT can be significant.

A MAT-wide approach to safeguarding
These are useful questions to ask as a starting point in ensuring the approach to safeguarding is consistent across your MAT.

- What is your governance approach to safeguarding and how consistent is it across your MAT?
- Do all academies share the same policy?
- Do you identify safeguarding themes at MAT level?

Five-step approach to MAT safeguarding
1. Consistent approach to policy, dissemination and training
2. Scheme of delegation
3. Ensure your DSLs work as a team
4. Post-incident reflection
5. MAT action plans

Great policies are useless if they are not disseminated effectively'

1. Consistent policy, dissemination and training

Policy
Your safeguarding policies are the foundation of your safeguarding approach and ideally the variations needed for local reasons or school type should be limited. Having consistent policies saves time and reduces duplication across schools. In a cross-phase MAT, policies will have bespoke elements (e.g. perhaps CSE is mentioned in secondary only) and there will be aspects of a policy that reflect school setting and local context but policies for schools across a MAT should still be around 90 percent the same.

Dissemination
Great policies are useless if they are not disseminated effectively. If you let staff know a policy has been updated by sending them an email, how do you know they’ve read it?
When disseminating a policy, consider the best way to do it and how you can measure its success. Questionnaires of understanding can be a useful success measurement, perhaps after giving people a deadline to have read the policy by. To ensure they retain the information, you may want to consider randomly picking a group of staff, at different points in the school year, and asking them to complete 10 questions based on the policy.

Training
Great policy and effective dissemination fail without the appropriate training. It’s important to ensure you have the right training for the right people, at the right time, in the right format. Different things work for different people so, as well as ensuring regular safeguarding training, talk to staff and get feedback on what format works for them and tailor where possible.

2. Scheme of delegation
Safeguarding procedures should be clearly set out in your scheme of delegation to ensure that all staff know who does what, when they do it and who is accountable. Reviewing the safeguarding governance structure should be part of your regular governance review. Is it strong enough? What can it be improved? How is it managed in a scheme of delegation?
Carrying out a safeguarding audit is a good way to share best practice across a MAT. You might want to consider termly or annual audits by the LGB safeguarding governor. Whatever you decide, make sure the approach is consistent across the MAT and learnings are shared.

3. Ensure DSLs work as a team
Depending on the size of your MAT, you’ll have several DSLs working across it so will need a clear structure of how they work together. Ideally, you’d be able to draw it
and, if asked, your DSLs would draw it in the same way. Do different schools across your MAT give their DSLs their own training or are they trained together? If they’re trained separately they’ll need time allocated for them to share knowledge and learning with fellow DSLs in the MAT.

You’ll want to consider whether to have a lead DSL or regional safeguarding lead in the MAT, which would likely be held accountable by the CEO. Among other responsibilities, this role would review all policies and procedures across the trust, know who to contact for further information, identify emerging themes both in the trust and more widely and know how to manage them.

4. Post-incident reflection
Carrying out a procedural review after a safeguarding issue is not unique to MATs and should be done in a single school, academy or MAT. It’s important to ask questions of your policies and procedures. Did they work, could they have worked better? What changes should you make? Do you need to engage the LSCB or other agencies?

MATs should also ask what learnings need to be shared MAT wide, resulting in an improvement plan which supports all schools in the trust.

5. MAT action plans
Having a safeguarding action plan is a way of presenting your safeguarding procedures. The plan should be reported on to the CEO or board at regular intervals, such as monthly or termly, and always after a procedural review.

Presenting an annual MAT safeguarding action plan to the board:
- drives consistency
- flags emerging safeguarding concerns across the schools.

**Ofsted and guidance requirements**
Current statutory safeguarding guidance, including KCSIE and Ofsted inspections, focus on the individual setting and do not mention inspecting MATs. But with a growing number of trusts, calls for greater accountability and regulation at MAT level will change that and raises questions.

Who will inspect a MAT? Where should that accountability lie?

There is no framework for MAT inspections and Ofsted have only ever inspected single schools: do inspectors have enough understanding of MATs? Should inspection be undertaken by a regional school commissioner RSC or one of the headteacher boards instead?

Although there is no current inspection requirement covering safeguarding in MATs, it is likely to have equal importance to MAT inspections as it does to school inspections now.

Ensure no child slips through your safeguarding net. Register your place at our forthcoming **Practical Strategies for Safeguarding in Education** conference oego.co/Safeguarding18
Respond to cyberbullying

Do your staff know how to put policy into practice and deal with incidents of cyberbullying?

JACK PROCTER-BLAIN shares steps to ensure an effective response

Cyberbullying is invasive, constant, often anonymous and difficult to eliminate. As the government acknowledges in the ‘Internet Safety Strategy’ green paper, ‘the internet has increased the ease and frequency with which people can be exposed to […] harmful messages’.

Schools have a responsibility to respond to all instances of cyberbullying that are disclosed to staff. The strength of a school’s response will be determined by the extent to which staff can:

• put into action the school’s behaviour and safeguarding policies
• follow clear procedures for reporting concerns and incidents
• facilitate a better, more positive use of social media in order to prevent further incidents.

Here is some advice for responding to incidents of cyberbullying.

Go at the child’s pace

Take seriously any disclosures and make sure children have someone to trust. Like all forms of bullying, cyberbullying is an abuse of power and victims need to be re-empowered by being listened to.

Contain the incident

Find out who first sent the abusive message and request that they remove it. If that’s not possible, service providers have a responsibility to take down anything that violates their terms and conditions. The UK Safer Internet Centre (UKCIS) offers more information on the safety features of popular social networks.

Take evidence

What does the message say? When was it sent? What is the username and phone number of the sender? Recording and preserving evidence will help you identify patterns, and refer the incident to other stakeholders. Cyberbullying leaves a digital footprint which can be traced – don’t delete abusive messages!

Seize and confiscate

With the pupil’s consent, staff can use discretion to confiscate an item – such as a mobile phone – and erase files if they have determined that there is ‘good reason’. Without consent, staff can seize anything that they have reason to believe is evidence in relation to an offence.

Inform parents

Make sure that the parents of both the victim and the perpetrator know the circumstances of the incident and what action the school will take.

Use your policies…

Are your staff confident in using the powers and fulfilling the duties set out in the school’s policies for behaviour, online safety and safeguarding? If not, this would form an ideal basis for an Inset or training session.

…and review them

Your online safety policy needs to be reviewed annually, or in response to a major incident. This will help ensure that you can respond effectively to the latest risks. For a template that you can adapt for your setting, find our online safety model policy on the Knowledge Centre.

Legal or illegal?

If the incident involves indecent images of children under the age of 18, threats of violence or sexual assault, or hate crimes, you should refer immediately to the police. Never share or copy the material yourself.

If the incident constitutes a safeguarding concern but there is no sign of illegal content, you should work with all relevant agencies (staff, parents, pupils) to follow the appropriate procedure.

Scenarios

How would your school respond to each of the incidents below? Keep in mind the following questions.

• In what way does the situation violate the school’s online safety, behaviour or safeguarding policy?
• What evidence needs to be recorded, and by what means?
• What would be the most appropriate way to resolve the situation for the victims and the perpetrators of the bullying?

Scenario 1: Emily was getting changed at her friend’s house when the friend took pictures of her in her underwear and posted them on a social networking site. In the description of the post, the friend asked people to rate Emily’s body out of 10.

Scenario 2: A chat room used by many pupils is having an open conversation about the sexuality of one pupil at the school. Many of the comments are homophobic.

Scenario 3: Michael has received a WhatsApp message from a boy in his year which says ‘goin 2 get u l8r, lol’.
Receive your own copy of Insight magazine

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

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

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

Explore Optimus Education today at oego.co/join-OE
Practical Strategies for Safeguarding in Education

Work together effectively to support mental health needs and protect children online

oego.co/SafeguardinginEd

#oeSafeguarding

Expert speakers include:

Will Gardner
Chief Executive Officer, Childnet

Caroline Hounsell
Director of Business and Partnerships, MHFA UK

Ella Savell-Boss
Safeguarding Manager, Shireland Collegiate Academy

David Marshall
Headteacher, Cale Green Primary School

KEY HIGHLIGHTS

ONLINE
Understand the new and emerging online trends

PARTNERSHIP WORKING
Work together efficiently and effectively across all agencies

MENTAL HEALTH
Create a whole school approach to supporting students

In association with: