Updates, guidance and resources for your whole leadership team

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TEACHING AND LEARNING
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Taking place on 10 and 11 October 2019 in Birmingham

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Welcome to Optimus Education Insight

Dear Reader

'The need to promote collaboration, shared vision, collective responsibility and shared ownership', says experienced SENCO Liz Murray (see page 48). She’s writing about her transformative project to introduce personalised SEND CPD for teachers, which saw her sign up 60 teachers to dedicate time each week to supporting individual pupils in class. Positive outcomes included increased teacher confidence, better deployment of teaching assistants within lessons, and improved pupil progress.

Staff development expert Chris Moyse is making more use of classroom teamwork too, in the form of live coaching. Why hide away at the back of the class, scribbling notes on a clipboard, when you could be supporting from the front? Turn to page 30 to find out how it works in practice.

While in theory you want all staff to benefit from professional development opportunities, in practice it’s hard to make it work for everyone. Especially when staff are only on site for a few hours in the day, as is the case with mealtime supervisors. Nickii Messer is often asked for advice on how best to engage this group of staff, so she’s put together guidance and checklists on everything from recruitment to team-building and appraisal (turn to page 22).

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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

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Liz Worthen
Head of Content
Optimus Education
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 and Assessment in Secondary Schools**  
**TUESDAY, 15 JANUARY, LONDON**  
Ensure whole-school engagement in efficient data use to accurately predict, measure and support student progress.  
*Leadership and Governance*

**GDPR for Schools**  
**THURSDAY, 24 JANUARY, MANCHESTER**  
Designed specifically for school data protection officers, this event will ensure you leave fully updated and with strategies to guarantee compliance across your school or MAT.  
*Leadership and Governance*

**Effective Operations of MATs**  
**THURSDAY, 31 JANUARY, LONDON**  
Build efficient communication structures, centralise common services and maintain a robust financial process across your schools.  
*School Business Management*

**FEBRUARY**

**Assess and Support the Progress of SEND Pupils**  
**TUESDAY, 12 FEBRUARY, LONDON**  
Effectively monitor and evaluate the progress of pupils with SEND and help them to reach the best possible outcomes by delivering impactful interventions and high-quality teaching.  
*SEN and Safeguarding*

**MARCH**

**Managing Behaviour in Schools**  
**THURSDAY, 14 MARCH, LONDON**  
Create a whole-school culture that promotes a positive and consistent approach to improving behaviour.  
*SEN and Safeguarding*

**Closing the Attainment Gap for Disadvantaged Learners**  
**TUESDAY, 19 MARCH, MANCHESTER**  
Cost-effective strategies for building aspirations, creating an inclusive culture and evidencing the progress of your disadvantaged pupils.  
*Leadership and Governance*

**Collaboration to Support Student Attainment**  
**TUESDAY, 26 MARCH, LONDON**  
Drive school improvement through effective collaboration and partnership with parents and the local community.  
*Leadership and Governance*

For a full list of our upcoming conferences, half-day briefings and training days, please visit my.optimus-education.com/conferences For further information or booking queries, please call the conference team on 0845 450 6404.
What’s in this month’s Leadership and Governance section?

Accountability is a theme in this issue as we look at the use of pupil premium to improve outcomes for disadvantaged pupils. Richard Sutton shares common barriers to effective provision and how to overcome them on page 10. We also look at the relationship between senior and middle leaders. How can they best work together to share effective practice? Find ways to embed consistent teaching and learning across the whole school on overleaf. Building good relationships with parents is crucial for a child’s development, and for independent schools, receiving a complaint from a parent can lead to claims against the school. Turn to page 14 for advice from Helen Tucker on managing a complaint and minimising damage. How are you getting on with data management under the GDPR? From sharing personal data to using photos of pupils, we put questions from members to Dai Durbridge. And after a Christmas break, remember to check your inbox every Monday for your member email.

Lisa Griffin, Senior Content Lead

Contributors in this issue

Helen Tucker is a partner in the independent schools team at Stone King. She advises independent schools on issues including school parent contracts and safeguarding and child protection cases.

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LEADERSHIP AND GOVERNANCE  
@OptimusEd
Secondary Focus | Leadership Skills

10 strategies to improve outcomes across subjects

How can the SLT work with middle leaders to share best practice in the classroom? JOSEPHINE SMITH offers ways to ensure consistency across the whole school

As a senior leader, you’ll be responsible for writing policies and introducing systems. The following strategies will ensure that the work you and your colleagues have done translates into consistent high performance across all departments.

1. Monitor systems and policy application
Monitoring, or quality assurance (QA), is vital to securing consistency and whole school improvement. Done in the right way, with the appropriate combination of challenge to set high expectations and support to ensure middle leaders feel that it’s a process that is done with them and not to them, it is one of the most important functions of leadership. There is no point in introducing a system or a policy unless you check that it’s being used consistently and leads to improved pupil outcomes.

If you monitor a system’s use and impact you can celebrate and share examples of when its use has resulted in positive impact on learners. Just as importantly, you can develop, adapt or abandon a system that is having little impact, based on evidence rather than supposition.

2. Provide the tools for support
The most obvious example here is providing middle leaders with the information they need to measure the impact of their teaching and learning initiatives. This is best done by buying in professional packages that offer user-friendly, web-based access to progress data.

The biggest error some schools make is asking middle leaders to come up with their own target setting and tracking systems. The result is different systems which are hard for leadership teams to draw any whole school conclusions from. Don’t stop at introducing a system which stores and reports the data: require awareness and analysis of it from teachers and middle leaders.

Build time into your QA systems for colleagues at middle and senior leadership level to discuss what the data is telling them and what action is being taken as a result. This allows trends to be spotted, impact measured, and interventions planned based on evidence.

3. Ring-fence time for conversations
As a leadership team, you should prioritise directed time for the conversations, training, sharing of ideas and so on, that are deemed most likely to lead to improvement. If developing a growth-mindset in pupils, for example, is the route most likely to improve outcomes, time needs to be allocated to it.

Last year in school we encouraged staff to form coaching pairs to share and develop pedagogical expertise. This year we are so committed to ensuring that staff can really learn from each other we have ring fenced directed time, allocated some of our cover budget and scheduled coaching session times across the school year.

We expect staff to use that time for coaching conversations and are monitoring the impact those conversations have in the classroom via staff feedback, QA processes and appraisal reviews.

4. Give middle leaders ‘quality time’ together
Allocating time to school priorities is important but it’s also crucial to give middle leaders time together to share ideas, support each other and work out any issues that they are facing.

Set out the parameters for new initiatives and provide time. Set out an area for development (e.g. revisions to the assessment system) by inviting middle leaders to share research, make recommendations, or choose from various solutions as well as asking for honest reviews and feedback after initiatives have been trialled.

5. Make the use of non-contact time clear
Look at the minutes from department meetings. Do they represent the actions being taken as a result of discussions? Are those discussions about issues to do with classroom best practice?

Another discussion to be had is about how the additional time given to TLR holders is to be used. Is that time used to get into the classrooms of teachers in
the department? Work alongside other colleagues? Meet with pupils to seek their feedback?

In other words, conduct department level QA and plan interventions as a result of any conclusions drawn.

6. Lead from the front
If you believe in the priorities you have set middle leaders, it needs to be clear that your leadership team share the same priorities. Show this by using your time to free up others to work on key initiatives. Why not volunteer to cover lessons to free up middle leaders to work with colleagues in the classroom? They will be much more effective in that time if those developments require subject expertise. The bonus is that you get to see pupils working in various subject areas and get a feel for their successes and the impact of the department’s effort.

As a senior team, it’s important to find ways to regularly and consistently show your commitment to whole-school priorities, not just at the point of their introduction but in a sustained way.

7. Focus on priorities
Decide on a limited number of whole school pedagogical priorities and demonstrate how different departments and areas can contribute. It’s consistent and sustained commitment of time and energy that pays real dividends and stops middle leaders and other colleagues seeing senior team initiatives as short-term whims that will soon be replaced by new priorities.

8. Link your SIP and documentation
Use the annual school improvement systems you have (such as the SEF, improvement plan, department improvement plan, pupil targets, CPD plans, meeting schedules) to join everything up.

There must be clear alignment between all the systems if there is any chance of your initiatives working and it’s a positive way of demonstrating to middle leaders that you have a workable plan for school improvement.

9. Provide CPD to support school priorities
Simple. If the training and development opportunities you are offering don’t match your whole school priorities, you’ve missed a trick.

10. Secure middle leader ‘buy in’
If you can’t achieve this, you won’t be able to achieve anything else. Commit energy to it, especially on tough days. You won’t convince everyone and middle leaders in different subject areas will have different expectations, ideologies and preferred styles. The list below is worth considering.

   a. Provide admin support (expensive but always appreciated).
   b. Always be prepared to adapt/ reduce/remove workload demands if they aren’t leading to pupil development. Show colleagues that you are genuinely interested in making school systems efficient. Whenever you introduce a new expectation look at what you can eliminate or reduce to create space.
   c. Don’t miss an opportunity to make the links to young people’s positive experience clear. While you might always think it is implicit, make it explicit.
   d. As a teacher, do you remember letting pupils feel there was no place you’d rather be than in their classroom teaching them? Similar positivity is required as a senior leader. Model it and you’ll be sure to get it back.

Sustained improvement
Improvement is about teachers constantly reflecting on best practice in their classroom and learning from each other. If the SLT is to help facilitate those improvements there is a much wider range of strategies that need to be employed.

Some of these are developed over time to influence pedagogical behaviours across all staff. These strategies combine to establish a set of expectations that new middle leaders joining the school get a keen sense of in their first terms.

They might include carefully thought out curriculum pathways, assessment strategies, or behaviour policies, for example. Others are more practical, clearly laid out systems and routines which teaching staff, under the guidance and encouragement of middle leaders, follow for the greater good.

They are tried and tested and regularly reviewed to ensure maximum impact in the classroom. They might include strategies for group work or best practice on classroom questioning techniques, for example.
Pupil premium leadership and accountability

Pupil premium reviewer RICHARD SUTTON shares common barriers to effective provision and how to overcome them.

**Leadership and accountability**

There needs to be robust accountability for all staff with respect to improving outcomes for disadvantaged pupils. And for that to happen, there needs to be documented accountability.

A simple way to do this is to take the pupil premium website template (available at my.optimus-education.com/pupil-premium-templates-your-website) and turn that into your one-year operational plan for raising attainment for disadvantaged learners. Within that document you include:

- names of key personnel
- measurable milestones
- targets for across the year.

With that as your starting point, leaders can constantly evaluate the effectiveness of their strategies, refining and adapting them as appropriate.

Governance is often underdeveloped in this area and tends to rely on the professional judgement of senior leaders rather than hard measurables. But with this operational plan, your governing body has a very clear tool against which to hold the school to account for their impact.

**Pastoral strategies**

A lot of schools spend quite a high proportion of their funding on pastoral elements. You need to consider how you will measure impact (and value for money) in this area too. For example, you can conduct entry and exit questionnaires for pupils who are participating in counselling, nurture groups or mentoring.

Include information about attendance, behaviour and participation in extracurricular activities in your operational plan, as well as information on attainment and progress.

**Provision maps**

As part of your culture of positive discrimination, I recommend developing a provision map for disadvantaged – as schools typically do for SEND. This map needs to include several things:

- All the provision you put in place for disadvantaged pupils, including the interventions, one-to-ones and trips.
- Milestone targets for interventions.
- Information about whether pupils have met their targets for different interventions and provision.
- The cost of each element of provision.

You now have another great tool for evaluating value for money. For example, governors can look at a summary of the provision map (or a version with pupil names removed) and see that 10 pupils were participating in an intervention, which cost £700 (the proportion of the salary of the TA who delivered the programme), and nine out of 10 pupils met their targets.

I often see schools who have produced masses of documentation around pupil premium usage, but at a strategic level you only need two documents: the operational plan and the provision map. And that's it.

**Subject provision**

Your positive culture won't develop if you haven't got key subject areas on board, mirroring the objectives from your operational plan. The key question those subject leaders need to ask themselves is: do we know what the subject specific barriers are for our disadvantaged pupils?

If the answer to that is no, then a piece of work needs to be done to establish what the specific barriers are. That triangulation could include learning walks, book samples or data analysis.

It's essential to distinguish between high, middle and low prior...
attainers, and any comparisons need to be with similar attainers who are not disadvantaged but of the same ability.

Once you’ve identified a pattern or trend, you can use that information to adapt teaching. It goes into the subject area plan, which is underneath the umbrella of the whole school plan. And then you’ve got a joined-up strategy for positive discrimination.

Classroom teaching
First-wave teaching is a crucial part of positive discrimination. I read a lot of pupil premium reports from various people and organisations, and they hardly ever talk about teaching. When I go into schools and sample books and talk to pupils, I find many common characteristics of weak performance.

- Disadvantaged pupils don’t do enough work, or do less work, in comparison to others.
- They don’t do work in enough depth, compared to others of similar ability.
- There’s incomplete work or poor presentation.
- There’s missed work, because their attendance is weaker than other pupils.
- Homework isn’t completed regularly or isn’t at the right standard.

If these common characteristics are not addressed, the cumulative impact is low attainment. If they are addressed, the cumulative impact is that pupils start to catch up.

So, establish some simple non-negotiables for the classroom. For example, teachers and TAs need to check the work of disadvantaged pupils in every lesson, every day (if you have a high proportion of disadvantaged pupils in a class you may need to modify this). Remember that the most cost-effective strategy, as identified in the Education Endowment Foundation’s Teaching and Learning Toolkit, is feedback in all its forms.

Don’t accept the expected. Pupil progress dialogue should be about ‘why isn’t this child getting greater depth, or a grade 8?’ What more can we do?’

Targeted questioning
This isn’t about teachers radically changing pedagogy, it’s about teachers changing classroom habits. Targeted questioning keeps pupils focused and is an assessment for learning tool for teachers, because it will tell them whether the disadvantaged pupils understand or not.

Monitoring and review
It’s good practice to keep these operational plans under regular review. For a large secondary school, I suggest establishing a pupil premium steering group. It could be led by the senior leader responsible for disadvantaged learners. The core group members would typically be representatives from English, maths and science – not necessarily the heads of department, but maybe ‘pupil premium ambassadors’ who have a responsibility for improving achievement of disadvantaged pupils in their subject area.

The attendance leader would come to meetings as required; you might pull in a family support worker or head of year, depending on what’s being discussed. The purpose of the group is to promote academic outcomes, with all the key stakeholders contributing, and to evaluate progress against the plans.

In a primary school, where the English and maths leads are often on the senior team, there isn’t the same need for a separate meeting. You may decide to devote every third or fourth SLT meeting to pupil premium review and progress, pulling in other colleagues (such as the attendance lead, or relevant class teacher) as required.

In summary
With your operational plan, provision map, subject plans and review process in place, you can be clear about accountability, targets, measures and value for money. Constant self-evaluation of the impact and effectiveness of your strategies is vital.

The 20-day challenge
Something I’ve seen working well is the 20-day challenge. Each teacher, or teachers in a particular subject, identify precisely why the three disadvantaged pupils in that class are not achieving well enough. Precise doesn’t mean ‘spelling, punctuation and grammar’. Precise means ‘using capital letters for proper nouns’ and ‘using commas correctly’.

You then ask teachers to reflect on their practice and consider what they’re going to do differently for the pupils to do that. And they make a commitment: ‘this is what will look different in their exercise books in 20 days’ time.’ Then you can identify qualitative impact and pupils move incrementally towards hitting their targets.

Pupil premium review
Our pupil premium reviews can help you effectively utilise this funding in your school. The two-day review includes:

- half day preparation out of school analysing documents including tracking data and the SEF
- one full day in school completely bespoke to your setting and pupil premium needs
- half day comprising of a comprehensive report with recommendations of how you can improve provision and outcomes for pupil premium pupils.

Find out more at oego.co/PP
Centralising policies in a MAT

Ensure your policies incorporate all the academies in your trust and are being correctly used at local level with this guidance from lawyers at **VEALE WASBROUGH VIZARDS**

**Every multi-academy** trust will centralise some services to ensure compliance and aim to make savings, both financially and in terms of efficiency. Centralising services or functions, such as your policies, can ensure they are streamlined and free up time for individual academy leaders.

**Type of policy**
Statutory policies are mandatory requirements under legislation, statutory guidance or code. Non-statutory policies are optional at individual academy level and often implemented to highlight best practice or inform parents of protocol.

Before implementing a new non-statutory policy, it is always worth considering whether it is necessary or whether information can be conveyed in another form (such as a newsletter, published on the academy’s website, or emailed to parents).

**MAT or academy level policy**

A MAT level policy:
- relates to the whole MAT
- applies to all academies within the MAT without further action or change
- must be adopted by the LGB of all academies within the MAT.

An academy level policy:
- is developed by, and is specific to, the individual academy only
- reflects local practices
- reflects the phase of education.

### Pros and cons of MAT level policies

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<th>Pros</th>
<th>Cons</th>
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<tr>
<td>Ensures compliance by all academies</td>
<td>Risk that policy contents aren’t relevant to academy without changes being made</td>
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<tr>
<td>Gives consistency across all academies</td>
<td>Majority still need to be adopted by LGB at academy level, with academy name inserted</td>
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<tr>
<td>Helps academies requiring more support</td>
<td>Heavy handed for academies who want more autonomy</td>
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<tr>
<td>Simple to put in place following conversion or rebrokerage</td>
<td>High performing academies may resist having their policies changes</td>
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### Specific policy considerations

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<td>Equality information and objectives (to demonstrate compliance with Public Sector Equality Duty)</td>
<td>Can have overarching objectives decided by the MAT, but most objectives must reflect academy’s pupil demographic/local area</td>
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<td>Admission arrangements</td>
<td>Can be based on MAT level template policy but each academy must have own arrangements (e.g. oversubscription criteria, distance measuring or catchment area)</td>
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<td>Child protection and safeguarding</td>
<td>Must reflect the academy’s own procedures, the procedures of the academy’s local safeguarding partnership and the name of the academy’s DSL</td>
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<tr>
<td>Accessibility plan</td>
<td>Must relate to academy’s own site and buildings</td>
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<td>SEN information report</td>
<td>Must reflect SEN and disability provision at that academy</td>
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<tr>
<td>Behaviour</td>
<td>Can have MAT level policy with standard legal information (e.g. exclusion procedure, searching and confiscation, reasonable force) but rewards and sanctions should reflect what academy does</td>
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<tr>
<td>Privacy notices</td>
<td>Must include details of the personal data processed by that academy (e.g. CCTV, electronic systems, biometric data, marketing) and the lawful bases for processing</td>
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### Considerations

Some policies, such as a parental complaints or equality policy, lend themselves to being MAT level, with no changes before adoption at academy level (other than the academy name).
Other policies can be MAT level but will need to be ‘academised’ before adoption at individual academy level. Changes or insertions will include the academy name, names of staff, characteristics of the academy and so on.

For MAT level policies, it’s vital to consider whether the content is relevant. Consider the following questions to help.

- What are the local governance arrangements?
- Does each academy have its own governor or advisory board or is it shared?
- Do academies have a nursery or sixth form?
- What level of support does the academy need? (e.g. high need/autonomous)

Roles and responsibilities
To ensure that policies work across the MAT, the trust will likely need someone who has overall responsibility for implementing, sharing and updating policies. At individual academy level, there will need to be someone who has day to day responsibility for ensuring policies are shared with staff in that academy, understood and updated where necessary.

There will also need to be processes in place for training on policies, both at MAT and individual academy level.

Introducing new policies
Before implementing a new policy as a MAT, be clear on what the aim is. Do you want to simplify inherited local authority policies? Bring inherited policies up to date and in line with best practice? Ensure harmonisation across the MAT?

- **Step 1:** Identify proposed changes: updating existing policies or introducing new policies?
- **Step 2:** Do proposals effect existing contractual policies?
- **Step 3:** If contractual, what are the options for effecting the change?
- **Step 4:** Do you have/need a business case, consultation period, union involvement, voluntary agreement to any changes?

Staff will need training on policies at MAT and individual academy level

'Centralising your policies can ensure they are streamlined and free up time for individual academy leaders'

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Policy and statutory document tracker
Head online to download and complete your policy and statutory document tracker at my.optimus-education.com/policy-and-statutory-document-tracker

The online MAT policy tracker spreadsheet helps make sure your policies and statutory documents are kept up-to-date, as well as letting you:

- check you have all the relevant policies for your type of establishment
- keep track of policy review dates
- record who is responsible for each policy or document
- check what needs to be available on your school website.

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Effective Operations of Multi-Academy Trusts
Focusing on building efficient communication structures, centralising common services and maintaining robust financial processes across your trust, this one-day event takes place on Thursday 31 January. Head online to secure your place at oego.co/EffectiveOps
**LEADERSHIP AND GOVERNANCE @OptimusEd**

Cross Phase | Responding to External Complaints

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**Parental complaints in independent schools**

Complaints from parents can lead to claims against the school and financial and reputational damage. **HELEN TUCKER** advises how to manage complaints compliantly

**Schools are required** to effectively implement a complaints policy which deals with the handling of complaints from parents of pupils. After safeguarding, it is one of the areas on which schools are most likely to fail at inspection. Complaints can lead to significant issues such as claims against the school, and wider reputational damage.

**What is a complaint?**

There is no distinction between a ‘complaint’ and a ‘concern’. A complaint is any matter about which a parent is unhappy and seeks action by the school. Schools therefore need to be alert to the ‘casual complainant’, seeking clarity if required as to whether a parent is happy that a matter has been resolved or whether any further action or follow up is required.

**Complaints policy**

All independent schools are required to have a written complaints procedure for parents of pupils in accordance with The Education (Independent School Standards) Regulations 2014. Schools with early years or boarding will also need to ensure compliance with the complaints requirements within the National Minimum Standards, and the Early Years Foundation Stage: Statutory Framework.

**The three stage procedure**

The complaints policy must set out clear time scales for the management of a complaint and allow for a complaint to be made and considered initially on an informal basis.

The typical complaints procedure will consist of three stages: 1. informal 2. formal 3. hearing before a panel comprising two governors and one member independent of the management and operation of the school, none of whom have been directly involved in the matters concerned.

Care should be taken to ensure it is clear as to whether the policy covers exclusions, or whether this is provided for in a separate policy.

’Consider whether handling complaints is included within staff training’

**Publication**

The complaints policy must be ‘made available’ to parents of current pupils (unless the policy states that it also applies to prospective pupils). It is best practice for schools to publish their complaints policy on the school website.

**Responding to parents**

The standard requires that the policy sets out clear time scales for the management of a complaint, and communication around complaints is often an issue. It is always important to acknowledge receipt of a complaint, ideally within five working days if received during term time or as soon as practicable otherwise.

Schools should set a time frame in which they aim to complete the different stages of the complaints procedure, while including some flexibility for complex complaints where significant investigation may be required. In such instances, the school should seek to set and communicate realistic timeframes for responses.

**Financial implications**

There are several financial implications relevant to parent complaints.

- Parental complaints can be very time consuming, particularly for senior management and governors.
- Late or non-payment of fees: unhappy parents may refuse to pay fees until their complaint is resolved.
- Loss of a student: a dissatisfied parent may remove his/her child in connection with the complaint.
- In severe cases, a complaint can lead to further losses, in terms of payments to parents, claims (albeit insurance may cover much of this), and losses from reputational damage.
Cross Phase | Responding to External Complaints

Serial complainants
Some policies include provision for vexatious complainants, particularly where the procedure has been followed to its conclusion and they seek to raise the same issue. Care should be taken with wording when concluding not to respond, to minimise any risk of suggestion that the school has not met the complaints standard.

The parent contract
There is often an overlap between the unreasonable parent and a termination of the parent contract. Commonly the parent contract will set out the bases on which the school may, at the discretion of the head, terminate the contract. It is important to ensure that these provisions cover as many potential eventualities as possible, to give an express contractual right to the school to terminate. Where this is not possible, often terminations of the parent contract are because of an irreparable breakdown of the fundamental relationship, trust and confidence between parent and school.

It is important that the contract provisions are clear as to the basis of any review or appeal of the head’s decision in these circumstances. Note that a termination of the contract would not stop the parent having the right to proceed through the complaints procedure, if the complaint has already been raised.

Reputation management
It is not uncommon for parents to threaten raising any or all of their concerns with a variety of third parties such as ISI, the DfE, the community generally on social media platforms or the media, to name a few. Depending on the circumstances, it may be beneficial to make a pre-emptive strike, for instance to ISI, so that they may be more likely to contact the school in the first instance should a complaint be received.

In relation to wider media, it is likely to be sensible to put a communications plan in place, with carefully prepared messaging to relevant stakeholders. Care is often needed to ensure that communications and responses do not inadvertently breach data rights, or employment law duties to employees.

Top tips for handling complaints
- Consider whether the complaint or outcome sought needs to be clarified.
- Seek to deal with complaints at the earliest possible stage.
- Consider whether handling complaints is included within staff training, including recording any follow ups made to parents where issues are raised.
- Always follow the proper process - do not allow parents to hijack, and ensure it is at the appropriate stage.
- Communicate any change to timescales or process.
- The school should drive the process, not the parent. Dictate the pace of response and slow it down if necessary (for example, if a parent is emailing the school numerous times a day).
- Manage unreasonable behaviour. If necessary, agree a single point of contact, restricted contact, or contact via third party.
- Write to parents to state that the school considers their behaviour to be unreasonable and why, as this may assist in any subsequent contract termination.
- Consider how complaints are monitored by governors so that they can be sure that the policy has been effectively implemented.
- Where there is a serious complaint likely to proceed to stage three, carefully consider which governors will be involved at which stage to ensure your preferred governors are not ineligible to sit on a panel.
- Consider making links with other schools (their trustees, heads and so on), so that you have a bank of potential people to call upon in relation to the independent member for a stage three panel, as they can be hard to find at relatively short notice.
- Carefully consider waiving of fees or fees in lieu to bring an issue to an end. This can make commercial sense in the circumstances and limit the time and stress on the school. Care should be taken as to the basis on which any such concession is made, and regard had to any precedent it could make.
- Consider liaising with insurers in serious complaints which are likely to give rise to claims, to minimise any risk of insurers subsequently seeking to assert that the policy has been invalidated.

Manage unreasonable behaviour of parents and do not allow them to hijack the process.
Governance and charity law compliance

Trustees and governors of academies and independent schools must adhere to charity law. Education lawyers JAMIE OTTER and VICKI HAIR explain the responsibilities and how to comply

Trustees and governors of academies and independent schools are required to have much more focus on their duties under charity law than governors of maintained schools.

The governing bodies of most maintained schools do not need to have regard to charitable law. The only exception is where voluntary aided, voluntary controlled or foundations schools receive donations; in this case, the governors are subject to charity law in the administration of such funds.

In comparison, academies and independent schools are autonomous and therefore all the funds they receive (whether from central government, the local authority, donations or otherwise) are charitable funds and must be administered in accordance with charity law.

Charity law compliance

Trustees of independent schools (through the Independent Schools Council) and academies (through the Academies Financial Handbook) are directed to the Charity Commission’s guidance on the responsibilities of a charitable trustee: ‘The essential trustee: what you need to know, what you need to do (CC3).’ In this document, the duties of trustees are:

• ensuring the charity carries out its purposes for the public benefit
• complying with the charity’s governing document and the law
• acting in the charity’s best interests
• managing the charity’s resources responsibly

‘Final responsibility for finances rests with all the trustees, not just those who sit on the finance committee or who have practical experience in the area’

• acting with reasonable care and skill
• ensuring that the charity is accountable.

Financial responsibilities

Charity trustees have three legal duties regarding finances.

1. To act in the best interests of the charity and its beneficiaries.
2. To protect and safeguard the assets of the charity.
3. To act with reasonable skill and care.

Trustees are expected to act in a reasonably prudent manner when dealing with the charity’s finances. A good rule of thumb is to ask, ‘Would a reasonable person, knowing what I know, make the decision I am about to?’

If the answer to this question is ‘no’, then the decision is unlikely to be reasonable in the circumstances and the trustees are likely to be at risk of breaching their financial responsibilities.

Although the trustees jointly have ultimate responsibility for the financial success of the charity, they will not undertake the day-to-day management and instead will delegate this function to the CEO, CFO and finance team. It is therefore vital that trustees have confidence in their policies and can support and challenge the finance team to ensure that the charity remains financially secure.

Final responsibility for finances rests with all the trustees, not just those who sit on the finance committee or who have practical experience in the area.

All trustees should have a good understanding of the charity’s finances and trustees who do not feel that they have sufficient knowledge or experience should seek further advice and support (including participating in the necessary training).

Risk management strategies

Financial risk can be minimised, although never wholly excluded, through ensuring that the risk register is regularly reviewed and updated.

The charity should also ensure that it has robust, regularly reviewed financial policies and that they are followed at all levels of the finance team and management. Errors and fraud are most likely to occur where policies have either not been put in place, are insufficient to meet the needs of the charity or are
Ensuring compliance

The practical application of trustees’ responsibilities will differ from charity to charity and school to school, but some common themes emerge for trustees.

- Understand and comply with the charitable purpose of the trust and do not stray from it. The charitable purpose is set out in the charity’s objects (these are generally set out in Article 4 of an academy trust’s articles of association).
- Be aware who your beneficiaries are (usually your pupils and the local community) and any restrictions (catchment area, geographic boundaries etc.) which may limit who you can support.
- Explain and demonstrate how the charity uses its money to achieve its charitable purpose.
- Comply with your governing document, charity law and any other laws which may apply (employment, data protection, safeguarding and contract law, the admissions code etc.).
- Identify and avoid conflicts of interest and have policies to deal with any potential conflicts.
- Act within your powers (these are generally set out in Article 5 of an academy trust’s articles of association) and only make decisions that a reasonable trustee body would make.
- Take advice where you feel inadequately informed.
- Avoid exposing the charity, its assets, beneficiaries or reputation to undue risk.

- challenge and get appropriate answers from those responsible for financial management
- ensure that minutes are taken for all discussions around financial management and risk
- consider and understand budgets including cash projections and business plans
- ensure that they have effective internal financial controls and policies in place
- monitor actual results for the year against predicted budget
- analyse their sources of income and expenditure
- take professional advice before entering into transactions which may give rise to significant future expenditure
- monitor and review the performance of contracts including grants and funding arrangements
- take professional advice where there is a risk that the trust is unlikely to be able to pay its debts in the short to medium term.

The Charity Commission

The role of the Charity Commission is two-fold: to support charities in achieving their goals and regulating those who misstep.

Independent schools are solely regulated by the Charity Commission on issues relating to charity law. Academies are dual regulated – primarily by the secretary of state for education but with reference to the Charity Commission for certain charity law issues, such as amending charitable objects.

When dealing with the Commission it is best to seek support as soon as possible and to provide as much information as possible on the issue at hand.

Where the trustees have failed to carry out their duties properly the Commission will want to know:

- the background to the breach
- the loss (or potential loss) to the charity and its beneficiaries
- whether the trustees sought and followed independent legal advice regarding the breach
- what steps have been taken to prevent the breach reoccurring.

The Commission is always keen to work in partnership with trustees to achieve the best outcome for the charity and its beneficiaries. The key aim is to ensure that mistakes are learned from.

Summary

- Trustees are subject to rigorous charitable duties, which overlap with their responsibilities under company law and education law, as well as responsibilities under the Academies Financial Handbook.
- All trustees should therefore be aware of the extent of their duties under charitable law (which overlap with duties under company law and education law).
- Trustees are advised to read ‘The essential trustee: what you need to know, what you need to do (CC3).’
- Trustees should be aware of their financial management responsibilities outlined in ‘Managing a charity’s finances: planning, managing difficulties and insolventy (CC12).’
- Trustees should ensure that appropriate risk management strategies are put in place, including maintaining and regularly reviewing a risk register.
- Trustees should also ensure that they undertake training and take professional advice as and when required.
Ask the experts: your GDPR questions

The GDPR brought changes to the way schools manage data and we’ve received many questions from members about what it means for them. DAI DURBRIDGE answers some of them.

Sharing personal data with a third party

Q Under the GDPR, do schools need consent to share information with third parties such as SISRA (who support pupil data tracking and analysis)?

A Article 6 (1)(e) of the GDPR gives schools a lawful basis for processing where it is necessary for the performance of a task carried out in the public interest or in the exercise of official authority vested in the controller.

This is the lawful basis that will apply to most of the processing of personal data by schools. For the usual tasks carried out by schools, they can rely on public interest rather than seeking consent.

When it comes to sharing data with a third party, we need to consider carefully whether the processing by that third party is a usual, everyday function of a school. Sharing contact details with ParentMail is likely to meet that test, as is sharing data to allow schools to adopt cashless catering systems.

The further we move away from the usual functions of a school the more likely it is that schools will not be able to rely on the public interest basis for processing and instead will need to rely on consent. There is no fixed answer on this; it will come down to deciding whether the processing would be considered a usual function of a school.

For SISRA, schools need to ask themselves if using SISRA and sharing personal data with them is a usual function of what schools do. If you decide it is, then you can rely on the public interest basis for processing. If not, consent will be required.

Using photos of pupils for marketing purposes

Q Is legitimate interest an acceptable basis for using photos of pupils in marketing materials, such as brochures or social media posts?

A It is unlikely that a school could successfully argue that the production of publicity materials and the processing of personal data within them is necessary for its legitimate interests.

To rely on legitimate interest, the processing must be necessary – a targeted and proportionate way of achieving the purpose. Legitimate interest will not apply if you can reasonably achieve the purpose by some other, less intrusive means.

The purpose here is to promote the school. While it can be said that including images of the children furthers that purpose, it could also be argued that stock images of other children and/or images of children produced in a way that does not identify them could also meet that purpose and would do so through less intrusive means.

In my view, it is more likely than not that the Information Commissioner’s Office (ICO) would expect you to obtain consent from the individuals whose images are to appear on social media, websites or hard copy marketing material.

Confirming changes to a parent’s contact details

Q What measures should we take if a parent or carer wishes to change their contact details (e.g. phone number, address) on our school’s system? Should we make any effort to confirm that the parent has provided accurate information, or could we just assume this to be the case?

A If a parent contacts you to change their own personal details then you can assume that they are providing you with the correct information and there is no onus on you to check it.

The same would be true where a parent or parents seek to change the personal details of their child, assuming there is no court order in place regarding residence. If the parents are separated you are still entitled to rely on the honesty of one parent telling you of a change in details without needing to check with the other parent.

GDPR for Schools

Our GDPR for Schools conference takes place on 24 January in Manchester. With sessions including safeguarding, managing data breaches and staff training, you can secure your place now at: oego.co/GDPR_Manchester
What’s in this month’s School Business Management section?

How does a school benefit from being part of a multi-academy trust? Talking with leaders from the Sharnbrook Academy Federation (see page 24) has really got me thinking about the ‘standardisation vs autonomy’ question. If your aim is to save resources, work efficiently and reduce workload, then surely consistency and shared processes are a necessity?

Nickii Messer frequently gets asked about how best to motivate and engage midday supervisors. It’s difficult to make people feel part of the team when they’re in school for just a few hours. Turn to page 22 for her suggestions, and then consider whether introducing staff probation periods could work for you (see overleaf).

I was surprised to find out from reading Justin Smith’s piece on school bursaries (page 26) just how many opportunities there are for reduced or no fee places at independent schools. How can this be shared more widely? See Justin’s piece for marketing ideas, then turn the page for lessons learned from his bid-writing experience. Finally, don’t forget to look out for your Wednesday email, highlighting the latest and most relevant resources.

Liz Worthen, Head of Content

Top school business management blogs
Where do new teachers come from? oego.co/teacher-routes
Surviving the Christmas countdown oego.co/countdown
Pupil premium: is it making a difference? oego.co/pupil-premium
See more at blog.optimus-education.com

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Staff probation periods: what, why and how?

Putting a probation period into the start of an employee contract helps avoid costly mistakes. CAROLINE COLLINS explains why they work and how to make the most of them

Probation periods are defined periods of time within which employees are exempt from certain contractual terms, such as the notice period. During this time the employee is expected to:

- meet specific performance levels
- be observed, mentored and assessed
- have their performance reviewed regularly.

In the probation period the employer can terminate employment with no risk of a claim for unfair dismissal. Similarly, the employee may decide that the job isn’t for them and can resign without the need for a lengthy notice period.

Why use probation periods?

Recruitment is challenging. Organisations, including schools, want to be sure that they pick the right candidate when they make the offer of employment. And the right candidate isn’t only the person who can do the job well, but also someone who fits into the school or organisation.

Sometimes a person’s application stands out and the recruiter knows that the applicant must be shortlisted for interview. At the interview the potential employee is fantastic, and the interviewer considers the candidate perfect for the role. An offer of employment is made, and a contract issued.

Then the person starts the job and the employer realises that the appointment was a mistake. This might be because of the employee’s lack of knowledge or skill, or because of bad timekeeping, frequent absences, different work ethic and so on. If the contract includes a probation period, the organisation or school can let the person go without any risk.

Of course, this works both ways: sometimes the new employee just doesn’t enjoy the job or isn’t able to settle in. For these reasons, probation periods are standard in most organisations and those organisations, particularly in the private sector, are free to choose a timeframe that suits them.

Can schools use them?

There is some uncertainty around whether schools can set probation periods for teachers. The uncertainty comes because there is no allowance for it within the school teachers’ pay and conditions document (STPCD) which schools and many academies follow.

The lack of reference to probation periods does not mean that they can’t be used. However, if schools want to introduce probation periods they must make sure that they undertake appropriate consultation.

Staff in maintained schools are employed by the local authority, and therefore any probation period must comply with the local authority. If a school decides to introduce probation periods they will need to make sure these are detailed in new contracts of employment. These contracts should be thoroughly checked by HR specialists or lawyers.

Some schools use agency supply staff to determine teacher suitability, but the fees charged when making staff permanent make this an expensive recruitment method. While the Teaching Regulation Agency framework introduced by the DfE goes some way to resolving this issue, the chance to incorporate probation periods into contracts would undoubtedly be of greater benefit to schools.

Many schools consider the NQT induction year to be a probation period. But passing induction or working for several years at another school doesn’t mean a teacher will fit in your school. It’s on these occasions that probation periods for teachers would prove useful.

It’s already common practice for school support staff to be subject to probation periods ranging from one to six months, depending on seniority of the role.

Effective probation periods

A probation period shouldn’t be seen as a way of dismissing new recruits, but rather as a tool to help develop or improve the skills and competence of the new staff member.

The employee may have real potential but you, as employer, recognise that s/
he needs some additional support and development. Targets can be set at different times during probation and reviewed regularly in the same way a manager would do throughout the performance management cycle.

By setting clear, SMART objectives you’ll be in a stronger position to ensure your new recruit is fully equipped to fulfil the role to the best of their ability. Furthermore, the new staff member will learn, early on, the high standards expected throughout the organisation.

**Six steps to successful probation**

1. Make sure the process and rationale are explained to staff. Be clear at the interview and offer stage that the probation is part of the contract. On the day that employment starts re-affirm expectations and ensure there is a named person responsible for overseeing the probation period.

2. Set SMART objectives for the probation period. Do this early on, within the first week from the start date if possible.

3. Establish regular review meetings and put them in the diary. Make sure you set aside enough time to discuss how things are progressing and to adapt or introduce additional targets.

4. Make sure the review meetings allow for a two-way discussion. Encourage the employee to give any feedback. Do not use the meeting to only discuss targets not met. Discussions should be constructive and, where there are concerns, constructive criticism should be used. This meeting is a chance for you and the employee to decide how things are working and where improvements can be made.

5. The meetings should allow you to decide whether there are any training needs for the employee. Document what the needs are, when training is likely to take place and what outcomes you expect. Make sure the new employee is clear about the training.

6. Document the review meeting outcomes so that you have a clear record. Ask the employee to sign the document and take it with you to the next review meeting. If the employee disagrees with any part of the document, ask them to write this on the copy so that you can both reflect at the next meeting.

Probation periods should not be used to fix a temporary problem. Senior leaders must ensure that probation periods are used appropriately, and that new staff are supported during the start of their employment.

**How long should the probation period last?**

Typically, probation periods last between one and six months. The longevity of the probation period should be decided by the relevant body (for example the local authority or MAT trustees). It should be realistic and sufficient for management to determine suitability. For support staff a period of three months is common and generally seen to be sufficient.

The general advice for schools who want to implement probation periods for teachers is to contact their local authority. This applies to all schools, even those that are not community schools. Schools should also ensure they seek appropriate legal advice before making any changes to teaching staff contracts.

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**Key points to remember**

- STPCD does not talk about probation periods.
- Schools can use them but should consult with relevant bodies (such as LA and unions) first.
- If schools want to adopt probation periods they must be put into the contract.
- New employees should be aware at interview of the probation period.
- Use the period wisely to train and develop.
- Use the probation period as a means of two-way communication.

**HR and Employment Law**

The annual HR and Employment Law conference takes place in London and Manchester in May 2019. Check [my.optimus-education.com/conferences](http://my.optimus-education.com/conferences) for details and dates.

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Download an example probation review form at [my.optimus-education.com/what-are-staff-probation-periods-and-why-use-them](http://my.optimus-education.com/what-are-staff-probation-periods-and-why-use-them)
Making the most of your midday supervisors

Midday supervisors play a crucial role in supporting pupil wellbeing. But who supports them?

NICKII MESSER suggests ways to engage, motivate and develop

School business managers often ask me for help with the line management of midday supervisory assistants (MSAs). The fact that these colleagues are in school for such a short time, bang in the middle of the day, coupled with the specific nature of the job they do, all adds to the challenge SBMs or bursars face.

So how can we work smarter to engage with these often disengaged colleagues, for the ultimate benefit of the children?

The role of the MSA

What is an MSA? What is their role in your school? What responsibilities do they have? What is their purpose? These rudiments need to be clearly articulated from the outset.

Although the specifics will vary from school to school, fundamentally these colleagues are responsible for the most significant unstructured part of the pupils’ school day.

For children who find challenges in friendships, self-esteem, navigating, eating, toileting and so on, the ‘lunch hour’ can be a frightening time. MSAs are entrusted to keep the children safe and secure, and to help enrich this critical time in the child’s school day, setting them up for a productive afternoon of learning.

Safeguarding is an essential element of the MSA role. With their less formal perspective, MSAs are often confided in by children facing difficulties, as well as being well-placed to spot children who are behaving out of character or having friendship problems. How they react to vulnerable children can be life saving.

Recruitment

Appointing the right people to the right jobs is an essential element of the school business leader role. As with any recruitment, begin by reviewing need. How effective, efficient and affordable is your current supervisory service? Are there other cost-effective solutions, such as asking TAs to take over?

Acknowledgement that a job that requires people to give up the middle of every day limits your recruitment pool. Make the job offer as attractive as possible; reflect the importance of the role in the advert, pay and job description.

Be clear about the personal skills and attributes required to fulfil the role, as well as listing tasks and responsibilities. The Institute for School Business Leadership (ISBL) professional standards include key school business management behaviours which may be useful for the person specification. For example, ‘establishes constructive collaborative relationships with colleagues in the team’ underlines the importance of teamwork.

As well as supporting recruitment, the right job description and person specification provides a scaffold for induction and performance management.

Induction

Effective induction helps new colleagues settle in quickly and be more productive from the outset. Include an explanation for MSAs of how their role fits within the wider school context, including their contribution to teaching and learning.

Equip MSAs with strategies and training for dealing with difficult behaviour, as well as how to respond to potential safeguarding issues, including prescribed processes should a child confide in them or they notice something amiss.

Provide a buddy from within the team and explain where to go for help. Make sure that they understand school rules and the importance of enforcing these fairly and consistently – including what to do if pupils really step over the line.

Line management and meetings

Like anyone, MSAs need direction, information and motivation. This requires proactive line management and investment of time and effort. The line manager needs to understand the role, purpose and challenges of the MSA – including working with vulnerable children. While SBMs are often expected to line manage MSAs, question whether this is the most appropriate structure for your setting.

Regular meetings help build relationships as well as providing conduits for information. This can seem impossible given the time constraints of the MSA working period. Consider adding time to the MSA contract for a 10-15 minute weekly catch-up. While this is an additional cost, regard it as part of the overall investment in providing lunchtime supervision.

One headteacher told me that she holds weekly ‘moans and groans’ meetings with her MSAs – so-called because that’s what they generally consist of. But constant complaining is usually symptomatic of something more fundamentally wrong, so find out what that is and get that right first.
Use team meetings positively. For example:

- give information about what is happening in the school
- share good practice
- discuss challenges and solutions
- make sure everyone is up to date on policies
- share information about pupils (most important!).

Time will inevitably be short, so focused agendas and a written summary of the discussion will ensure it’s used more efficiently. Aim to spot problems before they develop. A line manager who is available for a simple hello each day can significantly improve engagement.

**Team development and performance management**

Team development activities can be beneficial for MSAs, especially in helping individual MSAs feel less isolated. Becoming a team takes commitment, particularly from the line manager, to ensure that all members of the team understand their common purpose and how to work together to achieve their goals.

Try holding team performance management events once a year, perhaps on an Inset day. Get the team together and work with them to re-evaluate their purpose. Start by assessing strengths and what they have achieved over the past 12 months, then move on to priorities for improvement.

Using some of the ISBL professional behaviours for a team specification can aid understanding of how to improve both individually and collectively. Team performance management can be an excellent platform for individual performance management or appraisal too.

**Motivation and talent development**

Career progression can appear quite impossible for midday supervisory assistants. How can you avoid stagnation and instead ensure individuals can develop and use their talents more widely?

Conducting skills and aspirations audits is a good way to spot and nurture talent. We scour application forms when appointing staff, but quickly forget the previous experiences and skills new colleagues bring with them. MSAs are no exception and even without changing roles there can be room for growth and development. Perhaps one of your colleagues is particularly good at engaging with the disengaged, or negotiating with the intransigent. Can they share their strategies with the rest of the team, or with other staff in the school?

Or maybe they could use their experience with the children to support in the classroom? Given the opportunity to build confidence and skill set, they might aspire to become a future TA, teacher or school business manager.

**Checklist for engagement and motivation**

**Recruitment**

- Determine need and budget.
- Ensure job description is current, appropriate and recognises importance of the role.
- Ensure person specification reflects key attributes, skills and behaviours expected of the post holder.
- Pay should reflect importance of role and responsibilities, and even disruption to day (if sole job in school).
- Write advert to attract the candidate most appropriate for the role and the school.
- Consider incorporating job into TA or administrative role.

**Induction**

- Explain key responsibilities and school policies.
- Introduce to school and staff.
- Provide buddy and line manager support.
- Show how role fits into whole school context, aims and values.

**Team improvement**

- Meet and greet colleagues as they arrive in school.
- Invest time in regular meetings.
- Make meetings positive, productive and pupil focused.
- Hold team performance management events.
- Use ISBL professional behaviours for a team specification. For example:
  - open to new ideas and embraces change (change catalyst)
  - establishes constructive, collaborative relationships with colleagues in the team (collaborative)
  - consults others for ideas, advice and direction when facing challenges (challenger)
  - focuses efficient and effective activity on the agreed priorities within own remit (resilient).
- Use team appraisal as a spring board for individual performance management.

**Growth**

- Conduct skills and aspirations audits.
- Remember many colleagues have previous skills and experience they can draw on.
- Provide opportunities to share experience and expertise.
- Build a culture of personal and professional progression.

**Investment: the bottom line**

MSAs can feel disengaged from the rest of the school. In reality, there is no reason for treating them any differently from other colleagues. At one newly formed MAT, I joined a staff meeting to hear the principal’s address. Every member of staff was invited, including the MSAs, cleaners and school crossing patrols. He told them: ‘you are all, singularly and collectively, responsible for the wellbeing and success of the children in this school’.

If your MSAs are instrumental to the success of the children in your school, they are undeniably worthy of investment in time and effort.
Change, consistency and collaboration: our journey

What makes a group of schools a multi-academy trust in action, not just name? Members from SHARNBROOK ACADEMY FEDERATION share how they’re creating the conditions for collaboration

The MATs Summit was the perfect opportunity for Liz Worthen to catch up with Optimus Education members from the Sharnbrook Academy Federation (SAF). Over the past year they’ve been on a mission to professionalise and standardise systems across the Trust, ensuring they’re in the best position possible to support school improvement, enable collaboration and operate efficiently. What has the process of shifting from being a federated group of schools, to a MAT with all staff working for one employer, been like?

For us, a lot of change has been driven by the move from a three tier to a two tier system in Bedford. That change created an opportunity from a school improvement point of view, but also highlighted some barriers to overcome. SAF is unusual perhaps in that all the member schools were good or outstanding. While we may have been a successful lower, middle or upper school, we are now operating fully in the primary and secondary sector. Experience in terms of what that looks like for our young people, in our context, is therefore a change for us all to have to adapt to.

All our schools had their own effective, independent systems. But to create consistency across the Trust, we’re building shared systems to support school improvement. For example, we’ve been standardising the appraisal process, lesson observations, assessment and the CPD offer. We’ve been clear about needing a Trust approach that works for all of us, with representation from all the schools as to what that system looks like.

Once you start rolling out the systems, other change naturally follows. If there’s a standard assessment system, it makes sense to have a standardised assessment calendar. And then standardised assessments. Then you can compare data at the same points in time and get a more accurate judgement as to where you are. If you have an appraisal system that’s standardised, you start coordinating what your terms and conditions are for target setting and how you’re holding people to account, irrespective of their skill, experience or paygrade. That’s obviously the next step.

It’s important to get a sense of equality and parity across the system. For example, you want there to be equal access to the CPD offer across all the schools. It’s about creating that sense of one employer. And then, the children become all of our children: there’s a vested interest, even if the children aren’t in the phase that you teach. Because they will get to you eventually! As a trust that’s geographically close, all the children that start in reception will end up in our sixth form. We have a unique opportunity to make a difference to our children.

Over the last year we’ve had a complete review of our governance structures. This was in part prompted by the change from a three tier to two tier system, along with two further primary schools joining the Trust.

We’ve identified skills gaps, strengths, moved people into roles that best fit their skill set – and then had to fill the people gaps that have been created by those moves. We’ve worked with Academy Ambassadors and Inspiring Governance to help in that.

The local governing bodies now have a much clearer role and remit which helps them in holding their schools to account. With the finance and back office functions being overseen by the Trust board, the local bodies can concentrate on teaching, learning and outcomes for students. They know that the structures are in place to pick up on other issues, and Trust representatives attend local meetings to
answer questions and ensure transparency. It’s definitely a process – I wouldn’t say we’re the finished article. But the openness across schools is incredible. Everybody is willing to share (because everybody wants something in return as well!); everybody is on this journey together, and no-one has all the answers. And nobody has to re-invent the wheel, because we’re all trying to achieve the same thing.

Karen Sutton
Chief Finance Officer

I joined the Trust a year ago, and my responsibilities aren’t just for finance: I oversee the bulk of the back-office support functions, from ICT through to facilities and HR. Coming in as a new person I had a great opportunity to question and challenge how things were done, making sure that our compliance, accountability and reporting structures are robust.

A lot of effort has gone into delivering all these services in a consistent way across the trust. We are one employer, so everybody should get the same service. In addition, we’ve worked on fully embedding the Academies Financial Handbook, building our compliance with it and changing working practices across all the schools.

We’ve also changed the way in which we report our financials, and the responsibilities that we give to budget holders in the schools. Now they’re really focusing on the budgets that they can influence, rather than having to worry about the cost of a classroom cleaner. We’ve implemented a new single finance system across all the schools. That’s been a huge project, but it is already starting to show benefits in terms of increased visibility of costs and suppliers.

It also makes it easier to be transparent and consultative. Recently we had a whole day with leaders across the organisation to review the finances. By meeting collaboratively and getting that better understanding of each other’s strengths and challenges, there’s much more ownership in terms of delivering savings. They’ve come up with the ideas, so they want to see them through, as opposed to me saying you’ve got to take out 10 per cent. Having the underlying base data for them to understand was key to driving that.

My advice to others would be to make sure you’ve got sufficient capacity within yourself and your surrounding teams to be able to deliver the change you want to see, without it impacting on your day to day support and delivery. It’s like turning an oil tanker. You’ve got to work really hard to get that initial movement going. But the sooner you make that change, the sooner you start reaping the benefits of it.

Karen Sutton
Chief Finance Officer

Iain Denning
Chief Executive Officer

We’ve been a federation since 2011, but it was only when two more schools joined us in 2016 that the realisation dawned that we were a multi-academy trust and needed to operate as one. We started to build the central team and the last 18 months has been about professionalisation. For me, that means being compliant, being explicit about what we do in the finances, and being clear in our governance. Peter’s school improvement role is vital too, and one that is often missed.

So now we’ve got the systems in place, and the next challenge is developing people to work within those systems, and building in a consultative, collaborative way.

A year ago, the four of us were working in different places, physically. We’re now in one office, and that’s really powerful. You can have quick conversations, share ideas and achieve so much more, without having to send an email or travel down the road. My other advice to those in a similar situation would be to get someone who can understand finances earlier. Otherwise you can end up in a real mess. And recognise what you have done, the progress you’ve made. In the education sector we always worry about what we haven’t done, and it’s a very negative way of looking at things.

We’re starting to see the benefits of standardisation in terms of saving time and workload. For example, subject leads working together to choose exam board specifications. With more of that happening, we’ll see people really buying into the Trust concept.

We are one employer, so everybody should get the same service

Karen Sutton

Iain Denning

MAf Summit 2019
Booking is now open for the MATs Summit 2019, taking place in Birmingham from 9-11 October. Designed exclusively for MAT leadership teams, this two day event will provoke thought, build relationships and inspire fresh thinking: Find out more at: ogeo.co/MATs_2019
Funding and marketing school bursaries

Independent school bursaries help widen access to provide opportunities to students from all backgrounds. JUSTIN SMITH offers ideas to fund and market them.

Independent schools are required to demonstrate that they provide sufficient 'public benefit' to justify continuation of the tax relief that accompanies their charitable status.

They can decide for themselves the best way in which they could offer public benefit, and this shows itself in many ways such as:

- partnerships with local state schools providing access to facilities and the secondment of teachers and other specialist staff
- the sponsoring of academies
- bursaries and scholarships to help make termly fees affordable to families who otherwise would never consider a private education for their child.

The total value of independent school bursaries awarded each year is around £300m; nearly 80% of the cost is borne by the schools themselves, with donations and charitable trusts covering much of the remainder.

Means tested fee reduction schemes such as bursaries or scholarships can provide opportunities for families who, under normal circumstances, would have no way of raising the necessary funds, though the threshold for receiving financial help can vary significantly.

Funding the bursaries

Establishing a coherent income generation strategy, and a structured programme to suit, is the first step towards successfully funding bursaries on a sustainable basis.

The annual ISC report highlighted the number of private schools who have launched their own bursary fundraising campaigns, reaching out to alumni and parents past and present to contribute.

Some are aiming to be able to offer more than 25% of places as fully funded bursary places. Others are hoping to become 'needs blind', which means that any child who would benefit from going to the school would be able to have a place, irrespective of their family income.

'Bursary offerings need to be marketed with the same sense of vigour as the school would its fee-paying admissions'

What do other schools do?

Sixth-formers at Millfield School in Somerset are encouraged to contribute to a 'Leavers' Scholarship', helping fund bursaries for children from families who cannot afford the fees. This approach, modelled on American Ivy League fundraising methods, is typical of the approach taken by private schools to fund bursaries and scholarships.

The Sutton Trust research report ‘Fee remissions and bursaries in independent schools’ found that while schools earned 88% of their total income through fees, in almost all cases schools were funding bursaries from ‘other income’ – earnings from lettings, bank interest, donations and other innovative schemes.

For example, Stamford School in Lincolnshire state that governors are 'required to set aside a sum for the provision of bursaries, being an amount equal to 2% of the income received from parents for tuition, exclusive of extra subjects'.

Some schools do indeed fund bursaries from fee income. Gateways School, in West Yorkshire, state that: 'Although we have no endowments we annually ring fence £80,000 from income to widen access to the school.'

Wellington College in Berkshire are using fees from their international schools to fund an ambitious plan to provide significant fee remission for 25% of students by 2028, and then to double this to 50% by 2038.
Getting buy-in
Future First, a charity dedicated to supporting state schools and colleges in setting up alumni networks, found that private donations to independent schools provide £130m and that developing emotive buy-in between a former student and their school is key to converting a prospect into an active donor. There will be numerous motivators behind alumni donations, such as:

- a sense of duty
- nostalgia
- a need for recognition or enlightened self-interest
- genuine altruism.

Whatever the motivator, a potential donor must rationalise and frame their donation, so it best satisfies their own needs. This is where the school needs to develop a series of campaigns and mechanisms to appeal to a range of alumni – one size doesn’t fit all.

Marketing the bursary offering
Competition from the state sector is as fierce as ever, with a narrowing of the gap between academic outcomes and opportunities for students. Private schools are having to work harder than ever to encourage high flying students away from both traditional and state boarding schools.

Bursary offerings need to be marketed with the same sense of vigour as the school would its fee-paying admissions. As such, a consistent and structured approach is needed, with a diverse marketing mix that incorporates digital media and more traditional face to face methods.

Schools shouldn’t be shy in encouraging parents, via the usual channels, to come forward and openly ask what support may be available. The ISC suggests that specific open days should be added to the school calendar, aimed at potential bursary applicants so they can have dedicated one-to-one time and explore the options open to them.

The ISC also propose that forming links with local housing associations, in the way Reigate Grammar has done, is a way of accessing families who may benefit from financial support.

What do other schools do?
Rugby School has gone further, launching clubs for children in disadvantaged areas, building relationships with traditionally ‘harder to reach’ groups.

There are numerous success stories where alumni are reaching out to a new generation of young people who can then benefit from the education they received. King Edward’s Boys Schools in Birmingham raises money from former students to fund and sponsor applications from families who require this support.

Partnership programmes with neighbouring schools can help develop innovative and effective ways of promoting these bursaries. A group of 22 London schools have formed an alliance to collectively market their schemes, with a shared website at feeassistancelondonschools.org.uk

Establishing links with charitable trusts can promote the school bursary and scholarship offering, The Educational Trusts’ Forum (see educational-grants.org) is an association of educational trusts and offers a gateway for parents searching for the right level of financial support for their needs.

Public and private benefit
Through their charitable status, private schools enjoy significant tax breaks, so there are real incentives to the school delivering ‘public benefit’ via bursaries and the like. Equally, successful independent schools acknowledge that having a student population from a broad social mix, in keeping with modern society, is incredibly valuable.

More fundraising resources
Alumni fundraising
What role can your alumni play in fundraising? Try these ways to engage former students and utilise them in your fundraising strategy. my.optimus-education.com/alumni-fundraising

Income generation for independent schools: six strategies
When generating income, smaller independent schools need to find creative ways to compete with larger schools. This income gen plan has six strategies to try. my.optimus-education.com/income-generation-independent-schools-six-strategies

Offering SBM services to primary schools
Providing professional services in your area is a fantastic way to support schools which lack time, resources and knowledge and help you generate income. my.optimus-education.com/offering-sbm-services-primary-schools
Bid writing: five tips

Bid writing may be an answer to funding challenges, but what are the chances of success? Justin Smith shares five ways to increase the odds in your favour

With over £1.5 billion available in grants and trust funds nationally for educational purposes, it is tempting to look to bid writing as the answer to your school’s funding challenges. Sadly, there is no silver bullet. Almost all funds are oversubscribed and often the response is a negative one. But success is possible.

1. Take a holistic approach
My first tip is: don’t focus purely on bid writing. That may seem odd but when it comes to attracting funding for your project, a holistic, rounded approach often proves the most effective. This may include activities such as exploiting facility hire more effectively, introducing sponsorship opportunities for local businesses or refocusing your PTA to attract donations with Gift Aid.

Grant funders look more favourably on applications from schools who can demonstrate a coordinated and structured approach to their fundraising efforts. For example, showing that you’ve mobilised the local community, asked for their support for the project (via a survey maybe), received letters of support from the local councillor, your MP, mayor and other dignitaries.

Example: the new artificial pitch will cost £25k but you’re only requesting £18k from the grant funder. The balance is being secured in other ways. Demonstrating this level of joined up thinking when it comes to funding aspirational projects is far more likely to pique the interest of the grant holder.

2. Select the right grant and answer their questions
Writing a grant application is hard work. Don’t apply for a grant that cannot support your project. Make sure you have read carefully and understand the grant funders stated priorities and checked that your project is eligible.

Application forms usually contain fixed word counts and you must deliver concise and relevant content within these text boxes. Think carefully about what you’re being asked and frame your response so it answers the question clearly. Develop your content on a Word document first, hone and fine tune it so every word has a purpose and supports your case.

Tip: there are thousands of different grants and ‘grant finder’ websites can help narrow down the search for those most suitable. Subscribe to a grants database so you can filter and select appropriate grants easily.

3. Take this seriously and give yourself time
According to a school fundraising specialists’ survey, over 90% of school business managers agree it’s very important to have a fundraising plan, but only 6% have one. Lack of time is cited as the reason, and yet thousands of schools take the time to submit grant applications each year.

Build time and resources into strategic income generation at your school. Many schools incorporate this responsibility into school business management roles, while others are introducing development officer posts. Whichever route you take, allocate time to do this properly. Assemble a fundraising plan, identify priorities and garner support for your projects. Clear head space and thinking time will reap rewards.

Warning: almost half of national lottery award applications are rejected at the first stage due to incomplete or poorly thought-out applications. This is an unforgivable waste of our time!

4. Tell the story
Your grant application is a story that you’re telling a third party about your project. The grant trustees will know nothing about your school or its context. Set the scene and explain clearly why their funds should be invested in your school.

Demonstrate clearly what impact your project will have on the children. Add value to your application by including pictures or video clips, statements of support, testimonials and case studies.

Success story: I secured National Lottery funding for computers, furniture and the redecoration of a classroom. But my application wasn’t about the desks and computers, it was about the need for a basics skills beginners IT club for local people. Focus on the outcomes, not the resources.

5. Demonstrate need and impact
Your application needs to prove that this is a ‘must have’ project, an initiative in which you’re pulling out all the stops to make it happen. ‘Need’ can be brought to life with photos (physical condition) and with data (statistics to show progress or attainment). Show that you’ve explored all other avenues and that this funding support is the only way to finally bring this project to life.

Idea: A small pilot project can demonstrate impact on a small scale, enabling you to prove validity of the initiative and illustrate what could be achieved on a grander scale – with their funding.
What’s in this month’s Teaching and Learning section?

It’s not often that DfE decisions stop us in our tracks, but last April we had to remove an Insight article at the last minute, following changes to school census arrangements. After a period of uncertainty it transpired that the requirement to provide English proficiency codes for EAL learners had indeed been removed. However, as Diane Leedham makes clear in her revised piece on progress tracking (page 32), schools still need to support EAL learners by assessing language development.

The introduction of new GCSE grades and frameworks has also brought uncertainty. Vanessa Burton reflects on lessons learned for her school, and what they’re doing differently as a result. Does this more knowledge-focused curriculum leave space for the arts? Headteacher Kate Owbridge says yes it does: turn to page 38 to find out how she keeps creativity on the agenda, then get ideas on exploring a rich range of materials in the early years.

After years of involvement in teacher training, Chris Moyse is convinced that live coaching is the most powerful tool for bringing about rapid development. Find out how it works in practice overleaf.

Liz Worthen, Head of Content

Contributors in this issue

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Diane Leedham is an education consultant, trainer and writer. She has worked as a teacher, head of English, whole-school literacy lead, and local authority adviser for English, literacy and EAL.

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.

Vanessa Burton is assistant headteacher with a responsibility for raising achievement at The Bishop’s Blue Coat Church of England High School in Chester. She is a keen advocate of action research.

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Live coaching: feedback for rapid development

CHRIS MOYSE explains how shortening the feedback loop with classroom coaching and collaboration makes for faster teacher development

Teachers have long been committed to the value of providing feedback to their pupils and it is now widely accepted that feedback is a vital component of professional learning too. A significant part of my work in schools is helping teachers to become the very best versions of themselves. I am constantly striving to improve the way I support colleagues and I have found that when coaching and supporting teachers, especially inexperienced ones, 'shortening the feedback loop' has led to more significant and rapid changes in teacher behaviour and pupil learning.

Coaching has a wide range of definitions, but in this context, I am using the term to describe my intentional, often directive support, providing feedback on previously discussed and practised goals with the aim of supporting a teacher to act or think differently. Providing feedback is one of the core skills of any model of coaching and an essential feature of an environment that promotes professional growth and learning.

What is live coaching?
Live coaching is where an experienced mentor or coach, skilled in providing immediate live feedback, works alongside a (usually) less experienced teacher while they are delivering a lesson. The coach provides the teacher with feedback that can be acted upon immediately rather than being given after the lesson when it is essentially too late.

This contrasts with the more traditional model of observation, where once the lesson is underway the observer remains silent and unobtrusive: sitting at the back, possibly talking to the pupils but certainly not to the teacher. Feedback is provided later, often the next day.

To improve the way I support future or new teachers, I have been experimenting with and developing live coaching, where teaching can be improved or enhanced live and ‘in the moment’. I have found it makes the whole staff development process more transparent and impactful.

Establishing protocols
It’s very important to follow some rules and protocols to undertake this approach effectively, otherwise you run the risk of unduly stressing the teacher, undermining their authority or reducing their sense of leadership in their own classroom.

1. Visit frequently. The more frequently you visit the teacher’s classroom the more the teacher (and pupils) will be comfortable with you being in the room. You are trying to normalise this support. This helps build trust and ensures that you see typicality. Why give feedback on anything else other than typical? Feedback is most useful when it’s about what you do normally.

2. Work with focus. Use previous observations and reflections to establish reality and ascertain the next step for improvement. Keeping this next step relatively small helps to retain focus and increases the chances of being successful. Deliberately working on small changes at a time is both achievable and sustainable for a busy teacher. Small steps help you get started, build momentum and start to establish habits.

   The secret is to engineer situations where the success rate is relatively high in order to build consistent and effective habits. This small concrete next step becomes the sole focus for any subsequent practice and feedback.

3. Plan for practice. Design lessons where there is ample opportunity for this focus to be practised. The improvement focus almost becomes the purpose of the lesson. The more frequently and successfully a skill is practised the more likely it is to become automatic.

   For example, if you are working on transitions, design a lesson with several built in so that practice time is maximised and opportunities for any feedback increased. Let the teacher have some time to practise before you visit so they have built up some expertise for you to provide feedback on.

4. Share expectations. Discuss the role and nature of live coaching before the lesson so everyone is clear about the expectations.
How does it work in lessons?

**Positioning:** in the classroom sit or stand close to the teacher so communication is easier, the process is more transparent, and the pupils get used to seeing you.

**No surprises:** do not attempt to teach something new to the teacher during the lesson or point out things that cannot be changed, such as material on a PowerPoint slide. This will throw them, creating uncertainty and stress. The focus is pre-agreed before the lesson: stick to it.

**Length of time:** negotiate the length of time you are likely to be in the lesson. You’ve come to see one thing, so when you’ve seen the part of the lesson featuring the improvement focus and provided any feedback, leave (unless requested otherwise).

**Three types of feedback**

**Reward:** what the teacher does right is just as important as what they do wrong. If you see evidence of the pre-agreed focus going well, praise them. This will encourage them to do it again, the right way. Remember they will probably be nervous with you in the room. A quiet word, a thumbs up, a smile or even a word to the class about how you have noticed them working well in a particular way will be affirming, reassuring and confidence boosting.

**Remind:** before the teacher is about to undertake the agreed focus (e.g. share expectations before a task) remind them, if possible, about the pre-agreed elements of that focus. You might do this non-verbally by writing, in the case of task expectations, what you have both previously agreed they will say. This can act as a useful reminder to a novice and possibly even nervous teacher.

**Correct:** give the teacher some feedback and points to reinforce the strategy after it was done. This will prepare them for the next time they use that strategy in that lesson. Try to shorten the feedback loop and achieve correction and development as quickly as possible. Always correct privately: talk with your back to the class which also allows the teacher to monitor the class at the same time.

**Key things to remember**

**Get to the point**

Be as brief and concise as possible so as not to interrupt the flow of the lesson or the thought processes of the teacher. Remember that they will probably be scanning their class as you talk to them.

Providing small bite-sized bits of feedback makes it more likely to be acted upon right away. If they are unlikely to be able to act upon the feedback immediately and possibly not get it right ‘in the moment’, make a note and leave it to discuss in more detail in your follow-up session. Limit yourself to the focus and limit the volume of feedback you give too.

**Pick your moment**

Don’t interrupt their teaching: pick a moment when the pupils are working, such as during independent or group practice time, or talk partner time. This way the pupils are not distracted by your interactions and the teacher is able to focus on what you are saying.

**Non-verbal communication**

It may be possible to communicate with the teacher non-verbally. A hand gesture to encourage them to do something or a sign to remind. One or two words on a mini whiteboard as a visual prompt and reminder can work well. You may also use other physical non-verbal cues. For example, exaggerating your own stance and posture will remind your teacher to stand still and face the class.

When in their room, consider your own demeanour – smile, as this is reassuring to the teacher and models an enthusiastic approach to learning to the pupils.

**Avoid falling into checking mode**

If you want to talk to pupils or look in books to see any impact of the teaching do so, if possible, with the teacher so that the whole process is collaborative and transparent.

**Model it**

If appropriate, model for the teacher. Sometimes words may not be enough and in order to fully understand the teacher may need to have the strategy modelled to them. Agree this beforehand so as not to challenge their leadership and authority in their classroom. This can work well with novice teachers who may not have a sufficiently developed mental model of excellence.

**Summary**

I find frequent live coaching helps enormously in teacher development as it has the power to influence the lesson and therefore the learning in the moment, helps build great habits quicker and saves time on lengthy feedback conversations. It normalises feedback, helps build trust and collaboration and makes the whole process of staff development far more transparent and impactful.
Tracking progress for EAL learners

DIANE LEEDHAM highlights challenges around tracking progress for EAL learners and suggests ways forward for data managers and EAL leads

In January 2017 there were 1.5 million EAL learners identified via the school census in England. However, despite the DfE requirement to submit EAL proficiency data between September 2016 and June 2018, approximately 10% nationally were not given an English proficiency code at this time, rising to 20% in some areas.

Now that the requirement to submit proficiency data has been dropped, the chances of accurate, consistent proficiency tracking seem even further away. It’s time for a radical rethink about the way schools capture, track and analyse the academic and linguistic progress of EAL learners in school, along with the kind of professional knowledge and support needed to do this effectively.

What are the key issues?
A school data manager faces a raft of practical challenges relating to the assessment and tracking of EAL learners, many of whom are bilingual or multilingual.

- EAL learners are not a homogenous group and there are wide regional and local variations in numbers, individual contexts and proficiencies.
- Not all schools can access EAL expertise and leadership.
- The mainstream English school system has a monolingual default setting.

The first step is to identify where professional knowledge about EAL matters can be located or how it can be developed in your school. The methodology of EAL data collection will vary from institution to institution, but neither the capture nor the analysis will be secure without informed understanding.

In the absence of central guidance or leadership on EAL assessment and provision, it’s best not to work in isolation. Seek out existing EAL networks such as NALDIC Regional Interest Groups (RIGs) or form your own networks for professional conversations and moderation.

Three tracking measures
It’s helpful to think about EAL data in three broad areas.

1. The EAL register
An accurate EAL register is the result of a voluntary disclosure by parents/carers, so a school depends on trust, positive relationships and effective communication. It should be confidential and GDPR compliant, with your purposes transparent.

The DfE no longer asks for information about nationality and country of birth but in view of the high media profile for the school census, parents/carers may still need reassurance, particularly in relation to those questions which help schools develop a detailed, confidential EAL learner profile.

- How and when does your school ask parents/carers for personal information?
- Does your school explain the questions and share the definition of EAL used by the DfE in the census guidance?
- Does your school engage in positive dialogue with parents/carers to develop trust and support accurate information sharing?

2. EAL proficiency in English: to track each EAL learner’s acquisition of English proficiency in a school/subject learning context until age/stage proficiency is reached on a par with peers, but with ongoing oversight of the latter category in case further proficiency related issues emerge when academic demands increase.

3. EAL progress in mainstream: to track each EAL pupil’s progress in curriculum learning, alongside their peers, but alert to the fact that assessment in English may reflect proficiency rather than knowledge or ability until the learner is fully bilingual.
A school with excellent understanding of EAL will want to keep a confidential pupil profile, capturing information which supports the most detailed understanding possible of each EAL learner’s context and developmental language and learning journey. Therefore, along with the information about ethnicity and first language/s still requested for the census return, schools should also seek to establish and record each EAL learner’s:

- proficiency in their other language/s, including literacy/literacies and any ongoing development, for example via supplementary school attendance
- prior education experience
- cognitive ability, allowing for the challenges of translation and cultural/experiential positioning, for example via CATs or CAMLs. An assessment via English, even non-verbal, can only be a tentative signpost if the student is not proficient in English. Specialist EAL cognitive assessments are preferable.

In addition, the EAL register should signpost if the student also has additional needs, is identified as LAC, receives free school meals or whether there are safeguarding concerns.

### 2. Tracking English proficiency

Even though the DfE no longer collects the information, schools should still seek to maintain an oversight of pupil progress in the use of the English language. To do this, as a minimum, schools need to:

- establish a baseline proficiency code for each EAL new arrival in their setting
- review a proficiency code given to an EAL pupil by another setting
- update an EAL learner’s proficiency code at least once a year.

Schools are strongly advised to evaluate an EAL learner’s performance in English via a portfolio of evidence in different subject contexts, both for baseline assessments and annual updates. It’s ineffective to rely on a single EFI style test or pupil performance in English as a school subject.

Lack of proficiency in English is the most significant risk factor for EAL outcomes, but there is no single template for the rate of EAL proficiency progress to age/stage equivalence. Research suggests that five-seven years is the ‘typical’ or average time it takes for an EAL beginner to progress to age/stage equivalent fluency. An annual review and update is only a minimum step in maintaining a basic overview of proficiency progress. It’s not enough for a thorough insight and the legacy DfE descriptors are not detailed enough to give teachers the guidance they need to plan for language development in lessons. It’s therefore strongly recommended that an annual update is supported using more fine-tuned descriptors which are aligned with the legacy DfE codes, such as the Bell Foundation EAL Assessment Framework.

### 3. Expectations of progress

There is a statutory requirement to add EAL learners who are on the school roll to whole school assessment and progress data, and to include them in mainstream expectations of progress. An EAL pupil who is not yet proficient in English and has no prior data needs to be added to the school data set, but both their baseline judgement and any subsequent targets can only be a tentative hypothesis.

A first language/s assessment and recognition of prior learning will establish a more accurate picture. First language/s assessment is of crucial importance at EYFS, the phase with the fastest growing EAL demographic, including children born in the UK and new to English when they start school.

Whatever curriculum assessment and tracking approaches the school has adopted, an EAL learner who is not yet fully bilingual will need to make faster progress than peers in both English proficiency and curriculum assessments in English, to catch up with their performance. Catch up rates will differ, so the best course is to keep a watchful eye on each EAL ‘narrative’ via a case study approach which triangulates between an EAL learner’s proficiency progress, curriculum progress and long-term goals.

### Looking further ahead

Are these three measures sufficient to track the progress of your EAL learners in mainstream learning? If your concern is the best outcomes for pupils as opposed to meeting external measures, then not really. Ethical progress tracking of EAL learners goes beyond monolingual Progress 8 measures and considers relative outcomes and long-term trajectories, such as Post 16 choices and outcomes.

It’s a matter of both social justice and pragmatic provision to ensure you ask the right questions about the progress pathways of EAL learners.
Progress 8: four lessons learned and next steps

How are you adapting to the new style GCSEs and more linear curriculum? VANESSA BURTON reflects on her school’s experience and what they’re doing differently as a result.

Ask any school leader to evaluate Progress 8 and you’ll receive a mixed response. There are undoubted benefits to a system which has shifted focus from the C/D borderline to all borderlines, extended the range of subjects deemed important for life chances from five to eight and furthermore, placed more value on progress than attainment.

As with any system, there are issues, and the complexity is such that as it stands, the framework is a traditionalist one and may be more suitable for some students (and some schools) than others. However, that’s both a controversial and moot point because Progress 8 is here to stay.

The challenges

The post summer results professional dialogue between staff, subjects and schools is crucial, not least to reaffirm the importance of subjects and the need to trust the decisions of their senior leaders – and we all need to trust the DfE!

It all trickles down… So, with the first and second wave of reformed GCSEs having come into force, what have I learned, as the senior leader responsible for leading our school’s experience and what they’re doing differently as a result?

Happily, everyone was in the same boat. We saw relationships forged across schools, even within local authorities, which league tables may have formerly frozen.

Relationships within schools are just as important. Middle leaders facilitating new courses needed support, from training on comparable outcomes and grade boundaries to time to co-plan, collaborate and create.

And let’s not forget the students. How many teachers (me included) fell into the trap of scaremongering by warning the students of the extra demands of the GCSE reforms?

Relationships are built on trust. Our students need to trust us as teachers, our teachers need to trust the direction of their middle leaders, our middle leaders need to trust the decisions of their senior leaders – and we all need to trust the DfE!

Progress measures and calculations delivered after the exam season.

Lesson 1: Literacy and middle ability prior attainers

Our biggest learning curve was that we found the shift from the 3 to 4 borderline to be quite stubborn. Deep analysis of the literacy bar has been raised. Vocabulary knowledge, comprehension of exam questions, writing structure and the ability to evaluate all make a difference.

Some of our Bucket 3 subjects had not made as much progress as previous years. Clearly this can be cohort-specific but, without being too reductionist, literacy was a common denominator. New style exams, the more rigorous requirements to achieve grade 4 (less accessible for lower middle ability students with weaker literacy skills) and a one-size fits all entry system, with the removal of tiers, all had an impact.

Lesson 2: Assessment for learning and mastery learning

From the start, exam boards had urged the delivery of useful school-based training sessions and materials, national networks wrote quality resources and the wealth of online resources available were all fully exploited by our two subject leaders.

Applying this same approach to Bucket 2 and Bucket 3 subjects was more difficult. In most cases, the full cohort is not sitting these courses and therefore, three-year trends to create comparable outcomes are less useful. Predictions were not always accurate.

Our ‘first wave’ students achieved very pleasing English and mathematics outcomes. Almost obsessive statistical attention to detail secured us the right accuracy of grades, including summer predictions (three-year trends, averaging legacy grade boundaries, use of networking). As such, we could intervene with the right students and intervention was specific and rigorous. We adopted question-level analysis for each internal examination series, which yielded specific knowledge for teacher planning, student revision and parent support. Exam boards
Typical forgetting curve for newly learned information

- **First learned**
- **Reviewed**

**DAYS**

- 0
- 1
- 2
- 3
- 4
- 5
- 6
- 7

**RETENTION**

- 100%
- 90%
- 80%
- 70%
- 60%

The importance of identifying what students could and couldn't do. A keen focus on assessment for learning was best, rather than becoming bogged down by grading papers and exam questions. This approach would serve to shed light on areas for improvement, rather than just yielding grades. Grades and predictions do not necessarily lead to student progress. Use of differentiated starters and homework to consolidate learning are helpful in closing knowledge gaps.

Differentiating by ability in teaching exam skills is also key. What do middle ability students aiming for grade 4s and 5s need to be able to do first, before they start aiming for the higher levels? By no means should we be capping our students' potential by only teaching to their target grades, but we should be securing their knowledge, understanding and skills before we race on, potentially leapfrogging vital stages. This is basic mastery learning with a stronger focus on the skills which thread through topics and units.

**Lesson 3: Exam stamina and memory**

Having requested many grade 3 and 4 papers, we identified that timing was an issue for students – the exam season is now even more intense. Reading skills, exam stamina and quick recall are all requirements for coping with these demands. Students are in a race against time and each other, in a contrived environment which suits the most resilient learners.

How can we reduce this pressure and allow examinations to better reflect their ability?

Exam training and stamina are necessary for progress. Students should experience the full set of examinations for each subject, without abridged papers or two different papers clumped together, Frankenstein-style. Every assessment opportunity is a training opportunity.

Then there's training students to remember and recall content so that they can efficiently apply it. If we can give students the skills to recall information more easily, having been trained through teacher testing, and re-testing, quizzing and interleaving, we have fought half the battle. We need to combat the 'forgetting curve'.

**Lesson 4: Curriculum**

Cohorts can fluctuate dramatically, and the curriculum needs to be flexible enough to accommodate this. Achieving a 'broad and balanced' curriculum within a Progress 8 framework is not easy and this is where context is everything. Forging the right pathways for students and their futures should drive our decisions. What value is there in entering students for subjects which are unlikely to secure their engagement and worse, unlikely to enhance their life chances?

While the Technical Awards are not guaranteed as long a shelf life as EBacc subjects, they will secure a longer shelf life in Year 7, we have a renewed focus on reading, vocabulary and oracy across all year groups.

**Closing the Attainment Gap**

Our first set of mock exams will diagnose what students can and can't do (skills first, content a close second) and allow the setting of appropriate 'gap closing' exercises. Indeed, there are an increasing amount of sophisticated resources available for independent study and this, coupled with an enhanced focus on memory and recall (quizzing, recall, frequent exam questions) will improve student exam performance.

Year 11 support – from parents' evening to senior staff mentoring – started early, making use of Year 10 summer data. A key change is that our heads of core subjects take mini form groups for half a term at a time, intervening with targeted groups. The difference in our cohort is palpable.

KS3 however, holds the solutions. We are intervening early with the English and mathematics threshold. Starting in Year 7, we have a renewed focus on reading, vocabulary and oracy across all year groups. We have introduced a new assessment system at KS3 which focuses on skills and shorter, more meaningful pieces of graded learning, rather than burning resources available for independent study and this, coupled with an enhanced focus on memory and recall (quizzing, recall, frequent exam questions) will improve student exam performance.

Thirdly, we are introducing Year 11 support – from parents' evening to senior staff mentoring – started early, making use of Year 10 summer data. A key change is that our heads of core subjects take mini form groups for half a term at a time, intervening with targeted groups. The difference in our cohort is palpable.

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Exploring and using media and materials 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 sing songs, make music and dance, and experiment with ways of changing them. They safely use and explore a variety of materials, tools and techniques, experimenting with colour, design, texture, form and function.’

All staff need to be confident of their role in developing children’s understanding of this area of learning and development. Different approaches are appropriate for different ages and children will progress in their understanding at different rates.

The following three scenarios come from an early years setting offering sessional education and childcare for all ages of children in the EYFS. It has restricted indoor space and the practitioners make good use of the outdoor environment. The setting serves families from a range of cultural and ethnic backgrounds.

Under twos
The children under two share two indoor spaces in the setting – one which is used for active play and mealtimes and one which focuses on restful, reflective activities and sleeping. Background music is played at all times which gives the children the experience of a wide range of music from the many different cultures in the local area.

The toddlers and practitioners enjoy moving and dancing to music, both using CDs and music played by the children and adults. Whenever the opportunity arises, dancing and movement takes place out of doors to provide greater freedom of movement. This also applies to the provision of large scale mark-making opportunities for the babies and toddlers out of doors throughout the year.

The limited space indoors is enhanced by the creation of a large sensory shed in the outdoor area to encourage the babies and toddlers to use all their senses and to explore a rich variety of media using whole body movements. Some of the resources in the sensory shed are changed on a monthly basis; these include small mirrors, baskets of reclaimed and natural materials, musical instruments, fabrics and scarves and construction blocks. Larger equipment, such as the large three-sided mirror, is stored and used in the shed on a permanent basis.

Two to three year olds
As well as the many activities which are provided indoors to encourage the children to explore and use a wide variety of media and materials, the outdoor area is set up to encourage children to experiment with the visual and performing arts and design technology.

The practitioners in the setting are aware of the importance of young children having opportunities to use gross motor skills as a precursor to developing the fine motor skills which are needed for mark making and writing. One of the outer walls of the setting has a large blackboard fixed to it and the children are free to use the range of chalks to draw, ‘write’ and leave messages.

They enjoy ‘painting’ with water on the blackboard surface, creating patterns and transient images and writing their names. The practitioners have provided a range of resources for the children to use when they are designing with water, including sprays, rollers and large brushes.

As the children’s manual dexterity develops they become interested in using fabrics, papers, wool, foil, ribbons and cellophane to create woven designs.

The practitioners find that it is much easier for children to weave on a large scale out of doors and they make weaving frames from rigid garden netting and pea
netting. The children also enjoy weaving on the picket fence at the edge of the garden.

Four to five year olds
The oldest children in the setting also enjoy the experience of painting and mark making on a large scale out of doors. The practitioners often create a temporary painting area in the garden, covering surfaces with plastic sheeting and providing large sheets of paper or fabric for painting on. Brushes of many thicknesses and sizes are provided for the children who are encouraged to mix their own colours of paint in small buckets or tins. The children often choose to work collaboratively on group paintings, exploring colour, texture, movement and design as they work.

Making dens out of doors provides the children with excellent opportunities to explore working with resistant materials such as wood, thick card and ridged plastic.

They learn about cutting and joining materials and about how to decide whether different materials are fit for their purpose. One of the practitioners has a particular interest in design technology and shares her knowledge and skills about designing and making with the four and five year olds, making sure that they learn the necessary skills to handle tools, equipment and materials safely and effectively.

Music, singing and dancing take place indoors on a regular basis but the practitioners of the setting have made sure that children can enjoy the benefits of exploring music out of doors by working with a local artist to provide large scale musical instruments which are available to be played by the children at all times. The outdoor area provides the perfect opportunity for the children to explore sound, rhythm and movement.

Playing music out of doors, along with streamers and ribbons, encourages both boys and girls to move rhythmically and to match their movements to music.

Environment audit: exploring and using media and materials
Use this audit tool to check which resources are available and which ones are needed. Include the name of a supplier where possible.

<table>
<thead>
<tr>
<th>Item</th>
<th>Available</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>A rich variety of paints which children can learn to access independently.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A range of brushes of different sizes for use by all age groups.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Crayons and pens of different thicknesses – clean and stored attractively.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pastels, inks and charcoal to extend the children’s learning.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Papers of different sizes, shapes and colours.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resources for creating patterns and placing and arranging, including beads, counters, natural and reclaimed materials.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fabrics, threads and papers for weaving and collage.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A rich variety of materials for mixing and model making – sand, sawdust, plaster.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A variety of malleable materials including clay and dough.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2-D and 3-D shapes made of different materials and with different properties: solid and translucent plastic, mirrored surfaces, wood, foam.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Construction bricks of different sizes, shapes and complexity.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tools and materials for designing and making (shaping, assembling and joining) appropriate to the children's ages and stage of learning and development.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wheels, axles, motors and simple electrical components for making working models.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Streamers, ribbons and fabrics for movement and dance.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A wide range of good quality musical instruments which are age appropriate.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Audio recorders, video recorders and cameras of appropriate sizes and types.</td>
<td></td>
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</tr>
</tbody>
</table>
Arts in the curriculum: one school's approach

How do we stop creative subjects being squeezed out of the curriculum? ELIZABETH HOLMES spoke to the headteacher of one primary school that is keeping the arts in the picture.

The impact of funding cuts and the pressure to prioritise core academic subjects has led many schools to spend less on the creative arts and narrow the curriculum choices available to their pupils. In a growing number of schools, the effect of this approach is plain to see: plenty of English and maths displays lining the corridor walls, while the arts slip further and further out of frame.

How do the teachers and school leaders who value the benefits of learning about, and through, the arts continue to place emphasis on creative subjects in the curriculum? I caught up with Kate Owbridge, headteacher at Ashdown Primary School in Crowborough, to find out about their approach.

KO: ‘Wouldn’t it be boring if we were all the same?’ my mum used to say. Every child is different, every child has their own strengths and weaknesses, everyone does. That is why it is important for children to have access to a wide range of educational experiences and learning during their primary years. No one knows what we are unlocking inside a child.

EH: Absolutely. But is that becoming more difficult to achieve in the current climate? What is your experience?

KO: As a two-form entry school, we group our subjects together and have a team developing each group. One of our teams is responsible for ‘languages and the arts’. This includes music, art, drama, some dance and Spanish. As with any subject, the team is responsible for the curriculum, lesson planning and delivery, the quality of learning, monitoring and CPD. In this respect, they are on equal footing with every other team. There is no squeezing out of these subjects in our school.

EH: That sounds incredibly positive. How does it work?

KO: The curriculum is tight. All foundation subjects are offset against each other (except for PE and PSHE). This means that over a year there will be three half terms where we teach each subject. Our curriculum is designed so that this is not exclusive. If learning comes up during a topic focus then it can be taught.

We found that by relaxing the time expectations, we could teach the arts (and other subjects) properly. We employ a Spanish teacher and a music teacher, but they only work two afternoons per week and hold their sessions during class teachers’ PPA time.

EH: How do you maintain a focus on the arts throughout the academic year?

KO: Every curriculum team has one ‘focus day’ per year, and every third year a ‘focus week’. What we cover in the day or week is up to the team to decide, and often we explore the more exciting or unusual aspects of our pupils’ learning.

Each class can hold its own assembly once per term, and we encourage class teachers to show examples of learning in all areas of the curriculum. Each pupil is given a learning book for their non-core subjects, as well as a sketch book for art. They are available for parents to see when they attend parents’ evenings.

EH: Does your approach have the backing of governors?

KO: Our governors have a rolling programme of 10-minute presentations from curriculum teams. Each term a core team and a foundation team will present to the governing body. The team will put together a budget bid and action plan, and we will allocate funds accordingly.

EH: How do you utilise the artistic talent in your local community to create opportunities for learning in school?

KO: Every class is expected to have a visitor six times over the course of the year. Some of these visitors come with historical crafts to do, chocolate to make, sketches to draw or instruments to play. We also have a choir, an art club and a drama club, which run after school. We make a small charge for these clubs (£10 per half term) and the money goes back into the extended schools budget to pay for the support staff who organise the clubs and the resources they use.

EH: It’s clear that you champion the arts in such a visible and tangible way, and that you’re seeing the benefits as a result.

KO: The arts are as important as every other subject. I am biased, having been a music specialist, but it remains fair to say that no subject is unquestionably more or less important than the others. And it is how well the arts can complement maths and English that makes them such perfect curriculum fellows! I am still hoping for the next Damien Hirst, Darcy Bussell or Idris Elba to come from the small but significant beginnings we have made at Ashdown Primary.
Introduction

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

This issue puts the spotlight on some excellent examples of leadership in practice. As SENCO and assistant principal at Wren Academy, Liz Murray recognised that students with SEND needed greater input from specialist teachers, and SEND itself needed more emphasis in teacher CPD. On pages 48-50 she explains how she formulated and shared a vision for positive change. Every local authority should provide a comprehensive, transparent and accessible picture of locally available services. Anita Devi has suggested some simple ways to get more from the Local Offer – turn to page 46. Empowering parents and creating an empathic culture are the priorities at Lessness Heath Primary School, which has been working hard to change mindsets over the last two years. Kelly Hannahagh describes the project in detail overleaf. Schools have the power to use reasonable force, but it remains an issue about which staff can feel hesitant. Dai Durbridge sets out the who, what, when and why on page 44. For plenty more advice and good practice, look out for the weekly email in your inbox.

Jack Procter-Blain, Content Executive

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Two years ago, I took up the opportunity to lead on a project to change the mindset of a whole school community. The school had recently been placed in special measures and morale was at an all-time low.

I quickly understood where my focus was needed. A culture of blame had been established, and there was tension between parents and staff. Parents feared that the school was failing their children and no longer trusted staff. Digging deeper, it became clear that relationships between all stakeholders in the school were fraught and fragmented. Creating an empathic culture was fundamental to success.

Starting with relationships
At first parents were very defensive, seeing me as someone to sound off their frustrations with. My aim was to use a solution-focused approach. This would enable me to start shifting the responsibility of ownership of triggered emotions back to the parents.

It soon became apparent that many of our parents had experienced trauma in their own childhood or were currently in complex life situations. There was a strong link between the behaviours of parents and their needs. It was important for me to offer a real sense of understanding, while embedding an empathic approach towards the parent’s thoughts and feelings. This is where the power of connection was established.

Developing a strategy
While inviting parents in for coffee mornings was my initial response, it soon became apparent that this facilitated a space for parents to project negative thoughts. I changed my tactic and asked the parents what they needed from an empowerment programme. The answer was clear. ‘We want to understand how to be the best parent possible and to gain the tools to help our children with life’s challenges.’

This was the starting framework for our Family Matters Empowerment Programme, which focused on the following elements.
- Healthy relationships
- Skills to improve mental health
- Health and wellbeing
- Positive psychology
- Solution focused approaches
- Links between behaviours and emotions
- The five ways to wellbeing

Every Friday parents were invited into a safe space to explore how their own past experiences could affect their parenting capacities. Parents now understood that they were a product of their environment – and therefore their children were too. It quickly became apparent that the need was greater than I could ever have imagined. To ensure that parents shared their concerns safely and responsibly, we asked them to sign a confidentiality agreement.

‘Taking the decision to fund a wellbeing programme at a time of budget cuts was a risk’

Challenges faced
Engaging disaffected families was a priority. They were our hardest-to-reach audience, and it took considerable time to win these families over. Some of these families were highlighted through safeguarding procedures and establishing strong links with social care was vital.

Encouraging staff to get on board was difficult initially. In the past parents had behaved aggressively and were hostile. This created anxiety, and teachers often avoided face-to-face contact with parents.

Senior leaders were the driving force behind the wellbeing focus. Time was allocated for them to be included in the development of plans and strategy. This was a risk at first, as there was no raw data or evidence to share with the school governors to predict impact. But having headteachers and senior leadership on board had substantial importance in steering the project forward.

Successes
As word spread on how positively the
The programme had impacted on parents’ lives, attendance grew. With parents feeling that their opinions and concerns mattered, they were empowered and grew in confidence – making life successes possible.

- Parental separation was significantly reduced.
- Relationships within families dramatically improved.
- Parents were returning to study and securing jobs for the first time in years.
- Parents gained a clear understanding of the signs and symptoms of mental health issues and had the skills to address these and seek help.

To date 200 parents have engaged with the Family Matters programme. We have now created a steering group of parents, who have roles and responsibilities within the programme. Graduates have even formed a social media group to empower others and signpost help that’s available within our local community.

The greatest change has been in relationships between all stakeholders within our school community. Staff, parents and pupils say that they feel safe and happy in our school, with blame and shame released, and help always available.

**Impact on staff**

The staff at Lessness Heath Primary School report that their wellbeing has been improved due to the whole school focus on improving relationships. Staff feel more confident in addressing parents and positive working partnerships have been formed. Teachers feel less intimidated by parents, due to having a deeper understanding of their needs. Up-to-date information and training, based on current research, is on offer to parents and staff.

We ensure we do everything possible to safeguard the mental health and wellbeing of the children and young people in education.

**Prevention and risk taking**

My work as wellbeing leader at Lessness Heath School will continue to evolve as needs arise. We are focused on putting preventative measures in place and ensuring wellbeing remains at the heart of our school. Our hope is to share our strategies and good practices with the wider community, for greater outcomes in growing a resilient future generation.

Taking the decision to fund a wellbeing programme at a time of budget cuts was a risk for headteacher Kate O’Connor. Our governing body now understand the importance of a sustainable wellbeing focus and have seen the impact of this in our recent SATs results and Ofsted outcome. We have created a family of people in education who care and look after each other, and our pupils are happy and engaged for learning.

**Releasing stigma**

We have used a range of strategies to release the stigma around talking about mental health.

- We regularly measure and monitor the emotional health of our parents, pupils and staff and form action plans to support current needs.
- Our wellbeing focus is included in the school development plan.
- A staff wellbeing menu has been introduced.
- We have created a four-tier approach for supporting vulnerable pupils.
- Staff and parents receive regular mental health awareness training.
- A strong link with all outside agencies has been established, with a high success rate of referral accepted and support offered.
- Staff are offered regular supervision.
- Wellbeing is threaded through all our school policies and procedures to ensure longevity in our approaches.

**Wellbeing Award for Schools**

The Wellbeing Award for Schools (WAS) provides a framework for schools to evidence good practice in improving the emotional wellbeing of pupils and staff. Find out more at oego.co/OE-WAS.
Consistent mental health provision in a MAT

How can academies procure the right mental health services and share good practice across a multi-academy trust? KAREN BURNS explains how her MAT provides consistency and autonomy.

In a multi-academy trust (MAT), there will be high numbers of pupils who are experiencing poor mental health. There needs to be robust systems and structures in place across the trust to prevent young people from developing serious conditions.

Local authorities are being stretched beyond capacity and the central services and personnel previously accessed by maintained schools are unable to fulfil the growing need for support of young people. Schools within a MAT need to have the consistency of a level of service and training, potentially provided centrally by the trust, as well as the ability to reach out for external support where applicable.

As the chief executive of a MAT, I believe strongly that there needs to be an overarching, non-negotiable expectation that staff training and pupil intervention is facilitated effectively within each academy. However, the mechanisms the academies have in place need to be bespoke to each site and appropriate for meeting the needs of their pupils. The size of the schools, staffing numbers and roles and responsibilities will also vary across the trust and approaches to supporting mental health should be applied as such.

Appropriate training

The main driver and expectation across all academies in the Victorious Academies Trust is that staff in each school are trained in mental health to a level appropriate to their role in school and the Trust supports the financing of this.

Ordinarily all support staff (including midday assistants) access basic online training which lasts approximately one hour. Teaching assistants and teachers complete an intermediate online training programme which lasts around two hours and then more senior pastoral staff complete one day’s advanced face-to-face training which qualifies them to be a mental health and wellbeing officer.

Apart from requiring all staff to complete this accredited level-based training, the Trust is flexible and open to accepting varying techniques and strategies in this area in each academy. Regular meetings between senior leadership teams from all the academies in the Trust facilitate the sharing of good practice. Several schools use similar methods and there is a level of consistency in the choice of intervention and pastoral support offered to pupils. However, as a Trust we respect the individual decisions made by schools that they believe will secure the best outcomes for their pupils and all sites can broker personalised services where appropriate.

As a Trust we respect the individual decisions made by schools that they believe will secure the best outcomes for their pupil'

If several schools in the Trust choose to access a particular training programme or intervention package, then we can often achieve economies of scale – which is advantageous in a time of tightening budgets! In such instances, the Trust will broker this service and the schools will contribute accordingly. Also, the Trust will provide training opportunities which can be attended by any member of staff.

With the separation from most local authority services in the process of academisation, usually our academies access mental health services from the private and voluntary sectors. But given our approach to autonomy and positive collaboration with LAs, there are occasions where LA initiatives or events are valuable, and our academies engage in these.

Mentally healthy children should be able to:

- develop psychologically, emotionally, intellectually and spiritually
- make and have friends but also play alone
- show a sensitive and caring side
- play and learn
- understand right from wrong
- develop problem solving skills and learn from setbacks
- develop academically and learn and achieve in school.

Source: Team Mental Health (2018)
Monitoring

Each term, our academies are expected to record the impact of mental health support for those pupils who have received intervention. These records are of a qualitative and a quantitative nature, providing a narrative illustrating improved behaviours and achievement and producing evidence of impact through records of incidents of poor behaviour, absence and academic progress.

The detail is presented within each school’s pupil progress meetings cycle, and while each academy can present the information in their own format, the feedback must contain:

- the academic levels pupils were working at before and after intervention
- attendance and behaviour incident figures
- a narrative about the pupil’s personal development.

This evidence is invaluable in demonstrating the effectiveness of mental health support within each academy. It is presented at our termly data meetings, which all heads of school attend. These meetings are also a good opportunity to share good practice or recommend particular services.

We’re seeing more and more online monitoring mechanisms for schools to monitor pupils’ mental health and wellbeing. These are generally taking the form of regular questionnaires and interactive apps which generate a picture of a young person’s state of mental health. As a Trust we are investigating incorporating one of these options into our monitoring cycle.

Consistency and autonomy

I would recommend that all MATs:

- take a corporate approach to supporting mental health in their academies by providing a centrally sourced training programme for all staff
- put in place non-negotiables when it comes to monitoring and reporting the impact of intervention.

By providing a comprehensive training package, MATs can have the confidence that every member of staff will be able to recognise the early signs of poor mental health in young people and know how to highlight concerns to the mental health and wellbeing officers in their school.

For a MAT to comfortably give autonomy to its academies, the training provider they select centrally should offer a higher-level course to each academy’s mental health and wellbeing officer, so that they may be fully equipped to intervene, signpost, outsource or refer as appropriate.

Consistency and regularity in the reporting of the impact of mental health intervention will provide a MAT with the certainty that the training they offer is effective, that staff are confident in supporting pupils, and that pupils are achieving well as a result.

A principal’s perspective

‘With so many young people going through primary and into secondary education without the capacity or strategies to process their own emotions, let alone to discuss them openly as a matter of course, our aim as an academy is to provide our pupils with the opportunity and language they need to talk about their mental health. By making these conversations the norm – organising regular time as well as embracing ad-hoc discussions – we hope to make positive mental health and wellbeing an integral part of daily life at the academy.

‘Every member of staff has received the training selected centrally by the Trust, which we hope demonstrated our shared commitment to promoting positive mental health. The training gave us practical advice for how to spot the initial concerns and warning signs, and this advice was supported by contextual information that shed some light on how these initial signs tend to arise. For example, it gave us a good overview of early brain development, and how it can be affected by neglect or attachment issues.

‘Additionally, being able to extend so many of the key messages and ideas to staff and parents as adults meant that our aim from the outset was to safeguard and promote the positive mental health of everyone in our organisation, regardless of age, gender, role or background. The centrally commissioned training has given us an excellent set of resources with which to do this.

‘There are of course times when we identify a mental health need that requires third-party involvement. The training we received through the centrally sourced provider has given us the grounded understanding, language, background information and confidence to refer to external services as and when we need to. However, we don’t feel that we are completely dependent on heavily stretched external services for support. We are ready and willing to provide the right mental health support for everyone in our organisation.

‘We have received encouraging comments from our pupils and the families we have supported, which only inspires us to do more. During our recent Ofsted inspection, our ‘personal development and welfare’ was graded outstanding, with several references to our work around promoting positive mental health for all.

‘The organisation-wide training has played an important part in the formation of a healthy and vibrant atmosphere at our academy. Everyone participates in a daily dialogue on what is affecting our feelings, and what support we might need. It’s normal, regular, even integral, but doesn’t take over. It doesn’t take a lot of resourcing. It just requires us to tap into the information from the training and into our basic human instincts to support and care for one another and ourselves.’

Louise Byrne is associate principal at Inspire Academy, part of the Victorious Academies Trust.

In order to prevent, detect and alleviate poor mental health in their community, a MAT should enable and empower its staff to understand how issues may present and the steps to take if they recognise symptoms. A whole-school approach to mental health and wellbeing is the best path forward to adequate prevention, early intervention, effective support and a reduction in stigma.'
Using reasonable force: who, what, when and why

Schools have the power to use reasonable force in certain circumstances. Dai Durbridge explains how you can develop a robust procedure.

While there has been little change in the law and guidance on using reasonable force in schools, the addition of three paragraphs about it in the latest updates to the 'Keeping children safe in education' guidance has raised its profile again. This article will talk you through what you can and cannot do and the pitfalls to avoid.

A power, not a duty
The law allows you to use reasonable force in schools in certain circumstances, which I’ll explain below. The key point to note is that it is a power, not a duty. That’s important for one simple reason: you can choose to exercise a power, but you have no such choice when the law imposes a duty upon you. Now that’s clear, let’s look at the who, what, when, why and how of reasonable force. To do that, we need to review the DfE guidance, 'Use of reasonable force' from 2013.

The who
All staff have a legal power to use reasonable force. The headteacher can also allow others such as unpaid volunteers or parents to exercise that power. Be careful here – I have no problem with this as a legal position, but in practice it could cause problems.

Parents are likely to be less accepting of restraint or force being used on their child by a fellow parent on a school trip or a volunteer. Clarity of policy and communication are critical if you intend to allow volunteers or parents to exercise this power. In case it needs saying, I would not recommend extending the power to pupils.

The what
This is all about using reasonable force as required. Deciding what is reasonable has kept the courts busy for many years now, but staff do not have the luxury of time when determining how much force to use. This is the basic rule to follow: the amount of contact or force used should be proportionate to the consequences it is intended to prevent. I have set out some examples for you below.

Staff should aim for the minimum contact required. This will be a judgement call in each case and the law will side with you where you have acted sensibly in these circumstances.

The when and the why
The law allows you to use reasonable force to prevent pupils from damaging property, hurting themselves or others, or causing disorder. The first two are relatively clear and are likely to feature in the majority of circumstances during which reasonable force is used. The third is a little trickier and requires a good deal of thought.

What the guidance refers to as ‘causing disorder’ the law terms as ‘prejudicing the maintenance of good order and discipline’. The essence is that the law allows you to use reasonable force in order to stop poor, disruptive behaviour. While I’m not suggesting that you do not allow staff to exercise the power in these situations, in my experience the majority of parental complaints or challenges come when schools use force when pupils are causing disorder. So, do be careful with this element of the power.

The how
Force should not be your go-to response. Using your authority through voice, language and physical presence are the first ports of call. If contact is required, then we are usually talking about physical contact in order to control or restrain.

- Control means either passive physical contact – such as blocking the path of a pupil – or active physical contact – such as leading the pupil by the arm to remove them from a classroom.
- Restraint involves a greater level of contact and tends to involve holding back a pupil or even greater levels of physical intervention. Separating fighting pupils is the most common example.

To help put it in context, here are three hypothetical scenarios.

Disruption in the classroom
A pupil is disruptive in class. You ask him...
to leave and he refuses. In these circumstances you would begin by using your presence, gravitas and voice to influence a change in behaviour. If that did not work, you would be entitled to use physical contact to remove the pupil.

Remember the golden rule: the amount of contact or force used should be proportionate to the consequences it is intended to prevent.

**Disruption on a school trip**

A pupil is fooling around on a school trip to a museum. You are concerned that her behaviour is such that she may cause damage to artefacts or property. She refuses to act appropriately when asked on three occasions. Given the risk of property damage, the potentially high value of that damage and the risk of injury to that pupil or other pupils, you are entitled to use reasonable force to bring under control that pupil’s behaviour. Again, any force must be proportionate.

**Protecting a pupil from harm**

You and your Year 7 class are walking on a pavement next to a busy road. One pupil breaks from the group to chase a pigeon. You are seriously concerned that the pupil could run into the road which would almost certainly result in contact with the vehicles, which in turn is likely to cause serious injury or death.

Here, the consequence is so significant that almost any level of force would be justified in stopping that pupil. Of course, you would only want the minimum force required, such as grabbing the pupil, but if you felt that the only way to stop them needed more force, in all likelihood your actions would be deemed reasonable.

**Policy and communication**

You are not required to have a policy around the use of force, but it does make sense to have one. That way, you are being open and transparent with parents from the outset, making it clear when and how physical contact may be used and in what circumstances (if any) you will tell parents about using force with their child.

There’s no requirement to tell parents, but it is worth doing in the more serious cases – better than they hear a possibly distorted version from their child.

Two don’ts to finish on.

- Never use force as a punishment (that’s still illegal).
- Steer clear of no contact policies. They’re too restrictive and tend to cause more trouble than they’re worth.

So, you have the power to use reasonable force and as long as you remember that the force used should be proportionate to the consequences it is intended to prevent, you should have no problems.

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Looking for a summary of what’s changed with the new KCSIE guidance? Download our flyer at my.optimus-education.com/kcsie-2018-main-changes-booklet
Making the most of the Local Offer

The Local Offer sets out the support available to children and young people with SEND. **ANITA DEVI** suggests five ways SENCOs can fully utilise this resource.

**Every local authority** should provide a comprehensive, transparent and accessible picture of locally available services: a Local Offer. However, it isn’t always clear to school leaders and SENCOs how they will benefit from engaging with and contributing to their Local Offer, and what role they should play in creating, publicising and reviewing it.

**What is the Local Offer?**
The Local Offer is a guide to the services that are available, in each local authority, for children and young people with SEND, aged from birth to 25. Local authorities have a statutory duty to publish a Local Offer, publicise it, maintain it and obtain feedback on its effectiveness each year. They must also state what course of action is taken as a result of the feedback.

Page 22 of the SEND Code of Practice 2015 states clearly that, ‘local authorities must consult children with SEN or disabilities, their parents, and young people with SEN or disabilities in [...] preparing and reviewing the Local Offer.’ Maintained nurseries, schools (including academies) and colleges have a duty to ‘cooperate with the local authority in drawing up and reviewing the Local Offer’ (pages 55 and 58). The Local Offer must also include information on how to make complaints about services.

**How is it published?**
In theory, the Local Offer is a dynamic, responsive and accessible source of information about SEND services. It should also inform strategic assessments of local needs and reviews of education and care provision. But in practice, there is great variability in what local authorities have produced.

Over the implementation period of the SEND reforms (2014–2018) I carried out three separate analyses of all 152 Local Offers in England. I found that they all vary in format, functionality and accessibility. Most are written in plain English and some have stuck rigidly to the local authority branding style, making them almost robotic in nature. Others have created a separate site. Moreover, some do not contain all the information they are required to.

Despite the differences and difficulties, the Local Offer has a significant role to play. The more we can improve its quality and effectiveness, the better it will serve children, young people and their families. This is especially important in a time of diminishing school budgets and greater focus on integrated services. I would encourage readers to look at the following documents.

- 0-25 years SEND Code of Practice 2015 (see chapter 4). This provides a comprehensive guide to the Local Offer and the statutory duties placed on local authorities. It is also worth reading paragraph 3.20 (page 41) to understand the link between education, health and care plans (EHCPs), joint commissioning and joint strategic needs assessments. An accurate definition of need (and how it will be provided for) is not only vital for the child or young person, but also local provision decisions.

- SEND Regulations 2014 (Schedule 2). This contains a full list of what must be included in a Local Offer. If you think some information is missing in the Local Offer, then let your local authority know! In some cases, I have found that the information is there but not easy to access. Again, this is vital feedback.

Here are five ways in which SENCOs and school leaders can make better use of the Local Offer.

1. **Check your own Local Offer submission**
   Working with your governors or proprietors of academies, check your submission to the Local Offer regularly. Is it accurate? Do the links to your website work? Ideally this link should be directly to your SEN information report page.

   I often carry out random checks on different settings and authorities as part of local authority change projects. I am amazed at how often the information is inaccurate and links...
broken. Check at the beginning or end of each term and report any inaccuracies as soon as you find them.

2. Check what you are expected to provide
Local authorities are required to state what they ‘expect’ all schools to provide as part of the Local Offer. Each local authority will set these expectations out differently. In Wirral, for example, they are called ‘threshold documents’. The purpose behind this is to ensure that all settings are inclusive and support children and young people with SEND.

3. Find out what is available locally
I had the privilege of working with Pathfinder and non-Pathfinder authorities in setting up their Local Offer. Many local authorities used the previous Family Information Service (FIS) to set up their Local Offer. One authority carried out an audit to find out how many school leaders and SENCOs had heard of or used different services listed in FIS. It concluded that many local services were under utilised, when they could have provided effective support for respite, the development of social communication skills and physical development.

4. Share details with parents and carers
Signpost parents and carers to the Local Offer via your website, newsletters, social media and notice boards. You could also organise a Local Offer surgery: dedicated time each week (usually between 8.00am and 9.00am or 2.00pm and 3.00pm) for parents and carers to receive advice on navigating the Local Offer. This could be something the SENCO delegates to a higher-level teaching assistant (HLTA). It would be ideal for parents who speak English as an additional language, do not have internet access at home, or need support in accessing services.

   Accessibility is crucial. All Local Offers include a search function and some will also have Google Translate. Most also have an accessibility link to simplify the text and ensure that viewers can benefit from Browsealoud. Some Local Offers will offer a free app for parents and carers to download, and others will have associated accounts on Facebook (search for Derby City Local Offer) and Twitter (see @LONorthants).

5. Participate in reviewing the Local Offer
Most Local Offers provide the option of giving direct feedback, and also include a page of what’s been done as a result of consultation – Reading is a good example. Think about how you can get involved or what feedback you and your community could provide. How could you involve children and young people?

Play your part
According to the SEND Code of Practice, the Local Offer should be collaborative, accessible, comprehensive, up to date and transparent. Does your Local Offer match up? More importantly, what role will you play in shaping it? The Local Offer will only be effective if everyone plays their part in keeping it accessible, responsive and up to date.

Note: the Local Offer examples included in this article were deemed accurate at the time of publication.

Further reading

Assess and Support the Progress of SEND Pupils
Attend this year’s SEND assessment conference for guidance on how to monitor, evaluate and present an accurate view of pupils’ progress. Taking place in London on Tuesday 12 February, you can find further details at oego.co/SEND_2019
In 2015, the new SEND Code of Practice emphasised the need for effective teaching for students with SEND. Meanwhile, researchers at the UCL Institute of Education published ground-breaking guidance on ‘Maximising the Impact of Teaching Assistants’ (MITA) (Sharples, Webster & Blatchford, 2015), with precise recommendations for the better use of TAs. The new Code of Practice and MITA research provided a clearer focus on the quality of teaching and in-class support for pupils with SEND, and collectively they had the potential to instigate change.

But at the same time, budget cuts had made it more difficult for schools to provide regular CPD to teachers, or to retain and fully utilise TAs. Or at least, this was my experience as assistant principal for inclusion and SENCO at Wren Academy. Wren Academy prioritised high quality CPD and had in place a weekly CPD hour for teachers, which was in addition to timetabled departmental planning and evaluation periods, and regular after-school training sessions. Due to financial constraints, we faced having to reduce the number of hours that TAs were available to support SEND students and had to consider cutting the teachers’ CPD hour.

While completing the final project for my National SENCO qualification, I identified a gap between the progress of students with SEND and the rest of the cohort. I knew from observations that students with SEND needed greater specialist teacher input, and teachers needed better CPD in SEND.

**Principles for change**

I knew that discussing my NASENCO project with colleagues at Wren Academy would prompt a significant change to how the school provided for pupils with SEND. The first step was to identify some principles that would guide the academy through a smooth transition. I knew that I needed to promote collaboration, shared vision, collective responsibility and shared ownership (Ekins, 2012), and I opted to use Cowne’s action research model as the basis for collaborative working.

1. Identify the problem.
2. Illuminate the problem.
3. Review and decide on action and success criteria.
5. Evaluate actions.
6. Review and decide on next steps. (Cowne, 2008)

I decided to recruit a working party, or a ‘core change group’ (Cowne et al., 2015), to begin the process of identifying the problem. The intention was that this group encompassed the broadest possible range of perspectives. I knew that, by engaging several other members of staff, we would have greater success in conceiving and implementing a whole-school vision than I would have achieved alone.

**From problem to opportunity**

To help colleagues view this as a professional opportunity, I wrote a brief entitled ‘strategic directions for inclusion’. It included the following rationale:

‘Although pupil premium and SEND students make very good progress, it is not as good as other students at Wren Academy. This is an area that we want to tackle. In addition, financial constraints mean that the SEND team will probably have fewer staff to support students and so we need to develop strategies that make our systems and structure more efficient.’

I included a goal, ‘improving the progress of SEND students’, and some areas for development. After publishing this document, I asked for interested volunteers. The working party comprised two pastoral leaders, two curriculum leaders, two main scale classroom teachers, one NQT and three teaching assistants.

We held five meetings over the course of a term. To stimulate discussion, we spent the first 20 minutes of each session using a SWOT analysis to identify our areas for development and critique our
current practice. We eventually concluded that, to address the gap in staffing and CPD, teachers could use their allocated, timetabled hour of CPD to work directly with SEND pupils. While we recognised that this would be a radical change, we also felt that it would be a useful opportunity to offer more meaningful CPD.

Developing the rationale
At the centre of the working party’s recommendation was a shared commitment to improving the attainment of pupils with SEND. But we recognised that teachers’ CPD is crucial to ensuring that students make progress. Sara Bubb’s study of what makes effective staff development (in Helping Staff Develop in Schools) found that in schools rated outstanding by Ofsted, ‘staff were motivated to identify and seize opportunities.’

We were guided by the need to be transparent, and to ‘take(s) account of the history, both recent and past, that inform the change taking place’ (Cowne et al., 2015). We took inspiration from Wren Academy’s well established CPD partnerships model, but nevertheless emphasised the change we needed and the reasons for it.

Illuminating the benefits and challenges
To raise awareness of the idea and seek other viewpoints, we conducted questionnaires and group interviews with TAs and teachers designed to explore:

1. what best practice support looks like
2. how support is viewed and its impact on students
3. the training and support required for teachers undertaking a support role
4. how this change might be viewed, to anticipate challenges and to formulate solutions.

I’ve presented the teachers’ and teaching assistants’ responses in the table on the left.

Effective support and meaningful CPD
The next step was to discuss findings with the SLT and at this meeting we decided on some principles that were integral to benefiting students and providing staff with a genuine CPD opportunity.

- Staff must have some agency and choice as to whether they would participate in this project.
- We must explain the context as clearly as possible.
- We needed to support the practical learning with some discrete workshops.

Subsequently, the assistant headteacher for teaching and learning and I designed an action plan that encapsulated these principles. We used a model for leading complex change which considers five areas of change: the vision, the skills, incentive, resources and action plan (Knoster, 1991). We communicated the vision and context of the plan to colleagues, emphasising the positives from the interview data and the existing CPD framework. We scheduled specific SEN skills training through discrete sessions as part of the ‘learning support partnerships’ pathway.

While we recognised that this would be a radical change, we also felt that it would be a useful opportunity to offer more meaningful CPD'

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<td>Workload</td>
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<td>The ability to choose: SEN, subject, teacher, student</td>
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<td>Enhanced teaching practice through observing others</td>
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<td>SLT in a support role could create anxiety for staff</td>
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<td>Would it really be effective CPD?</td>
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<td>Teachers’ lack of SEN knowledge</td>
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<td>Teacher temperament might not be suited to a support role</td>
<td>TAs could help to lead training for teachers</td>
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<td>Could address a perceived imbalance in status</td>
<td>Skills for enabling learning</td>
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CPD for SEND: learning in partnership continued....

Our teachers reported feeling more confident in understanding different types of special educational need'

Recommendations
Not every school will have a weekly CPD hour, but there are some elements of our programme that could be adapted to suit your context. You should always begin by reviewing how the school’s SEND policy is put into practice. When organising the training, you should encourage your TAs or SEN teachers to become experts, and lead workshops of their own. At least once per term, your teachers should have the opportunity to support a matched student in a lesson. Finally, you should review the roles of teacher and teaching assistant in your classroom and decide how you can improve them.

Context is king, but any refreshing of SEND CPD for teachers will be underpinned by similar aspirations. Namely, that the CPD must be bespoke to the school and focused on meeting the needs of the specific cohort (and adapted accordingly if needs change). It must also motivate staff and be of practical use to them.

References

For practical training on supporting pupils with SEND in the classroom, visit my.optimus-education.com/training/send-inclusive-teaching-programme
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<tr>
<td>Access over 200 webinars and join live sessions</td>
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<td>Your questions answered by our panel of experts</td>
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<td>Keep track of your learning through the CPD tracker</td>
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<td>Full access to Insight magazine</td>
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<td>Online access for all your staff</td>
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<td>Over 40 online CPD training courses</td>
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<td>Your very own Optimus account manager</td>
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<td>25% off our national conferences</td>
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<td>10 free conference places plus 50% off additional delegates</td>
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<td>Access to past conference resources</td>
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Visit oego.co/OE or call 0208 315 1506

www.optimus-education.com/membership
SEND Inclusion Award

Demonstrate to Ofsted and stakeholders that your school has achieved an outstanding level of SEND provision and complies with the latest legislation.

“Our staff have been very grateful for the support the award advisors have given us along the way.”

Executive Headteacher, Barcroft Primary School

Register your interest today at oego.co/OE-SENDIA