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Contents

Welcome: Stronger together

Conferences calendar

LEADERSHIP AND GOVERNANCE

Introduction
Building resilience and emotional intelligence
Headteacher appraisal process
GDPR: what you need to know
MATs: getting governance right
Engaging parents in secondary school
Joining a MAT: maintaining identity
Primary headteacher year planner

TEACHING AND LEARNING

Introduction
NQTs: building good habits
Teacher growth mindset: does it matter?
Getting every day right: a checklist for teaching staff
Developing feedback techniques
Early years autumn planner
Structuring maths in a mastery curriculum
Using challenging texts to support the KS3 transition

SEN AND SAFEGUARDING

Introduction
Effective TA interventions: the process in practice
TA induction: developing questioning techniques
TA deployment: a case study
Autism and transition
SEND year planner
Managing your digital footprint
Recognising peer-on-peer abuse
Religious and cultural differences: advice for DSLs
Responding to trauma in public life

SCHOOL BUSINESS MANAGEMENT

Introduction
Creating a resilient workplace
Ask the experts: your questions answered
Payroll checklist
New roles in school business management
Minimising the risk of redundancies
Difficult conversations in a restructure
Investigating an allegation
Marketing your school to new pupils

MANAGING CHALLENGES

Introduction
Managing stress and burnout
Dealing with conflict
Mentor training

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Welcome to Optimus Education Insight

Dear Reader

Do you talk about difficulties or challenges? Failures or opportunities to learn? Research suggests that having the capacity to view difficulties as challenges to overcome is a key facet of resilience: that vital ability to bounce back when things get tough. If you're facing the school year with worries about reduced resources, an inspector calling, how you can meet the ever-more complex needs of the children coming through your door – have you got a resilient workplace to support you? Nikkii Messer has been considering what organisational resilience might look like: turn to page 24 to find out more.

We've been considering the importance of working together in other areas too. Sometimes secondary schools find it tougher than primaries to engage effectively with parents, but Ellowes Hall Sports College in Dudley makes it a priority. Mini-Olympics, a dance extravaganza, newsletters and text messages are all part of the mix to improve pupil achievement. See page 17 for details.

In these budget-squeezed times, support staff – and teaching assistants in particular – may be seen as an optional extra. In the SEN section of this term's issue we explore how TAs can be deployed most effectively. Appropriate induction and meaningful, carefully planned interventions play an important role. Turn to page 56 to read how a primary school in Soham changed their approach and improved teaching as a result.

Liz Worthen
Head of Content
Optimus Education

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September

Child Protection in Education 2017
WEDNESDAY, 13 SEPTEMBER, LONDON; TUESDAY, 19 SEPTEMBER, BRISTOL; THURSDAY, 5 OCTOBER, MANCHESTER
Keep abreast of the latest legal guidance and pressing safeguarding issues, and clarify your safeguarding priorities for 2017/18.

SEN and Safeguarding

Stretch and Challenge the More Able
WEDNESDAY, 27 SEPTEMBER, MANCHESTER; TUESDAY, 3 OCTOBER, LONDON
Gain access to innovative and proven strategies for deepening learning and supporting your school’s more able pupils.

Teaching and Learning

October

The Multi-Academy Trusts Summit 2017
THURSDAY 12 AND FRIDAY 13 OCTOBER, COTSWOLDS
Designed exclusively for MAT leaders, this two-day event will inspire you to move beyond boundaries and build relationships with trusts across the country.

Leadership and Governance

November

Mental Health & Wellbeing in Schools
TUESDAY, 7 NOVEMBER, LONDON; THURSDAY, 23 NOVEMBER, MANCHESTER
Hear from a range of mental health experts, and gain proven skills and techniques to support all pupils in your school.

SEN and Safeguarding

December

Effective Financial Management in Uncertain Times
WEDNESDAY, 6 DECEMBER, LONDON
Understand the implications of the National Funding Formula, manage staff restructures and achieve efficiencies.

School Business Management
Introduction

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

Start September on the right foot with the resources we have for you in this issue. As you welcome new pupils and parents, read our case study on how a secondary school successfully engaged parents and won an award for it. Primary headteachers can use our year planner to structure tasks each term and record key dates and priorities. Resilience and emotional intelligence are key leadership qualities explored in a webinar report overleaf. If you’re considering joining a MAT, the case study of a school’s experience will come in useful, as will our interview with a deputy CEO exploring how to get governance right in a trust. Are you ready for the GDPR? Major changes are coming to the way you manage data in schools so turn to page 12 to find out the steps to take now to ensure you’re prepared. Head online for plenty more resources, and look out for your weekly member email from us landing in your inbox every Monday!

Lisa Griffin, Content Lead

Contributors in this issue

Rekha Bhakoo was a primary school headteacher in London for over 20 years. She is now a full-time Ofsted inspector, conference speaker and educational consultant. @rbhakoo

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

Jeremy Bird is an experienced primary headteacher and an Optimus school improvement adviser. He specialises in headteacher support, coaching and school self-evaluation.

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

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Top leadership and governance blogs

How to write a school policy: 9 top tips
oego.co/policy-tips

Why pupil interview panels are a bad idea
oego.co/pupil_panel

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Building resilience and emotional intelligence

Resilient leaders manage their own emotions and recognise those in others to build strong relationships. In her webinar, HELEN MORGAN looked at ways leaders can increase EI and develop resilient leadership.

Being able to deal with challenges and roadblocks with optimism and an ability to see future possibilities are characteristics of leaders who are resilient and possess high levels of EI.

By recognising emotions in yourself and in others, such as team members, leaders can motivate staff, manage feelings in challenging situations and build a resilient and successful team.

Helen’s webinar explored the definitions of resilience and how it relates to school leadership, discussed characteristics of resilient leaders and identified ways to recognise our own feelings and those of others.

Resilience and EI in partnership
As school leaders, building resilience in yourself and others in your team is key to developing successful relationships. Resilience goes hand in hand with emotional intelligence - they work in tandem to achieve personal and professional success, and that success should transfer across your department and through to your pupils. When things are going well at work, they’re often going well at home and vice versa. When things aren’t going so well, issues from either area can affect the other and it is your level of resilience that impacts how you react.

In situations of challenge or when faced with a setback, resilient leaders bounce forward rather than bounce backwards. Rather than dragging you down, a setback is a chance to take stock and identify the best way to move forward.

The Johari Window

The Johari window is a self-reflection tool consisting of four quadrants. (Luft,1969)

The ability of a substance or object to spring back into shape.

The capacity to recover quickly from difficulties and develop a toughness that’s needed to bounce back.

What is resilience?

The Johari Window
To be resilient and emotionally intelligent, you need to know yourself extremely well. Being self-aware helps you develop your relationships with others at work.

Helen referred to The Johari Window as a tool to use in self-reflection when testing how well you know yourself. It works with four quadrants. The first is the open quadrant, which refers to something that is known to yourself and to others. Perhaps you’re creative and great at coming up with new ideas or solutions to problems, for example.
'Resilient leaders bounce forward rather than bounce backwards'

The blind spot is where, as a leader, you have to listen to others. There are things known to others about you but not known to yourself. It might be that you have lots of ideas but struggle to embed them, or that you take on too much and find it difficult to delegate.

The hidden quadrant refers to things known to you but not known to others. For example, you may seem confident on the outside but not feel the same way on the inside.

The last quadrant is the unknown. We're always learning so it's crucial to make sure you have time for self-reflection to be able to learn things about yourself.

**Characteristics of resilient leaders**

**Strong values:** these keep you grounded, ensure you know what matters and provide the ability to weather any storm.

**Emotional intelligence:** how well do you know how people around you work? How confident are you in responding to staff needs?

**Optimism:** the best leaders look for solutions to problems and see opportunities and possibilities.

**Reflection:** make time to stop, take stock and deal with an issue effectively. What is the problem telling me? What do I need to do?

**Perspective:** when you face a problem, think of where it would sit on a scale of one to 10. If it's a seven or more, think about what you could do to move it down to a four on the scale. Then, think about what you could do to move it from a four to a one. Take small, practical steps to deal with a problem.

**Reflections**

As a school leader, you're likely to face a range of different setbacks. It could be a dwindling budget, a timetable change or a staff shortage. Helen asked attendees to think of a time when they experienced a setback at work and asked what they would do differently next time in the same position. The important thing when facing a setback is to learn from it. It's all experience and that experience will help to anchor you the next time you find yourself in the same or a similar situation.

Resilience building is achieved by facing setbacks and getting back on your feet. Helen quoted Nelson Mandela to emphasise this: ‘Do not judge me by my successes, judge me by how many times I fell down and got back up again.’ One of the things to keep hold of as a leader, particularly early in your career, is that it's a long game. Over time you will gain the experience to help you bounce back. Helen referred to her time as a teacher and being asked by pupils ‘How do you learn to get it right?’ Her answer was always that you usually get it wrong first and you learn from that before you get it right.

**Emotional intelligence**

Intertwined with resilience, emotionally intelligent leaders recognise their own feelings and those of others and manage them well, particularly in times of challenge. Helen discussed EI in relation to self-management and self-control. In the face of a setback, how do you maintain motivation of yourself and of your staff? As a school leader, do you recognise your emotional triggers? How do you keep your emotions under control?

As well as self-control, those with emotional intelligence know how to deal with people, try to understand them and show them kindness whatever the situation. Helen explored the concept of organisational awareness. This is understanding what makes your organisation and the people within it tick. Matching the needs of your organisation with what you want is a very useful exercise. If what you want isn't what the organisation needs, this will result in conflict. Instead consider what the organisation needs and how best, you as a leader, can help achieve this.

**Key factors of EI**

- Knowing your emotions.
- Managing your emotions.
- Motivating yourself.
- Recognising emotion in others.
- Handling relationships.

**Managing feelings and emotions**

As a leader, often there is some personal and professional overlap at work, particularly in regards to establishing working relationships with those you consider to be friends. Maintaining a strong sense of perspective, in good and more challenging times, will help deal with any situation.

How you respond to situations at work is important. Avoid giving impulsive, quick responses when a staff member tries to talk to hurriedly in the corridor. Suggest fixing a time after school to talk to your colleague instead. This approach ensures you give yourself the time and space to weigh things up and consider the range of responses you could make.

**Bouncing forward**

Helen closed the webinar by discussing how to bounce forward from a setback, rather than bouncing back. When you hit a problem, it can stop you and your team from achieving a goal. The ability to bounce forward requires you to be able to remove any barrier in your way. This comes with learning from experiences and keeping your eye on the ultimate prize. If you do face a setback or problem, identify the small steps and actions you can take to begin to solve the problem and overcome the barrier to achieve success. By keeping your eye on the prize, you're always looking forward rather than back.
Headteacher appraisal process

The headteacher’s appraisal is carried out by the governing body in maintained schools. **Jeremy Bird** provides a guide to ensure governors review performance fairly and set objectives.

**The headteacher appraisal** process is the duty of the governing body, appraisal panel and pay committee and must be carried out by 31st December each year. The process involves reviewing performance against last year’s targets and ensuring new targets complement the whole-school improvement plan.

**Nominate governors to carry out the review**
Governors should reflect on their governance structure and determine who will be involved in the performance management process. It is usual for a governing body to appoint two or three governors to carry out the review. Governors who are teachers or members of staff at the school must not be involved in the review.

Governors will also need to determine how other governors will be kept abreast of developments, both for the headteacher and for other staff. Governors will need to nominate a designated person (which could be the headteacher) for an external adviser to contact and arrange a school visit, and to ensure that school contextual documents are available.

**Selecting an external adviser**
Maintained schools have a statutory duty to appoint an external adviser; academies and free schools are advised to appoint an external adviser. The external adviser is there to provide guidance, advice and support in appraising the headteacher. External advisers could include education consultants, school link advisers or people previously employed as external advisers. It is for the governing body to determine who they wish to use, ideally with the agreement of the headteacher.

The work of the external adviser will normally include:
- reading, reviewing and analysing documents supplied
- providing written advice for the appointed governors which reviews a head’s progress against objectives and suggests areas for future objectives
- holding pre-review meetings with the head and appointed governors attending the review meeting and carrying out agreed functions
- carrying out any agreed post-review work.

**Adhering to an agreed timeline**
Governors may choose to work to an academic year cycle to plan dates to review the current year’s performance and to plan for the new year. The board will need to determine how they will keep up to date with developments through the year. They might choose to hold a mid-year review to hear how the year is progressing, in light of agreed objectives.

The end of year review might form the agenda of one meeting or be part of the planning meeting for the new year.

**Preparatory information**
The headteacher, governors and adviser should agree who will provide the adviser documents including:
- current school contextual information
- objectives set for previous year
- monitoring information collected during the year
- most recent statistical and performance data available
- most recent external test or examination results
- current school improvement plan
- SEF
- most recent Ofsted inspection report.

**Adviser’s preparatory work**
The adviser reviews the documents. Possible objectives for this year could be drafted and sent to the headteacher, or this may be left until the meetings between adviser and headteacher, and adviser and governors.

**Adopting agreed pro forma for capturing detail**
The pro forma needs to prompt users to state areas including:
- objectives
- actions and success criteria by which the headteacher will meet the objectives
- deadlines and monitoring notes
• signatories (namely governor chairing the panel, the headteacher and the external adviser).

Governors might also want the pro forma to include their school improvement priorities and where evidence will be seen, for example in headteacher reports to governors.

**Presenting key information in meetings**
Governors, the headteacher and the external adviser will need to determine who will provide which information to support the process. Such information will include:

- current school contextual information
- recent historical achievement information (including the dashboard performance data)
- current pupils’ achievement
- current monitoring and evaluation information
- the school improvement plan and the self-evaluation form (if relevant).

Governors can refer to a headteacher skills audit, such as the one on the Optimus website at [my.optimus-education.com/headteacher-skills-audit](http://my.optimus-education.com/headteacher-skills-audit)

The audit identifies key areas of focus including qualities and knowledge, pupils and staff, systems and processes, and the self-improving school system.

Such a template provides governors with a helpful structure on which to base discussions, adapting to the context of their own school. The information contained in the key characteristics column will help guide dialogue and the drafting of specific objectives for the coming year.

**Pre-review meeting**
The headteacher will meet the adviser to discuss the preliminary advice, overall performance and arrangements for the formal review meeting.

The adviser will then meet the appointed governors to discuss the preliminary advice, overall performance and the handling of the formal review. This meeting can be part of the review meeting itself.

**The review meeting**
The review meeting takes place with the appointed governors, headteacher and the adviser present. The review should cover the overall performance of the head during the year, including achievements against previously agreed objectives. Professional development needs and activities should also be discussed.

New objectives will be agreed if this meeting is to include the planning for the coming year. If a subsequent planning meeting is to be held, objectives will be determined then.

**Recording the outcome**
Following the review meeting, a performance review statement (and a statement of objectives for the new year) will be produced. The review statement will be brief, summarising the discussion at the review meeting, and the conclusions reached.

The statement of objectives should include details of arrangements for monitoring. The document should identify the training and development needs and other requirements for the headteacher to be able to meet the objectives set.

On agreement that the objectives are mutually acceptable, copies of the document should be made and circulated to all parties involved in the performance management process for signature. Dates for performance management in the new year will need to be agreed.

**Setting headteachers’ pay**
Governors will need to refer to their pay policy for guidance. Although the external adviser can give a professional judgment that, as a result of the appraisal, it might be appropriate for the governors to award performance points, it is the governing body’s responsibility to decide on the pay of the headteacher. It is not within the external adviser’s remit to advise on the pay of any other leadership group member either.

The appointed governors should provide a copy of the review statement, on request, to those governors responsible for taking decisions relating to pay.

The appointed governors should make a recommendation on pay progression at the end of the review meeting, in the absence of the headteacher. They will need to know the school’s Individual School Range (ISR), current salary of the headteacher and the governance strategy/policy for additional payments which may be available to the head. Attention will also be drawn to reviewing the overall performance of the head. This must be done by 31st December.

**Headteacher coaching**
Would you or your headteacher benefit from personalised support and coaching? Jeremy Bird or another member of the school improvement team can work with a headteacher to provide an appropriate programme. See [www.optimus-education.com/services/consultancy](http://www.optimus-education.com/services/consultancy) for details.

LEADERSHIP AND GOVERNANCE    @OptimusEd

LEADERSHIP AND GOVERNANCE
Cross Phase | Data Management

General Data Protection Regulation (GDPR): what you need to know

The GDPR will change the way schools manage their data and information. LISA GRIFFIN provides a to-do list schools can use to prepare for the new data protection laws and outlines the changes.

**From 25th May 2018**, the Data Protection Act (DPA) will be replaced by the General Data Protection Regulation (GDPR). This means the way you manage data and information within your school will change, bringing significant additional compliance requirements.

Under current legislation schools have a duty of care to ensure that their data is kept safe and secure. With the GDPR coming into effect schools will have an increased responsibility to ensure the way they process and store this information is compliant with the changes.

**What is it?**
The GDPR is a new data protection regulation designed to strengthen and unify the safety and security of all data held within an organisation in the EU. It will entirely replace the current DPA, making changes to many existing data protection rules and regulations that organisations such as schools, academies and other educational establishments currently adhere to under the DPA.

The GDPR will come into force before the UK leaves the European Union. Therefore, UK organisations handling personal data will still need to comply with the GDPR.

**How will schools be impacted?**
Although there are similarities between the GDPR and the DPA, there are also significant differences that will impact the way data and information is managed in your school. Non-compliance can result in huge financial penalties (up to £500,000) being imposed from the Information Commissioners Office (ICO), as well as Ofsted ratings being impacted if the correct data and IT security policies and procedures aren’t in place.

Now is the time to start putting policies and practices into place ahead of the change to ensure compliance with the new regulation.

**What can we do to prepare?**
The ICO suggests ways in which organisations can prepare for the data protection changes and has published a 12-step checklist, summarised below.

**Awareness**
Key decision makers in your organisation need to be aware that the DPA is being replaced by the GDPR. They need to understand the impact that the changes to data protection law will have and identify areas where the school will need to make changes to ensure compliance.

**Information you hold**
Carry out an information audit and document the personal staff and pupil data you currently hold, where it came from and who it is shared with. You should also map out which parts of the GDPR will have greatest impact on you.

**Communicating privacy information**
Review your current privacy notices and guidance and put a plan in place for making any necessary changes ahead of GDPR implementation.

Consider such issues as the information

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**To do list**
- Ensure all staff with access to personal data receive mandatory data protection training.
- Keep records of who has received training and when; make sure any staff who didn’t attend get trained and provide regular staff refresher training.
- Designate a data protection officer.
- Undertake a data protection audit so you have a map of personal data and information you hold, where it came from and who it is shared with.
- Update your e-safety policy to ensure that all stakeholders know what needs to be done to remain compliant with the GDPR.
- Choose the right data processor partner. They will ensure IT asset disposal is carried out in a safe, secure and compliant way.
- Make sure you have a contract or service level agreement in place with your chosen partner.
- Gain clear consent for the different uses of personal data and review systems to ensure that the means of recording consent is compliant.
- Update your systems to ensure new timescales, such as data breach notifications and answering subject access requests, are met.
Individuals’ rights
A new requirement under the GDPR is for you to be able to explain your legal grounds for processing and using personal data in your privacy notice. In addition, individuals will have a stronger right to have their data deleted where you use consent as your legal basis for processing.
Check your current procedures to ensure they cover all rights of individuals, including how personal data is deleted and how data is electronically provided.

Subject access requests (SAR)
Under the GDPR there is a new requirement to explain your legal grounds when answering a SAR. You should update your procedures, plan how you will handle requests within the new timescales and provide any additional information.
The GDPR will continue to allow individuals to ask the school for a copy of their personal data along with other information about how the school is processing it. The data controller must provide a copy of the personal data, free of charge, in an electronic format.

Lawful basis
You should identify and document the lawful basis for your data processing and update your privacy notice to explain it under the GDPR.

Consent
The conditions for consent have been strengthened and you should review how you are seeking, obtaining and recording consent for processing personal data and whether any changes are required.
Under the GDPR, consent must be freely given and as easy to withdraw, at any time, as it was to provide it in the first place. If consent is revoked this must also be recorded.

Children
The new legislation introduces some child-specific provisions, including the legal grounds for processing children’s data.
Plan the systems you need to put in place to verify individuals’ ages, and to gather parental or guardian consent for the data processing activity.

Data breaches
Breach notification must be made within 72 hours of having become aware of the breach. Make sure you put in place the procedures to detect, report and investigate a personal data breach in the new specified timescale. You should also maintain an internal breach register.

Privacy impact assessments
Privacy impact assessments (PIAs) are used to identify and reduce the privacy risks of your projects. The ICO’s code of practice on PIAs explains the principles which form the basis for a PIA. Organisations should familiarise themselves with the code and plan when to implement PIAs.

Data protection officers
Under the GDPR it is mandatory for public authorities, including maintained schools and academies, to have a designated DPO. You need to hire a data protection officer or designate an individual to take responsibility for data protection compliance.

International considerations
Review and map any flows of personal data outside the EU, consider what transfer mechanisms are in place and ensure these comply with the GDPR.

Now is the time to start putting policies and practices into place.
Multi-academy trusts: getting governance right

Having the right skills, knowledge and experience on your board is key in ensuring good governance. Lisa Griffin interviews LEE MILLER from The Thinking Schools Academy Trust and explores the structure they’ve adopted

The Thinking Schools Academy Trust (TSAT)

‘Multi-academy trusts as a whole and the individual academies within the trusts can struggle with who looks after what and who is responsible for what,’ says Lee Miller, deputy CEO and board director at TSAT.

To counteract this, Lee has developed a guide to governance for academies within TSAT. The guide is provided to each academy and explains how governance is structured and the responsibilities held by the five different levels of governance.

‘A MAT has to publish its scheme of delegation but whether everyone in that MAT, particularly those new to it, really understand it is a different matter,’ says Lee. ‘What we’re trying to do is make it simpler and easy to see the different layers of governance we have in our MAT.’

Members

The members are the ‘guardians’ of the Trust and ensure that the Trust acts within its charitable objects. There are five members who meet with the chair and CEO three times a year. They also hold an annual meeting where they review the appointments of the board, the appointment of the external auditor and review the financial statements.

Board of directors

Directors are charity trustees and company directors as well as the governing body for all academies within the Trust. The board has three core functions, namely:

- to ensure clarity of vision, ethos and strategic direction
- to hold the executive to account for the educational performance of the Trust
- to oversee the financial performance of the schools and making sure money is well spent.

The board consists of 11 members: six appointments from members, three appointments from regional governing bodies and two executive appointments. They meet three times a year and review and approve the scheme of delegation.

MAT information

- Trust name: The Thinking Schools Academy Trust
- 11 schools in the MAT, based in Medway and Portsmouth
- Member schools include primary and secondary schools
- Five layers of governance:
  - members
  - board of directors
  - executive
  - regional governing body
  - academy advisory board.

As we’ve grown we regularly review whether the scheme is still right for us

Executive

The board has appointed several senior officers to act as the executive group and as agents on behalf the board. In TSAT this group consists of:

- CEO who acts as accountable officer
- deputy CEO who acts as the chief finance officer
- director of primary education
- director of secondary education.
- Regional Governing Bodies (RGBs)

The board has created three RGBs to support its work and has given explicit delegated authority for these bodies to act on its behalf. Each RGB will meet three times a year prior to the main board meeting, as well as meeting in early September to plan the workings of the RGB and allocate responsibilities. There are also two dedicated training sessions a year for RGBs, for which training requirements are agreed at an RGB meeting.

RGBs are made up of eight members, determined by the board. The individuals are linked to skills that the board has identified.
as critical to provide an effective body. Each member of the RGB is committed to at least one monitoring visit per year.

**Academy Advisory Board (AAB)**
Each academy within the Trust has its own academy advisory board (AAB). The AAB has no delegated authority but acts as a ‘critical friend’ for the academy. Membership is made up of parents, staff and individuals from the local community.

The agenda is set by the executive and agreed with the head or principal and the chair of the RGB. The AAB meets three times a year, prior to the RBG meeting, and a member of the RGB will attend each AAB meeting.

**How are lines of reporting decided in your Trust?**
We wanted to look at best practice both from within the sector and from the private sector. Our solicitors provided lots of advice and support. We did a lot of work with them in understanding terms of reference and who is responsible for what under different schemes of delegation.

As we’ve grown we regularly review whether the scheme is still right for us. One of the most powerful days we had as an organisation was when we got our board and senior leaders together to carefully unpick our structure and decide on how we wanted our scheme of delegation to work and what our various layers of governance would look like. The result is the structure we have today.

**How important is it to adapt the governance structure as you grow and how did you approach this?**
During our growth towards five schools each school had its own governing body which worked in a very traditional way, holding an individual school to account, and the Trust board was more of a background figure. At that size, we had the Trust board taking responsibility for strategic decisions and direction and local governing bodies responsible for more operational decisions.

As we moved towards 10 schools, we had to review the layers of governance and this created some tension.

We had some great governors on our local bodies who had to give up some responsibility to the directors. Of course, we wanted to keep them and so we had to ensure that they understood why this decision was being made. We had to make the new model clear and explain how this would benefit not just the individual school they governed but also the whole Trust. We did a lot of work in ensuring that anyone who worked here, paid or not, understood that their responsibilities meant they look after all the children in TSAT, not just those in a single school.
We view the Trust as a family and therefore need a governance structure that is adaptable.
We view the Trust as a family and therefore need a governance model which works effectively across all the schools."

model which works effectively across all the schools.

I’m a big fan of Lewin’s change model (‘unfreeze, move and refreeze’) which looks at what’s not working now, identifying what needs to change and focusing on the benefits of that change. I’ve found that those three stages can really help to get people on board. Any good governor wants to be part of an organisation that has a positive impact on the education of every child it is responsible for and so being able to show why a change is beneficial to the pupils was the most effective way of managing changes to our governance structure.

What is the induction process for new directors or governors and is there any professional development available for them?

A new director or governor has an introductory meeting with key stakeholders including the chief executive, deputy CEO, and the head(s) of the school(s) under their responsibility. Each of our non-executive directors has a particular responsibility and we link them up with a staff member from the Trust with the same responsibility. For example, if a non-executive director looks after HR, we partner them up with the head of HR so that they can share their expertise and offer support to each other.

This plays to the strengths of people. If a non-executive director comes in, new to education, but has lots of experience in ICT, it makes sense for them to work closely with the ICT manager in the Trust. They can quickly begin to understand our ICT priorities and become confident in their role of critical friend, offering support from a board level.

We want a direct link between the governors and the school and so encourage them to build a strong relationship with the headteacher. In terms of professional development, we make sure that there are three training sessions a year for all governors and directors where we focus on school issues such as school improvement strategies or pupil premium information. Governors and directors need to have the right skills and knowledge to become a critical friend to the Trust.

What challenges have you faced in recruiting those with the right skills and knowledge?

We had a vacancy on our board for a director and wanted some help in making sure we recruited the right person for us. We used the service of Academy Ambassadors, advertising with them using their web portal, and were really impressed with the quality of candidate. They match business people and professionals with MATs looking to strengthen their boards.

They helped us find someone who has become a very active and influential member of the board. It’s so important to find the right person for the right role and make sure they are the best fit.

As directors, how are you measuring the impact of the MAT with regards to school improvement?

Each school has a school improvement plan (SIP) overseen by their local governors and each item on the SIP has an impact measure. We also have a Trust development plan. The priorities identified in each SIP are consolidated and pulled together to create the Trust development plan with impact measures.

We also have a Trust self-evaluation process. Every year we take areas across the organisation and make a judgement on whether they are secure, making a difference or need extra work and attention. This is monitored and overseen by the board, and senior executive staff report on how much progress has been made against our priorities on a termly basis.

School improvement is very closely monitored by the board and each year we take stock of where we are. We have an overall three-year strategic plan and look at the SIPs and self-evaluation on an annual basis to dictate our strategy before the start of the next academic year. It is extremely important to look at the plans and think about what we said we were going to focus on, what we’ve achieved and whether we are still on target and following our strategic direction.

Within our governance structure we also have a governance and ethics committee who look at the impact that governance has across the Trust. All the chairs of governors that we have make up the committee and they meet solely to look at how effective governance is across the Trust and how it can be improved.

What’s next for TSAT?

We currently have 11 schools and are in the process of adding more within the Portsmouth hub. We have more schools in Medway than Portsmouth and want to balance that out to even out the number of pupils in both hubs. After that the next step is to look at creating a third hub in between Medway and Portsmouth. We want to stay as local as we can so that each hub is never more than an hour from each other.

Download the ‘Multi-Academy Trusts: getting governance right’ case studies for more on adapting your governance board as your MAT grows and building a great trust board: my.optimus-education.com/multi-academy-trusts-getting-governance-right
**CASE STUDY**

**Engaging parents in secondary school**

Effective parental engagement supports pupils’ learning and can help bridge the attainment gap. **SUZANNE O’CONNELL** finds out how a school engages parents to improve achievement.

**Ellowes Hall Sports College** in Dudley is a great example of a secondary school that wants parents to remain part of their children’s education. ‘It’s partly to do with expectations,’ says assistant headteacher Andy Johnson.

‘At primary school it is expected that parents get involved. They’re on the playground in the morning and they come into school. ‘When pupils transfer to secondary school the links start to be broken. We don’t want that to happen here,’ explains Andy.

**Bringing the parents in**

Most families are introduced to Ellowes many years before their children are due to transfer there. Getting parents into school is a priority and they start well before the children begin in Year 7.

From Year 4 onwards, parents are coming in to school for the different local events that Ellowes hosts. One example is the mini-Olympics in which local primary schools compete with the help of Ellowes’ sports leaders.

‘We also host the dance extravaganza,’ says Andy. ‘Again, this brings the community into the school and breaks down any barriers there might have been at an early stage.’

When they do get them into the school, Andy is very keen to make sure that every point of contact with parents counts. ‘If they come in for a parents’ evening, for example, we want to make sure that they think it was worth it. If it isn’t, we might not see them again.’

‘When pupils transfer to secondary school the links start to be broken’

Every opportunity is nurtured, such as the annual parents’ meeting with the pupil’s class tutor. The pupils are grouped vertically so this means that, provided the tutor doesn’t move on, they could have the same point of contact throughout their school career.

‘This consistency is important,’ says Andy. ‘They know who to go to and we take time with them. The appointment lasts for half an hour and that’s enough time to ensure that a plan can be put in place if there is something that needs addressing.’

Subject leaders feed into these meetings, but parents can also see them themselves if they wish.

**The LPPA**

Ellowes has just been awarded the Leading Parent Partnership Award (LPPA) for the fourth time in a row. The LPPA is a national award aimed at strengthening a school’s work with parents. It requires schools to go through a process of self-evaluation and portfolio building and provides schools with a clear framework for action.

Andy has played an important role in helping secure Ellowes’ success in engaging with parents and is delighted that the school has been recognised once more for its outstanding work.

‘The overall intention of the LPPA,’ explains Andy, ‘is to develop parental engagement with the aim of improving pupil achievement. Through improvements to punctuality, attendance and behaviour pupils’ progress improves too.’

**A framework for action**

An important benefit of achieving the award is that it isn’t only recognition of the school’s work in engaging parents but it also provides a clear structure for taking the next steps. Andy recognises the clear progress there has been over the past four years.

‘During the first year it was a case of meeting the criteria,’ he explains.

‘In the second we knew we already met the criteria so we developed our provision around the new sports hall that had been built and the all-weather pitches.

‘For the third year we focused on the extent to which our premises were being used by the community and renting them out. During the fourth we focused on the virtual learning environment.’

Their next focus, among others, is on provision for gifted and talented pupils.

‘We must ensure that staff know who the pupils are and parents have access to the information they need too,’ explains Andy.

**Virtual learning environment**

Ellowes has recognised the opportunities...
Implement strategies to engage all groups of parents in supporting their children’s learning and development, from early years to post-16.

“We are so pleased to receive the LPPA as recognition for the hard work our staff, Governors, parents and pupils have put in to ensuring our school has an effective home school relationship.”

Mr Alan Chaffey
Biggin Hill Primary School

Register your interest today at oego.co/OE-LPPA
Engaging parents in secondary school continued....

Ellowes has just been awarded the LPPA for a fourth time in a row

there are in the virtual learning environment. The school uses the internet and technology to improve the speed and relevance of communications.

‘It’s intended for teachers, pupils and parents and emphasises keeping everyone informed. It was designed by an ex-pupil too, so someone who really knows what our school is about,’ says Andy.

He feels that this approach has made a difference to the level of communication that parents have. ‘They know immediately if there has been a problem with attendance or behaviour.

‘If a pupil has a detention parents are informed by text message and they know within 15 minutes. We also send a letter but the text message has more impact because it is quicker,’ explains Andy.

It’s not just for negative communications, of course. Parents get to see their child’s termly assessments as they are published and are notified about good behaviour as well as bad.

‘It means they have a historical record they can access. All the reports can be viewed online and you can be sure that they get home this way.’

The weekly newsletter is emailed, and parents can access previous newsletters and teachers’ email addresses.

‘This means that if they do have a specific problem they can contact the teacher directly,’ says Andy, ‘without having to go through reception and find a convenient time to call.’

Hard to reach

Andy is aware that there is a small group of parents who are still proving hard to reach. ‘Fortunately this is a very small group now so we can use face-to-face contact where necessary and our parent liaison officer and team of pupil support can work on developing an effective form of contact.’

It is very important that Ellowes Hall works closely with its primary schools to pick up on the families where additional or alternative methods of communication may be necessary.

‘Our induction of pupils is vital for this. Use of our facilities also encourages the more reluctant to step onto school ground,’ says Andy.

Ellowes Hall has a booking facility that means that local teams can play on their pitches. ‘We were the first state school to have an army cadet regiment which has proved to be very successful in helping us to engage with families who might be reluctant initially,’ says Andy.

‘Most importantly’ says Andy, ‘it has to be a team effort. Our determination to engage with parents goes across the school into every department. It spreads out in a common partnership that we are very proud of.’

The Leading Parent Partnership Award (LPPA) gives schools a framework to deliver effective parental engagement from early years to post-16. The award can help schools improve pupil progress, punctuality, attendance and behaviour and increase parental involvement in school life.

Available via a school-led or adviser-led approach, school leaders develop an evidence portfolio to demonstrate to Ofsted and other stakeholders that the school has an outstanding and sustainable programme for parental engagement.

Find out more about the LPPA and other awards at www.optimus-education.com/services/awards
When Eastgate Community Primary School went into special measures in 2013, the staff and community were devastated. There were several reasons why it happened, but headteacher Linda Hothersall knew that they still had what was needed to bring the school out of special measures. First, they had to find a MAT with the right ethos to let them try. They were lucky. The College of West Anglia (CWA) Academy Trust contacted them and after talking to the CEO, David Pomfrett, decided they would be a good fit. ‘What impressed me,’ explains Linda, ‘is that we had the same core interest - the quality of education for the children.’

Since then Linda has only praise for the relationship that has developed between the school and the trust. ‘It hasn’t been easy,’ Linda points out. ‘To begin with, they interviewed me extensively to confirm that they could trust me to take the school forward. We then had to speak to all the staff and explain the journey ahead.’

Staff could have left but apart from one, who left for family reasons, they all continued at the school. It is unusual to find a school that comes out of special measures to achieve an outstanding Ofsted report without shedding headteacher and staff.

Retaining individual identity
‘I found myself suddenly in board meetings, in situations I’d never been in before,’ says Linda. ‘It was quite overwhelming.’ However, Linda counts herself lucky that CWA Academy Trust proved to be a source of support and guidance rather than one bent on creating a school in its own form.

Throughout the transition to academy and outstanding school status, Eastgate Academy has been allowed to retain its individual character and make decisions for itself. Much of the guidance has come from the director of education at the time, Dr Duncan Ramsay, who has a wealth of experience as an Ofsted inspector, as well as a proven track record in education.

Linda found the additional sources of advice and support that came from the MAT, such as HR and data handling support, to be of huge benefit. ‘It has made my job so much easier having these people to provide advice on areas that I don’t have time for,’ explains Linda.

There were regular meetings that helped in the process: ‘Duncan was coming into the school initially two to three times every half term,’ says Linda. ‘He was able to work alongside me in a way that was helpful and challenging but not threatening.’

Linda was expected to continue to provide the lead, with the board overseeing. ‘When RAISEonline was out, I could prepare the summary report and then the director of achievement would review it,’ says Linda. This oversight provided the assurance that Linda needed at a time when her confidence was shaken post inspection and she welcomed having her views confirmed.

Distributing leadership
One of the most important messages that came from her MAT advisers was that she didn’t have to do everything herself. As a primary headteacher she was used to carrying out many tasks independently. Now, she not only had people to consult back at the trust but was also encouraged to allow more of her team to attend meetings too. ‘I used to try and go to everything,’ says Linda. ‘But now, for example, my business manager will go to finance meetings and feed back to me.’

Another major development was in
the structure of the leadership team. Originally phase leaders, Linda changed the job descriptions and titles of her SLT to assistant principals. ‘They had taken on more responsibility and were in charge of developments they had picked up from our many visits to other schools. It seemed only right that they were titled accordingly.’

When it comes to planning, the ethos is now much more of distributed leadership and involvement. ‘I don’t create a strategic plan on my own. Everyone takes responsibility for it,’ says Linda. Linda has found her own professional development being nurtured through her involvement in strategic planning within the MAT itself.

Training and development
Linda has always had an interest in IT and responsibility for its development in school. Now, this expertise has been recognised within CWA Academy Trust and she has been involved in a strategic planning group to determine their approach and identify providers.

The school governing body are much more involved at a strategic level with different governors’ groups meeting to maintain oversight of progress. These groups also comprise teacher and teaching assistant (TA) representatives and Linda is impressed with the different perspective they have brought.

The TAs have also seen their role changing. ‘The TAs recognised that there would be much more emphasis on their role and that expectations of them would be higher. They asked for the training necessary to equip them for this.’ This training is delivered by teachers every half term, so the TAs feel as skilled up as the staff. Greater emphasis has been placed upon time for liaison too, with dedicated sessions now allocated.

Peer review
Within the MAT, there are regular meetings across the five primary schools, arranged according to year group. There are four review groups: EYFS, years 1 and 2, years 3 and 4 and years 5 and 6.

The groups visit each other’s schools and observe and reflect on the good practice they’ve seen, helping them to build effective strategies and address problems if any emerge. It’s not only the primary schools in the MAT that work together. CWA Academy Trust includes three secondary schools and forging links between them and primary schools is a key feature of the collaborative work that they do.

‘I’ve been helping to develop practice in Year 7,’ explains Linda. ‘There are benefits for everyone and we have been able to challenge some of the traditional misunderstandings there can be between the secondary and primary sector. We’re finding ways of supporting each other and improving practice across the schools.’

Eastgate Academy is a refreshing example of where the relationship between the school and the MAT can work. Alongside the glowing inspection report and an improved offer for pupils, life for Linda and her staff has blossomed too. ■
# Headteacher year planner

The year planner for primary headteachers will help structure your workload across each term and ensure your time is managed effectively. **REKHA BHAKOO** provides one to use.

<table>
<thead>
<tr>
<th>Term</th>
<th>Tasks</th>
<th>Notes</th>
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<tr>
<td><strong>Half term 1</strong></td>
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<td>• Ensure the smooth induction of new pupils.</td>
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<td>• Ensure all new staff and governors have an induction, including safeguarding training, and that all staff receive a refresher.</td>
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<td>• Implement school improvement plan (SIP) and launch new initiatives and curriculum changes.</td>
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<td>• Complete staff annual reviews and set new objectives by 31st October.</td>
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<td>• Review KS1, KS2, EYFS and phonics outcomes and discuss in SLT meetings.</td>
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<td>• Draw up a preliminary report to governors and hold meetings with team leaders.</td>
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<td>• Update self-evaluation form (SEF) in light of results from the previous summer term.</td>
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<td>• Implement review processes, including teaching observations.</td>
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<td>• Begin budget planning with an evaluation of the current budget.</td>
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<td>• Ensure teachers’ pay and appraisal policies comply with the STPCD.</td>
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<td>• Consider whether staffing structures need to be reviewed.</td>
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<td>• Submit October school census data.</td>
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<td>• Ensure staff are briefed on changes to Ofsted guidance.</td>
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<td>• Review and update policies according to schedule.</td>
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<td>• Fix governors’ agenda, write headteacher report, Organise dates for parents’ evenings and curriculum information evenings for parents.</td>
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<td>• Review school website and ensure that specific contents comply with DfE and Ofsted requirements.</td>
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<td><strong>Half term 2</strong></td>
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<td>• Begin annual curriculum review in the light of budget projections for the future academic year.</td>
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<td>• Ensure pupil assessments have been organised and that reporting to parents is taking place.</td>
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<td>• Monitor capability processes.</td>
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<td>• Check pupils at risk of underperforming have been identified and appropriate interventions planned.</td>
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<td>• Ensure appraisal and QA processes are occurring to schedule.</td>
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<td>• Review results in light of inspection data dashboard and ASP service (RAISEOnline replacement) .</td>
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<td>• Ensure curriculum plan has been completed and present to relevant governors’ committee.</td>
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<td>• Ensure the headteacher review is completed by 31st December (or in line with your school’s policy).</td>
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<td>• Update the SEF in light of the inspection data dashboard and ASP service (RAISEOnline replacement).</td>
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<td>• Ensure pupil assessments are analysed and feed into intervention strategies.</td>
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<td>• Report on standards and their implications to governors using official DfE data and school tracking data.</td>
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<td>• Review on standards and their implications to governors using official DfE data and school tracking data.</td>
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<td>• Review and update statutory whole school policies and send them to governors for approval.</td>
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<td><strong>Half term 3</strong></td>
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<td>• Submit January census data.</td>
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<td>• Cost the curriculum and the new school improvement plan.</td>
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<td>• Monitor intervention strategies and ensure key pupils are shared with staff.</td>
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<td>• Attend RAP (raising attainment and progress) meetings.</td>
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<td>• Ensure mid-year appraisal reviews with staff are completed.</td>
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<td>• Plan assembly focus for the term.</td>
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<td></td>
<td>• Request that curriculum leaders produce a SEF and development plan.</td>
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<td>• Continue to ensure that the school website contains up-to-date and relevant information.</td>
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<td>• Report progress and budget implications of curriculum and staffing structure to the governing body.</td>
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<td><strong>Half term 4</strong></td>
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<td>• Constantly review staffing requirements during the interview season.</td>
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<td>• Continue to report on whole school pupil progress and budget implications to the governing body.</td>
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<td></td>
<td>• Continue to monitor standards in teaching and learning and pupil progress.</td>
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<td></td>
<td>• Carry out mid-year review of SIP; update the SEF and make any necessary changes.</td>
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<td><strong>Half term 5</strong></td>
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<td>• Plan for Year 6 leavers’ days.</td>
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<td>• Plan transition days for Reception and nursery.</td>
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<td>• Plan assembly focus for the term.</td>
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<td><strong>Half term 6</strong></td>
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<td>• Write, consult on and communicate school development priorities for next academic year.</td>
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<td>• Review and analyse pupil progress across core subjects and report KS1 and 2 results to parents.</td>
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<td>• Read and sign end-of-year reports.</td>
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<td>• Ensure the QA process is updated and in line with Ofsted grade descriptors.</td>
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<td>• Ensure the staffing structure is in place for the new school year (including contracts).</td>
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<td>• Report on school progress based on SIP and final staffing to governors.</td>
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<td>• Prepare for next appraisal target setting and review cycle in September.</td>
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<td>• Check that a staff in-service training plan has been organised.</td>
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<td></td>
<td>• Ensure the INSET day arrangements are published and sent to all parents/carers.</td>
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What’s in this month’s School Business Management section?

How are you feeling as you start the school year? Excited? Ready for new challenges? Fearful of problems that may lie ahead? Resilience seems to be the word on everyone’s lips at the moment – and it’s not just for pupils. Nickii Messer has been exploring how we can create a resilient workplace with three C’s: commitment, challenge and control. Another phrase that comes up repeatedly when talking about professional development needs is difficult conversations: often challenging but not to be avoided. Sue Birchall has been considering them from the perspective of restructures and the kinds of questions you’re likely to be asked. How do you see your own role developing in the year ahead? We caught up with Stephen Morales, CEO of NASBM, to talk about new roles emerging in MATs and the importance of continuing professional development for school business managers. Finally, to keep up to date with what’s new online, look out for your weekly member email, landing in your inbox every Wednesday.

Liz Worthen, Head of Content

Contributors in this issue

Micon Metcalfe is director of finance and business at Dunraven School. She is a specialist leader of education, has worked in schools across the 4-19 age range and is experienced in change management. @miconm

Nazli Hussein is a freelance SBM with over 10 years’ experience of working with a variety of schools across London. She’s passionate about processes, project management and efficiencies. @sbm_support

Nickii Messer was a school business manager for many years in three school phases. She now works as a consultant and is Anglia Ruskin’s operational lead for their SBM programmes. @NickiiMesser

Stephen Morales is CEO at NASBM and a keen advocate of the professionalisation of school business management. Prior to his education career, Stephen worked in investment banking. @stephenpmorale1

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Twitter
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Creating a resilient workplace

Commitment, challenge and control are key elements of resilience. NICKII MESSER explores these and discovers how we can prepare for the toughest of days

You know that feeling when you lose your mojo? You might not know exactly where or when it went, but it just doesn’t seem to be around now. It’s been a really tiring, and trying, week, stuff is happening at home, and there is so much bad news in the media. Whatever caused it to go, one thing you know for certain is that today’s score is ‘life 1 – mojo 0’.

The other thing you can be sure about is that you will bounce back, and soon. You are resilient. You cope. If you get knocked down, you get back up again. And as a school leader, you absolutely must, whatever else might be going on.

But what if you were in a new job, new to an organisation, not sure of yourself or your capabilities? How resilient might you be then?

Individual and organisational resilience

I talk to many school leaders about personal resilience and recently ran a half day training event for headteachers and deputies on creating a more resilient workplace. It was working with this group of senior school leaders which helped me better understand the intrinsic link between individual and organisational resilience. Indeed, the more I looked, the harder it became to separate the two. If school leaders are to be resilient, they must be surrounded by a resilient workforce. But that workforce, in turn, needs the rigour and safety of a resilient organisation.

The Oxford English Living Dictionary defines resilience as ‘the capacity to recover quickly from difficulties’. This means that when the going gets tough, resilient people keep going. Being a school leader, you have to be resilient because a number of people rely on you. But what does resilience look like and how do we get it – for ourselves and our workforce? Leading psychologist Susan Kobasa argued that there are three essential elements to resilience: commitment, challenge and control.

Commitment

Kobasa’s research found that resilient people are committed to both their lives and their goals. When we recruit new colleagues we often question them about their goals, ambitions and career aspirations. But how do we ensure they will also become committed to the school’s goals, while retaining time and energy to commit to their lives?

This can feel like an especially difficult dichotomy for young teachers at the start of their careers. Yet it is an important balance they must maintain if they are to remain resilient. At the start of the new school year, there will be so much information for a new member of staff to absorb. But in many schools this might be the only time the school’s values, goals and development priorities are shared and explained.

Challenges

Kobasa described resilient people as having the capacity to view difficulties as challenges. Schools are constantly facing difficulties, with funding cuts, reduced resources, worsening behaviour (parents as well as pupils!) and the seemingly constant threat of Ofsted inspection. But those schools who feel able to cope, who say ‘bring it on’ to Ofsted, who welcome
challenges as opportunities to grow and develop, not something to grind them down, will be able to maintain a culture of resilience.

A growth mindset, whether at organisational or individual level, means viewing failures as opportunities to learn. I learned a lot about my own ability to overcome intractable difficulties when preparing for a motorbike test a few years ago. I had fallen off my 750cc motorbike three times in one afternoon trying to carry out a particularly complex manoeuvre (for the uninitiated, a motorbike is heavy enough to hurt when it lands on you). I realised that I was failing to learn, and learning to fail. I saw the difficulty as my nemesis instead of my teacher. It was only when my tutor explained that it was my self-doubt that made me fail, not my lack of ability, that I finally mastered the manoeuvre and moved on.

**Control**

Kobasa found that resilient people do not waste energy worrying about those things they have no control over but, instead, focus their efforts where they can make a difference. The ability to recognise what is ahead of you and how you feel about it requires a certain degree of mindfulness. For example, resilient schools will understand what their funding situation is likely to be over the next few years, and therefore work to gain a better outcome. Staff will feel comfortable voicing opinions in regular, meaningful consultation.

To use a cliché, change is one of the few constants in schools. All staff, especially those new to this unpredictable world of education, can find change exhausting. When John Fisher considered the impact of change on the individual (oego.co/ Fisher-change), he recognised that while we all go through a certain rollercoaster of emotion, the length of time we spend ‘in the trough of depression […] depends on certain factors such as ownership and control’. School leaders who consult with, and consider the impact on, their staff when determining change, will give them the degree of control that is so integral to resilience.

**Whole-school resilience**

Working with the group of headteachers and deputies, I showed them a list of ‘signs of resilience’. I asked them to prioritise the ones that they, as leaders, felt they could most influence to ensure resilience within their workforce. These included:

- the ability to bounce back
- capacity to have courage
- motivation to move forward
- power to stay centered
- awareness of knowing themselves
- the gift of laughter
- potential of showing promise
- capacity to ask for help
- tenacity to accomplish goals
- willingness to share feelings
- capability to connect with others
- the inspiration to give back.

The exercise generated a great deal of discussion and an agreement that, overall, they could have a hand in influencing every one of these. What I didn’t tell them until afterwards was that they are in fact ‘signs of a resilient child’ from the book *Raising Our Children to Be Resilient: A Guide to Helping Children Cope with Trauma in Today’s World* (2004) by Linda Goldman.

We agreed that having a list such as this at the very centre of the school, along with the core values and vision, can help everyone, staff and pupils alike, to build and maintain essential resilience.

Finally, I turn to Maslow: ‘In any given moment we have two options: to step forwards into growth or to step back into safety.’ School leaders need to encourage everyone to make the right decision. This means giving staff, be they new or more experienced, the confidence to take those steps forward when the moment is right.

Resilience is like a rubber band. It can stretch, reform and stretch again, but overstretch it too much or too many times and it will snap.

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Emotional welfare is the responsibility of all members of the school community. Our new Wellbeing Award for Schools (WAS) provides a framework for schools to evidence good practice. Find out more about the WAS at www.optimus-education.com/services/awards/wellbeing-award-schools
Ask the experts: your questions answered

MICON METCALFE answers members’ question on salary scales, staffing costs and pupil premium leadership

Question
I work in an international school in Bahrain. We are considering appointing a new school business manager, and I am trying to obtain a copy of the salary scale they would be paid under in the UK. I understand it may be JM3-4 but I cannot find a scale to confirm. Would you be able to point me in the right direction?

Answer
In the UK, there is a wide variation in the salary range for SBMs. In maintained schools, some local authorities define the range as part of the ‘single status’ agreements for local government staff, whereas foundation and academy schools can set a salary that they think appropriate.

There are also wide variations in job roles. A SBM may be the finance director of a medium-sized company (in an academy), or they may be more like an office manager in a small school within an academy chain.

The NASBM professional standards define the various levels at which SBMs may operate. Before setting a salary, it may be appropriate to match the job role to a corresponding NASBM tier.

That said, SBMs can be paid anywhere between £25,000 and £80,000 (although few reach the upper level). If operating at a strategic level with a wider range of responsibilities, a salary equivalent to an assistant headteacher might be the best starting point.

It’s also worth consulting the local government pay scales for London and the rest of the UK. A typical SBM salary might start at around spine point 41 in a primary school and perhaps spine point 51 in a secondary.

Question
When working out the overall percentage for ‘staffing costs’ within a school, what should be included? Is it just your staff on payroll, or would you also include agency supply staff, adverts, CPD and so on?

Answer
In short, it depends! In an academy, the total staff costs in the staff costs note includes:

• wages and salaries
• social security costs
• pension costs
• agency teaching costs
• staff restructuring costs.

In the benchmarking information for maintained schools and academies, total staffing costs include:

• indirect employee expenses
• training costs
• staff related insurance.

In the school spend data published by the government, these sums are included in expenditure on school staff.

In terms of how you assess spend on employee costs for your management accounts, either figure could be used. I tend to report the other employee costs as part of the total staffing costs and include in the staffing KPIs, but these areas of expenditure account for less than 2% of the total.

Question
Does the person responsible for overseeing the pupil premium have to be a member of the senior leadership team or can it be a member of staff on a lower level of management?

Answer
The pupil premium conditions of grant are silent on who and how it is overseen in schools. In fact, that grant is not even ring fenced – it can be used for any educational purpose. That said, the DfE does publish guidance on ‘Pupil premium: funding and accountability for schools’ (www.gov.uk/guidance/pupil-premium-information-for-schools-and-alternative-provision-settings).

This clarifies that Ofsted inspect the use of pupil premium and that schools must publish how it is spent and the impact on their websites. The effective use of pupil premium appears under leadership and management in the Ofsted inspection handbook. Leaders and governors are expected to know the grant is being used effectively and having an impact.

Want to ensure your school is using pupil premium funding effectively? Find out about our consultant-led pupil premium reviews at ogeo.co/pupilpremiumreview
Payroll checklist

Is your payroll up to date? Make regular use of this checklist from NAZLI HUSSEIN to stay on top of changes and variations

<table>
<thead>
<tr>
<th>Employee lifecycle</th>
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</thead>
<tbody>
<tr>
<td>Add new starters to the payroll:</td>
</tr>
<tr>
<td>• start date</td>
</tr>
<tr>
<td>• NI number</td>
</tr>
<tr>
<td>• salary scale</td>
</tr>
<tr>
<td>• contracted hours/weeks</td>
</tr>
<tr>
<td>• P45/G</td>
</tr>
<tr>
<td>• birth date</td>
</tr>
<tr>
<td>• bank details</td>
</tr>
<tr>
<td>• auto enrolled into the pension scheme (staff must purposely opt out). Add pertinent information to the Single Central Record (SCR).</td>
</tr>
<tr>
<td>Administer pre-employment checks for new starters i.e. asylum/immigration/qualified teacher status.</td>
</tr>
<tr>
<td>Absence: time off without pay, sick, annual leave and so on.</td>
</tr>
<tr>
<td>Identify staff having career breaks/secondments, update budget accordingly.</td>
</tr>
<tr>
<td>Process resignation/termination dates and leavers from payroll.</td>
</tr>
<tr>
<td>Create, implement and manage a disaster recovery strategy for payroll.</td>
</tr>
<tr>
<td>Process income tax and national insurance (NI) queries – PAYE, P11D production and issue of P45 and P60’s.</td>
</tr>
<tr>
<td>Manage pay slip distribution, preferably online to minimise administration.</td>
</tr>
<tr>
<td>Adjust tax codes with payroll as staff are notified by HMRC.</td>
</tr>
<tr>
<td>Carry out monthly salary monitoring, investigate/explain variances.</td>
</tr>
<tr>
<td>Complete year-end activity in line with HMRC and payroll guidelines.</td>
</tr>
<tr>
<td>Respond and advise on day-to-day matters concerning pay e.g. income.</td>
</tr>
</tbody>
</table>

| Payroll process: remember to check… |
| Payments and deductions. |
| Collated timesheets and any authorised overtime. |
| All authorised variations to pay. |
| Pay increases. |
| Calculated redundancy payments. |
| Annual increments and national pay awards. |
| Occupational/statutory sick deductions and payments. |
| Calculated leavers final payments. |
| Expenses and mileage. |
| Third party deductions: statutory, student loans, child care vouchers etc. |
| Maternity, paternity and adoption payments. |
| Voluntary deductions. |

| HR administration |
| Maintain electronic HR data on the chosen management information system for the school. |
| Collate qualification and teaching certification for all new teaching staff and add to the Single Central Record (SCR). |
| Process completed pensions forms; ensure next of kin etc. information is completed. |
| Process maternity, paternity and adoption leave, ensure written notification/certificates have been correctly received, intent to return letters provided, and support/advice offered. |

| Pensions and reporting |
| Calculate pension contributions. |
| Local Government Pension Scheme Returns. |
| Deduct additional voluntary pension contributions and added years contracts. |
| Production of Teachers Annual Service Return. |
New roles in school business management

Are you ready for a role as a chief finance officer in a MAT? We spoke to Stephen Morales about what the job entails and how SBMs can prepare for new opportunities.

What are the key skills that a finance director (FD) or chief finance officer (CFO) in a MAT needs?

Firstly they need a strong understanding of the appropriate financial frameworks. They need to be able to navigate and interpret the accounts, and they need an appreciation of their responsibilities, accountabilities and statutory duties. Both technical knowledge and strategic leadership skills are important.

Not everyone would agree with me, but I don’t think you necessarily need to be a chartered accountant. You do need the relevant technical knowledge, but you can also get support via your audit company or an accountant on your team.

What’s the best way into being a CFO: promotion through the school ranks, or coming in from the outside?

This is an interesting debate across the sector! Personally, I believe it’s harder to acquire the deep technical knowledge and strategic leadership capability needed for the role, than it is to understand the context into which you’re coming. But maybe I would say that because that was my journey! Others would argue the other way.

However, you certainly cannot come in from outside education and not be sensitive to the needs of the people you’re serving and your stakeholders. There has to be a complete commitment to the optimisation of resources; the bottom line is only a means to an end.

If you came into the school environment and your sole aim was to achieve a surplus, irrespective of the needs of the children, then that would be a huge mistake. But coming in and saying: ‘how can we work differently, more innovatively, more efficiently, ensuring that we get more resources to the front line, and can serve our community of children over a sustained period?’ – that has merit.

How does this differ from the traditional role of an SBM or finance manager?

For school business managers working in local authority maintained schools, reporting is mainly done using a template provided by the local authority. You are told how to report different categories of spend or income, and there is very little latitude. A lot of the technical consolidation would be done at local authority level anyway, with a robust team to provide support.

In those roles, the balance sheet is less important. It’s much more about income and expenditure, rather than assets, depreciation, land and buildings and so on.

In the maintained environment, you’re a conduit between the school and the local authority.

In an academy environment, you’re directly accountable to many more people.

We may wish there was continued support at local authority level yet increasingly there isn’t – we’ve got to be more self-sufficient.

Ask yourself: how do I want to position myself for the future? Do I want to be a generalist? Do I want to specialise and go down an HR route, or procurement, or finance? Do I want to take on a broader strategic remit and aspire to a chief operating officer role?

You need to understand where you are, the landscape, and where you want to be. What you mustn’t do is ignore what’s happening and hope for a change of government that will take us back to where we were before. I think that’s perhaps a little naive.

If we regard ourselves as professionals, I think there is an imperative for continuous improvement: engaging in study, gaining new knowledge – so that you can perform to the best of your ability.

What advice would you give to aspiring school business managers?

I’ve been saying to our members and the education community at large that we need to appreciate the current landscape. If we regard ourselves as professionals, I think there is an imperative for continuous improvement: engaging in study, gaining new knowledge – so that you can perform to the best of your ability.

What’s the future looking like for NASBM?

As we transition to becoming the Institute of School Business Leadership, we’re reaching out to the FDs, CFOs and COOs who historically have found their homes with the accounting bodies. We can offer something that has an education context. You may be a qualified accountant, but there is a broader aspect to the management of schools.

We’re branching out, but not forgetting that most of our members are on a journey. We want to give all practitioners professional status, as part of a unique, dedicated body.
How to minimise the risk of redundancies

Reached a point where making staff redundant seems to be the only way of balancing the budget? Read NICKII MESSER’S 10 step guide to reducing redundancy risk before making any decisions

A few years ago, the idea of making school staff redundant in anything other than the most exceptional of circumstances would have been unthinkable. Sadly, increasing numbers of schools are facing and going through this prospect.

Paring staffing to the bone while still providing an effective and efficient service is increasingly seen as an essential part of the SBM job description. So, if your school is struggling to make ends meet, and you are faced with making staffing cutbacks, here are 10 essential points to consider before you start.

1. Have a clear plan
   Before making any key decisions, you need a clear plan of action. The starting point for the staffing plan is school need. The SBM should find this documented in the school’s improvement or development plan (SIP/SDP). This, in turn, starts with critical self-evaluation (the SEF) to identify school strengths and weaknesses, the reasons behind these, and what the school needs if it is to improve and develop.

   Once the SIP/SDP has established need, school improvement strategies and initiatives are identified, prioritised and appropriate resourcing – including staffing – determined.

   Staffing requirements in the SIP/SDP should be represented at role, rather than person, level. This supports objectivity and longevity; changes will not be required as staff come and go. This information feeds into the budget, where affordability will be tested and overall budgetary position ascertained.

   The SBM now has the information required to plan for an appropriate staffing structure. One note of caution: decisions must be based on at least the medium term (three+ years) plan. What the school needs, or doesn’t need, this year, might change in subsequent years, so plan within that context.

2. Ensure the accuracy of the budget
   An accurate school budget, explicitly reflecting the SIP/SDP, is crucial to reduce the risk of redundancy. Staffing costs account for 70%-80% of total expenditure, so staffing and staffing cost information must be accurate and up to date.

   Only include confirmed income. Including aspirational income, for example potential lettings, is a high risk, often misleading, strategy. When checking staffing affordability, accurate income figures are vital.

   Recognise the in-year position, regardless of carry forward. Staffing costs require an appropriate level of sustainable funding, and one year carry forwards can mask the true longer term position.

   Staffing costs and budgeting should be on at least a three-year plan. Factor in worst case (i.e. most expensive) pension costs, inflationary increases and performance related pay awards when considering longer term affordability (or sustainability) of the staffing plan. Should the school face a deficit position, the sooner the SBM knows the more proactive they can be in reducing the risk of redundancy.

   The DfE’s ‘Schools financial health and efficiency’ toolkit (www.gov.uk/government/collections/schools-financial-health-and-efficiency) has a wealth of advice on ensuring financial health and efficiency.

3. Share information
   With so much media attention, staff already know schools are facing tough financial times. The SBM has a vital role in helping them understand what this means and the potential impact.

   Sharing the SIP/SDP and budgetary headline information with staff will help them understand what the school needs to do for the pupils and the challenges it faces. To avoid creating alarm, information needs to be disseminated strategically and in a way that is timely, accurate and sensitive. Draw up a plan for this.

   Disseminating key information provides the opportunity to engage staff support. Staff get instrumental in making the school successful and will be most impacted by difficult staffing decisions, so they deserve to know what is happening.

   Hold training or briefing sessions for staff, middle leaders and governors to help them understand the budget, how it works, and its relationship to the SIP/SDP. (You can use the In-House... Continued ››
How to minimise the risk of redundancies continued....

Training course on ‘Achieving value for money’ to do this my.optimus-education.com/training/achieving-value-money

Briefing sessions can help staff understand whole school context and the need to work flexibly within this. If staff know you are working to reduce the risk of redundancy, and understand their role, they are more likely to support proposals which involve working in different ways.

4. Review staffing as a whole
Once resourcing requirements are defined, and overall budgetary implications calculated, the SBM can make informed recommendations regarding the school's financial future.

Regular staffing reviews are essential to ensure the staffing plan is fit for purpose, efficient and effective. Regular reviews also help staff understand their role in providing value for money.*

SBMs are often required only to focus on support staff, but as all staff contribute to a common purpose and goals, there is a strong argument for whole-staff reviews. Offer to work with the headteacher or deputy head to create a joined-up approach to staffing reviews. Support staff face severe cut backs in many schools but the impact on teachers and their ability to do their job effectively must be considered.

*Maintained schools need to complete the schools financial value standards each year. Question 7 (Section A) requires that staffing structures should be reviewed annually in line with curriculum, improvement and as part of workforce planning [SFVS Support Notes, DfE 2017-18: 24].

5. Review roles and responsibilities, not people
In redundancies, it is the role rather than the person which is ‘deleted’. The use of roles rather than names in staffing reviews reflects staffing need as described in the SIP/SDP.

Should redundancies become necessary, the SBM should check the medium to long term SIP/SDP requirements to avoid redundancies which could have a detrimental effect on the future of the school. Referring to roles in the staffing reviews emphasises that objective, rather than emotive, judgements will be made.

6. Don’t confuse redundancy with performance management
The staffing review should only focus on school resourcing needs. The school should already have an appraisal or performance management process in place (preferably for all staff) as well as capability procedures.

If this is not happening for support staff, the SBM can have a pivotal role in introducing appropriate performance management. As all staff are paid from dwindling public funds, ensuring the effectiveness and efficiency of every member of staff is a key responsibility for the SBM. See the Knowledge Centre article ‘Support staff review and restructure’ for more guidance (my.optimus-education.com/support-staff-review-and-restructure).

If a member of staff is unable (or unwilling) to complete their work to a satisfactory standard, redundancy is not the means for dealing with that! Search for the expert answer on the Knowledge Centre on ‘correct procedures for parting company with staff’ for an example scenario.

7. Beware fixed term contracts
Temporary and fixed term contracts are used to fulfil temporary requirements such as maternity leave, a new scheme of work, or a gap between permanent posts. Employees on fixed term contracts have rights just as staff on permanent contracts do. This might include the right to redundancy payments.

A fixed term or temporarily contracted worker who works continually for the same employer for two years or more may have the same redundancy rights as a permanent employee. Employees on a fixed term contract for four or more years may automatically become a permanent employee. Where the employer is the local authority, the school may not even be aware of continuous service. The SBM needs to find this out and monitor accordingly. (The ACAS website contains useful guidance – search for ‘fixed term work’.)

Keep a spreadsheet to log fixed term or temporary contracts, with start and end dates, to eliminate the risk of nasty surprises.

8. Review before recruiting
Determining need and affordability is essential before proceeding with recruitment. If the school has a vacancy, this might create sufficient ‘slack’ in the staffing structure to avoid redundancies elsewhere. The SBM needs to be aware of all recruitment decisions, as they are best placed to check affordability. Make sure that your recruitment and selection policy includes a requirement that need and affordability are determined before recruitment can proceed.

Calculate affordability on a ‘worst case’ (i.e. most expensive) cost of new member of staff over at least a three-year basis. Include pension as well as inflationary and pay review costs.

Annual staff ‘skills and aspirations’ reviews help identify staff ready for new opportunities who might enjoy the CPD benefits of stepping up to cover a temporary gap. Where a vacancy is needed but not affordable, seek a more creative solution. See point below on collaboration!

9. Collaborate with local schools
Working collaboratively with other schools brings many benefits*, so explore the possibilities of innovative staffing solutions across a number of local schools. With many schools facing tough financial decisions, it’s likely that local schools are considering redundancies and would welcome collaborative solutions.
Sharing staff, even temporarily, can help reduce the risk of unaffordable recruitment. The SBM is recognised as being well placed to build these collaborative relationships, so include staffing ‘conversations’ within the SBM network.

More expensive staff, such as heads of department, SENCO, ICT manager, even the SBM, might be shared across two or more schools. ‘Surplus’ staff might be moved to a different school to plug gaps. With a culture of trust and openness, this arrangement can benefit all parties.

Make sure collaborative arrangements are formalised in legal contracts and include how areas such as performance management, sick leave and redundancy would be handled.

*For evidence of the far-reaching efficiency savings that schools can achieve by working together, see the ‘Review of efficiency in the schools system’ from the DfE.

10. Reduce the impact of redundancies

What if redundancy does become the most viable option? Before beginning procedures, the school needs to understand the potential risks and impact, and seek to minimise these.

To keep the school compliant, the SBM should be acquainted with key legislation and guidance on handling redundancies and seek professional advice. ACAS have published two advisory booklets on handling large scale and small scale redundancies.

The cost of redundancy needs to be carefully considered before making any decision. The SBM needs to demonstrate that any financial benefits of redundancy are not wiped out by the cost of the process itself.

As highlighted in my blog post on ‘Budget cutting should be long-term, not knee-jerk’, the complexities of managing redundancies should not be under-estimated. Getting it wrong can leave you with very costly tribunal claims. Redundancy is never going to be a cheap option, at least not in the short term, and if it involves ‘pension strain’ (generally affecting redundancy of staff aged between 55 – 60 years old) the sums soon start adding up.

There is potential for reputational risk, both within and outside the school. The SBM should develop a plan for communicating with stakeholders (staff, governors, parents) to optimise understanding and minimise damage. ‘The void created by the failure to communicate is soon filled with poison, drivel and misrepresentation’ (C. Northcote Parkinson).

Upcoming conferences

Managing Staff Wellbeing & Workload
28th November, 2017

With a shocking percentage of teachers highlighting that teaching is having a negative impact on their wellbeing, it’s vital you know how to manage staff stress and help reduce workload to create a healthy work life balance and to retain your teaching staff.

This conference will give you the knowledge and strategies you need to ensure staff are happy, motivated and able to develop in your school.

Effective Financial Management in Uncertain Times
6th December, 2017

With uncertainty surrounding the National Funding Formula and pressures to reduce costs mounting, now is the time for SBMs to come together and find out how to do more with less.

This interactive and practical conference will show you how to manage restructures, achieve efficiencies and generate income.
Difficult conversations in a restructure

A staff restructure can bring up all kinds of emotions and questions. SUE BIRCHALL shares suggestions for ensuring these conversations are handled in the best way.

**Difficult conversations can** arise from many situations, but when the conversation arises from a staff restructure, it can become even more challenging.

Recognise that these situations are emotive. It’s likely that you will be dealing with colleagues and staff members that you have close working relationships with or have known for a long time. This can be stressful.

Before getting to the stage of having conversations, be clear about these points.

If you have a conflict of interest with those involved, say so. Do not get involved in a process where you would be unable to be objective or are at a risk of being subjective. This will blur the process, create an even more unpleasant situation or could even give cause for constructive dismissal.

Work carried out at the start of the process is time well spent. Follow the strategy that’s described by your local authority, academy, trust or governing body. A restructure policy is valuable. Having the whole process written down, approved by governors, shared with staff and ratified by the unions will save problems later.

Don’t take anything personally. Having a restructure may be a business process but it’s also emotive. Reactions will depend as much on personal circumstances as anything work-related.

Think dialogue, not monologue. You don’t need to do all the talking. People may just be seeking an opportunity to share their feelings or thought processes.

Be professional. Remain professional at all times. Avoid promises (which you may not be able to keep) and personal intervention.

Be supportive. Be ready to offer support, guidance and help. Don’t be afraid to signpost support organisations, training and job opportunities if a redundancy situation arises.

**Difficult questions**

Having reached the point where decisions have been made and outcomes need to be shared, you now need to face the difficult questions. Be aware that some colleagues will panic at the first mention of organisational change and won’t have fully heard the proposals. You may have to start by explaining things again.

**Why am I being picked on?**
A first reaction and one that can be aired quite vocally. If you have shared the business proposal before this point this will be an easier conversation. If the question comes after this has been shared and you have gone through consultation, you may consider having one to ones with staff to manage the situation and to hijack the spread of bad feeling.

**Things are working well: why does there have to be change?**
Your change management skills will be useful here, reinforced by a thorough evaluation of the expected outcomes from the change. If people are included in a process, they are more likely to understand it and accept the final decisions.

**My job description says I do X; I don’t want to change and do Y.**
Having knowledge of your school policies as well as being armed with the legal position will help you to answer this. Be aware that any role changes need to have at least one month’s written notice, follow a proper process and consultation and be addressed as per the terms and conditions set out in your policy.

**I can’t take on any more work!**
Rationalisation and restructuring the workforce often means a redistribution of workload. Carry out a skills audit as part of the restructure process (and be open about this). The conversation can then be around fair allocation of work and you can reassure colleagues that their capacity has been considered.

**Will I lose my job?**
This is the most stressful perceived outcome and likely to be the question that you are asked the most. Honesty is without doubt the best policy and the answer needs to be delivered with a level of compassion and tact, whether it is yes or no.

Remember that colleagues will share their experiences throughout this difficult time; what you deliver needs to be consistent, honest and as direct as it can be. Consider how you would like to receive news and updates in this situation and use that as a benchmark.
Investigating allegations: a step by step guide

If an allegation has been made which needs a formal investigation, there are steps that should be taken to ensure compliance. **TOM WALLACE** explains the process.

**Allegations of misconduct** may come from direct observation or via informants such as colleagues, pupils, parents or external personnel. If an allegation has been made which can’t be resolved with an informal meeting between line manager and member of staff, a formal approach will need to be taken. The first step in a formal approach is to carry out an investigation.

**Who investigates?**
In some cases, it will be the line manager of the employee who is the subject of the complaint. In this situation, or if the line manager is a potential witness, it will be necessary to get another manager to investigate. Even if the line manager isn’t the subject of the complaint or a witness, determine if they will be considered neutral. If not, it’s best for someone else to investigate.

**The role of investigator**
The investigator must act as a fact finder. They are not there to make recommendations or assumptions; they should take an objective view of the allegation and investigate subjectively, with an evidence based mindset.

The investigator will take account of the employee’s explanation, speak to any witnesses to consider the accuracy of their accounts and distinguish between facts and opinions. Their conclusions will be based on factual evidence and it is crucial that the investigator can explain the rationale behind the conclusions.

**Preparation**
Prepare and plan your investigation carefully, deciding what is in and out of scope before you start. Check school rules, procedures, expectations and any previous disciplinary record to help determine whether there is a case to answer under the allegation.

Re-read the relevant policy and procedure under which you are investigating. For example, if it is a whistle-blowing investigation, you will need to inform certain people in the organisation.

**Investigation plan**
The investigator will then draft an investigation plan. This is important as it identifies the steps to follow and provides an indication of the timeline in which the investigation will be undertaken. The extent of the investigation will largely be determined by the nature of the allegation, so be clear (as far as possible) about the reason for the investigation and the precise issues to be investigated.

Where an employee is under investigation, they will need to be told (at some point) about this and what policy the investigation is being carried out under. This ensures there is transparency and clarity in the process. It would be helpful to provide a copy of the relevant procedure, the timescales and what the next steps will be.

**Witnesses**
As part of your plan, consider what documentary evidence is required and whether there are any witnesses. The list of witnesses may change as you go through the investigation but this will give you a starting point.

Decide the order of any interviews. In misconduct cases, you would normally interview the employee who is the subject of the investigation last. This means you can take them through what witnesses have said and ask for their response. Depending on how they respond you may need to re-interview witnesses and then re-interview the employee.

**Carrying out the investigation**
The investigator should only interview people who they believe can contribute to the facts of the case, not because they have been asked by the employee or someone else to interview them. Your policy may allow witnesses to be accompanied (by a work colleague or trade union representative). Check this before issuing requests to meet. All interviews should be conducted in private.

As part of the investigation, you will also be looking for evidence that does not support the allegation. Your investigation must be ‘reasonable in all the circumstances’. This means that the conclusions drawn and decisions made will be based on the ‘balance of probabilities.’

**Safeguarding**
If the allegation is related to a safeguarding issue you must ensure the DSL is aware and that the LADO is contacted. All schools must have a comprehensive child protection policy, which includes detailed procedures to follow in cases of suspected abuse and neglect.
Marketing your school to new pupils: nine top tips

When recruiting new pupils, you need to sell your school and services. LISA GRIFFIN offers ways to market your school with a range of resources.

1. WHAT’S YOUR USP?
   Brush up on the unique selling points of your school: provide parents and pupils with 5 or 6 reasons to join you!

2. UPDATE YOUR WEBSITE
   An attractive looking website will appeal to visitors – link to videos, share recent news and alert visitors to upcoming events.

3. BRANDING
   Brand your information carefully. Any prospectus and displays should be unified in their theme and message.

4. FIRST IMPRESSIONS COUNT
   Set the right atmosphere from the off and make sure your reception area is welcoming and well-lit for visitors.

5. SELL YOURSELVES
   Invest in high quality open day advertising for use in newspapers and magazines.

6. CELEBRATE
   Create a regular printed and electronic ‘celebration newsletter’ for students, parents and feeder schools.

7. EVERYONE LOVES A FREEBIE!
   Give away a set of promotional items to prospective pupils such as a bag with the school logo on to carry documents.

8. SAY CHEESE
   Display awards and trophies and high quality, framed photos of pupils engaged in school activities.

9. GO MOBILE
   Consider creating a mobile app for your school which staff, students and parents can download to keep in touch while on the move.

Find more advice and tips on how to market your school in our webinar: my.optimus-education.com/webinar-marketing-your-school
What’s in this month’s Teaching and Learning section?

When do you start planning for the transition between KS2 and KS3? If you want to reduce the KS3 performance dip, then start now! Verity Jones shares lessons learned about cross-phase projects and strategies for increasing challenge on pages 48-50. With the start of the new year, you may be welcoming NQTs into your team. Chris Moyse explains how his pole-vaulting experience led to an induction year based around short, focused observations and the building up of effective ‘mini habits’. There’s plenty more in this issue to support professional development: Tom Fay’s ‘getting every day right’ teaching checklist (page 40) was developed particularly for early career teachers, and the training activities on feedback techniques could be used for a group Inset or by individuals (page 42). Do teachers need a growth mindset too? Bradley Busch extrapolates applications for the classroom from recent research. Finally, to keep up to date with what’s new online, look out for your weekly member email, landing in your inbox every Tuesday.

Liz Worthen, Head of Content

Contributors in this issue

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

Chris Moyse is an education consultant with over 30 years’ experience in education, most recently as head of staff development at an all-through academy. He is also a senior SLE. @chrismoyse

Sam Attwater is director of nurseries at Aurora Academies trust (AAT) and holds an NVQ4 in early years. AAT consists of four primary schools and one all-through school in East Sussex.

Dr Verity Jones worked on the strategic development of the more able programme for Pembrokeshire, has been a primary deputy head and done doctoral research into science education. @VerityJones_edu

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NQTs: good habit building

What works for effective NQT induction? CHRIS MOYSE shares his strategy of weekly observations and focused feedback for building good habits

Over the last 15 years of working with teachers I have come to the conclusion that, even with inexperienced teachers, the biggest issue is habits: establishing and building good ones and, more problematically, breaking old ones. It’s about establishing and changing what a teacher does day in, day out.

If you’re serious about affecting and developing teachers’ classroom practice you have to help them change or build habits. One of the ways I do this is with newly qualified teachers (NQTs) at my own academy is short, weekly visits to their classrooms.

The problem: monthly observations

In many schools, teachers are observed infrequently, as a result receiving a lot of feedback at once, which is overwhelming and consequently rarely acted on.

I realised that if I observe an NQT once a month, I see an unexpected, ‘bells and whistles’ lesson. Neither the NQT nor I derive anything useful from feedback on something that isn’t typical. During the interim time in which I don’t see the NQT teach, they may experience some difficulties, not make sufficient progress or may start to establish poor habits which are difficult to break.

There is also an inevitable build up to this ‘higher stakes’ one-off lesson observation, exacerbating what is already a stressful situation.

The solution: weekly observations

In my school, for the last few years, every NQT is seen teaching once a week, for at least the first two terms, and provided with subsequent feedback. These are short observations, about 15-20 minutes, and unannounced.

The primary purpose of these observations is not to judge the NQT but to inform the mentoring and coaching process. As a result of these drop-ins, I have found that their development as teachers has accelerated. In addition, the children (especially the younger ones) get used to me coming in to their classroom and my presence does not change the dynamic within the room.

This frequency makes observation the norm, and takes the stress out of someone coming into your classroom. This shorter length of time enables me to see numerous teachers in one day.

How it works in practice

For the first two terms I visit every NQT, every week, for 15-20 minutes. I timetable these drop-ins into my diary but do not tell the NQTs when it may happen. I vary the times and days to allow for greater coverage. Each drop-in has a specific focus which has been established with the NQT the week before. My feedback is:

• focused on pre-determined weekly targets
• often delivered ‘live’ in the classroom
• always written up and sent before I leave that teacher’s classroom.

Using a note-taking app on my iPad enables me to write notes and generate some reflective questions. I also take photographs and sometimes very short video clips to act as evidence on which to reflect and aid subsequent feedback and discussion.

This feedback is provided at an equally short follow up session and is focused on an agreed target. One area for further growth, termed as a specific, concrete and actionable next step, is established at this brief meeting. This then becomes the focus of the next weekly visit. If appropriate, these skills are practised at the feedback meeting. Some targets inevitably take longer to achieve and therefore carry over until good habits are established.

Small gains, big changes

I was once a pole vaulter. I learned it at school, developed at club level and successfully took part in several competitions. The first time I saw Sergey Bubka, a Ukrainian pole vaulter, was at Crystal Palace in 1984 where he broke the world record. He was still vaulting when all the other athletes had gone home! Bubka went on to break the world record 35 times (17 outdoor and 18 indoor), with his final record of 6.15m standing for two decades.

Bubka has significantly influenced how I approach working with teachers to help them to grow in terms of training of the basic skills, specific practice, focused feedback and small ‘1cm’ bar raises to ensure continuous and sustainable ‘performance’ and improvement.

Over the years there’s been much talk about marginal and one per cent gains, based on the work of sports coaches Sir Dave Brailsford and Sir Clive Woodward, who tweaked every aspect of performance to bring about changes. But in my experience, teachers are too busy and don’t have the capacity to address EVERY aspect of their ‘performance’ - especially if they are NQTs. So I take the approach of 1cm bar raises: relentless pursuit of one aspect of practice, habit and routine...
building over time to add 1cm bar raise, then another, and then another.

In his book *The Success Principles*, Jack Canfield refers to these as +1s. Over time these small, sustainable and manageable improvements (the +1s) add up to big changes and great habits. These changes may even be daily! The legendary basketball coach, John Wooden used to extol the virtues of becoming a little better every day.

When you improve a little each day, eventually big things occur. Seek the small improvement one day at a time. That’s the only way it happens - and when it happens, it lasts.

**Focus on the things that matter**

The mantra at my school is ‘doing the right thing when no one is looking’. In the classroom, that means using strategies that are more likely to impact on pupils. With our NQTs we focus on the basic tools of teaching; the day-to-day tools that every teacher needs to master. These vary, depending on the time of year and the needs of the NQT and class, but include key skills such as explanation, modelling, classroom management, feedback, checking understanding and challenge.

The goal is to build up a repertoire of these basic tools so that they are well established, effective and habitual. We deliberately work on addressing one small change at a time. This is both more achievable and sustainable for a busy new teacher.

In *Mini Habits*, Stephen Guise talks about the need to get started and build momentum. A mini habit is a very small positive behaviour that you make yourself do every day; a mini habit’s ‘too small to fail’ nature makes it achievable, deceptively powerful, and a superior habit-building strategy.

**The importance of practice**

Practice is an important element of getting better at a skill and teaching is no different. In Joshua Foer’s book *Moonwalking with Einstein* he tells us that to improve a skill you need to retain some degree of conscious control over it while practising. You must force yourself out of autopilot.

We encourage our NQTs to book in practice time and purposefully practise their area of growth. We might also practise the specific skill at the feedback meeting, though usually practice takes place in subsequent lessons. When I visit the NQT’s classroom the following week they’ve had a chance to practise and rehearse their next ‘+1’. Then I can give targeted feedback on this predetermined focus.

Lasting growth doesn’t come from trying to learn everything about teaching at once. I have found that it comes from working on just one or two skills at a time and purposefully practising them until they become effective, efficient and a habit.

One of my pole vault coaches used to write brief reminders of key things to remember on pieces of card that were left by the runway. These visual prompts kept me focused on what we had been trying to do in training. I use this idea in my own school and all staff have these on their walls as a reminder of what they need to focus on. Teachers are also learners!

The important thing here is to have a focus. Herbert Alexander Simon said ‘a wealth of information leads to a poverty of attention’. Narrow it down and focus on the aspects of practice that an NQT must attempt to master in order to become highly effective.

In our feedback conversations, I focus on providing feedback on the agreed focus and then often utilise these cards as a tool for discussion and possible next steps. They act as a useful prompt to discussion and enable us to prioritise in specific, concrete terms the next ‘mini habit’ and small step in their development as a great teacher.
Teacher growth mindset: 
does it matter?

The benefits of a growth mindset for pupils have been widely shared, but what about the importance of teacher mindset? BRADLEY BUSCH explores the research evidence and applications for the classroom.

What are you more in awe of: natural ability or hard work? A lot of people in education claim to really value the importance of growth mindset, but are we all secretly holding a ‘natural talent bias’? If so, what impact does this have on how our pupils think, feel and perform?

A fascinating study (see ‘Naturals and strivers’ report in the list at the end of this article) looked to examine exactly this question. Researchers told professional musicians about two different pianists, who were equal in current achievement. The first, they were told, was ‘a natural’, who had early evidence of innate ability. The second was labelled as ‘a striver’, as they had demonstrated high levels of motivation and persistence.

Despite previously stating that hard work and dedication are more important than natural ability for musicians, when asked which pianist they would hire and which they thought would go on to have a better career, the participants were more likely to choose the ‘naturals’.

It seems that although we may say publicly that we value hard work and persistence, when push comes to shove we may be blinded by a ‘natural talent bias’.

Teacher mindset, strategy and pupil self-expectations

The benefits of having a growth mindset for pupils have been well researched (see the report listing for references). These include:

• seeking out better feedback and persisting for longer
• coping better with transitions and developing better self-regulation
• reducing stress and aggression in pupils
• increasing wellbeing and emotional functioning
• improving self-esteem, learning orientation and reducing helplessness
• being associated with grit and pro-social behaviours.

But what does the research say about the impact that a teacher’s mindset has on pupils?

Surprisingly, very little research has been done on this. One study that explored this (see report “It’s ok – Not everyone can be good at math”) posed a question for teachers: one of your pupils gets a low mark in their maths exam (65%). What do you think of this pupil’s ability and how would you respond?

Those with a fixed mindset took this as evidence that the pupil did not have a talent for maths and were more likely to respond with a ‘comfort focus’ (along the lines of ‘it’s ok, not everyone is good at maths, don’t feel bad about it, I’ll give you easier questions to answer to make you feel less stressed’).

Teachers with a growth mindset believed it was too early to make a judgement on the child’s maths ability and were more likely to offer a ‘strategy focus’, which included tips on how to get better and setting challenging questions.

What impact did these differing strategies have on their pupils? Those who received comfort-focused responses reported being less motivated than those who had received the strategy approach. When asked how they thought they would do on their next exam, comfort-focused pupils estimated about the same level (65%), whereas the strategy-focused pupils estimated significantly higher (80%). This suggests that a teacher’s mindset and beliefs mediates their teaching philosophy and strategies, which in turn influences pupil motivation and self-expectation.

‘Those who received comfort-focused responses reported being less motivated’

It’s not your mindset, it’s what you do with it

The recent ‘Changing Mindsets’ study, published by the Education Endowment Foundation (EEF), found that teaching teachers about growth mindset had little impact on pupil performance. But as always, the devil is in the detail. In this study, teachers received a course only consisting of ‘two half days of instruction’. The DfE ‘Standard for teachers’ professional development’ recommends that for CPD to be successful, it must be sustained over a period of time, which ‘includes opportunities for experimentation, reflection, feedback and evaluation’.
Indeed, a study into parental mindsets found that whether a parent has a fixed or growth mindset had little impact on their children. What mattered more was how the parents reacted to failures and setbacks. Some saw these as evidence of a lack of ability, whereas others viewed them as part of the learning curve. Why might this be the case? The researchers state that ‘it may be that parents, like children, have mindsets that shape their own goals and behaviours, but that these beliefs are relevant to shaping children’s beliefs only if they lead to practices that children pick up on.’ Someone’s mindset is not always visible to others. It is hard to accurately guess someone’s beliefs. What is easier is to see their actions.

It stands to reason that the same is probably true for teachers. Pupils may not be able to accurately infer their teacher’s mindset, but they can accurately assess your actions. The rollercoaster that is the school year is comprised of a series of highs and lows for pupils. By helping them understand that their lows are a natural (and indeed integral) part of the learning process, we can help them develop a growth mindset.

How to develop a growth mindset in your classroom

There is no set way to foster a growth mindset in your classroom. The subject you teach, your strengths and the characteristics of your cohort all play a role. Your mindset will shape your teaching practices, which in turn impact on how pupils see themselves. If you want to accelerate this process, there are some guidelines that may be helpful.

- Ask good growth mindset questions. For example: ‘is today’s effort worth tomorrow’s rewards?’ and ‘you’ve had a setback, what would you do differently next time?’
- Be subtle and stealthy. The fascinating review ‘Addressing achievement gaps with psychological interventions’ suggests that interventions should be so subtle and stealthy that pupils are unaware that they are receiving an intervention. In other words, don’t expect to change a pupil’s mindset with a big growth mindset assembly.
- Have high expectations – no one rises to low expectations. Encourage pupils to develop a growth mindset by encouraging them to aim high and then provide the support needed to assist them. Don’t accept low standards.
- Do better self-talk. Teach pupils about the importance of how they talk to themselves. Research shows that our inner narrative is linked to creativity, persistence and mindset.

To find out more about growth mindset questions, the power of expectations and the importance of self-talk, visit the Inner Drive blog at blog.innerdrive.co.uk.

Research reports for reference

- ‘The Role of Implicit Theories in Mental Health Symptoms, Emotion Regulation, and Hypothetical Treatment Choices in College Pupils’, Springer Science and Business Media (2014)
- ‘Getting Gritty with It’, Wellington Learning and Research Centre (2015)
- ‘It’s ok — Not everyone can be good at math’: Instructors with an entity theory comfort (and demotivate) pupils’, Journal of Experimental Social Psychology (2012)
Getting everyday right: a checklist for teaching staff

The key to becoming a successful teacher is to ask the right questions of yourself and others. TOM FAY shares a reflective checklist for outstanding practice and advice for new teachers

Who was your best teacher when you were at school? When thinking of your response you may not remember what that specific teacher did or said, but you will remember how they made you feel. Emotional memories are difficult to forget!

If you ask any pupil in any school or college across the country who their favourite teacher is, or who the best teachers in the school are, they will very quickly have a response for you. Everyone who teaches want to be in that cohort, and for that to happen, there are simple non-negotiables that must become part of your classroom culture.

Starting out

Most new teachers have three main concerns.

1. They want to be liked.
2. They don’t want behaviour management issues to stifle their confidence, creativity or passion for their subject.
3. They want to develop their craft fast to have maximum impact on outcomes.

I’m particularly interested in concern number three. Make no mistake about it: teaching is a tough job. There are internal and external pressures that people out of the profession will never understand. And teaching is more than just a job: it’s a way of life, a mind-set, a journey of self-discovery. We have the power to create or destroy! In collaboration with pupils and parents we can share dreams, calm fears, influence thinking and be remembered for generations. We hold the future in our hands and with that comes no greater responsibility.

The learning process

All good NQT and RQT CPD programmes should consider how they are imparting knowledge about the learning process to teachers. The more you understand about an individual’s internal and external drivers for learning, the barriers to learning that exist, how to remove them, and how learning actually happens in the brain, the more reflective you become about how you convey content to pupils.

Learning is a highly personalised and messy business that occurs in the individual pupil’s brain. It encompasses application of knowledge in familiar and unfamiliar contexts, connection to previously gained understanding and experiences and is highly prone to decay without reinforcement.

New teachers often make assumptions that are damaging to the learning process.

- We assume information makes contextual sense to them.
- We assume that they know how to revise and learn effectively.
- We forget what it is like to be their age.
- We forget that some may not have home lives to facilitate learning (support, resources).
- We forget that our subject may not connect with them.
- We forget what it was like to have lots of homework to do.
- We forget that pupils are not yet socially and emotionally mature.

Ask the right questions

For me, there are three fundamental questions to ask following every lesson.

1. Have the pupils in front of me made progress?
2. Have they made progress to the right extent?
3. How do I know?

The key to becoming a successful teacher is to ask the right questions of yourself and others - all the time. Surround yourself with people who:

- make you think about your practice
- encourage you to reflect on and analyse the impact of what you are doing
- make you think about learning
• provide you with time to think and draw your own conclusions
• remind you of how important you are in a young person’s life.

Try using the checklist on the right as a stimulus for thinking about the non-negotiables of outstanding practice, to plan lessons and to reflect upon the evidence you seek for learning on a daily basis. It isn’t exhaustive – feel free to add your own questions!

The questions are based on the PLACES framework for success: progress, learning, assessment for and of learning, core skills development, employability skills and stretch and challenge for all learners.

Advice for new teachers

For new teachers, there is so much to learn over a short time frame and it can be overwhelming if you do not seek the right support. My biggest tip is this: talk, talk, talk, think, think, think! If you want to get better at your questioning techniques, talk to teachers who are better than you. We have been modelling successful behaviours since the day we were born so use that to your advantage in your school. Try things out and think about the impact they are having. If it doesn’t work, scrap it and start again.

Never persist with low-level teaching strategies that require lots of effort with little gain. Learning takes time, energy, varied activities and contextual reinforcement to happen. If we teach our pupils the skills to become effective learners, and share with them our understanding and experiences of the learning process, we inadvertently prepare them not only for examinations, but for successful integration into the working world ahead. Remember, you never forget a great teacher!

Getting every day right: a reflective checklist

Progress and learning

• How do I seek evidence of progress?
• What evidence do the pupils provide to indicate that they are making progress?
• Based upon their starting points, how much progress are pupils making?
• Do pupils understand their levels of progress and how that fits into their expected synoptic flight path?
• What is my assessment and monitoring strategy (short, medium, long term) so I possess valid indicators of learning?
• How do I create a context for learning, or create the ‘big picture’ for pupils, so that the information makes sense to them and can be built upon successfully?
• How do I create a safe environment for learning?
• How credible am I through my pupil’s eyes?
• How do I develop positive relationships with young people to engage and stimulate learning?
• What type of learning role model do I want to be?

Assessment for learning

• Do the questions I ask probe learning, identify misconceptions and reinforce prior knowledge?
• How do pupils assess their own learning and that of others?
• Are group activities having the desired impact?
• Do pupils have opportunities to design their own questions to stretch and consolidate their learning?
• What type of feedback do I provide?
• Is there evidence that my feedback strategies are having an impact?
• Are pupils of all abilities making progress?

Assessment of learning

• What type of assessment strategies am I using to assess knowledge, application, evaluation, extended writing, summative understanding, long term learning, and skills development?
• How do I use assessment data to trigger intervention?
• How do I use assessment data to reinforce my teaching strategies related to previously taught content, current content, future content?
• How do I use assessment data to promote confidence, resilience and self-reflection within my pupils?
• How do I use assessment data to design homework and revision exercises?
• Do pupils have opportunities to design their own questions to stretch and consolidate their learning?
• What type of feedback do I provide?
• Is there evidence that my feedback strategies are having an impact?
• Are pupils of all abilities making progress?

Core skills development

• How are English and mathematical skills being promoted in my lesson?
• Can pupils use the correct terminology and language to succeed in exams (oral and written)?
• How do I promote a rigorous writing strategy that allows pupils to showcase their understanding?
• How do I identify and remove barriers to learning associated with weak English and maths skills?

Employability skills

• How do I promote group work, independence, lateral thinking, critical thinking and reflective self-awareness in my lessons?
• How are these skills made contextual and relevant in the eyes of my pupils?
• How am I developing the holistic skill set of pupils, so they are successful in their transition to further education and employment?
• How do I encourage pupils to speak to each other, listen to each other and support each other?
• Are pupils becoming resilient and resourceful individuals with the ability to cope with the pressures of our education and employment systems?

Stretch and challenge

• To what extent are pupils being challenged in my lesson?
• Are some pupils finding my lessons too easy, too hard or boring?
• How do my feedback strategies facilitate progress and further learning?
• Do I seek surface level understanding or true deep processing?
• Is my pace and pitch appropriate for the whole group?
• Do pupils know how to effectively revise and consolidate learning?

Download the getting every day right checklist from my.optimus-education.com
Developing feedback techniques

Feedback is vital for improving pupil outcomes – but only if it’s done effectively. Use these training activities to gain insight into what that means in practice.

Marking has been described as ‘the albatross around the neck of teachers’. Yet giving effective feedback is one of the best ways of improving pupils’ outcomes. Teachers must be able to construct effective feedback upon which pupils can consolidate their learning and develop their understanding. The purpose of this training unit is for participants to:

• explore a range of strategies to make marking more meaningful and manageable
• understand how pupils can improve through clear and specific feedback
• consider both written and verbal feedback techniques.

This training unit is part of the Teacher Development Programme, which can be accessed by Premium and Unlimited CPD members as part of the In-House Training library.

Introduction

The research shows that giving effective feedback is one of the best ways of improving pupils’ outcomes. The Education Endowment Foundation’s (EEF) Teaching and Learning Toolkit tells us that good feedback, given properly, will have a larger effect than almost any other strategy they considered. In addition, giving effective feedback tops Professor John Hattie’s table of effect sizes.

Activity

Find a few recent examples of your own marking. Perhaps some you are proud of, some that really helped move pupils on, and some that were not particularly effective. Think about the following questions.

1. How much time did this marking take?
2. Given how much the pupil got out of it, was it worth that time?
3. Why did I do this marking? For the pupil, for their parents, because of the school policy? Which of these motivations are worth acting on?
4. Has the pupil acted on this marking?
5. Has the pupil improved as a result of this marking? If so, how did it help them to get better?
6. Is my marking linked to my learning objectives? If not, to what extent is it still valuable?

What makes feedback effective?
Providing effective feedback is challenging. Here are some guidelines for effective feedback from the EEF Teaching and Learning Toolkit.

- Quantity of feedback should not be confused with quality.
- High quality feedback provides guidance on how to improve.
- Be specific, accurate and clear e.g. ‘It was good because you…’ rather than just ‘correct’.
- Compare what a learner is doing right now with what they have done wrong before. E.g. ‘I can see you were focused on improving X as it is much better than last time’s Y…’
- Encourage and support further effort.
- Give praise sparingly so that it is meaningful.

The research also suggests that careless mistakes should be marked differently to errors resulting from misunderstanding. Misunderstandings may be best addressed by providing hints or questions which lead pupils to underlying principles; mistakes should simply be marked as incorrect, without giving the right answer.

Be aware that awarding grades for every piece of work may reduce the impact of marking, as pupils can focus on grades at the expense of considering teachers’ formative comments. However, setting targets to make marking as specific and actionable as possible is likely to increase pupil progress.

Give pupils time to absorb written feedback. Pupils are unlikely to benefit from marking unless some time is set aside to enable pupils to consider and respond to marking.

Some forms of marking, including acknowledgement marking, are unlikely to enhance pupil progress. A mantra might be that schools should mark less in terms of the number of pieces of work marked, but mark better.

Reflection
- Are there any ideas here you disagree with? Why?
- How could you put some of the ideas about effective feedback into practice?

Marking strategies
There are many different strategies for marking. We have selected three strategies for you to look at in this section. They have been gathered from teachers blogging about their attempts to improve their own practice.

Educational blogs are a great way of finding out about how to improve classroom practice. Many teachers now blog about their classroom experiences, not just to share ideas but also to help them become more reflective and to aid self-evaluation.

The following three approaches to marking all feature strategies that should help make marking more meaningful, more manageable, or both.

Strategy 1: Codes and symbols
This strategy is based on Andy Tharby’s post ‘Marking: Minimum effort for maximum pleasure’, shared on Shaun Allison’s blog Class Teaching: Find the bright spots.

Andy started using a series of codes or symbols to prevent re-writing the same target out in pupil’s books.

When pupils receive their work back, they write the explanation of the code underneath their work so that they know what they need to improve. The pupils therefore have to read the comments as well as their grade and less time is spent working out what the teacher’s handwriting says!

A word of caution: make sure the system doesn’t become too complex with too many different codes and symbols that could get confused.

Strategy 2: Exit tickets and stickers
This strategy is taken from Joe Kirby’s blog post ‘What if you marked every book, every lesson?’ and draws on technique 20 of Doug Lemov’s Teach Like a Champion: exit tickets. An exit ticket is a short task, given to pupils at the end of a lesson, that sums up their key learning.

Joe’s colleague made marking these assessments simpler by using a red, amber, green sticker system.
The red/amber/green stickers let pupils know if they have fully/partially/not met the learning aim. The teacher then sets pupils a task in the following lesson that extends (for green stickers) consolidates (for amber) or repeats (for red) the key learning.

**Strategy 3: DIRT**

This strategy is based on David Didau’s post ‘Marking is an act of love’ from his blog The Learning Spy. It’s called dedicated improvement and reflection time (DIRT). It is a way that you can consider your time marking as time also spent planning and differentiating. When you mark, give each pupil one piece of feedback to act upon, then give them time in the next lesson to act on it.

With this approach, your marking will give you time to plan lessons as pupils act on the feedback you have given them. Dylan Wiliam says that feedback should be more work for the recipient than the donor. For example, if it takes a minute to mark a piece of work, it should result in 10 minutes’ worth of improvement from the pupil.

Furthermore, marking is differentiation because you can respond to how individuals have progressed in their learning and give them specific follow on tasks to move to the next level.

**Discussion**

If possible, share these strategies with a colleague and discuss them together. For each one, consider the following questions.

- Does it make marking more meaningful?
- Does it make marking more manageable?
- What might be the benefits of the strategy?
- What might be the challenges or barriers to using it in the classroom?
- How does it fit with the EEF guidelines on effective feedback?

**Verbal feedback**

Much of the feedback we give in the classroom is verbal. How does this compare to written feedback?

- Verbal feedback is immediate and quick, which is a benefit to learners.
- As in other forms of feedback, verbal feedback should be focused on helping the pupil understand how to improve their work.
- However, teachers should think about how the pupil acts on the verbal feedback, whether through a written response or further discussion.

**Note the following advice from Ofsted:** While Ofsted does not expect to see any written record of oral feedback provided to pupils by teachers.

Verbal feedback allows teachers to do some things that written feedback can’t, such as the examples below.

- A strategy for formative feedback.
- Being able to probe and ask further questions.
- Opportunities for metacognition strategies - ‘How did you work that out?’
- Sharing feedback with others - ‘What was good about that answer?’ or ‘What could they have done better?’
- Can lead to a more extended discussion through one to one feedback at critical times, e.g. mock exam feedback.

Do you already do this? How could you work this into your classroom practice?

**Verbal feedback strategies**

In the Knowledge Centre article ‘Eight verbal feedback strategies to challenge pupils and improve progress,’ Torsten Payne outlines simple prompts to keep verbal responses challenging and targeted.

1. **Praise:** look for opportunities to tell pupils they have got something right.
2. **Value all answers:** a positive but honest response will help to encourage pupils to speak up in future.
3. **Redirect:** if a response shows that a pupil hasn’t properly understood an idea, take the opportunity to explain it again.
4. **Mirror:** clarify a contribution by rephrasing it and repeating it back.
5. **Bounce:** bounce the answer onto another pupil for them to evaluate.
6. **Probe:** ask the follow up question that prompts further thought and deeper understanding.
7. **Devil’s advocate:** ensure a point has been fully understood by asking the pupil to defend their answer and consider the repercussions.
8. **Metacognition:** ask pupils to model their process, rather than responding with a simple ‘well done’. How did they work out their answer?

**Reflection**

- Which of the eight strategies do you or would you use?
- What purposes do you use verbal feedback for?
- Are there disadvantages to verbal feedback?
- What strategies could you use to ensure that students act on your feedback?
- How could you implement some of the ideas in this session in your own practice?
# Early years planner: autumn term

A year planner for early years leads will help you plan your workload across each term. **SAM ATTWATER** highlights tasks for the autumn term.

<table>
<thead>
<tr>
<th>Term</th>
<th>Tasks</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Half term 1</strong></td>
<td>• Where possible, start the year with a day of staff training.</td>
<td>• Carry out online headcount for early years educational entitlement (EYEE).</td>
</tr>
<tr>
<td></td>
<td>• Engage with your nearest early excellence hub.</td>
<td>• Complete EYEE parental agreement and early years pupil premium (EYPP) forms.</td>
</tr>
<tr>
<td></td>
<td>• Review and sign school policies for the year.</td>
<td>• Draft budget with the estimated EYEE amount from headcount (considering 30 hours of free childcare for working parents and the impact this may have on your budget).</td>
</tr>
<tr>
<td></td>
<td>• Review and sign risk assessments for the year.</td>
<td>• Remind those parents who may need to re-apply for their 30-hour voucher code.</td>
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<td></td>
<td>• Meet staff to brief them on policies and procedures, Ofsted, safeguarding requirements and so on.</td>
<td>• Conduct staff appraisals.</td>
</tr>
<tr>
<td></td>
<td>• Update self-evaluation form (SEF) to reflect any changes.</td>
<td>• Set dates for staff supervisions.</td>
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<tr>
<td></td>
<td>• Write a development plan and share with wider team.</td>
<td>• Complete data tracking from parents’ assessment of children (starting points).</td>
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<tr>
<td></td>
<td>• Organise staff training.</td>
<td>• Complete any two-year assessments.</td>
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<tr>
<td></td>
<td>• Carry out any home or settling in visits for all new children registered in term 6.</td>
<td>• Send letter to parents to plan celebrations/festivals for the year.</td>
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<tr>
<td></td>
<td>• Identify next steps and starting points for new children from term 6 paperwork.</td>
<td>• SetInset dates for the year.</td>
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<tr>
<td></td>
<td>• Set up new and review old setting-based support plans.</td>
<td>• Write newsletter and issue to parents.</td>
</tr>
<tr>
<td></td>
<td>• Have a list of spaces available for families showing interest in term 1.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Contact schools to see how Reception children have settled in.</td>
<td></td>
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<tr>
<td><strong>Half term 2</strong></td>
<td>• Add relevant festivals/celebrations from parent feedback to calendar.</td>
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<td></td>
<td>• Change estimated amount in budget to actual from EYEE.</td>
<td>• Adjust budget accordingly.</td>
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<tr>
<td></td>
<td>• Update data tracking from learning journey summary.</td>
<td>• Organise opening/closing times over Christmas.</td>
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<td></td>
<td>• Analyse data to identify priorities for the children’s learning.</td>
<td>• Rehearse Christmas concert.</td>
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<tr>
<td></td>
<td>• Note children receiving EYPP, and from the data determine how this money is best spent – put this in writing.</td>
<td>• Arrange parents’ evening.</td>
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<tr>
<td></td>
<td>• Complete late starter forms for EYEE children.</td>
<td>• Invite new families in with children – give them administration form, contract etc. to complete.</td>
</tr>
<tr>
<td></td>
<td>• Check waiting list for January, fill spaces and contact parents offering days and times available.</td>
<td>• Prepare all paperwork (e.g., learning journeys, pegs) for children starting in term 3.</td>
</tr>
<tr>
<td></td>
<td>• Contact school to see how late-starting Reception children have settled.</td>
<td>• Arrange new starters home visits and settling in visits.</td>
</tr>
<tr>
<td></td>
<td>• Review and update setting-based support plans.</td>
<td>• Look at spaces available for each age group, and adjust waiting list accordingly.</td>
</tr>
<tr>
<td></td>
<td>• All year settings to send letters out to full year families to organise children’s numbers over Christmas period.</td>
<td>• Adjust register from September for children changing ages and funding entitlement.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Organise staff training.</td>
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<tr>
<td></td>
<td></td>
<td>• Update budget for any staff changes or resources purchased.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Complete any two-year old assessments.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Hand out annual leave request forms for full year staff to complete for coming year.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Write newsletter and issue to parents.</td>
</tr>
</tbody>
</table>

Download the full early years planner and schedules for other roles from [my.optimus-education.com/year-planners-school-leaders](http://my.optimus-education.com/year-planners-school-leaders)
Structuring maths in a mastery curriculum

A structural approach to maths can provide deeper learning opportunities. JULIA STEAD outlines some strategies for stretching primary pupils’ knowledge of the number system.

With so many primary schools adopting a mastery approach to teaching maths, I am often asked about activities and methods that can be used to encourage deeper thinking in numeracy. If we use effective questioning alongside practical and methodical teaching, we can help all pupils master the number system. In our classroom, I teach the structures of maths explicitly. In every starter activity, we refer to the structures of the number system and how numbers and calculations are constructed through structural representations.

Change and continuity
The main idea with structure is that in maths some things change, but the structure of number never does. If we can teach pupils to see the number system in terms of mathematical structures, then we can teach them to calculate, manipulate and truly understand how numbers work. When they come across maths in different contexts or higher numbers, they can rely on their understanding of number system structure to help them work it out.

Our teaching is an opportunity to use all the changeable things to create deeper learning opportunities and stretch those who have mastered the number system.

Top tips for your classroom
To understand how numbers work, pupils need to be able to see how numbers work. This is the concrete and (later) pictorial stage of mastery learning. Getting the following resources ready in your classroom often takes little more than time and inclination.

Ten frames and counters
Using ten frames is a good way to teach subitising: partitioning bonds to 10, or 100 if you use each box as 10. You can also use it to model tenths, representing numbers as fractions or decimals.

Singapore bar method
Similar to the part, part, whole method, the Singapore bar method can be adapted to more complex calculations. It’s a good way to get pupils thinking about each part of a calculation, and clarifying the connections between numbers. Try using it to frame missing number problems.

The words we use
Repetition is the key to embedding methods and ideas in maths. This means repeating the things we say, and repeating tasks. The key to pupils mastering a concept, though, is to vary it with each repetition, and build on it in tiny increments. The task becomes more challenging, but the pupils use their existing knowledge as a little step each time, helping them to climb to the next step.
‘Stem sentences’ allow for guided discussion, and using similar sentences each time you repeat a type of calculation, and each maths lesson gives pupils the confidence and explanatory language needed to be able to really justify their thoughts and help other pupils’ learning.

I can compare [...] and [...]  
The first step is to...  
If____=____, then____=____.  
I notice that...  
We know that______, so________.  
I can check my answer by...

When we give pupils the words and language they need to explain their working, we give them a powerful tool. We have introduced quite complex vocabulary to our maths lessons recently:

\[
\begin{align*}
74 + 921 &= 995 \\
995 - 74 &= 921
\end{align*}
\]

Being able to articulate mathematical vocabulary arms pupils not only with the means to explain their work, but also with a label by which to understand numbers and their role in calculations.

Using our fingers
I have been using fingers a lot with my Year 3 class recently. Not in the classic ‘adding’ way, but for place value and times table practice. Laying our hands out on the table means we can tap fingers as we say our maths. Fingers are great because they are always available! They can be relied upon because they match the structure of our number system.

The decimal structure of our number system can be replicated when calculating with our ten fingers. Pupils can use them as method of counting, for multiplying, partitioning and aiding their understanding of place value. Muscle memory will help ingrain the position of numbers in pupils’ minds.

Making it work in the class
This kind of teaching needs a commitment to believing in how it can make maths clearer for your pupils. Its success relies on your class’ ability to make connections, and then explain and use those links to help them solve the next tiny step. Success will come with practice and repetition.

It’s sometimes difficult for us to change our teacher mindsets. After all, we have a huge amount of content to cover in the 39 weeks we have with pupils. However, racing through content to ensure coverage is a false economy.

How many times have you had to re-teach something you’ve already covered, or worse still, something they should have ‘cracked’ in the previous year or key stage? If we truly embed number skills in our pupils’ minds, then there should be no need to go back over old content.

When the pupils who start with this approach in Reception make their way up through the school years, their skills and knowledge will become more advanced.

Imagine a world with no learning gaps! How many times have you had to re-teach something you’ve already covered, or worse still, something they should have ‘cracked’ in the previous year or key stage? If we truly embed number skills in our pupils’ minds, then there should be no need to go back over old content.

We have introduced quite complex working, we give them a powerful tool. Language they need to explain their work, but also with vocabulary arms pupils not only with the means to explain their work, but also with a label by which to understand numbers and their role in calculations.

We know that______, so________.
We need to be able to really justify their knowledge will become more advanced. Imagine a world with no learning gaps! How many times have you had to re-teach something you’ve already covered, or worse still, something they should have ‘cracked’ in the previous year or key stage? If we truly embed number skills in our pupils’ minds, then there should be no need to go back over old content.

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This month
1. Teach pupils to use more advanced vocabulary to match their advanced thinking processes. Sell it to them as adding tools into their ‘explanation toolkits’.

2. Introduce the idea of the Singapore bar method once pupils are confident with using the tens frame and part, part, whole resources.

3. Write some sentence stems out for display. While you’re getting to grips with using them, it’s good to have them there to refer to.

Longer term
1. Ensure other teachers, year groups and members of staff join in with the teaching of mathematical structures. Could you contribute to a staff meeting to inform others?

2. Consider how to display structural resources on working walls, or more static displays. The more methods available to pupils, the greater the number of prompts they’ll have to use a variety of concrete and pictorial tools in their activities.

3. Invest in other resources that help pupils see the same thing many ways.

Conclusion
Helping pupils make connections and truly understand number is something we all aim for. Pupils need us to present things in tangible ways. Show structures and explain them, rather than letting pupils work things out for themselves.
Transition into KS3: using challenging texts

To prevent Key Stage 3 becoming the wasted years, pupils need a curriculum that provides challenge, not replication of previous learning. VERITY JONES explores how this could work in practice.

The DfE report ‘KS3: the wasted years?’ highlights the growing gap between key stages 2 and 3, naming the latter as ‘the wasted years’. With an increased pressure to deliver schemes of work that develop deeper thinking, there is no time to waste. It is crucial for all teachers in both key stages to prepare a curriculum that challenges all pupils.

But what does this look like in the KS2 classroom, and how can KS3 teachers prepare a curriculum that does more than merely replicate what has previously been taught?

Opening doors to quality writing at key stages 2 and 3

Using challenging texts in the classroom can be difficult, especially for the non-literary specialist. However, there are several resources that have been published recently which provide excellent insights into our literary heritage. For this article, I will refer to a unit of work from Bob Cox’s Opening Doors series as a case study, highlighting some strategies that can be used to stretch pupil thinking and develop writing and comprehension. I have used this unit in both KS2 and KS3 settings and will share examples of work from Year 6 to highlight the sophistication that should be expected and exceeded in Year 7.

Case study: Wilkie Collins’ The Woman in White

The Woman in White is a classic Victorian text more usually associated with A-level and undergraduate study. A daunting thought to teach at key stages 2 and 3? Not necessarily. Using a flexible step-by-step strategy to assist the text enables pupils to dig deeper, while linking thinking and reading – without a stifling methodology.

Access strategies

Allowing every pupil in the class to become familiar with themes, ideas and emotions running through what might otherwise be a text too advanced for their years, is crucial if they are to succeed with later comprehension.

Following the Opening Doors approach, activities began with engaging the pupils. We listened to ‘spooky’ music. We talked about what kind of people and places made us uncomfortable, and looked at the opening chapter of Neil Gaiman’s The Graveyard Book (2008).

Early writing – taster drafts

Excited about mysteries and the uncertainty of suspense, pupils were given an image of a woman in white meeting a stranger in woodland. To unpick the historical context, time was spent collecting vocabulary and word groups associated with this image – nouns, verbs, adjectives, prepositions. New and unusual vocabulary was shared. Pupils then wrote a taster draft in 20 minutes. At this point pupils still hadn’t seen the original prose – the reading of Wilkie Collins’ text came later.

In the taster draft I expected to see language and strategies that were mirrored in the opening to Gaiman’s book (which pupils had read), and Wilkie Collins’ excerpt (which pupils were still yet to read) – and I wasn’t disappointed (see examples on the right).

Revealing the text

Having inspired some initial writing, the text was finally revealed. For those who needed further support to understand what was going on I used a 1948 black and white film clip of the scene. This proved a great way to further question the original text, build in more intertextual understandings and analysis using a point, evidence, effect model.

Moving beyond the text

Acknowledging intertextuality, and how literature and film use similar approaches in different contexts, is key to developing deeper understanding. My class used Bri Meyer’s two-minute animation Road’s End, Rodrigo Blaas’ award winning short animation Alma, and the opening sequence to Steven Spielberg’s ET to pick out strategies and rewrite moments of suspense in the style of Wilkie Collins. These activities got pupils thinking, asking questions, wanting to read more of The Woman in White and put their skills into practice.

Top tips for access strategies

- Make it fun.
- Use as many different mediums as possible – music, art, poetry, sound effects, film clips and stills.
- Find texts that use similar strategies to the classical text you will ultimately study.
- Don’t rush – take time to immerse the pupils in the theme.
Using what you've learned
Allowing pupils to embed their knowledge and develop their understandings comes when opportunities to use newly acquired skills are provided. Using images from The Mysteries of Harris Burdick (2011) as a stimulus pupils were asked to create an extended piece of suspense writing. They collected language associated with the illustrations, talked, acted out, listened to and composed their own musical accompaniments. Then they wrote.

Planning for the future
I have provided one example of how a challenging text can be used in a primary classroom to develop comprehension and writing skills. When inspectors visited, they commented that the level of discussion in the autumn term of Year 6 was normally reserved for GCSE classes. There are many teachers doing the same thing day in, day out – supporting pupils to develop sophisticated understanding that KS3 teachers then need to develop. This strategy has been successfully replicated in KS3 and The Woman in White unit used to great effect. However, careful planning needs to be considered within transition as the repetition of work is a major turn off for pupils.

During transition between the key stages the need to discuss ALN/SEN and prepare pupils for a change in their social world is generally recognised. It is equally important to liaise with KS2 teachers on topics covered and plan effective, challenging units.

One example of how this can be successful came out of a disastrous start to Year 7 when a secondary school thought they were providing challenging work in asking pupils to study Roald Dahl's Going Solo. At the end of the unit teachers asked for feedback and were surprised to find that over 75 per cent of the cohort had studied it previously at primary school and therefore found the whole unit of work boring and repetitive – not one pupil had mentioned this during the unit. Understandably they felt nervous of being criticised in their new surroundings and by teachers they didn’t know.

The result was that the school

Examples of taster drafts from Year 6 pupils

‘The wind blew softly through the empty meadow and the moon hid behind the clouds, plunging the world into an inky black darkness. Gripping his cane the mysterious man trudged on slowly. His whiskers quivered in the wind as if they were scared of something about to begin.

One drop of rain fell.

Lightning flashed, as if a torch has been turned on above the Earth. Glimmering, the moon came out and cast an eerie shadow over phantom creatures in the darkness. In front of him appeared a woman without a shadow. She raised the arm in her long white gown and pointed at him. He stared into the empty sockets, seeing the void of an endless abyss. Lightning flashed.’

Lachlan, Year 6

‘Through the gloomy mist, a pair of peering eyes stared at me. I moved closer. A nose appeared sitting under the eyes that still seemed to be staring right through me and into my soul. Next came a mouth, whispering something, something strange and suspicious. As I moved closer, a woman as pale as a ghost appeared in front of me, dressed from head to toe in white.’

Emily, Year 6
Transition into KS3: using challenging texts continued....

Excerpt from *The Woman in White* by Wilkie Collins

‘...in one moment, every drop of blood in my body was brought to a stop by the touch of a hand laid lightly and suddenly on my shoulder from behind me.

I turned on the instant, with my fingers tightening round the handle of my stick.

There, in the middle of the broad, bright high-road – there, as if it had that moment sprung out of the earth or dropped from the heaven – stood the figure of a solitary Woman, dressed from head to foot in white garments, her face bent in grave inquiry on mine, her hand pointing to the dark cloud over London, as I faced her.’

'This was such a success that the maths, science and humanities departments created similar programmes of study'

recognised the need to liaise with feeder schools more effectively. They invited Year 6 teachers together with KS3 literacy coordinators to discuss texts that were being studied. A summer term unit of work for the Year 6s was developed on the theme of ‘Living Things’ and used the poems ‘Pike’ by Ted Hughes and ‘White Tiger’ by RS Thomas. This linked to a persuasive writing unit for the autumn term, when the pupils were in Year 7, which was designed to consider how we need to conserve and protect our world.

This strategy not only developed closer working relationships between the schools, it helped KS3 teachers recognise the sophistication of younger pupils and the high expectations primary teachers demand. This was such a success that the maths, science and humanities departments created similar programmes of study along the same theme (looking at local lizard populations in maths, the location of bat populations in geography and adaptations of local fauna and flora in science).

A more holistic approach to transition resulted where project based work at primary school linked to subject specific topics at secondary school. Year 6 teachers were then invited in to look at the work their old cohorts had done at secondary school before the October half term, as well as discuss the transition with their former pupils. This feedback was then fed back to teachers to ensure continuity of approach and expectation.

Top tips for KS2 teachers for the transition to KS3

• Make every key stage count – map the journey from KS2 back through the school. What are the expectations of each year? What books and poetry will each year group access? This will ensure progression and coverage.

• During transition meetings provide a list of books, poetry and writing themes that have been covered – you might want to cover the whole of KS2 or just years 5 and 6.

• Encourage your feeder school(s) to take examples of good writing, and when possible plan a transition unit together.

• Develop your own subject knowledge to confidently teach the more demanding curriculum and thoroughly prepare pupils for KS3.

Top tips for KS3 teachers for the transition from KS2

• Make every key stage count – map the journey from KS5 through the school. What are the expectations of each year? What books and poetry will each year group access? Ensuring progression and coverage from Year 7 is essential for continued progression.

• Discuss with feeder schools the topics covered and books and poetry studied through the KS2 phase.

• Ask pupils what they have studied previously before undertaking a unit – many primary schools are now introducing Shakespeare plays and working on many young adult texts. If the work you are planning has been undertaken before then raise the expectations and go deeper.

• Invite primary teachers in to scrutinise Year 7 books and assess progress on known pupils during the autumn term.

• Gather examples of great Year 6 work and make sure that your expectations are always high.

• Take risks – Year 7 pupils are sophisticated thinkers and will surprise you if you give them the opportunity!

Opening to extended mystery writing, using an image from *The Mysteries of Harris Burdick* (2011) as a stimulus

‘Dreams can come true; many don’t believe me.

It happened the day I looked in the attic and found a book. A book layered with dust. A book so old it was almost forgotten. Almost. Its fragile moth bitten paper shied away as I turned its pages. Then it happened, page 32 let fly a shaft of light through a crack in the fold. Slowly the beam lengthened and was gone, taking me with it.’

Esme Year 6
What’s in this month’s SEN and Safeguarding section?

For some of you, the beginning of a new school year will herald the arrival of new teaching assistants. But with budgets squeezed, are you confident that teachers are making the most of their support staff? On page 54, Elizabeth Burns shares one aspect of her robust induction process for new TAs, while on page 52 Natalie Packer explains how meaningful interventions can be put into practice.

In light of the events that took place in London and Manchester earlier this year, it’s vital that schools can support the pupils in their care through traumatic times. Turn to page 66 for Zoe Dale’s advice. Abuse is an unfortunate reality in many schools, whether it’s committed from peer to peer (page 62) or in the guise of religious or cultural practice (page 64). Staff need to be prepared to spot the warning signs and, when necessary, act with confidence.

Want to receive the latest SEN, safeguarding and pastoral resources from Optimus? Look out for your weekly member email every Thursday.

Jack Procter-Blain, Content Assistant

Contributors in this issue

Ruchi Sabharwal is assistant headteacher at The Weatheralls Primary School, with additional responsibility for teaching and learning, behaviour and inclusion.
@Missvintagepink

Natalie Packer is an independent education consultant, specialising in SEND and school improvement. She is the author of The Perfect SENCO and The Teacher’s Guide to SEN.
@NataliePacker

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

Alan Mackenzie is an independent ICT and e-safety adviser. He previously managed all IT services at Lincolnshire County Council, covering 350 schools.
@esafetyadviser

Top SEN and safeguarding blogs

SEND is everyone’s business oego.co/SEND-everyone
‘On the back foot’: a parent’s view on choosing the right school for SEND oego.co/back-foot
See more at blog.optimus-education.com

Forgotten your log-in details or want to add more members from your school or organisation?
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Effective TA interventions: the process in practice

Teaching assistants should enrich teaching, not substitute for it. Natalie Packer explains how they can work with teachers to prepare and deliver meaningful interventions.

TAs tend to have a variety of responsibilities in schools, including the delivery of one-to-one or small-group interventions. However, some teachers and TAs will use intervention programmes that are unstructured or underdeveloped. If this is the case in your setting, there are some common elements of effective interventions to keep in mind.

I’ve illustrated the process that teachers and TAs can work through together to ensure many of these elements are put in place.

Preparing the intervention
Begin by discussing the rationale behind the intervention and share any information you have about the pupils.

• If they have SEND, do they have individual support plans? If so, what do the plans include?
• What strengths do the pupils have that the TA could build on?
• What are the pupils’ barriers to learning?
• How do they respond to working individually or in a group, and what motivates them?

It’s important to clarify the objectives and intended outcomes for each session. The TA should have the opportunity to acquaint themselves with the content and format of the materials being used. They may benefit from observing someone else’s delivery of a session before they try it themselves.

If resources are required, the TA may need time for preparation and somewhere to store them. It may seem obvious, but TAs should have a designated space for interventions: there’s nothing worse than having to spend the first five minutes of a session simply finding somewhere to go!

You should also discuss how information about the intervention will be shared with pupils, parents and other teachers, so everyone can understand the purpose and intended outcomes of the intervention.

At this stage, it is crucial that you consider how progress will be measured and how the intervention will be evaluated. As part of the preparation, the teacher should explain:

• what baseline assessments the TA needs to carry out
• what feedback you expect from them after each session, and how you expect it to be presented (verbally or written)
• what information will be useful if you expect the TA to write notes – this could include what the pupils can do, how well they met the objectives and any misconceptions or areas that need revisiting and suggestions for next steps

Delivering the intervention
Some commercially available intervention programmes may provide specific training, or even a script for the TA to follow. However, where schools are using more unstructured programmes to support the delivery of interventions, the teacher will need to provide this support.

To illustrate how teachers might help TAs plan and deliver interventions effectively, I’ve created the two hypothetical scenarios below.

Scaffolding the process of problem solving
Year 3 maths teacher Joanna has two pupils in her class with moderate learning difficulties. Both have been given targets to improve addition and subtraction up to 20. They have made good progress so far, and Joanna has begun challenging them to develop their problem-solving skills.

In conjunction with Sarah, her TA, Joanna has planned a series of 15-minute sessions in which the pupils will be given mathematical word problems. Sarah has watched Joanna model problem solving to the class several times, so feels...
confident in doing the same at the start of the session. During the session, Sarah talks through ‘what's in their head’ as she models the problem solving.

'I am going to show you how I would solve this problem. I would like you to listen carefully to me and watch what I am doing. Firstly, I am going to read the problem.’

[Reads problem aloud]

'Now I am going to underline the key words and numbers I think I will need.’

[Underlines 8 and 3, takes from]

'Next I am going to think about which operation I will need to solve the problem.’

[Rereads the problem, looks at the mathematical operations mat and circles subtraction]

'I am going to write the number sentence.’

[Uses vertical pictorial representation to show 8-3]

'Now I am going to do the calculation.’

[Points to the picture to show the difference between the 8 objects and the 3 objects and counts 5]

‘That means the answer must be 5.’

[Writes 5 to complete the number sentence]

Following Sarah’s modelling, the pupils try the word problem themselves. Sarah scaffolds the learning at this point by:

- helping the pupil to identify a strategy they already know, such as drawing the number sequence
- helping pupils to decide what they need to do first
- encouraging the pupil to ‘self-scaffold’ so they can solve the problem independently.

Joanna has spent time explaining how this scaffolding works to Sarah, and after each session they assess how much scaffolding was required for each pupil to successfully solve the problem (and how much they are likely to need next time). The aim of the intervention should be to give pupils the skills to solve problems independently.

**Direction and modelling**

Year 7 English teacher Sam has a group of four pupils who struggle with word decoding and comprehension. He has planned a group intervention to be delivered by Mark, the TA. Each session involves reading a short fiction text, with time for discussion and questions at the end. Sam gives Mark the following guidance to help him structure the session.

1. Prepare the pupils for reading the text by discussing the cover illustration, title, contents page and blurb – see if they can predict what type of text it will be.
2. Introduce pupils to any difficult or unfamiliar vocabulary they will encounter.
3. Make sure that everyone in the group understands the learning objectives of the session.
4. Read the first part of the text to model the reading process.
5. Ask pupils to take turns reading parts of the text aloud. During the reading, remind them of strategies they can use when struggling with a word (such as sounding out or blending). Praise them for appropriate use of expression and pace.
6. When you’ve finished reading the text, give a verbal summary of the text or ask the pupils to provide a summary. Refer to the structure of the story.
7. Ask the group a range of questions to reinforce their understanding of the text. Include questions that will give them opportunities to predict, clarify, imagine and summarise. Ask pupils to devise some questions of their own to ask each other.
8. Ask the group to review the learning objectives and discuss how they were met. Plan any next steps for learning.

**Evaluating the intervention**

It’s important that the teacher and TA take time to evaluate the intervention together. This is primarily to measure the progress each pupil has made towards the objectives of the intervention, by considering how well pupils have developed the desired skills and what other outcomes there have been for each pupil.

Evaluation will also help you determine whether the intervention should be used again. If you decide that it has been effective, seek to determine what went well and what changes could be made for next time.

For an intervention to have been effective, a pupil will need to be able to transfer whatever skills they’ve acquired back into the classroom. The teacher and TA will need to consider how they can both support the pupils to do this. For example, Sam and Mark could jointly devise a list of strategies to use for decoding tricky words that the pupils can use as prompts when reading in class.
TA induction: developing questioning techniques

For teaching assistants, a proper induction is as important as any later training. ELIZABETH BURNS shares some example questions her TAs use to support pupils from day one

This month, the SEND department of St James’ Catholic High School will be welcoming new teaching assistants. Their induction is vital to our ensuring that as little knowledge or capacity is lost by the changing of staff as possible. The process is twofold: we ensure that new starters have a robust knowledge of SEND and the department, while embedding our ethos for teaching and learning.

At the start of the school year, we have a whole-school SEND update in which we remind everyone about the process of ‘assess, plan, do, review’. We also share our criteria for identifying SEND, and in an hour-long session discuss the new Year 7 pupils who are in need of additional support. This session is attended by all TAs. We discuss strategies for removing barriers to learning and setting suitable challenges in lessons.

The teaching and learning training is delivered by members of teaching staff and more experienced TAs. We give all new members of staff, including our TAs, a copy of our school’s teaching and learning handbook. This is a summary of best practice, including sections on ‘assess, plan, do, review’ and other matters pertinent to SEND. TAs are expected to attend new staff meetings, which are valuable opportunities to share key information about school policies and provision for SEND in school.

Higher level questioning
In their first two days, new TAs are trained in effective questioning and feedback. This involves shadowing a more experienced TA who will be assigned to them as a mentor. Additionally, they are given a teaching assistants handbook with an example question grid, an adaptation of which you’ll find opposite.

The grid outlines the progression of open and closed questions a TA can ask to help pupils in everything from remembering basic information to evaluating their work. SENCOs should ensure that teachers devote some time to discussing these questions with TAs before a lesson - they can easily be adapted to suit the needs of particular pupils or the content of a lesson.

Final thoughts
Developing new TAs is the responsibility of everyone in the school. The SEND department, SENCO and teachers all have a part to play.

When thinking ahead to those crucial first few days, here are some final questions for you to consider.

- What key skills do you want TAs to develop?
- Who do your TAs need to be acquainted with?
- What do they need to know?
- What opportunities are there for training?
- Have you devised a series of Inset sessions for SEND over the year, and invited your TAs?
<table>
<thead>
<tr>
<th>Remembering</th>
<th>Understanding</th>
<th>Applying</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Finding out what the pupil knows</strong></td>
<td><strong>Finding out what the pupil understands</strong></td>
<td><strong>Solving a problem using what has been learned</strong></td>
</tr>
<tr>
<td>1. Who?</td>
<td>Tell me in your own words…</td>
<td>How can you use what you know to help…?</td>
</tr>
<tr>
<td>2. What?</td>
<td>Which is the best answer, and why?</td>
<td>What do you know already?</td>
</tr>
<tr>
<td>3. Where?</td>
<td>What facts/ideas/words show…?</td>
<td>What other way would you?</td>
</tr>
<tr>
<td>4. When?</td>
<td>How are these the same?</td>
<td>Can you think of another way of doing this?</td>
</tr>
<tr>
<td>5. Which?</td>
<td>How are these different?</td>
<td>How could you rearrange…?</td>
</tr>
<tr>
<td>6. Why?</td>
<td>What is the effect of…?</td>
<td>How could you compare […] and […]?</td>
</tr>
<tr>
<td>How would you show/explain/describe…?</td>
<td>What is the main idea?</td>
<td>Can you find another way to …?</td>
</tr>
<tr>
<td>Look back in your book and:</td>
<td>What does this mean?</td>
<td>What would happen if…?</td>
</tr>
<tr>
<td>1. tell me about…</td>
<td>Can you think of another way to say…?</td>
<td>What could you do next time?</td>
</tr>
<tr>
<td>2. tell me what happened…</td>
<td>Can you give another word that means?</td>
<td></td>
</tr>
</tbody>
</table>
Make improvements
At nearly every SLT meeting I attend, the words ‘maximising teaching assistants (TAs)’ never fail to crop up. With overstretched budgets and recruitment challenges, many schools are having to think carefully about how they can invest in existing staff to meet demanding progress and attainment targets.

At The Weatheralls, we have a strong workforce of around 36 TAs to support the needs of our 620 pupils and, in line with recent research on added value, we have had to think very carefully about how our TAs are deployed and the overall effectiveness of this provision. This has required some difficult, but honest and shared conversations with all members of staff.

Where did we start?
Initially, we chose to find out how our teachers and TAs perceived the role of support staff. We suspected a traditional mindset, with a large proportion of staff using TAs to prepare resources or work with the lowest attainers. We knew things had to change, but we also knew we had to listen, not dictate.

Armed with flipchart paper and pens, we organised meetings with our TAs and asked a few questions about their understanding of the role. True enough, most believed that their purpose was to assist the teacher and ensure pupils completed their work, ‘supporting’ them by any means necessary. For some, this often meant giving pupils the answers or doing the work for them. Many were fixated on children with SEN, behaviour management and task-orientated support. Our teachers thought the same. Clearly, we had some work to do.

We knew that the traditional culture was our greatest barrier to improvement, with many long-serving TAs clinging complacently to an outdated perception of their role. Attempting to change things too quickly would leave many staff feeling anxious and defensive at a time when we needed everyone to pull together.

With this in mind, we started with our job description for TAs – scrapping the ‘teaching assistant’ title in favour of ‘learning support assistant (LSA)’. This was a clear indication of our effort to change the way support staff work.

Next, we put together a short and long-term plan. These underlined the importance of fostering a teaching and learning identity for support staff, raising their professional status and adjusting pre-conceptions around their role. We divided our objectives into three ‘P’s: practice, pupil outcomes and pedagogy.

Reflecting on our practice
To improve our practice, we needed to:

- align all support staff with the school’s vision and values
- develop positive relationships between staff and pupils
- ensure a visible line of accountability between staff.

From initial meetings, it was clear that direction and communication were high on our staff’s agenda. LSAs simply didn’t know which strategies to use in certain lessons, and weren’t always aware of the lesson outcomes they should be working towards. Lesson observations revealed that many LSAs were accustomed to sitting at the back of the classroom, hovering around the same groups of children or whipping groups outside to work. ‘This was what they had ‘always done’.

Teachers did not think there was enough time in the school day
to discuss their expectations with LSAs, and felt uncomfortable talking to support staff during breaks or holding them back at the end of the day. Many newly-qualified teachers (NQTs) did not feel confident in challenging more experienced LSAs who were not taking the initiative and being proactive during lessons.

As teachers have overall responsibility for the progress of their pupils, we appointed them direct line managers of the LSAs in their class. We drew on the phase leaders to model and mentor less experienced teachers, and ensured planning was used to highlight who the LSA would be working with, what they would be doing and when this would take place. We made sure everyone understood that this shift would involve using communication and reciprocal support to drive improvement.

Giving time for LSAs to communicate was high on the priority list. We reviewed our LSA contracts and, where possible, extended the working day from 9.00am–3.00pm to 8.30am–3.15pm. This would allow for a meaningful breakdown of the anticipated outcomes and strategies to use, as well as a reflective conversation at the end of the day.

**Putting pupils’ outcomes first**

To improve outcomes for pupils, we needed to:

- match our expertise carefully with need
- improve pre and post-lesson communication
- use support staff more effectively in lessons.

During our school-wide evaluation, we realised that the inclusion of an extra desk in every classroom and the allocation of rooms to specific LSAs were unnecessary legacies of an outdated model. Why did LSAs need a room and desk for clerical duties that kept them away from the pupils? Out went the desks, and our teachers paid closer attention to the nature of support our LSAs were providing. This meant looking at which pupils were being supported, the context (one-to-one or group, in-class or out-of-class) and duration of support.

It was also important to promote high expectations, particularly for lower attaining pupils. Every LSA was trained to raise expectations with simple sentences or questions, and give lower attaining pupils more time with their teacher, not less.

We also carried out a skills audit (no mean feat in a school of our size), which helped us decide how to match expertise with need. For example, we learned that a significant number of teachers were Elkan trained, and others had undertaken specific ASD training. This informed our decisions to pair up staff and organise in-house training sessions.

**Sharing our pedagogy**

To improve our teaching, we needed to:

- invest in CPD for LSAs that reflects our direction for school improvement
- develop the questioning skills of teachers and support staff
- improve our reflective practice.

As LSAs better understood their role, they gradually became more confident in feeding back to less experienced teachers. We began to see pockets of joint ownership where previously there had been a divide. Joint observations give teachers and LSAs the chance to learn from each other, and we have also steadily introduced lesson study into our appraisal process for teachers – LSAs have the option to observe this process too. Simply put, we now have a clear line of accountability, which in turn has improved teacher-LSA relationships.

To monitor the implementation of these reforms, a member of the SLT holds fortnightly meetings with our LSAs. Long though the journey has been, we are now seeing the results of our efforts: greater independence and better outcomes for our pupils.
Autism and transition: what the research tells us

We know how difficult the leap from primary to secondary school can be. GARETH D. MOREWOOD explains why coordinating transition in the best interests of the child is time well spent.

Earlier in the year, Dr Judith Hebron published research on behalf of the Leverhulme Trust into the experience of transition from primary to secondary school for pupils with autism.

Why are secondary schools so different?
Judith highlights that the changes accompanying transition can be challenging for all young people, but may be particularly difficult for those with autism.

In secondary schools, a higher number of pupils on roll puts the emphasis on relative ability and competition rather than on effort and improvement, and an individual’s relationship with their teacher is often less personal.

It is also important to remember that preference for routine and low sensory stimulation is at odds with the often-chaotic mainstream school environment, potentially making it a very stressful place for pupils with autism.

Colleagues Humphrey and Ainscow (2006) indicate that upon arrival to secondary school pupils are moving from the protected top of the social hierarchy to the bottom of a much more complex one, going from the oldest in one structure to the youngest in another.

In their research, Hughes, Banks, and Terras (2013) found that a mere 17 per cent of transition studies focused on pupils with SEND. This is despite teachers and parents reporting that young people with SEND seem to have more difficulties than their peers at this time of year.

What does this research suggest?
Recent literature underscores the significance of transition as a critical point in a young person’s social and educational development, but also that a positive transition is possible. Indeed, in Judith’s study, most young people with autism transitioned successfully.

Judith’s findings offer an excellent starting point for SENCOs as we prepare for our new intake.

We should share good practice more frequently. Many schools have excellent transition programmes in place. Talking to other schools and speaking to existing parents/carers about what worked well for them last year is an important element not to be missed.

Schools need to designate staff members to manage the transition of pupils with autism. This needs to begin well in advance of the whole-school transition process. Even with tight budgets and other external pressure, it is important that a designated member of staff can support smooth transitions.

Thinking about how we can meet individual needs during the transition, often with individual visits, photos of key staff and developing supportive relationships with peers can significantly reduce the associated risks.

Parents, carers and pupils should be involved in planning transitions. This means giving them enough time to acquaint themselves with the new school and key members of staff. Parents can often highlight any anxieties and potential challenges new pupils may face.

Schools must train all staff in autism awareness. Professional development is integral to a school’s provision for SEND. Taking time on the first day to highlight the needs and provision for individual pupils is a good way for SENCOs to give all staff a clear understanding of their responsibilities.

A school must not neglect the social and emotional impact of transition. Don’t ‘wrap’ all the pupils into one, but instead take time to understand specific anxieties and address them individually.

A successful transition
We shouldn’t underestimate the value of a positive, coordinated transition from primary to secondary school. Judith’s points are unsurprising insofar as they identify what most of us would already consider good practice.

A successful transition depends on many factors, each unique to the individual. However, Judith’s research illustrates that common to all transitions is the need to promote social inclusion through the school ethos. Embracing difference and diversity will allow the SENCO and other staff to get to know young people as individuals, which in turn will allow a better accommodation of their needs.

For references, see blog. optimus-education.com/transition-pupils-autism-what-does-research-tell-us
## SEND year planner

A year planner for SEND will help you stay on top of your priorities and meet all statutory requirements for the new academic year. **ANITA DEVI** has created this example to adapt

<table>
<thead>
<tr>
<th>By Sept 2017</th>
<th>By Dec 2017</th>
<th>By April 2018</th>
<th>By July 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Local Offer</strong></td>
<td>Questions: What activities have you undertaken to signpost parents/carers to the Local Offer?</td>
<td>Ensure your policies meet the requirements of the SEND Code of Practice. This includes your:</td>
<td>Ensure SEND and use of support staff are part of the whole-school monitoring process.</td>
</tr>
<tr>
<td>• Contribute to Local Offer and user feedback/LA evaluation.</td>
<td>• Teaching and learning policy</td>
<td>• Behaviour policy</td>
<td>• Review SEND register and monitor approaches, including finance tracking.</td>
</tr>
<tr>
<td>• Ensure link to local offer on school website is active and easily accessible.</td>
<td>• Accessibility plan</td>
<td>• SEND policy.</td>
<td>• Look at annual review dates for 2017-2018.</td>
</tr>
<tr>
<td><strong>Policies</strong></td>
<td>Ensure your policies meet the requirements</td>
<td></td>
<td>• Inform parents of local authority conversion plan, and using whole-school diary look at opportunity to inform parents regularly.</td>
</tr>
<tr>
<td></td>
<td>of the SEND Code of Practice. This includes your:</td>
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<tr>
<td></td>
<td>• Teaching and learning policy</td>
<td></td>
<td>• Review SEND register and monitor approaches, including finance tracking.</td>
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<td></td>
<td>• Accessibility plan</td>
<td></td>
<td>• Look at annual review dates for 2017-2018.</td>
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<tr>
<td></td>
<td>• Behaviour policy</td>
<td></td>
<td>• Inform parents of local authority conversion plan, and using whole-school diary look at opportunity to inform parents regularly.</td>
</tr>
<tr>
<td></td>
<td>• SEND policy.</td>
<td></td>
<td><strong>Parent engagement</strong></td>
</tr>
<tr>
<td><strong>Systems and structures</strong></td>
<td>Ensure your policies meet the requirements of the SEND Code of Practice. This includes your:</td>
<td></td>
<td>• In line with the Code of Practice, revisit the core principles of SEND provision and determine how well they align with your school’s values.</td>
</tr>
<tr>
<td></td>
<td>• Teaching and learning policy</td>
<td></td>
<td>• Use newsletters to inform parents of local offer portal.</td>
</tr>
<tr>
<td></td>
<td>• Behaviour policy</td>
<td></td>
<td>• Issue end-of-term questionnaire.</td>
</tr>
<tr>
<td></td>
<td>• SEND policy.</td>
<td></td>
<td><strong>Pupil engagement</strong></td>
</tr>
<tr>
<td><strong>Reports/reporting</strong></td>
<td>Question: What is it you do for every child who walks through the door?</td>
<td></td>
<td>Talk to your school council or a specific focus group: how can you better involve pupil voice?</td>
</tr>
<tr>
<td>• Make sure an up-to-date SEN information report is on your website.</td>
<td>• Consider at the following levels:</td>
<td></td>
<td>Gather feedback on reporting mechanisms.</td>
</tr>
<tr>
<td>• Question: Do you keep previous year’s on your website for comparison and to demonstrate development?</td>
<td>a. Whole school</td>
<td></td>
<td><strong>Staff development</strong></td>
</tr>
<tr>
<td></td>
<td>b. Key stage</td>
<td></td>
<td>Carry out induction of new staff.</td>
</tr>
<tr>
<td></td>
<td>c. Departments.</td>
<td></td>
<td>• SENCO performance management: link to SEND action plan.</td>
</tr>
<tr>
<td></td>
<td>• Review assessment processes to ensure they are intervention-based.</td>
<td></td>
<td>• Revisit Wave 1 values/principles and the graduated approach.</td>
</tr>
<tr>
<td></td>
<td>• Watch out for feedback from Rochford Review consultation (which ended in June).</td>
<td></td>
<td>• Draft an enhanced training and CPD plan.</td>
</tr>
<tr>
<td></td>
<td>• Slim down paperwork.</td>
<td></td>
<td>• Carry out performance management for teaching assistants.</td>
</tr>
<tr>
<td></td>
<td>Carry out end-of-year review to inform SEND information report and develop new action plan.</td>
<td></td>
<td><strong>Staff development</strong></td>
</tr>
<tr>
<td><strong>Monitoring</strong></td>
<td><strong>Development work</strong></td>
<td></td>
<td>Carry out induction of new staff.</td>
</tr>
<tr>
<td></td>
<td>• Review SEND register and monitor approaches, including finance tracking.</td>
<td></td>
<td>• SENCO performance management: link to SEND action plan.</td>
</tr>
<tr>
<td></td>
<td>• Look at annual review dates for 2017-2018.</td>
<td></td>
<td>• Revisit Wave 1 values/principles and the graduated approach.</td>
</tr>
<tr>
<td></td>
<td>• Inform parents of local authority conversion plan, and using whole-school diary look at opportunity to inform parents regularly.</td>
<td></td>
<td>• Draft an enhanced training and CPD plan.</td>
</tr>
<tr>
<td></td>
<td>• Review SEND register and monitor approaches, including finance tracking.</td>
<td></td>
<td>• Carry out performance management for teaching assistants.</td>
</tr>
<tr>
<td></td>
<td>• Look at annual review dates for 2017-2018.</td>
<td></td>
<td>• Train staff on leading working with parents and holding meetings.</td>
</tr>
<tr>
<td></td>
<td>• Inform parents of local authority conversion plan, and using whole-school diary look at opportunity to inform parents regularly.</td>
<td></td>
<td>• Provision management: Wave 2 and 3.</td>
</tr>
<tr>
<td></td>
<td>• Review SEND register and monitor approaches, including finance tracking.</td>
<td></td>
<td><strong>Staff development</strong></td>
</tr>
<tr>
<td></td>
<td>• Look at annual review dates for 2017-2018.</td>
<td></td>
<td>Audit staff knowledge, skills and impact in the classroom.</td>
</tr>
<tr>
<td></td>
<td>• Inform parents of local authority conversion plan, and using whole-school diary look at opportunity to inform parents regularly.</td>
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</table>
Managing your digital footprint

Everything we do online contributes to a traceable 'digital footprint'. ALAN MACKENZIE explains how you can teach students to mind their step.

'Privacy settings are great in principle, but they’re no guarantee of safety'

What is a digital footprint?
One's unique set of digital activities, actions and communications that leave a data trace on the Internet, or on a computer or other digital device and can identify the particular user or device.
dictionary.com (oego.co/digital)

The ‘digital footprint’ is a hot topic when talking to children and young people about online safety, and with good reason. A lot of the resources schools use are unduly narrow or fear-mongering: ‘If you post this online, something bad will happen to you.’ Young people are also warned never to post personal information online. This is completely unrealistic.

I started using the internet in the early nineties, when it was mostly passive (Web 1.0). The introduction of Web 2.0 in the early noughties saw traditional browsing and downloading diversify into more collaborative services and user-generated content. Since then I’ve written hundreds of articles, produced scores of videos and posted/shared innumerable tweets, Facebook posts, photos, comments, blogs and so much more. I’m aware of pretty much everything there is about me online, because a positive reputation is integral to the success of my business.

What about Web 3.0? We now have smart devices or services that can talk to one another without our input: a fridge that can order milk from the supermarket when you’re running out. All of this is possible because all devices we carry around have unique identifiers. Attach these unique devices to information such as our browsing history or online habits and you can see that the scope of one person’s digital footprint can be extraordinary.

For the benefit of informing a school’s e-safety procedure, the concept of the digital footprint can be split into two categories: passive and active.

Passive digital footprint
How long we watch a Facebook video, what we shop for and what we search on Google are all examples of our passive digital footprint. These are mainly convenient snippets of code used to store information not only on our own devices, but also in the ‘cloud’ (shared storage space) as well. It’s becoming more common for companies to use computer algorithms to profile us individually, and tailor things for us. The longer you watch a Facebook video, the more interested you must be, therefore you’ll see more similar content.

Another more common example is targeted advertising. If I’ve been looking at something on Amazon, I soon find adverts for similar items across my Instagram timeline and when I’m browsing the web. It’s marketing on a grand scale, and many companies sell and share our personal information. We give companies permission to do this when we sign up for and use their services.

Similarly, details about our habits are recorded when we’re in a shop, commonly called ‘location-based engagement’. This data used to be stored locally on the device itself, but as many of us have become owners and users of multiple devices, these details are also stored elsewhere for convenience. For example, if I use the Google Chrome browser at home and allow it to store all my login details (or perish the thought, banking details), I can easily sign into my Google account from a computer or device anywhere in the world, as if I were sitting at home.

Active digital footprint
An active digital footprint mainly describes what we are deliberately (or sometimes accidentally) sharing online. Examples include an email, a photo shared on Instagram or even a typed comment on an online game.

While discussing the evolution of Web 2.0 to 3.0, and the differences between our passive and active footprints, is useful for students by way of introduction to their digital footprint, we need to focus on the positive and negative implications of what we do. Remember that balance is important: don’t focus solely on the negatives!

Encourage awareness
The greater the awareness students have of potential consequences, the more likely they are to make informed decisions.
One suggestion for a lesson activity would be to make students create a portfolio of work around a chosen area of interest; a student interested in politics or the economy might create a video blog or 'vlog' to showcase their thoughts. In doing so, they can explore the processes involved in posting content online and recognise its permanence.

Primary-aged children commonly use online platforms such as YouTube to watch video game footage and commentary. A significant minority upload videos of their own. That shouldn't be discouraged, as it can be fun and educational – although be mindful of age restrictions.

Careless management (deliberate or inadvertent) of a digital footprint can have repercussions for someone's reputation and life chances in the present, or in years to come. There are plenty of examples out there that teachers can share, especially with older students. When using stories as prompts for discussion, be careful not to impart any blame or cast a judgement. The purpose should be to show why and at what point things went wrong – and what the consequences were.

Although promoting an awareness of the digital footprint should be a matter for an e-safety curriculum, it's equally important that all school staff are fully aware of their responsibilities. As professionals who work with children and young people, staff must adhere to the school's code of conduct, and such policy must reflect the technological age we live in.

**Guard your school's reputation**

Something that can be easily overlooked is a school's digital footprint, which includes what it posts on the school website and social media. A free and easy way to monitor what other people post about the school is to use Google Alerts. It isn't a watertight solution (there's no such thing) but it can prove useful.

Think carefully before posting photos of students on the school website. We encourage students to ask permission before posting a photo that includes someone else. Similarly, we ask parents for their permission before posting photos or videos of their children. Should we ask the students too? After all, young people have as much a right to privacy as anyone else.

**Respond to concerns**

When talking to secondary school students, I’ve often focused on privacy, or rather the lack of privacy online. This is to draw their attention to the fact that nothing we do or say online is truly confidential. Privacy is a useful umbrella topic for several reasons, but mainly because it affects every single one of us. It also allows you to delve into many related issues and touch on important aspects of safeguarding. Steer clear of weak rules such as 'Always use privacy settings.' Privacy settings are great in principle, but they're no guarantee of safety.

If privacy is something you’re planning to cover in school, or if you’re inviting someone in to discuss it, gather some questions from students in advance. They may not ask them in an assembly-style discussion, but if you can respond to specific concerns then your impact will be far greater.

You may also find that some of the questions are quite technical, in which case it's helpful to have your technical support/network manager to hand. Equally, if you make an assertion ('Once you post something online, it stays there forever') then be prepared to back it up with evidence or explain why it's the case.

The digital footprint is a colossal topic that relates to many other aspects of online life. I’m a great believer in keeping things simple and responding to the concerns of students first, embedding the important e-safety messages in turn. It’s a win-win.
Recognising peer-on-peer abuse: examples for staff

All staff have a role to play in identifying and acting on allegations of peer-on-peer abuse. ANN MARIE CHRISTIAN shares a few examples of abuse in context.

In late 2006, I saw an influx of referrals being made to the team I was managing in children's social care. Some of the referred incidents included girls performing oral sex, and a group of boys and girls coercing other girls into performing sexual acts on boys. These were escalated to child protection enquiries (section 47s). In some cases, the culprits were excluded permanently from school and the victims were given fresh starts in new schools. It was a challenging time for our team, and cooperation with other agencies had to be at the heart of our work.

Ten years later, schools and colleges have clearer guidance for child protection, as set out in the document Keeping Children Safe in Education (oego.co/KCSIE). On page 19, in the section ‘Allegations of abuse made against children’, it is clearly established that children can abuse their peers. Staff should be aware that peer-on-peer abuse does exist, and their school’s child protection policy should include procedures for minimising risk and investigating incidents.

It’s important to emphasise that nothing should be dismissed as ‘banter’ or a ‘part of growing up’ without proper investigation. Even seemingly innocuous ‘jabs’ could conceal instances of emotional, sexual or physical abuse. While the additions to statutory guidance are welcome, school staff still need to be able to recognise peer-on-peer abuse as it takes place.

A discerning approach
Research carried out by Dr Carlene Firmin at the University of Bedfordshire (oego.co/firmin) examined the extent of peer-on-peer abuse in secondary schools, and found that many schools could be considered recruitment grounds for peer-on-peer child sexual exploitation (CSE). In addition to identifying and speaking out against unacceptable behaviour, teachers and parents have a responsibility to nurture the emotional wellbeing of victims, who in some cases may require specialist support.

In the past, I’ve been notified of serious cases of abuse that were subsequently referred to children’s social care and the police. One alarming trend is the recording of sexual acts being performed on or by teenagers, and then shared via social media. Sexting may well be the norm in most pupils’ lives, but recording or sharing indecent images can carry significant legal consequences.

'Always consider the degree of aggression, the motivation for the behaviour and its characteristics'

If a Year 9 pupil repeatedly harasses (physically, sexually and emotionally) a female classmate because he’s attracted to her, or a Year 6 pupil kisses a boy in her class for the same reason, do we first consider the experience of the pupil being targeted, or the pupil causing the harm? When vulnerable children are being coerced into being perpetrators and victims of these acts, online and in person, it’s vital that staff take a discerning approach to investigating potential child abuse.

Below you’ll find a few other hypothetical examples of peer-on-peer abuse, with little more contextual information than a member of staff is likely to have in the first instance. Under each one, I’ve included questions that must be kept in mind when deciding on a response.

Peer-on-peer abuse at primary level
A Year 4 pupil chases a female peer across the playground, pins her down and lifts her skirt.

Key questions:
1. Were there any adults in the playground when this took place?
2. Is the school aware of any ‘blind spots’ on the school grounds, and what can be done to ensure that pupils are monitored in these areas?
3. Did the female pupil consent to being chased? If so, is she old enough to make such a choice, especially as her skirt is being lifted?
4. How can staff support the wellbeing of the girl? How does she feel?
A boy in Reception follows another boy into a toilet cubicle and demands he pull down his underwear.

**Key questions:**
1. Were there any adults nearby when this took place?
2. Why did the boy follow him into the cubicle?
3. Are both sets of parents aware that the incident took place?
4. Was the incident reported, and to whom?

In a WhatsApp group chat, a group of Year 5 pupils mock and insult someone in their Year 5 class.

**Key questions:**
1. Is the school aware that this took place? Was it reported?
2. Who initiated the negative discussion, and have they been spoken to?
3. Is there a home-school agreement that covers the use of social media, and allows the school to act on instances of harmful online behaviour?

**Peer-on-peer abuse at secondary level**

A female Year 7 pupil is pressured by a group of friends into French kissing a male classmate.

**Key questions:**
1. Who initiated the pressure, and have they been spoken to?
2. Does the female pupil have a voice? Does she need any specialist support?
3. Was the incident reported, and to whom?

A picture of a female Year 9 student wearing nothing but underwear is shared across the year group by a friend with whom she’s fallen out of favour.

**Key questions:**
1. Was the female student aware that the image was being shared?
2. Who do you need to talk to in order to find out what the image contained?
3. How widely have the messages been shared?
4. Is this something to refer to the police?

The headteacher, governing body and designated safeguarding lead (DSL) are responsible for keeping awareness of abuse high on the school’s agenda. However, all staff have a duty of care and should be prepared to respond to any disclosures a pupil could willingly or hesitantly come forward to make.

When responding to incidents, always start with the facts: who said, sent or did what to whom? All indicators of potential abuse should be viewed in the context of a pupil’s background, and any unmet behavioural or developmental needs. It is important that staff assure young people that they can report their concerns confidently, but not place themselves in a position where they promise not to share sensitive information.

Always consider the degree of aggression, the motivation for the behaviour and its characteristics (is it verbal, physical or sexual?) when assessing incidents between peers. Preventing harm and ensuring safety should always be immediate priorities, but be mindful of any longer-term emotional or psychological effects.

If the actions of a particular pupil amount to a significant incident, it’s important to report to the police or a social care unit, in line with the procedures of the school’s Local Safeguarding Children Board. Staff should also encourage parents to be alert to their children’s wellbeing and encourage them to communicate their concerns with school staff. Multi-agency working will help you to keep peer-on-peer abuse out of the picture.

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Our Child Protection in Education event is the perfect opportunity to clarify your safeguarding responsibilities for the new academic year. See my.optimus-education.com/conferences for dates and venues in September and October.
Over the last few years, the ever-widening range of ethnicities and cultures that the children who come through our doors represent has impacted on my role as a designated safeguarding lead (DSL). Safeguarding children and young people whose families observe different cultural and religious practices has proven to be no mean feat – and I’m sure I’m not alone. Below I’ve identified some of the greatest obstacles to safeguarding that religious differences can present, and given some suggestions for overcoming them.

Lack of knowledge

Only with an accurate understanding of the religious and cultural practices you encounter will you be able to critically evaluate and make decisions.

‘Prayer ties’: a case study

Here’s one example of an incident I’ve dealt with in the past. A young Asian pupil with additional needs was taken abroad by his parents. He was to be seen by a religious leader who would ‘cure’ him of his autism.

Upon his return, the child had several thin, black material ties wrapped tightly around his upper arms and his ankles. The child told us that the religious leader had placed them there, and that they held ‘spells’ wrapped inside to make him better. The child was highly anxious when I asked to take a closer look: he had been told that if they were removed, something bad would happen to him. The interest I had shown made him visibly agitated.

At this point, I immediately recorded the information in full detail, including:
- what the child had said
- what I had said
- what the ties looked like and where they had been placed.

I also had to consider whether there was any safeguarding or child protection concern. Although the child did not disclose that he was hurt when this event took place, and there were no marks to indicate any injury, it was clear that I needed to arrange a conversation with the child’s parents.

I called the parents and asked them to come into school, so we could discuss the concerns I had. The father of the child responded aggressively, telling me not to touch the ties. I re-iterated that I needed to have a conversation with him about the tightness of the ties on the child’s arms and about the anxieties the child had around the ties being touched. The father shouted at me to leave the ties alone, and told me that he was coming straight to the school.

When he arrived, I tried to calmly enquire about the ties and their purpose. I was told that I was a ‘white woman’ who had no right to be ‘nosy’ into other peoples’ lives. I asked the parent what the ties were, and he explained that they ‘held religious prayers’. I asked if they could be loosened on the child’s arms, as they would otherwise begin to restrict the flow of blood. The parent refused, insisting that they be left in place for one month.

Undeterred, I firmly requested the parent to loosen the ties, warning that I would otherwise have to refer my concerns to children’s social care, as leaving the ties in place would inflict significant harm on the child. My ultimatum prompted the parent to accuse me of being racist, and threaten to report me to the local authority. I pointed out that my sole concern was the safety and wellbeing of the child.

In these moments, a DSL must be resolute in their decision, so I re-iterated that I required the ties to be loosened. The parent then attempted to intimidate me by warning that if I so much as touched their child, or reported the incident, he would wait for me and ‘get’ me: he ‘knew which car I drove’. Then he stormed out of the school.

In response, I recorded every detail of the meeting with the parent, including the threats made against me verbatim. I then contacted the safeguarding governor and the police to report what had taken place. Both were very supportive. The police followed up my complaint and the parent eventually complied with my request.
what families tell you.

However, always ensure that you get the correct information from a reliable source. I have worked with many religious leaders and cultural centres, and have never come across any who have condoned the abuse of children or young people. Question the credentials of anyone who suggests that child abuse is acceptable in certain practices or cultural situations.

Knowing about religious or cultural practice will not allow you to decide if any given incident constitutes abuse or not, but it will allow you to carry out your role as DSL (and have difficult conversations) with assurance. It can be very daunting when you must confront a parent about a religious or cultural practice if you are not armed with some facts that enable you to stand your ground.

**Fear of causing offence**

One of the greatest difficulties for DSLs when addressing safeguarding concerns that involve religions or cultures is the fear that your response will be deemed offensive. When their practices are challenged, some parents can become confrontational and accusatory - distracting from the issue at hand.

A DSL can suddenly find themselves accused of being ‘racist’, ‘prejudiced’ or ‘discriminatory’. Some parents will attempt to frighten you into backing down and abandoning the school’s safeguarding procedure. Remember that abuse is abuse, no matter what excuses some parents may give. To let their response cloud your judgement is to neglect your duty to keep children and young people safe in education.

**Intimidation or threats**

It is not unusual for a DSL to be threatened by immediate and extended members of the family. Threats can take a variety of forms, including harm to the DSL or members of their family, a formal complaint to the local authority or even legal action.

If you are threatened in any way, it’s important to refer the incident via the appropriate channels – involve the police if necessary. However, this should not prevent you from having an honest conversation with parents, difficult though it may be.

**What can you learn?**

This underlines the importance of taking a calm and evidence-led approach to your initial enquiry, and not being put off by accusations or threats. Ultimately, you have a duty of care to protect all children regardless of background, and you are not being racist or prejudiced by putting a child’s safety or wellbeing first.

If you are threatened or intimidated, police will always act on your concerns. But never give in!

**Where can a DSL find support?**

Being a DSL requires bravery and resilience even at the best of times. However, there are many ways for new and experienced DSLs alike to find support when incidents arise. I would recommend that an inexperienced DSL links with a more experienced colleague who can provide advice, support and encouragement.

Equally, I have found a school’s safeguarding governor to be a great source of support, and it’s worth requesting their presence at difficult conversations with parents. Of course, governors will not always be at your disposal, especially if you need to take immediate action or if incidents must remain confidential. However, they can be a ‘critical friend’ who can advise on the actions you plan to take or have taken, and how they link to your school’s policies. For this reason, they should be sought for encouragement whenever possible.

Social workers are occasionally given a bad press, but I have always found them willing to provide advice, or to liaise with other agencies when requested. When managing religious or cultural practices in safeguarding incidents, we should not be afraid to seek more specialist help if we are to be confident enough to act.

Getting to know your local religious leaders and cultural centres in your area can be an excellent opportunity to establish contacts and develop partnerships. Inviting local religious leaders and key representatives from cultural centres into school, or even simply making a polite telephone call to book an informal ‘get-to-know’ meeting, can be a great way to establish your reputation in the local community and better understand the religious and cultural forces at play.

**Key messages**

- Never allow any form of abuse to take place in the guise of religious or cultural practice.
- Never allow families to pressure or intimidate you into abandoning your safeguarding policies and procedures.
- If you feel uncomfortable for any reason, remember that colleagues are there to support you: be it someone in your own school, your safeguarding governor, your local social care service or safeguarding board.

Safeguarding children and young people whose families observe different cultural and religious practices can be challenging.
Response to public trauma

Public tragedies can have lasting effects on the pupils in your care. Zoe Dale explains how a school can provide emotional support in times of distress.

This year, tragedies in London and Manchester have provoked strong emotions in us all: horror at the loss of life, anger at the injustice and the dreaded feeling that ‘it could have been us’. But for school leaders, the challenge is to keep the young people in your care emotionally secure. After all, many of your pupils will have seen images or footage of the attacks, and some may even be struggling with the loss of relatives, close friends, homes and treasured possessions.

In the immediate aftermath of the incident, the best approach is to accept that children will feel distressed. Teachers and parents can help considerably by letting pupils talk, or convey their feelings through play and drawing. Staff should be prepared to answer unsettling questions, but not elicit them. If children feel pressured to speak, this can be detrimental in the long run.

Furthermore, whole-school and year group assemblies can be good opportunities for the headteacher to explain why incidents occur, and frame a constructive response. It’s important to reassure pupils that – no matter what has happened – our societal values remain intact and our way of life continues.

Below I have outlined some of the ways a school can support pupils who struggle with the impact of trauma in the short (first two weeks), medium (two to four weeks) and long term (more than four weeks). I’ve taken these distinctions and adapted some of the following information from the NHS England document, ‘London incident support pathway for children and young people’.

A whole-school response

In the first two weeks, the school should take the lead in acknowledging loss. Senior leaders should prepare staff for the sensitive and challenging questions they are likely to be asked. Why did the incident happen? Who was hurt? Are pupils safe in school? This will be an important prerequisite to staff helping pupils make sense of the incident themselves. Moreover, regular communication with parents and the local community will help keep the school’s position clear.

Continuing with school routines and normal daily activities will provide important reassurance that life goes on. Encourage pupils to attend school so that they can remain connected with friends and trusted adults. It will benefit pupils’ long-term emotional health to prevent social withdrawal if possible.

Targeted support

After two weeks, you should have systems in place to identify pupils who remain distressed, and are not responding to initial advice and support. Pupils with existing mental health difficulties or special educational needs (SEN) can be particularly vulnerable.

Depending on the scale of the incident, your local authority should implement a major incident plan, which will address the support needed for schools. This should include any additional training and support from your local CAMHS and educational psychology services.

Specialist support

After four weeks, some of your pupils may still be exhibiting signs of acute distress. Use your current safeguarding and risk assessment tools to identify pupils at risk, and record your concerns. This specific information will inform any referrals to a GP or local CAMHS.

Continue to promote social connectedness in all aspects of school life, such as friendships, extra-curricular activities and sport. Be creative, carry out home visits where necessary, consider flexible timetables and smaller group work for more vulnerable pupils.

Support self-soothing and self-regulation for pupils. Provide a place for distressed pupils to take ‘time out’. Abdominal breathing exercises, progressive muscular relaxation and mindfulness techniques can be useful.

Memorialisation

A place for pupils to leave pictures, letters and flowers can be a valuable way of overcoming loss in the weeks or months following an incident, as can a remembrance book. Establish a time at which these memorials will be cleared away and replaced with a permanent memorial, such as a plaque.

Staff wellbeing

Supporting traumatised pupils and their families is important but potentially draining work for your staff. School leaders must be aware of how vulnerable staff members can be to distress. If things become acutely difficult for a staff member to manage, ensure they have access to their own confidential support.

Dealing with traumatic events is a protracted process. Give your school time to regain its resilience – it won’t happen overnight. Above all, remember that school staff are uniquely placed to provide pupils with a narrative of hope and the emotional resilience to move forwards without untoward distress and fear.
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