

# Governance News

**A Termly Newsletter for Liverpool Governors and  
Trustees**



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# Understanding Progress in the 2020/21 Academic Year



## Summary

The Department for Education has published a joint report from the Education Policy Institute and Renaissance Learning on the learning loss experienced by pupils in England as a result of the COVID-19 pandemic. It is based on assessment data from Renaissance Learning's Star Reading and Star Maths. Star Assessments are computer-adaptive in nature and adapt to the individual, providing an assessment that identifies gaps in learning from the entirety of the curriculum independent of their current year group. Star assessments also include a standardised measure which takes account of the pupil's age in years and months.

This data has been linked with data held by the Department for Education in the National Pupil Database enabling analysis by pupil characteristics. The report provides estimates of the overall level of learning loss by the end of the summer term in the 2020/21 academic year.

## Extent of learning loss and recovery

The first national lockdown and the lack of in-person learning for most children was associated with pupils making less progress in reading and mathematics than would have been expected given historic outcomes. The academic year 2020/21 might then be characterised as involving some catch-up, further losses, and further catch-up through the second half of the autumn term, the spring term, and the summer term respectively.

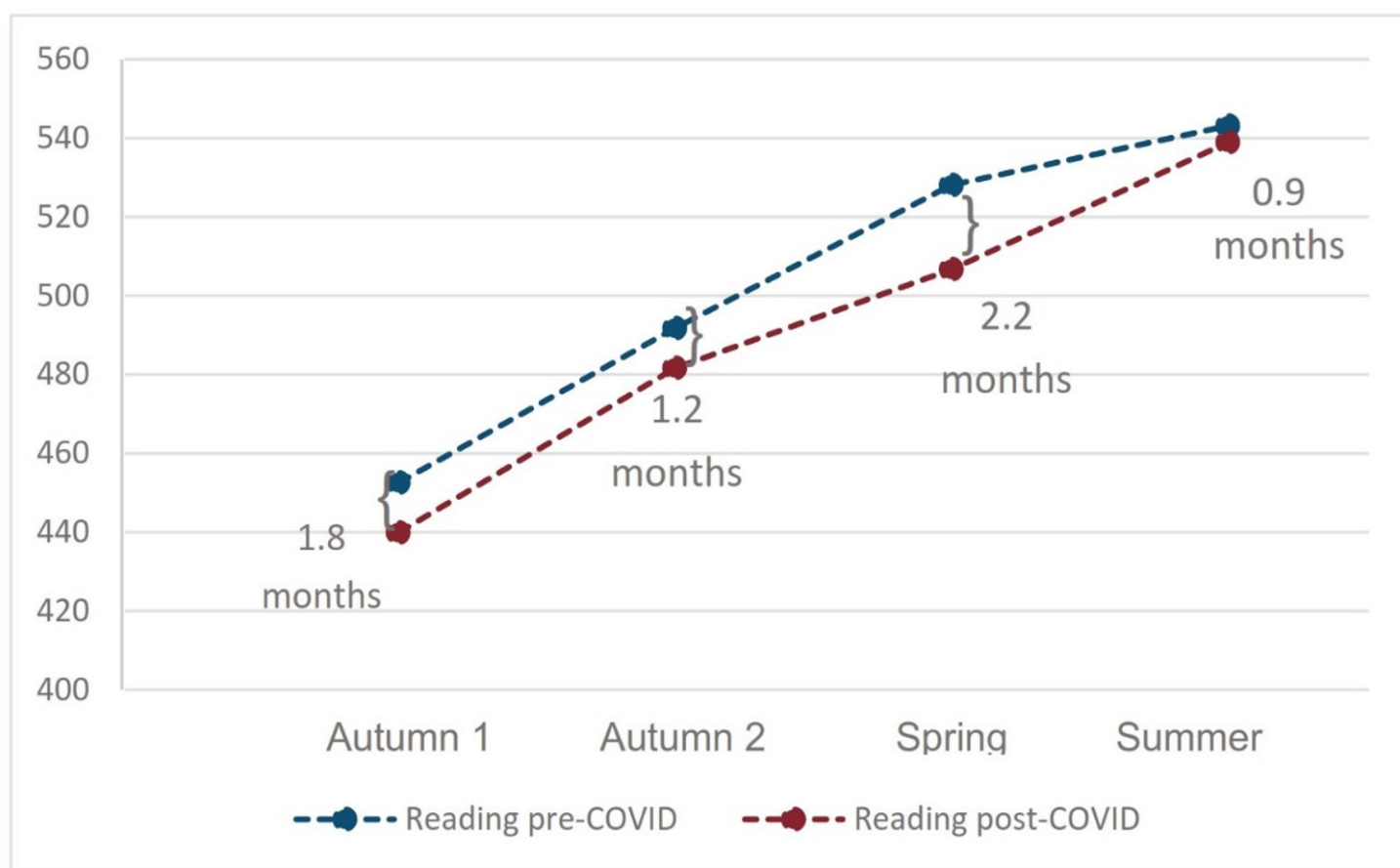
By using assessments taken during the first half of the autumn term the report estimates that, in reading, primary aged pupils had experienced an average learning loss of around 1.8 months. Then by looking at outcomes throughout 2020/21 findings show:

- By the end of the autumn term, primary aged pupils had lost on average around 1.2 months of learning in reading, meaning catch-up of just over half a month in comparison to the start of the academic year.
- By the end of the spring term, primary aged pupils had experienced a total learning loss in reading equivalent to around 2.2 months of progress on average, implying losses were around their early autumn level as a result of pupils missing out on in-person learning in early 2021.
- By the summer term, there was notable catch-up for primary aged pupils in reading with the learning loss for this cohort improving by around 1.3 months on average from the estimate of learning loss by the spring term, resulting in an average learning loss by the summer term of around 0.9 months.

To aid with visualising and understanding the concept of learning loss, Figure 1 below sets out reading learning loss estimates in 2020/21, in months, measured against 2019/20 average learning trajectory. This reiterates that pupils are still making progress in their learning during the pandemic but at a slower rate than would be expected in a normal year.

Effectively, it asks the question what would pupils have achieved in 2020/21 if they had progressed at the same rate as pupils in 2019/20? (or, for the summer term, what would pupils have achieved in 2020/21 if they had progressed at the same rate as pupils in 2018/19?), and the difference is deemed to be “learning loss”.

**Figure 1: Reading learning loss estimates in 2020/21, in months, for primary aged pupils measured against 2019/20 average learning trajectory.**



Learning losses in mathematics for primary aged pupils followed a similar pattern, though losses were larger at around 3.6 months by the first half of the autumn term:

- By the end of the autumn term, there was greater catch-up in mathematics than in reading (around a month) though overall there was still a notable learning loss of approximately 2.6 months in mathematics by that point.
- By the end of the spring term, learning losses remained larger in mathematics than in reading with a total learning loss in mathematics of around 3.4 months.
- By the summer term, there was notable catch-up for primary aged pupils in mathematics with the learning loss for this cohort improving by around 1.2 months from the estimate of learning loss by the spring term, resulting in an estimate of learning loss by the summer term of around 2.2 months.

Analysis for secondary aged pupils is more limited due to sample sizes and robust estimates can only be determined in reading. By the first half of the autumn term secondary aged pupils had experienced an average learning loss of around 1.5 months in reading. By the summer term, secondary aged pupils had caught up only slightly, resulting in an estimate of learning loss by summer term of around 1.2 months.

### **The effect of economic disadvantage**

Throughout the academic year 2020/21, pupils from disadvantaged backgrounds (primarily those eligible for free school meals (FSM) at some point in the last six years) experienced greater learning losses than their more affluent peers as a result of the pandemic.

By the end of the first half of the autumn term, pupils from disadvantaged backgrounds had lost, on average, approximately 1.9 months in reading amongst both primary and secondary aged pupils, and around 4.5 months in mathematics for primary aged pupils. In comparison to their peers this means that early in the 2020/21 academic year, disadvantaged pupils had:

- Experienced similar learning losses to non-disadvantaged pupils in primary reading;
- Lost about half a month more learning than non-disadvantaged pupils in secondary reading; and
- Lost around a month more learning in primary mathematics.

As observed in the overall results, outcomes for disadvantaged and non-disadvantaged pupils then both followed a pattern of some catch-up, further losses, and further catch-up through the second half of the autumn term, the spring term, and the summer term respectively. The extent of this recovery and further losses were not always consistent between the two groups. For example, by the end of the second half of the autumn term, pupils from disadvantaged backgrounds had recovered around 0.4 months of learning in reading amongst primary aged pupils, compared with non-disadvantaged pupils who recouped 0.6 months of learning.

Analysis shows that by the summer term, the gap in learning loss between disadvantaged pupils and their more affluent peers in reading was around 0.4 months for primary aged pupils and around 1.6 months for secondary aged pupils. The gap in mathematics for primary aged pupils was around half a month.

These learning losses are relative to the progress pupils usually make. On average, pupils from disadvantaged backgrounds make less progress than other pupils. The pandemic has exacerbated a situation in which pupils from disadvantaged backgrounds achieve lower progress and lower outcomes than their peers.

As well as variation by pupil disadvantage, there is variation by the level of deprivation of the area in which pupils live. In fact, non-disadvantaged pupils in areas with medium and high levels of deprivation experienced a similar or greater degree of learning loss to disadvantaged pupils in areas with low levels of deprivation. This is important to note as disadvantage clearly impacts learning losses at both an area-level as well as at pupil-level.



## **Regional variation**

The pandemic has resulted in regional disparities in the degree of learning loss, with pupils in some regions experiencing greater learning losses than other parts of the country.

By the end of the first half of the autumn term, in reading, both primary and secondary aged pupils in the North East and in Yorkshire and the Humber experienced the greatest learning loss (around 2.4 and 2.3 months respectively in primary, and around 1.6 and 2.5 months respectively in secondary). In primary mathematics the differences between regions were larger. Again, it was the North East and Yorkshire and the Humber that experienced the greatest learning loss – around 5.1 and 5.7 months respectively; more than double the loss experienced in the South West and in London.

After the re-opening of schools to in-person learning for all pupils, the majority of regions appeared to show some degree of recovery in reading amongst primary aged pupils, though due to sample sizes these are not all statistically significant. The same trend was found in mathematics for primary aged pupils. Most regions then experienced some further learning losses during the spring term (though due to sample sizes these are not statistically significant).

Analysis shows that by the summer term, primary aged pupils have shown some degree of catch-up in reading since spring. The greatest recovery was in Yorkshire and the Humber where pupils experienced recovery of around 2.1 months. The trend in primary mathematics is similar, with most regions appearing to have shown some degree of catch-up in learning loss since spring, though due to sample sizes these are not statistically significant. The greatest recovery in lost learning was again for pupils in Yorkshire and the Humber (around 3.8 months).

## **Association between pupil absence and learning loss**

One of the key factors that may have had influence on estimates of learning loss was the amount of time that pupils were absent from school despite schools being open for in-person learning. For both reading and mathematics, the proportion of days that pupils were absent from school were correlated with estimates of learning loss (i.e. the more time pupils spent in school when schools re-opened for all pupils, the smaller the degree of learning loss was).

It is important to note that there are other factors that influence the relationship between the degree of absence and learning loss (e.g. absence may be linked with disadvantage, less engagement with school, parental involvement, extenuating medical circumstances etc.), and therefore this analysis is by no means causal and should not be treated as such.

## **Conclusion**

Periods in which there were restrictions to in-person learning created and exacerbated learning losses in both reading and mathematics. These were partially counterbalanced by periods where schools re-opened for in-person learning for all pupils and there was some catch-up. This analysis suggests certain characteristic groups experienced greater learning losses, notably pupils from disadvantaged backgrounds and pupils from particular regions of the country, and that the degree of absence during periods when schools were open to in-person learning are associated with how severe learning losses were during the pandemic.

# The EEF Guide to the Pupil Premium



In November, the Education Endowment Foundation (EEF) published a comprehensive new guide to support schools to use evidence to improve outcomes for disadvantaged pupils through their pupil premium strategy.

It follows the publication of a new pupil premium reporting template from the Department for Education, which – for the first time – asks schools to demonstrate they have considered evidence when developing their pupil premium strategy. The guide is designed as a practical starting point to support school leaders to develop, implement and monitor an evidence-informed approach to their pupil premium strategy.

## **The tiered approach to school improvement**

Considering a tiered approach to Pupil Premium spending can help schools balance approaches to improving teaching, targeted academic support, and wider strategies.

The tiered approach aligns with the DfE strategy template, so school leaders can be confident that their school improvement approach meets the needs of their pupils and fulfils the expectations of the pupil premium strategy document.

### ***1. High quality teaching***

Spending on developing high quality teaching may include investment in professional development, training and support for early career teachers, along with recruitment and retention. Ensuring an effective teacher is in front of every class, and that every teacher is supported to keep improving, is the key ingredient of a successful school and should rightly be a top priority for pupil premium spending.

### ***2. Targeted academic support***

Evidence consistently shows the positive impact that targeted academic support can have, including on those who are not making good progress, or those who have been disproportionately impacted by the effects of the pandemic. Considering how classroom teachers and teaching assistants can provide targeted academic support, such as linking structured small group interventions to classroom teaching and the curriculum, is likely to be an essential ingredient of an effective pupil premium strategy.

### ***3. Wider strategies***

Wider strategies relate to the most significant non-academic challenges to success in school, including attendance, behaviour, and social and emotional support, which also may negatively impact upon academic attainment. Given the impact of the pandemic, issues such as securing high levels of

attendance may be more prominent for schools as they develop their strategy. While many challenges may be common between schools, it is also likely that the specific features of the community each school serves will affect spending in this category.

Many approaches within the tiered model will overlap categories, and the balance between categories will vary from year to year as schools' priorities change.

Schools should always combine evidence with professional judgement about how transferable approaches are to their own setting.

### **The four-step approach to strategy**

School leaders may wish to consider the following four-step approach when developing and sustaining their strategy:

1. Diagnose your pupils' needs
2. Use strong evidence to support your strategy
3. Implement your strategy
4. Monitor and evaluate your strategy.

The development of an effective pupil premium strategy should be cyclical and be considered an integral part of existing school development planning.

The DfE recommend a longer-term three year approach to planning, but require that if you use a multi-year approach, you still must review and publish an updated strategy statement every academic year before 31 December.

Setting longer-term objectives will give you the time and space to diagnose the challenges facing your disadvantaged pupils accurately and implement key elements of your strategy plan, such as spending, recruitment, teaching practice and staff development.

#### ***1. Diagnose your pupils' needs***

Gaining a thorough knowledge of your disadvantaged pupils' levels of attainment is the first step in developing an effective pupil premium strategy.

Once you have gauged the performance of your disadvantaged pupils against national benchmarks, for pupils whose attainment is below age related expectations, you should examine what could be hindering their attainment. This will involve **diagnostic assessment** of academic challenges, but also take account of wider challenges, such as attendance.

School leaders will take account of their in-depth understanding of any challenges that disadvantaged pupils are facing when developing their strategy. These can be identified using a wide range of internal data and information, including:

- Attendance data and levels of persistent absence;
- Teacher feedback on pupils' levels of engagement and participation;



- Behaviour incidences and exclusions data;
- Information on wellbeing, mental health and safeguarding;
- Access to technology and curricular materials.

## ***2. Use strong evidence to support your strategy***

School leaders must also utilise a broad array of external evidence to inform their decision making, alongside the expert knowledge they have of the pupils in their care. For instance, after identifying pupils in need of targeted reading interventions through standardised assessments, school leaders should seek relevant and robust evidence on which approaches are most likely to provide appropriate and effective solutions, such as particular phonics or reading comprehension programmes.

Evidence from research provides insight into what has happened in classrooms in the past, but not whether it will be effective in the future. Careful judgement of the relevance and applicability of the evidence is necessary. Additionally, thinking hard about the specific contextual factors of your school, and any necessary ‘intelligent adaptations’, is essential when interpreting the evidence that informs your strategy.

The DfE guidance [\*\*Using pupil premium: guidance\*\*](#) for school leaders includes worked examples of pupil premium strategy documents that exemplify the use of a range of high-quality evidence sources.

## ***3. Implement your strategy***

Successful implementation of a pupil premium strategy is a carefully staged process that takes time, rather than being a one-off event. The strategy needs to be aligned with other school development plans and existing practices to ensure a sustained impact.

School leaders will scrutinise the evidence that has informed their strategy with a focus on effective implementation.

Practical questions that may attend this focus on implementation may include:

- How have we successfully addressed similar challenges and needs of disadvantaged pupils in the past?
- How do aspects of the strategy align with existing beliefs, assumptions and practices of staff?
- Does the approach require changes to processes or structures, such as timetables or team meetings?
- Does the strategy provide the necessary professional development and support for staff to implement the approach successfully?
- Are there any activities that you should stop doing, either because they are not working, or because their impact is weaker than you believe new approaches may be?
- The EEF’s guidance report [\*\*Putting Evidence to Work: A School’s Guide to Implementation\*\*](#), offers comprehensive advice around the implementing change in schools.

#### **4. Monitor and evaluate your strategy**

School leaders must continually monitor the progress of the pupil premium strategy, adapting their approach when and where appropriate.

As new initiatives are implemented it is important to provide support for staff so that they can take ownership of them and deliver them successfully.

School leaders will likely consider:

1. How to provide flexible and motivating leadership as challenges emerge;
2. What training or follow-on support is required for staff beyond initial training; and
3. How to respond to implementation data to tailor and improve approaches.

A pupil premium strategy is more likely to be effective if school leaders plan how to sustain it from the outset and monitor practice in an annual cycle. School leaders should not assume that strategies which have been effective in one year will continue to be effective in another.

An effective pupil premium strategy requires goal setting, underpinned by short, medium and long term outcomes needed to reach those goals. The ongoing rigorous evaluation of pupils' attainment, barriers to learning and needs is essential.

A focus on the achievement of pupils from disadvantaged backgrounds is no doubt challenging for school leaders, especially given the disruptions and impact of Covid-19, but it has never been more important.

#### **Pupil Premium Myths**

##### **Myth 1: "Only eligible children can benefit from Pupil Premium spending"**

The Pupil Premium is designed to support schools to raise the attainment of socially disadvantaged children. However, many of the most effective ways to do this—including improving the quality of teaching—will also benefit other groups: that is fine. Likewise, you may wish to direct some forms of targeted academic support or wider strategies towards other pupils with identified needs, for example, those who have or have had a social worker, or those who act as young carers.

##### **Myth 2: "The Pupil Premium has to be spent on interventions"**

There is a strong evidence base showing the impact that high-quality interventions can have on the outcomes of struggling students. However, while interventions may well be one part of an effective Pupil Premium strategy, they are likely to be most effective when deployed alongside efforts to improve whole-class teaching, and attend to wider challenges to learning, such as attendance and behaviour.

##### **Myth 3: "Pupil Premium spending can be justified using school data alone"**

Collecting data about the attainment and progress of pupils eligible for the Pupil Premium can help schools identify priorities and target additional support. However, school data cannot tell leaders

which approaches or programmes are most likely to be effective to address the needs of their students. That is why school leaders should use high quality external evidence to inform their decision making, alongside the expert knowledge they have of the pupils in their care.

#### **Myth 4: “The Pupil Premium cannot be used to support education recovery”**

Evidence shows that disadvantaged pupils have been disproportionately impacted by the pandemic. Activity to support those pupils to recover missed learning is an appropriate use of pupil premium funding.

Schools will also receive additional funding to support education recovery through the recovery premium. The recovery premium can be spent on a wider cohort of pupils than those who attract the funding, depending on where school leaders think the need is greatest. Schools should consider their use of this funding alongside developing their pupil premium strategy.

#### **Accessing and interpreting evidence**

Developing a pupil premium strategy is best supported by accessing the best available evidence. Given the range of demands teachers and school leaders are faced with, keeping up to date with high quality evidence can prove challenging. Reflecting critically on how evidence is used to inform, implement, and monitor school strategy is therefore crucial.

‘Evidence’ is a broad term that means different things to different people. If we are going to make strategic school improvement ‘best bets’ based upon evidence, then it is important to work at identifying credible evidence sources.

What makes a good piece of evidence?

The following prompts can help school leaders interpret and appraise the quality of different evidence sources:

- Consider the sample that was used and whether it is relevant to your context. For example, if an approach has largely been researched in secondary schools, what needs to be put in place to monitor its effectiveness if delivering it in a primary school?
- Consider the independence of the evidence. Is it likely to be biased or was the programme evaluated by someone other than the programme developer?
- Consider the purpose of a piece of research. The aim of case studies might be to exemplify a school’s experience and surveys will be useful in understanding how teachers view approaches, but they will not provide evidence for the efficacy of an approach.
- Consider whether the evidence is comprehensive and whether other studies have similar findings. Would most experts in the field agree/ disagree about the claims being made?
- Consider if this is evidence or an evidence-informed viewpoint. Has research been carried out where researchers collected data directly, or is this someone’s opinion (based upon primary research)?

The EEF Guide to the Pupil Premium can be accessed **[here](#)**.

# Environmental Sustainability: A Whole School Approach



As a society we have become increasingly aware of environmental issues, climate change and the need to create a more sustainable future; young people have helped to raise awareness of these challenges. Schools have a crucial role in achieving environmental sustainability because they help young people understand the world and develop skills and attitudes to live fulfilled lives as responsible citizens.

Governing boards are in a position to consider their role in environmental sustainability and ensure that their trusts and schools take action. It is a core function of boards to determine the values, vision, ethos, and strategic priorities of the trust or school it governs.

The National Governance Association, in collaboration with the National Association for Environmental Education (NAEE), has produced **guidance** which supports a wide range of professional educators to help them improve the quality of their teaching and their pupils' learning in relation to environmental and sustainability issues.

## ***1. Being strategic: a whole trust or school approach***

Governing boards can take the decision to make environmental sustainability an organisational priority by identifying it as a key element of their trust's or school's strategy. In doing so, environmental considerations will then run throughout the trust/school's decision-making and all of their work.

### 1.1 Values and vision

The values that governing boards adopt and reaffirm every year guide the thinking and behaviour in the school or trust, underpinning all its activities. Governing boards should consider whether their existing values support environmental sustainability and consult stakeholders on whether the values need to be updated to ensure care for the environment is more explicitly incorporated. This would generate a commitment to develop policies and procedures that ensure the value is lived on a daily basis.

Ensuring clarity of vision is the first core function for every governing board. The vision is reviewed annually and should, in a few sentences, describe what the school or trust will look like in three-to-five years' time, and what their pupils will leave the school knowing, thinking and having done. Making environmental sustainability part of the vision reinforces the commitment to developing and promoting practice throughout the school or trust.

### 1.2 Strategic priorities

The board's strategy is a high-level document which sets out how the vision will be achieved and includes a small number of priority goals. Taking the decision to make environmental sustainability one of those strategic priorities will ensure that it is embedded in the fabric of the trust/school: a whole school or trust approach. It also means that the topic will become part of the annual strategy review.

This discussion about strategic priorities will usually occur at the annual review of the strategy, often held with both the governing board and the executive/senior leadership team in the summer term or sometimes at the beginning of the autumn term. However, if environmental sustainability was not covered in that last conversation, rather than waiting for another year, it could be added to a full board meeting in the meantime.

## **2. The Four Cs approach to sustainability**

A whole school/trust approach to environmental sustainability, by definition, should encompass all aspects of school life, learning and management.

The NAEF explains this by using the **Four Cs model**:



### 2.1 Curriculum

The school's curriculum is an embodiment of its vision and values. Treating environmental sustainability as a core value should lead to governing boards taking a keen interest in how this is covered in the curriculum. When having a conversation with your school/executive leaders at the relevant governing board meeting, you could ask them:

- What and when do pupils learn about climate science and climate change?
- How and when do pupils learn about the concepts of environmental sustainability, such as the impact of human activity on the climate and biodiversity?
- How is working across subjects and collaboration between teachers encouraged?
- How do pupils develop knowledge and understanding of their local environment and their place within it?
- What part does outdoor learning play?
- Does the curriculum foster curiosity and give pupils the opportunity to explore wider and global environmental issues?
- Do pupils develop positive attitudes and behaviours towards the environment?
- Have pupils been consulted on their experience of the curriculum and teaching and learning on environmental sustainability?



- Does the curriculum best prepare this generation for the world in which they will live, laying the foundations for green technology skills and green careers?
- Does the curriculum maintain an awareness of the implications of raising sustainability issues (such as eco-anxiety) and seek to foster a sense of hope through pro-environmental behaviours?

## 2.2 Campus

This encompasses all aspects of school buildings and grounds. It is most likely that energy will already have been considered from an environmental point of view, but there are other aspects which require consideration. As a starting point, ask school leaders:

- Is there an existing policy on how the school/trust manages its campus in a sustainable fashion?
- Are sustainable procurement choices the first option?
- What investment is needed in our buildings to improve their environmental sustainability?
- Is our energy supplier using renewable technologies and could we generate energy from renewable sources?
- How is energy use monitored to ensure money and carbon are not wasted?
- What waste is recycled or composted?
- Do we seek to increase biodiversity?

## 2.3 Community

### *Inside school*

- Do staff work with pupils to develop the curriculum and the policies and practices for managing the campus to make biodiversity gains, save energy, and create less waste?
- Have environmental considerations been applied to food provided in the school?

### *Outside school*

- Are children and staff travelling to school by walking and by bike, and how is this actively facilitated by the school/trust?
- What is the air pollution in and around school? How can we work with others to reduce this?
- Has the school worked with parents and drawn them into sustainability-focused activities in an appropriate and productive manner?
- Does the school act as a hub for any environmental projects or offer premises and support to other community schemes?

## 2.4 Culture

- Do we take sustainability seriously, act responsibly and model pro-environmental behaviours transparently in the school's operation?
- Do we understand the challenges posed by climate change, and go beyond seeing recycling and turning lights off as adequate responses?
- Do we see young people's participation and activity in a positive light?
- Are pupils empowered to act on climate change, both within the school by reducing emissions and in their home environment?

### 3. Leading change

#### 3.1 Roles and responsibilities

The Department for Education's (DfE) Governance Handbook states that governors and trustees should have "determination to initiate and lead strategic change when this is in the best interests of children, young people and the organisation, and to champion the reasons for, and benefits of, change to all stakeholders".

The governing board needs to initiate the discussion on environmental sustainability if it has not yet begun at the trust/school. Where discussion has been limited to one aspect of school life, the board should ensure the approach is extended to cover all aspects of the work of the trust/school.

The board needs to ensure that there is the leadership capacity to undertake this work. They should seek assurance that the budget reflects this priority and the resulting policies and plans.

#### 3.2 Equipping staff

##### *Clarity of role*

It needs to be clear which executive leader is tasked with progressing the activity for each of the Four Cs. The CEO of a trust and headteacher of a school should take responsibility for culture. For campus, it may also be obvious that the CFO or operating officer takes the lead in a trust and a school business professional at school level. A decision however needs to be made as to the lead on work on the curriculum and with the community.

##### *Capacity*

The board needs to ensure time is available to those who have been identified in delivering this change.

##### *Creating a plan*

The Four Cs provide a model for leaders to follow when undertaking an audit of existing practice and developing an operation plan to achieve some specific goals for each C. For example, reduced energy use, increased active travel or sustainable purchasing.

##### *Knowledge*

The governing board must be prepared to invest in time and resources to ensure staff are able to develop and deliver the plan, especially as knowledge grows on environmental sustainability and practice evolves. For example, to accompany a focus on the curriculum, teachers are likely to need high-quality CPD that helps them to engage with the topic and to confidently deliver an up-to-date curriculum.

Support is available from a range of providers, such as [United Nations Climate Change Learning Partnership](#) and [Future Learn](#) who offer free climate education modules. Resources such as NAEF's curriculum guides detail opportunities for schools and trusts to focus on climate change and environmental issues in a way which helps pupils develop a global perspective, foster responsible

attitudes and inspire them to take action in order to live more sustainably.

### *Support and expertise*

Countless organisations are working at local, national and international level to provide information, training, resources and opportunities that both inspire and affect positive change in schools. The [NAEE website](#) is one such invaluable resource.

### 3.3 Board practice

The ways of working and practices that governing boards adopt set an important tone and exemplify the value placed on environmental sustainability to the whole school. 'Quick wins' can be achieved by reducing the amount of paper generated by board meetings and a schedule that combines face-to-face with virtual meetings, therefore reducing the need to travel and the carbon footprint.

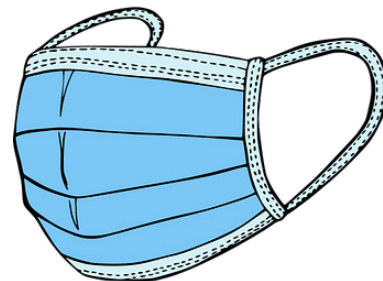
Many governing boards now use a digital document storage system for papers, and many are adopting a blend of face-to-face and virtual meetings: communicating this progress to others is useful. The use of e-learning – reducing paper and the need to travel for training – also has a part to play.

### 3.4 Engaging stakeholders

Engaging stakeholders and listening to their views is a core function of governing boards. The environment is a topic with which stakeholders are likely to be eager to engage. Involve them from the beginning to find out their concerns, understanding and what they would like to see.

Discuss with your leadership team how to harness the knowledge, energy and enthusiasm of:

- Pupils, classes, year groups and school councils – young people are increasingly concerned about sustainability and climate change and are looking for opportunities to learn more and to make change.
- Parents and parent forums – when schools have the support of parents, they are in a much stronger position to achieve their aims around environmental sustainability. Some parents may have specific expertise in the topic.
- Staff – teachers are fundamental to pupil learning about sustainability and school business staff have an important role in making sustainability a part of resource management.
- The wider community – there are many examples of businesses, charities and local authorities willing to collaborate with schools and support them to build a more sustainable infrastructure.
- Colleges, universities and employers – the government has launched the Green Jobs Taskforce, working in partnership with business, skills providers, and unions, to help develop plans for good quality green jobs by 2030; they may be able to support schools with preparing pupils for the future world of green work.



# COVID-19 and the Use of Face Coverings in Schools



## January 2022

The Department for Education has published a [summary of the evidence](#) that informed the government's decision to revisit the guidance on the use of face coverings within secondary schools and colleges in England - temporarily extending their recommended use in communal areas to also include classrooms and teaching spaces for those in year 7 and above. This decision was taken on the recommendation of the UK Health Security Agency (UKHSA) based on a range of evidence that shows that face coverings can contribute to reducing transmission of COVID-19 primarily by reducing the emission of virus-carrying particles when worn by an infected person.

It is intended that this temporary guidance on face coverings will be reviewed on 26 January, alongside the review of the government's Plan B measures.

### Impact of face coverings in education settings

Whilst not conclusive, there are now a number of scientific studies which consider the association between COVID-19 and the use of face coverings specifically in education settings. The review of evidence conducted by UKHSA included evidence from studies in schools and summer camp settings. These were observational and therefore the results provide less direct evidence of the effectiveness of face coverings than randomised control trials. The results were mixed but taken together support the conclusion that the use of face coverings in schools can contribute to reducing COVID-19 transmission.

There have also been several studies in the USA, comparing schools in US counties with and without mask requirements for students, including two recent studies from the US Centres for Disease Control and Prevention. These were excluded from the latest UKHSA review (due to the type of study design) or published after the cut-off date, but generally find higher rates of COVID-19 in schools without mask requirements, compared to those with mask requirements. There are also modelling studies looking at the potential impact of face coverings – for example, a study assessing impacts of the use of face coverings in schools and society in September-October 2020, which suggest that mandating face coverings in secondary schools, in addition to other parts of society, could reduce the number of infections.

The DfE has also undertaken initial observational analysis based on data reported by 123 secondary schools that implemented face coverings during a 2-3-week period in the autumn term 2021, compared to a sample of similar schools that did not. The preliminary findings demonstrate a potential positive effect in reducing pupil absence due to COVID-19. The analysis has yet to be peer reviewed.



Department  
for Education



UK Health  
Security  
Agency

DfE intends to undertake further work to validate and strengthen it, with a view to bringing it closer to the approach taken for existing evidence on face coverings, such as the studies considered in UKHSA's review.

A survey conducted by the DfE in March 2021 found that pupils had a somewhat positive attitude towards wearing face coverings. Pupils generally agreed that face coverings made others (**87%**) and themselves (**70%**) feel safe. However, **80%** of pupils reported that wearing a face covering made it difficult to communicate, and more than half felt wearing one made learning more difficult (**55%**). In a Unison survey of support staff, **71%** said face coverings in secondary school classrooms are an important safety measure.

Wearing face coverings may have physical side effects and impair face identification, verbal and non-verbal communication between teacher and learner. This means there are downsides to face coverings for pupils and students, including detrimental impacts on communication in the classroom. At different times during the pandemic, the risks of potential negative impacts on teaching, learning and wider health and wellbeing have needed to be balanced against the benefits of face coverings. Another DfE survey conducted in April 2021 found that almost all secondary leaders and teachers (**94%**) thought that wearing face coverings had made communication between teachers and students more difficult, with **59%** saying it had made it a lot more difficult.

Research into the effect of mask wearing on communication has found that concealing a speaker's lips led to lower performance, lower confidence scores, and increased perceived effort on the part of the listener. Moreover, meta-cognitive monitoring was worse when listening in these conditions compared with listening to an unmasked talker. A survey of impacts on communication with mask wearing in adults reported that face coverings negatively impact hearing, understanding, engagement, and feelings of connection with the speaker. People with hearing loss were impacted more than those without - the inability to see facial expressions and to read lips have a major impact on speech understanding for those with hearing impairments. The worse the hearing, the greater the impact of the mask.

The World Health Organization reports that "the wearing of masks by children with hearing loss or auditory problems may present learning barriers and further challenges, exacerbated by the need to adhere to the recommended physical distancing. These children may miss learning opportunities because of the degraded speech signal stemming from mask wearing, the elimination of lip-reading and speaker expressions and physical distancing". It is therefore important to continue to offer flexibility to education settings either not to use face coverings or to use transparent face coverings to meet the needs of pupils with hearing impairments. The Department for Health and Social Care has been working on a range of initiatives to enable the creation and availability of safe and effective transparent masks including piloting transparent face masks in a range of settings, to further explore their usability.

Government guidance on the use of face coverings makes clear that there are circumstances where people may not be able to wear a face covering – for example due to illness, impairment or



disability, or where communication relies on lip reading, clear sound or facial expressions – and advises education settings to be mindful and respectful of such circumstances.

The potential difficulty of wearing face coverings correctly is likely to be exacerbated for younger children, who find it harder to adhere to recommendations on hygienic use and feel the impact on communication more acutely than older children. Throughout the pandemic, evidence continues to confirm that children can be susceptible to COVID-19 infection although a range of analyses suggest that in the absence of vaccination, children are less susceptible to infection than adults. The evidence is stronger for pre-school and primary-aged children.

Government guidance continues to be that children aged under 11 years old should be exempt from requirements to wear face coverings in all settings including education. UKHSA does not recommend face coverings for children under the age of 3 years for health and safety reasons. There are a range of measures to mitigate transmission in primary schools and early years settings which include staff testing, staff face coverings in communal areas, daily testing for close contacts and improved ventilation.

### **Preliminary DfE analysis on the use of face coverings in secondary schools**

In a weighted sample of secondary schools that did not use face masks, the average COVID-19 absence rate fell by 1.7 percentage points from **5.3%** on 1 October 2021 to **3.6%** in the 3rd week of October. This is equivalent to a **32%** decrease.

In secondary schools that did use face coverings (either face coverings only or a combination of face masks and additional communications, e.g. providing more communications to parents but not introducing any further measures such as increased testing), the average COVID-19 absence rate fell by 2.3 percentage points from **5.3%** on 1 October 2021 to **3.0%** in the 3rd week of October. This is equivalent to a **43%** decrease.

At surface level, this suggests that COVID-19 absence fell by 0.6 percentage points more (an **11%** relative difference) in secondary schools that used face masks compared to similar schools that did not over a 2–3-week period.

There is a level of statistical uncertainty around the result. The analysis is non-peer reviewed and with the current sample size, shows a non-statistical and unknown clinically significant reduction in infection in a short follow up period, including that a ‘false positive’ (i.e. finding that face coverings saw reduced absence when the finding is actually by chance) would emerge around **15%** of the time; a **5%** threshold is widely used to declare statistical significance in academic literature.

The summary concludes that further work should be done to extend the analysis in terms of scope: for example, looking at different statistical methodologies, capturing different and longer treatment time periods and controlling for a wider number of school and local area variables to ensure this is a consistent finding.



# Tackling Online Abuse of Teachers



## What is online abuse?

Online abuse isn't limited to social media – it can happen over text messages or messaging apps, email, online chats, online games and on streaming sites. There are different kinds of online abuse and people can be at risk of it from people they know or strangers.

The government's [draft Online Safety Bill](#) defines online harms as user-generated content or behaviour that is illegal or could cause significant physical or psychological harm to a person.

Examples of online harms include:

- Child sexual exploitation and abuse
- Terrorist use of the internet
- Hate crime and hate speech
- Harassment, cyberbullying and online abuse

There are many reports of pupils making explicit, offensive and harmful videos on social media, particularly on TikTok. The videos are either making reference to the school or individual teachers themselves through a variety of online accounts. Some of the content that has been shared includes pictures of staff being pulled from their organisation's website and being altered to include pornographic imagery, offensive wording or harmful accusations relating to conduct or personality.

As well as this, school's trademarked logos and other pieces of branding have been used, highlighting concern over how it will affect their schools' reputation online.

TikTok have confirmed that the best way for parents, schools and colleges to get content removed is to report content through the [Professionals Online Safety Helpline - UK Safer Internet Centre](#). The Professionals Online Safety Helpline has produced an [article and short video on how best to report content](#).

TikTok has committed to removing content which breaches their [community guidelines](#) and people are encouraged to call the helpline on 0344 381 4772 or email [helpline@saferinternet.org.uk](mailto:helpline@saferinternet.org.uk). All schools, colleges and other educational settings should report any online abuse, including videos, to the police.

Some incidents can result in a criminal offence being committed and it is important people are aware of the consequences of abuse and the impact it can have on an individual's mental health. Other social media platforms have their own guidance on how to report abuse including: [Facebook](#) and [Instagram](#), [Snapchat](#) and [Twitter](#).

[Get Safe Online](#) also provides important information and advice on where people can get further help and information such as the [National Bullying Helpline](#). Harmful content can also be reported to Report [Harmful Content](#).

The [Keeping Children Safe in Education \(KCSIE\)](#) statutory safeguarding guidance provides all school and college staff with information about different types of abuse and harm, including online abuse. KCSIE was most recently updated on 1 September and among other things now gives online safety the prominence it rightly deserves.

The guidance states that:

- All staff should have safeguarding and child protection training (including online safety) at induction, with training being regularly updated.
- Schools and colleges should ensure that appropriate filtering and monitoring systems are in place.
- Schools and colleges have a clear policy on the use of mobile technology, which amongst other things reflects that many children have unrestricted access to the internet via smart devices.
- KCSIE also includes information and tools that schools and colleges can use to help keep children safe online; this includes a dedicated collection of resources to support them in signposting parents and carers to help them keep their children safe from different risks online.

Many parents may feel concerned about the activities and content their children are accessing. The DfE's [Teaching online safety in schools](#) outlines how schools can ensure their pupils understand how to stay safe and behave online.

Also, through the introduction of compulsory Relationships, Sex and Health Education (RSHE), pupils are taught about online relationships, the implications of sharing private or personal data (including images) online, harmful content, cyberbullying and where to get help and support.

### **Is there any support for parents?**

The following resources provide guidance for parents and carers to keep children safe online. They will, amongst other things, support parents to talk to their children about a range of online safety issues, set up home filtering in a child-friendly way and set up age-appropriate parental controls on digital devices:

- [Thinkuknow](#) by the National Crime Agency - Child Exploitation and Online Protection command (NCA-CEOP) provides resources for parents and carers and children of all ages to help keep children safe online.
- [Childnet](#) has developed [guidance for parents and carers](#) to begin a conversation about online safety, as well as [guidance on keeping under-fives safe online](#).
- [Parent Info](#) is a collaboration between Parent Zone and NCA-CEOP, providing support and guidance for parents and carers related to the digital world from leading experts and organisations.
- National Society for the Prevention of Cruelty to Children (NSPCC) has guidance for parents and carers to help keep children safe online.

- [UK Safer Internet Centre](#) provides tips and advice for parents and carers to keep children safe online - you can also report any harmful content found online through the UK Safer Internet Centre.

*Taken from the [gov.uk blog](#) published on 26 November 2021*



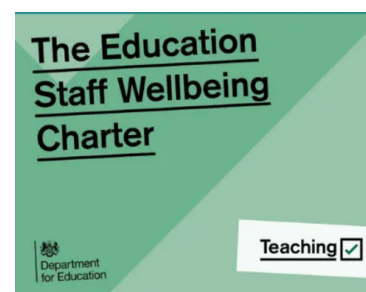
# The Education Staff Wellbeing Charter



The Education Staff Wellbeing Charter was created by the education sector (including teaching unions, schools, charities, DfE and Ofsted). The charter is for all staff working in education settings in England. This includes support staff and temporary staff. All state funded schools and colleges, including maintained nursery schools, school-based nurseries, special schools and pupil referral units are invited to sign up to the charter voluntarily as a shared commitment to protect, promote and enhance the wellbeing of their staff.

## The charter:

- Is a tool for schools and colleges to create, and publicly commit to, their own wellbeing strategies
- Is a declaration to protect, promote and enhance the wellbeing and mental health of everyone working in state education
- Includes commitments on education staff wellbeing by DfE and Ofsted, with school's also making 'organisational commitments'
- Sets out principles of shared understanding on the meaning and importance of wellbeing and everyone's roles and responsibilities
- Sends a message to everyone working in schools and colleges that their wellbeing and mental health matters
- Aims to improve wellbeing in schools and colleges by encouraging debate and accountability.



## The Department for Education's commitments

We recognise that the Department for Education shapes the policy environment that state funded schools and colleges operate in, and that our policies can have both direct and indirect impacts on the wellbeing of staff. DfE will work in partnership with the sector, leading the way in protecting, enhancing and promoting wellbeing.

## We will:

1. **'Design-in' wellbeing.** We will integrate wellbeing into DfE's school workload policy test, where appropriate, considering the impact of policy changes on staff wellbeing.
2. **Measure and respond to changes in staff wellbeing.** For the school sector, we will measure on an ongoing basis the levels of anxiety, happiness, worthwhileness, life satisfaction and job satisfaction across the sector', using established metrics and methods. We will track trends over time and build this evidence into policy making. We will also continue to take the advice of sector experts on wellbeing and mental health.
3. **Support the sector to drive down unnecessary workload.** We will continue to work with the sector to drive down unnecessary workload and promote the Workload Reduction Toolkit. We will work to remove unnecessary burdens, including improving how we collect data.



4. ***Ensure that DfE guidance meets user needs.*** Where appropriate we will ensure DfE guidance covers staff wellbeing. We will also develop guidance based on the needs of educational staff, focusing on what they need to know and do. We will publish GOV. UK content aimed at education staff only during working hours (unless, for specific guidance documents, there is a significant user need not to do so, or there is a legislative requirement).
5. ***Champion flexible working and diversity.*** We commit to establish school cultures, and encourage FE settings, to support and value flexible working at all career stages. We will also strengthen our efforts to promote diversity in the sector – eliminating discrimination, advancing equality of opportunity and fostering good relations between those who share a protected characteristic and those who do not.
6. ***Break down stigma around mental health.*** We will build staff wellbeing and mental health into DfE's wider communications strategy on recruitment and retention, linking to existing campaigns that aim to tackle mental health stigma in our society.
7. ***Embed wellbeing in training and professional development.*** We will continue to strengthen support for professional development. We will ensure that training and development is underpinned by the Standard for Teachers' Professional Development and that it includes mental health and wellbeing where appropriate. We will also ensure that teacher training and professional development continues to include a focus on managing pupil behaviour effectively.
8. ***Improve access to mental health and wellbeing resources.*** We will work to improve access to high quality mental health and wellbeing resources online, with a particular focus on those that help employers and staff deliver their 'organisational commitments'.
9. ***Review.*** We will review progress made against our commitments in 2023. We will also review the impact of this charter in helping to protect, promote and enhance wellbeing among staff.

## **Ofsted's commitments**

Ofsted recognises that we have a dual role to play in protecting and enhancing the wellbeing of staff. First, we are committed to making sure our requirements of schools and colleges on wellbeing are clear. Second, we recognise that staff can feel that inspections are a source of stress.

1. We will ensure that inspectors take staff wellbeing into account in coming to their judgements and monitor this through quality assurance and evaluation.
2. We will review whether the framework is having inadvertent impacts on staff wellbeing (for example, creating unnecessary workload) and take steps to alleviate any issues.
3. We will continue to clarify that we do not expect providers to create documentation for inspection, to try to reduce administrative workload.

## **We will also be clear that:**

- We do not grade individual lessons or people.
- We do not require evidence from any lesson visit that could be used in capability/disciplinary proceedings or for the purposes of performance management.
- We do not require lessons to be planned in a certain way or for lessons plans to be provided to inspectors.
- We do not require schools or colleges to prepare for inspections.
- We do not require schools or colleges to provide information in any specific format.

## **Organisational commitments**

In signing this charter, this school, college or trust commits to placing wellbeing and mental health at the heart of our decision making. We will support staff to make positive choices for their own wellbeing and encourage a collegiate culture across and between all roles in the school or college. Specifically, we commit to develop a long-term strategy for improving staff wellbeing that will:

### ***1. Prioritise staff mental health. We will:***

- Tackle mental health stigma within the organisation, promoting an open and understanding culture.
- Give the same consideration and support to mental health as physical health, including in the management of staff absence.
- Fulfil our legal duty to control the risks associated with work-related stress in the education setting so far as is reasonably practicable.
- Channel support to individuals whose role is known to have a significant emotional component. This might take the form of peer support, supervision, and/or counselling.
- Ensure that staff understand the real benefits that sensitive pastoral support can have, while also recognising where their limits are as non-specialists. We will therefore ensure there are opportunities to increase joint working in support of pupils, as well as routes to refer for specialist support.

### ***2. Give staff the support they need to take responsibility for their own and other people's wellbeing.***

We will empower staff to take ownership of their own wellbeing and look out for the wellbeing of others. This will include ensuring that all staff are familiar with the different dimensions of wellbeing, including mental health, financial wellbeing and physical wellbeing. We will ensure that staff know how to access appropriate guidance, support and tools, and that their use is encouraged throughout the organisation.

### ***3. Give managers access to the tools and resources they need to support the wellbeing of those they line manage.***

We will work to provide managers with tools, resources and training to support their staff. We will not, however, expect managers to provide professional wellbeing support for which they have no professional training, and will ensure that there are clear routes in place to escalate for further support.

***4. Establish a clear communications policy.*** We will provide clear guidance to all stakeholders (internal and external) on remote and out-of-school/college hours working, including when it is and isn't reasonable to expect staff to respond to queries. This should not necessarily include preventing staff from accessing email at 'unsociable' hours if it suits them personally.

***5. Give staff a voice in decision-making.*** We will constantly strive to improve the ways in which the voice of staff is included in the decision-making process across the college or school. (This may also include engagement with key stakeholders, such as recognised trade unions and others). In particular, we will pro-actively seek to draw upon the experience of those with mental health issues and/or of discrimination, ensuring that they are able to share their experience confidently and safely.

**6. Drive down unnecessary workload.** We will work pro-actively to drive down unnecessary workload, making use of available tools (such as the Workload Reduction Toolkit for schools).

**7. Champion flexible working and diversity.** We will work to create a supportive culture around flexible working. We will agree an approach that not only recognises employees' legal right to request flexible working but acknowledges that for some staff working flexibly can be a key means of protecting and enhancing their personal wellbeing. We will work to promote diversity – eliminating discrimination, and advancing equality of opportunity.

**8. Create a good behaviour culture.** We will work with staff and pupils to maintain and implement a school-wide behaviour policy. All staff and pupils will have a shared understanding of how good behaviour is encouraged and rewarded, and the sanctions that will be imposed if pupils misbehave. We will support staff to create calm, safe and disciplined environments, which allow teachers to teach and pupils to learn. Our approach will go hand-in-hand with understanding and supporting pupil mental health issues.

**9. Support staff to progress in their careers.** We will ensure that staff are able to pursue professional development without adversely impacting their own or other people's workload. In schools, we will ensure that any professional development activity is aligned to the Standard for Teachers' Professional Development.

**10. Include a sub-strategy for protecting leader wellbeing and mental health.** We will ensure that all those with strategic decision-making responsibility (including as appropriate governors and trustees) should collaborate to develop a sub-strategy specifically for protecting leader mental health. This should include access to confidential counselling and/or coaching where needed.

**11. Hold ourselves accountable, including by measuring staff wellbeing.** We will measure the wellbeing of staff using recognised tools and metrics and be transparent about results. We will monitor trends over time, and act in response to changes. Further, we will work with staff and relevant stakeholders (this might include parents, recognised trade unions and others) to agree an approach to organisational accountability on our commitments, giving due consideration to workload.

More information on the Education Staff Wellbeing Charter can be found [here](#).

Information on Liverpool's city-wide Whole School Approach to Emotional Health and Wellbeing can be found on the [Liverpool Learning Partnership's website](#).



# Financial Sustainability of Schools



Having last done so in 2016, the National Audit Office (NAO) has [published a report](#) on the financial sustainability of schools, finding that the financial health of the mainstream school system has held up well despite the funding and cost pressures that schools have faced in recent years.

In January 2021, there were more than 20,200 mainstream state schools in England, educating 8.2 million pupils aged four to 19. Around 11,400 of these schools (**56%**), with 3.6 million pupils, were maintained schools, funded and overseen by local authorities. The remaining 8,900 schools (**44%**) were academies, with 4.5 million pupils. Each academy school is part of an academy trust, directly funded by the Department for Education (DfE) and independent of the relevant local authority.

## Financial health of schools

*The school system has faced considerable financial pressures in recent years.* The DfE's per-pupil funding for mainstream schools rose by **0.4%** in real terms between 2014-15 and 2020-21, and the DfE estimates that cost pressures exceeded funding increases by £2.2 billion between 2015-16 and 2019-20. Schools have also been affected by the financial pressures on local government, which have resulted in local authorities reducing support services for children and young people. From 2010-11 to 2019-20, local authorities reduced spending on non-schools education by an estimated **32%** (£2.6 billion). Among other things, this spending covers a range of education support services, such as school transport and educational psychologists.

## Maintained schools

*Despite the financial pressures, most maintained schools were in surplus from 2014-15 to 2019-20, although the proportion reporting a deficit more than doubled.* In 2019-20, **88%** of maintained schools reported a cumulative surplus; **11%** reported a cumulative deficit, up from **5%** in 2014-15. The net position for the maintained school sector as a whole in 2019-20 was a cumulative surplus of £1.3 billion, equivalent to £337 per pupil (a reduction from £1.8 billion, £378 per pupil in 2014-15). The proportion of maintained schools in cumulative deficit varied considerably between local authorities, ranging from **0%** to **46%** in 2019-20. Analysis did not indicate a link between the deprivation level of a local authority and the proportion of maintained schools in deficit within it.

*A larger proportion of maintained secondary schools have been in deficit than primary schools, although the gap narrowed from 2017-18 to 2019-20.* NAO reported in 2016 that there were signs of financial challenges in secondary schools. The proportion of maintained secondary schools reporting a cumulative deficit peaked at **30%** in 2017-18, falling to **27%** in 2019-20. In contrast, the proportion of maintained primary schools in deficit was **10%** in 2019-20, although this was up from **4%** in 2014-15. The average balance per secondary school pupil fell from £307 in 2014-15 to £153 in 2019-20, a **55%** decrease in real terms. The average balance per primary school pupil fell from £401

in 2014-15 to £385 in 2019-20, a **13%** decrease in real terms. The relatively worse financial health of the secondary school sector may partly arise from the fact that the balance of school funding shifted from secondary schools to primary schools between 2014-15 and 2020-21.

### **Academy trusts**

*Around 90% of academy trusts were in surplus from 2017/18 to 2019/20, and some have built up substantial reserves.* The finances of the academy sector are accounted for at academy trust level, rather than academy school level. In 2019/20, **93%** of academy trusts reported a cumulative surplus, up from **88%** in 2017/18, the earliest year for which reliable data are available. Some academy trusts have substantial reserves – in 2019/20, **22%** of trusts reported cumulative surpluses equivalent to **20%** or more of their annual income. The net position across all academy trusts in 2019/20 was a cumulative surplus of £3.1 billion, equivalent to £689 per pupil (an increase from £2.5 billion, £608 per pupil in 2017/18). The ESFA has provided extra funding to some academy trusts in financial difficulty in order to maintain financial stability and protect educational provision. As a result, the financial position of the trusts concerned and the sector as a whole has been enhanced. This funding included £45 million in ‘non-recoverable’ deficit funding and £79 million in ‘recoverable’ funding provided from 2014-15 to 2019-20. The ESFA has written off or impaired £30 million of the recoverable funding as it has assessed that it is unlikely to recover this funding from trusts.

### **Education provision**

*Ofsted has consistently graded more than 80% of mainstream schools as good or outstanding, but has found that the steps schools have taken to remain financially sustainable may have affected aspects of their provision.* Ofsted’s inspections indicate that the quality of schools’ provision has generally remained high. The proportion of mainstream schools that Ofsted had graded as good or outstanding increased from **81%** at August 2015 to **86%** at August 2020. Some of these schools had not been inspected for a long time because, until November 2020, schools graded as outstanding were legally exempt from routine re-inspection. The DfE has not carried out research into the impact of financial pressures on schools’ provision. Qualitative research by Ofsted and feedback from stakeholders indicate that the steps schools have taken to remain financially sustainable have affected aspects of their provision. For example, some schools reported that they have reduced staffing levels or changed the support provided to pupils with special educational needs and disabilities.

### **Support for schools’ financial sustainability**

*The DfE has a range of programmes to help schools improve their financial sustainability, which have been broadly welcomed by the sector.* In 2018, it published a strategy setting out how it would support schools to manage their resources and reduce costs. The strategy covered spending on workforce and procurement, and tools such as the schools financial benchmarking service, which allows schools to compare their income and spending in various categories with those of similar schools. NAO views the support offered as sensible, and stakeholders consulted were generally positive about the actions that the DfE has taken. They also reported that the guidance and tools are useful resources for schools. The ESFA started to manage the support programmes collectively as a school resource management portfolio in 2020.



***The DfE has lacked reliable data to assess the impact of its portfolio of financial support programmes effectively, but is making improvements.*** NAO sought to assess the impact of the DfE's programmes and examined in detail the school resource management advisers scheme and the support for better procurement in schools. However, assessment was constrained by limitations in the DfE's information. While some programmes had reliable data, for others the data were incomplete or not reliable enough to use. As its programmes have evolved, the DfE has also changed a number of the performance indicators it uses, making it difficult to track progress over time, in particular against the objectives in its business cases. The DfE is improving the quality of its data and analysis as a result of NAO's work. It recognises the shortcomings in its information, and is seeking to improve its management and oversight as it takes the school resource management portfolio forward.

***The school resource management advisers programme has helped schools and academy trusts to make savings, but the ESFA's incomplete data mean it cannot fully assess the impact of the programme.*** School resource management advisers are accredited practitioners who work with schools and academy trusts, and make recommendations to improve efficiency and resource management. From September 2018 to March 2021, advisers completed 979 visits to schools and trusts and identified total potential savings of £303 million. The ESFA asks most schools and trusts to complete a workbook six months after a deployment, with details of the savings planned and achieved against the adviser's recommendations. At March 2021, from 909 relevant deployments, schools and trusts had returned 313 workbooks to the ESFA. They reported that they had realised savings of £16.9 million in the six months after the visits and expected to make savings totalling £83.2 million over the three years after the visits. These data do not provide a complete picture of performance and the ESFA cannot assess fully the savings that schools and trusts have made. It also cannot judge whether it met the target in the programme's initial business case to realise savings of £50 million by the end of 2019/20.

***The DfE has also helped schools to make procurement savings, through its risk protection arrangement and buying hubs, but does not have reliable data to demonstrate the effectiveness of its procurement frameworks.*** In January 2017, the DfE published a school buying strategy, which set out how it would support schools and academy trusts to save time and money in procuring goods and services. Most of the reported savings have come from the long-standing risk protection arrangement. The main elements of support have been:

- Procurement frameworks – of which there were 45 at March 2021 – with recommended deals covering, for example, supply teachers, cleaning services and ICT support. The DfE did not prepare a business case for the frameworks setting out what it was aiming to achieve, how it would measure impact and what level of performance would constitute success. The DfE's data on how much schools have spent through the frameworks and how much they have saved are incomplete and unreliable, meaning that it cannot evaluate the impact of the frameworks;

The risk protection arrangement, through which the DfE itself offers schools a cheaper alternative to commercial insurance. This was set up for academy schools in 2014 and, at March 2021, **73%** of academy schools were part of the scheme. The DfE extended the offer to maintained schools in 2020 and take-up is growing. The DfE estimates that the arrangement saved £420 million for members from September 2014 to March 2021; and

- Regional buying hubs, which the DfE piloted in 2017 in the North West and the South West, providing schools in those areas with access to specialist procurement advice, guidance and support. The DfE's internal evaluation found that both hubs saved more than they cost to run, although the South West hub had been substantially more effective. The DfE estimated that, at March 2021, the hubs had saved £23.1 million at a cost of £8.4 million.

In April 2021, the DfE published an updated buying strategy, setting out its approach for the next five years. It has started to introduce a new national buying service which will replace the regional hubs by May 2022.

### **Conclusion on value for money**

The financial health of the mainstream school system has held up well despite the funding and cost pressures that schools have faced in recent years, although the data do not yet reflect the impact that the COVID-19 pandemic may have had. Most maintained schools and academy trusts are in surplus, but there are significant pressures on some maintained secondary schools. The concern in relation to the academy sector is that a sizeable minority of academy trusts are building up substantial reserves, meaning they are spending less than their annual income on their pupils. Ofsted inspection ratings suggest that mainstream schools have generally maintained educational quality, although there are indications that the steps schools are taking in response to financial pressures may adversely affect aspects of their provision.

The DfE has implemented a range of sensible programmes to support schools to improve their resource management and achieve savings, which have generally been well received by the sector. The programmes have added value and helped schools to achieve savings. However, the DfE's data have not been sufficiently complete or reliable to assess whether the programmes are having the impact it intended or achieving value for money. The DfE has started to improve its data but, until it has better information, it cannot make fully informed decisions about the support it offers to schools and how continuously to improve it.

### **Recommendations**

The DfE and the ESFA should take the following actions:

- a. Assess the impact on provision of the various measures adopted by schools in response to financial pressures, for example reducing staffing levels or changing support for pupils with special educational needs and disabilities. This work should include quantitative analysis and qualitative research to understand how schools have adjusted their provision and identify lessons and good practice.
- b. Establish why maintained secondary schools are under particular financial pressure. The DfE and the ESFA should use that information to identify any further action needed to support secondary schools to be financially sustainable.
- c. Investigate why some academy trusts have built up substantial reserves. The ESFA should use that information to develop its understanding of why trusts are acting in this way, seek assurance that levels of reserves are acceptable, and take action where it has concerns that this is not the case.

- d. Develop further their performance management systems so they can effectively monitor and evaluate the effectiveness of their programmes to support schools' financial sustainability. In doing this, the DfE and the ESFA should:
- Consistently collect good-quality data about the operation and impact of the programmes;
  - Have systematic internal reporting against clear performance criteria using good-quality data to judge when corrective action needs to be considered and to evaluate impact; and
  - Report publicly, routinely and on a consistent basis, on the take-up and impact of the programmes.



# Cost of School Uniforms



The Department for Education has issued statutory guidance relating to the cost of school uniforms. This means that schools and their governing boards must have regard to it when developing and implementing their school and trust uniform policies. It should be read alongside the non-statutory guidance on [school uniforms](#).

## Main points

- Parents should not have to think about the cost of a school uniform when choosing which school(s) to apply for. Therefore, schools need to ensure that their uniform is affordable.
- In considering cost, schools will need to think about the total cost of school uniforms, taking into account all items of uniform or clothing parents will need to provide while their child is at the school.
- Schools should keep the use of branded items to a minimum.
- A school's uniform policy should be published on the school's website, be available for all parents, including parents of prospective pupils, and be easily understood.
- Schools should ensure that their uniform supplier arrangements give the highest priority to cost and value for money (including the quality and durability of the garment).
- Single supplier contracts should be avoided unless regular tendering competitions are run where more than one supplier can compete for the contract and where the best value for money is secured. This contract should be retendered at least every 5 years.
- Schools should ensure that second-hand uniforms are available for parents to acquire. Information on second-hand uniforms should be clear for parents of current and prospective pupils and published on the school's website.
- Schools should engage with parents and pupils when they are developing their school uniform policy.

## Requirements for schools

Following publication of the guidance, all schools should review their current uniform policy to determine if any changes are required.

Where changes of either uniform items or uniform suppliers are agreed, schools should work with their suppliers to ensure that there is a sensible transition period in place, taking into account the fact that suppliers plan in advance and that most sales occur in the weeks preceding the autumn term.

Governing boards should be compliant with much of the guidance by September 2022. The exceptions to this would be where:

- This would breach a pre-existing contract or informal agreement with a uniform supplier (particularly when the supplier may already have stock)
- A school will need to run a competitive tender to set up a new contract for their uniform
- This means the following actions need to happen before parents seek to purchase or acquire uniform items in summer 2022:
- Changes to the uniform policy which do not fit with these exceptions, such as removing an unnecessary branded item
- Publishing the uniform policy on the school's website and ensuring it is easily understood
- Making sure that second-hand uniforms are available to acquire (either from the school directly or from an established scheme)

Where a school needs to run a competitive process to set up a new contract to secure a supplier for elements of their uniform, they will need to ensure that they have a clear plan to meet this requirement as soon as possible. The size of the contract and the number of changes required will determine how long any changes will take but the contract should be in place no later than December 2022. This will allow time for suppliers to provide the new uniform for the summer of 2023.

As a result, all schools should be fully compliant with the guidance by summer 2023, although some schools might be tied into existing contracts with suppliers and may not be able to comply with some elements of the guidance until their contract is due for renewal, which may be later.

### **The importance of the cost of school uniform**

It is for the governing board to decide whether there should be a school uniform policy and if so, what that should be. It is also for the governing board to decide how the uniform should be sourced. Schools are strongly encouraged to have a uniform as it can play a key role in:

- Promoting the ethos of a school
- Providing a sense of belonging and identity
- Setting an appropriate tone for education.

By creating a common identity amongst all pupils, regardless of background, a school uniform can act as a social leveller. It can reduce bullying and peer pressure to wear the latest fashions or other expensive clothes. If, however, the uniform is too expensive it can place an unreasonable burden on families. Furthermore, if a distinction can be made between those who can afford it and those who cannot, this can reduce the benefits of a uniform and has the potential to negatively impact attendance, access and participation, and lead to bullying.

Parents should not have to think about the cost of a school uniform when choosing which school(s) to apply for. No school uniform should be so expensive as to leave pupils or their families feeling unable to apply to, or attend, a school of their choice. Therefore, schools need to ensure that their uniforms are affordable.

## **Cost considerations**

Developing a school uniform policy will require governing boards to consider a range of factors. As well as thinking about the cost for parents, governing boards will be considering:

- How the uniform can create a shared identity and common sense of purpose
- What is required practically for classroom lessons or for sport
- Obligations under the Equality Act 2010
- Safeguarding and health and safety considerations
- The wishes of parents and pupils

Nonetheless, school governing boards should give high priority to considerations of cost for parents, and they should be able to demonstrate how best value for money has been achieved when developing or making any change to their uniform policy.

Schools will need to think about the total cost of their school uniform. It is not enough to consider everyday classroom wear. Schools should also take into account all items of uniform or clothing parents will need to provide while their child is at the school. This includes items in their PE kit.

No pupil should be discouraged from participating in any aspect of school life, such as inter-school competitions, because of the cost of additional uniform requirements.

## **Branded items**

Generic items which are widely available (including from low-cost outlets) give parents choice and allows them to control the cost of school uniforms. As such, schools should keep branded items to a minimum and limit their use to low cost or long-lasting items. Schools should carefully consider whether requiring a branded item is the most cost-effective way of achieving the desired result for their uniform. For instance, whilst it may be appropriate to require a certain colour for socks, requiring them to have the school logo would be unnecessary.

The term 'branded item' is not just an item with a logo. It is used to describe an item of clothing with distinctive characteristics which make it unique to the school or trust. As a general rule, if an item cannot be purchased at a range of retailers it is likely to be a branded item. Such items are often designed specifically for the school and are unique in colour, design, or fabric. For instance, a blazer with a school logo embroidered onto it, a sew on logo, a sweatshirt with a specific coloured trim, or trousers with a unique style which are therefore only available from a specific supplier, would all be classed as branded items. In comparison, a navy skirt or a grey cardigan that can be bought from a variety of retailers would not be considered a branded item.

Where a school decides that a branded item is required, they should consider how they can maintain the benefits of a branded item whilst keeping costs low. This may involve using sew or iron on labels or limiting the branded items to longer-lasting items such as ties rather than items that the parent may need to purchase more frequently or in larger quantities such as shirts. Schools should also consider whether changes to the specification of a branded item might reduce costs for parents.



To ensure that school uniform acts as a social leveller, optional branded items should also be kept to a minimum.

To avoid parents having to purchase multiple expensive items such as coats, bags, and trainers, which they may already have purchased for use on non-school days, schools should avoid being overly specific about such items in their uniform policy. For instance, it may be appropriate to require a coat to be simple, sensible and without any branding but requiring a coat to have the school logo or certain school colours would be unnecessary. Similarly, schools should be mindful of the cost implication for parents when they make requirements on what is deemed appropriate footwear, including footwear required for sport.

### **PE kit**

When developing their school's PE kit, governing boards should apply the same consideration to cost as they would for the everyday items in their uniform.

Schools should avoid being overly specific in their kit requirements for different sports and keep the number of items, particularly the number of branded items, to a minimum. For instance, it may be appropriate to have both shorts and tracksuit bottoms but specifying different shorts for football and hockey would be unnecessary.

No pupil should feel unable to participate fully in PE or represent their class or school because the PE kit is too expensive.

### **Pupils attending more than one school**

Where a pupil is attending 2 settings as part of a regular educational programme, the school to which the pupil is registered should consider how it can support them with uniform for the other setting.

### **Arrangements for the supply of uniforms**

Cost and value for money for parents should be the most important consideration for governing boards when considering how school uniforms should be sourced. Parents should be able to purchase generic items of uniform from a range of retailers giving them choice and value for money. Where a school's uniform policy includes a branded item, the governing board should ensure a written contract is in place with their supplier for these items.

Governing boards should be able to demonstrate that they have obtained the best value for money from suppliers. Any savings negotiated with suppliers should be passed on to parents. Governing boards should not enter into cashback arrangements. Governing boards should ensure that suppliers continue to provide good value for money throughout the duration of the contract.

Single supplier contracts should be avoided unless regular tendering competitions are run where more than one supplier can compete for the contract and where the best value is secured. This contract should be retendered at least every 5 years. Reviewing a policy does not necessarily have to result in changes being made.

As a general rule, the value of the contract will determine the type of procurement procedure a school needs to undertake. The higher the value of the contract the more rigorous the tender process will need to be. For example, this might range from seeking 3 quotes for low-value contracts to a full tendering exercise for high-value ones.

More information is available in the guidance on [buying for schools](#) and [buying procedures and procurement law for schools](#).

### **Provision of second-hand uniforms**

Second-hand uniforms can benefit all parents, particularly those on low incomes. In addition, by extending the life of garments, it is more sustainable.

Schools should ensure that arrangements are in place so that second-hand school uniforms are available for parents to acquire (for example through periodic second-hand uniform sales or swap shops). It is for the school to decide how this will be best achieved. A school may wish to organise the provision or sale of second-hand uniforms themselves or via their Parent Teacher Association (PTA), or to participate in other appropriate established local schemes (for instance a local authority uniform exchange scheme).

While schools can decide the particular method, they are going to use to make the provision of second-hand uniforms available to parents, all schools should ensure that information on second-hand uniforms is clear for parents of current and prospective pupils and published on the school's website. This should clearly state where second-hand uniforms are available to be purchased.

### **Other support with the cost of school uniforms**

Local authorities and trusts might choose to provide school clothing grants to help with the cost of school clothing in cases of financial hardship.

In some cases, individual schools may run their own schemes to provide assistance, particularly for supporting new intakes of pupils entering the school or in the event of substantial changes to the existing uniform.

### **Providing information to parents**

A school's uniform policy should be:

- Published on the school's website
- Available for all parents, including parents of prospective pupils
- Easily understood.

If an item needs to meet specific requirements, for instance, smart black shoes, then this should be clearly stated.

The published uniform policy should clearly state whether each item is optional or required. If the item is only used in certain circumstances or at particular times of the year, then this should be made clear.

The policy should also make clear whether a generic item will be accepted or if a branded item is required.

Schools should include sufficient information so that a parent is clear whether an item can only be purchased from a specific retailer or if it can be purchased more widely, including from second-hand retailers.

# Liverpool Governance Forum



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## LGF AGM 16 November 2021

Our AGM featured guest speaker Janet Myers from the National Governance Association (more info below) and included the following reports:

### *Treasurer's financial report for the academic year 2020/21*

David Blythe delivered his sixth report as treasurer and extended his thanks to members for their support during the year. Income was down on the previous year due to the impact of Covid. It was noted that the development of the new LGF website had been concluded, however there would be an annual maintenance payment incurred for subsequent years. It was also noted that no LGF conferences had been held during the Covid pandemic so expenditure had been lower than previous years.

Subscriptions from schools had been suspended during the Covid pandemic but are about to be reinstated. This will have a positive effect on LGF income. The bank balance at the end of the reporting period was £2798.62. David advised that the balance should be sufficient to carry out LGF business until expected income from subscriptions is received during the coming year.

### *Chair's report*

Kathy Desmond confirmed that the [Annual Review 2020/21](#) had been circulated and uploaded to the [LGF website](#). David Blythe was thanked for his hard work in compiling/presenting the report. All members of the LGF committee were also thanked for their work and attendance throughout the year as was Paula Anderson for her secretarial services.

Kathy highlighted the service and support provided by Cynthia Carmichael, Pauline Warrington and Howard Harris, all of whom have recently resigned after many years' service on the LGF.

Kathy highlighted how difficult it had been to carry out LGF responsibilities during the pandemic especially when face to face meetings were not possible. This had been exacerbated on occasion by poor internet connection and lack of equipment. She suggested that individual schools should provide their Chair of Boards with a laptop and appropriate internet access to ensure they are able to carry out their responsibilities. This would promote equal rights and ensure everyone has the opportunity to serve as chair regardless of their circumstances.

Having previously given notice that she would be standing down as Chair, Kathy said it had been a privilege to work with her LGF colleagues and thanked all members of the committee for sharing their expertise and experience and making her role as Chair of LGF easier.

Kathy was proud that LGF had tackled some of the important issues in education such as staff welfare, SEND, attachment in the classroom, governing body self-assessment etc. She highlighted that the topic for discussion at the next LGF conference would be The importance of sleep and its impact on the brain function of pupils, parents, and educators.

Kathy said a final thank you to all LGF members as she stood down as the Chair of LGF.

LGF colleagues paid tribute to Kathy for her hard work, leadership and her pivotal role in developing LGF as the representative body for Liverpool governors.

#### Election of Officers for 2021/22

**Chair** - having been duly nominated and seconded, Michael Morris was unanimously elected as Chair.

**Vice Chair** - having been duly nominated and seconded, Frank McFarlane was unanimously elected as Vice Chair.

**Secretary/Treasurer**- having been duly nominated and seconded, David Blythe was unanimously elected as Secretary/Treasurer.

#### Autumn Term Meetings

The autumn term saw us return to face-to-face meetings, albeit suitably managed.

Although our preference is to meet in schools across the city, we felt that this would not be appropriate. Instead, we held our meetings at St Mary's Millennium Centre on Meadow Lane in West Derby Village, and were made to feel very welcome.

#### September

*Guest speaker: Jonathan Dickson, Head of Service, [Resonate Music Hub](#)*

Jonathon leads the delivery of the aims of the National Plan for music in Liverpool and shared a power point presentation highlighting the role of Resonate in the delivery of music across the school curriculum. Resonate is a DFE funded organisation to support Music in schools. Resonate are supporting schools in Warrington and Halton as well as Liverpool. Apart from a short time when the Covid pandemic forced lockdown, Resonate had continued to provide music support for schools.

Resonate is keen to work with schools in delivering an ambitious, well sequenced, well implemented music curriculum as highlighted by Ofsted. **55%** of schools are taking part in a whole class instrumental programme (for at least one term in years 3 and 4). Resonate is funded to support schools with this. Every child should have access to music lessons in KS 1,2 and 3 and all children should be singing, listening, composing and performing for a minimum of one term per year. Governors need to ask their individual schools if there is a music policy. Do they have an ambitious, sequenced and accessible curriculum? Is there an opportunity to sing, play and learn? Is there access to venues, musicians and live music? Is there a KS4/5 offer?—

Ofsted have recently appointed a new national lead for music, this indicates a greater expectation for music in the curriculum in schools. Asked if special schools must provide music lessons, Jonathan confirmed that this was the case and was an area Resonate is working hard at with Liverpool special schools having managed to obtain additional funding to support special school pupils fostering talent. 1 in 20 autistic pupils can have perfect pitch which is a much higher than the average figure. Resonate also runs a Development of Music Leadership Programme with 90 schools involved. There are also online courses available linked to the DfE's Model Music Curriculum.

## November

*Guest speaker: Janet Myers, North West Regional Lead, [National Governance Association](#)*

Janet outlined how governance had developed during and after Covid, priorities for the next 12 months and what support NGA can offer governors. She encouraged governors to contact NGA if there were areas where they felt they needed support.

A survey of governing bodies was conducted at the start of the pandemic and the results showed that the following six areas were of most concern:

- Balancing the budget
- Staff wellbeing
- Ensuring a broad and balanced curriculum
- Improving attainment
- Pupil wellbeing
- Support for pupils with SEND.

Surprise was expressed that balancing the budget was top of list. This led to a discussion regarding the issues raised by dealing with the pandemic and the resulting actions/benefits. Janet then shared the results of a second survey conducted more recently where priorities had changed to:

- Pupils' mental health
- Managing and improving premises
- Attracting and keeping high quality leaders
- Best use of resources
- Behaviour and exclusion
- Support for pupils with SEND.

JM informed the meeting of the support NGA can offer including the NLG programme (National Leaders of Governance) which provides an external review of governance. Currently 64 designated NLG's have been recruited. Concern was expressed that as NLG's are now paid, they may be less informal and approachable

The NGA Skills Audit had been recently updated and is available for all schools to access, not just NGA subscribers.



## December

*Guest speaker: John Byrne, Strategic Finance Manager, [Liverpool City Council](#)*

John delivered an update on the current funding situation for Liverpool schools. The Chancellor's recent statement was positive from a school's point of view with more funding promised than anticipated, although it was still not clear how the funding would be distributed - possibly via a grant rather than being included in the school's budget.

John highlighted significant cost pressures expected in the coming year e.g. teacher's salaries, energy costs and an expected **5%** inflation rate. The city council's fixed price energy contract expires at the end of March 2022 after which time a significant increase is expected. There were pros and cons to joining the city council's energy contract as prices can fluctuate over the length of the contract period. Schools were able to negotiate their own energy contracts.

Additional funding was announced for nursery placements. The LA's expected funding will increase to 21p per hour for a 2-year-old and 17p for a 3/4-year-old, a **4%** increase. A consultation had begun with all schools and nursery providers relating to how the deprivation factor of the early years funding is calculated to improve distribution. (The consultation closed on 17 December). It was noted that the increase in the minimum wage has had a detrimental financial impact on many nursery providers which is expected to be exacerbated when the support staff pay award is agreed.

There may be less bureaucracy involved in applying for High Needs funding which may be linked to a pupil's education health care plan, making it easier to apply. It was noted that this was still a work in progress. Placing a pupil in a LA special school at a cost of £15,000 - £20,000pa contrasted sharply to an independent or out-of-area special school which can cost more than £50,000. Concern was expressed that a few pupils in independent/out of area special schools command a disproportionate amount of the budget at the detriment of the remaining special needs pupils. This concern had been noted by the LA, but it was a slow process to reverse the current system. It was also noted that it is disruptive to individual pupils who may have been in their educational provision for some time to change to a LA school. It is far better to offer them suitable provision in a LA school initially. There had been an increase in capital funding for SEN, expected to be in the region of £15m, which will allow schools to accommodate more pupils.

The Covid Recovery Grant is set to continue and should increase in value over the next three years although no figures had been published. It was noted that this makes forward planning difficult.

The LA was working with schools who are in deficit position and asked governors to give advanced warning if they believe their school may be going into this position. Asked how the numbers of primary schools in deficit compared to secondary schools, John said the percentage per sector was approximately equal but the value of the deficit in secondary schools was higher. The LA was speaking with schools with significant excess balances noting that some schools had planned expenditure projects that could not be implemented due to Covid.

When a school that is in a deficit situation becomes a sponsored academy, the LA has to absorb the deficit. It was felt this was unfair as ultimately the rest of the LA schools are detrimentally affected.

A discussion ensued regarding solar power installation. It was noted one of the city council's commitments was to address climate change. There was also a DfE scheme that provides schools with loans, which can be repaid over several years, to allow them to replace equipment/fixtures with more energy efficient replacements. Some schools had taken advantage of this to replace their lighting systems, for example.

### Spring Term Meetings

We have two meetings planned for spring 2022 on Tuesday 25 January and Tuesday 15 March, both at 10am.

We plan to hold both meetings at St Mary's Millennium Centre, Meadow Lane, L12 5EA however, at the time of writing, we may have to revert to Zoom. Our meetings are open to all Liverpool governors but if you would like to attend, please email [admin@livgovforum.org.uk](mailto:admin@livgovforum.org.uk) or check our website [www.livgovforum.org.uk](http://www.livgovforum.org.uk) to confirm the venue.

## School Improvement Liverpool

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