

**LA /ESSEX PRIMARY HEADS' ASSOCIATION MID AREA  
THURSDAY 11 NOVEMBER 2021**

**MEETING SUMMARY: ISSUES AND RECOMMENDATIONS**

Agendas and minutes for these meetings available at [www.essexprimaryheads.co.uk](http://www.essexprimaryheads.co.uk)

<b>Attendance List</b>																					
<p><b>DISTRICT AND EPHA AGENDA (a.m.)</b> (Notes below) Dawn Dack, Chair</p>	<p><b>Welcome to the following Headteachers:</b></p> <table border="0"> <tr> <td>Jamie Bearman</td> <td>St Peter's West Hanningfield</td> </tr> <tr> <td>Lucinda Bellett</td> <td>Richard de Clare Primary (Head of School)</td> </tr> <tr> <td>Hannah Cagney</td> <td>Bocking Primary</td> </tr> <tr> <td>Lisa Christian</td> <td>John Ray Infants</td> </tr> <tr> <td>Xanthe Glynn</td> <td>St Nicholas CE Primary, Tillingham</td> </tr> <tr> <td>Sue Kemp</td> <td>Silver End Academy (Head of School)</td> </tr> <tr> <td>Nicola Morgan-Soane</td> <td>Richard de Clare Primary (Executive Head)</td> </tr> <tr> <td>Natasha Outhwaite</td> <td>Trinity Road Primary</td> </tr> <tr> <td>Ferliene Willis</td> <td>Woodcroft Nursery</td> </tr> <tr> <td>Carolyn White</td> <td>De Vere Primary (Head of School)</td> </tr> </table>	Jamie Bearman	St Peter's West Hanningfield	Lucinda Bellett	Richard de Clare Primary (Head of School)	Hannah Cagney	Bocking Primary	Lisa Christian	John Ray Infants	Xanthe Glynn	St Nicholas CE Primary, Tillingham	Sue Kemp	Silver End Academy (Head of School)	Nicola Morgan-Soane	Richard de Clare Primary (Executive Head)	Natasha Outhwaite	Trinity Road Primary	Ferliene Willis	Woodcroft Nursery	Carolyn White	De Vere Primary (Head of School)
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<p><b>EPHA meeting, including outcomes of the Headteacher wellbeing survey</b> <b>Managing parental complaints</b> <b>Juniper Payroll</b></p>	<p>Dawn Dack and Pam Langmead</p> <p>Natasha Taylor, Essex Legal Services Gavin Freed</p>																				
<p>p 2 -14</p> <p><b>AREA AGENDA</b> LA updates on current priorities including:</p> <ul style="list-style-type: none"> <li>• Strategic Aims 2021/22</li> <li>• Work of the Taskforce</li> <li>• SEND Strategy</li> <li>• ECC resettlement of refugees</li> <li>• Safeguarding</li> <li>• Early Years Strategy</li> <li>• School Partnership refresh and relaunch</li> <li>• Assessment and Moderation</li> </ul>	<p>Clare Kershaw Jo Barclay Carolyn Terry</p>																				
<p>p 16</p> <p><b>Key dates</b></p>	<p><b>MID headteacher meetings 2021/22 – The Lion Inn, Boreham</b> Thursday 10 March 2022 Thursday 16 June 2022</p> <p><b>Headteachers' Annual Conference 2022</b> Friday 25 March 2022      Chelmsford City Race Course</p> <p><b>Deputy Headteachers' Annual Conference 2021</b> Friday 8 October 2021      Colchester Football Stadium</p>																				
<p>*Page numbers refer to the full minutes (posted on the EPHA website) of the Autumn term Area meetings with LA Officers and Headteachers.</p>																					

**LA /ESSEX PRIMARY HEADS' ASSOCIATION MID AREA  
DISTRICT AND AREA MEETING  
THURSDAY 11 NOVEMBER 2021  
ATTENDANCE**

**Present**

Lois Ashforth	Cold Norton Primary
Deborah Bailey	John Bunyan Primary
Ruth Baugh	White Notley CE Primary
Rebecca Black	St Andrew's Juniors
Amanda Buckland-Garnett	Collingwood Primary
Dawn Baker	CEO Hera Academy Trust
Ian Bowyer	Boreham Primary
Alex Burden	Great Waltham CE Primary
Dida Burrell	White Court School
Dawn Dack	Wentworth Primary/Mid Chair
Lisa Christian	John Ray Infants
Anna Conley	The Howbridge Infants
Sue Crace	Downham CE Primary
Lisa Dale	Howbridge Juniors
Sharon Derbyshire	St Pius X Catholic Primary
Anita Easton	Great Bradfords Infant and Nursery
Kate Garnett	Tollesbury School
Carol Gooding	Danbury Park Primary
Mary Gurr	Hatfield Peverel Infants
Karen Harrison	John Ray Juniors
Vicky Jackson	St Francis Catholic Primary
Ceri Jones	Chipping Hill Primary
Jenny Kemp	Latchingdon CE Primary
Ann Kelliher	Holy Family Catholic Primary
Jane Landa-Arrese	Moulsham Infants
Catherine Lewis	Holy Trinity CE Primary, Halstead
Sarah Manning	Galleywood Infants

**LA Officers**

Clare Kershaw	Director of Education
Catherine Hutley	Assistant Director, Mid
Alison Fiala	Head of Education and Early Years
Jo Barclay	Head of Education Safeguarding
Caroline Gibson	School Effectiveness Partner, Mid
Vikki Webber	School Effectiveness Partner, Mid

Richard McIntosh	Baddow Hall Juniors
Ross McTaggart	Barnes Farm Juniors
Sarah Meares	Terling CE Primary
Natasha Outhwaite	Trinity Road Primary
Jennifer Penney	Shalford Primary
Rachael Plunkett	Priory Primary, Bicknacre
Matt Poyton	Lawford Mead Primary
Rowen Prigg	St Michael's CE Juniors
Lesley Roche	Our Lady Immaculate C Primary
Emma Saward	Notley Green Primary
Helen Shaw	Elmwood Primary
Jakki Sibley	Earls Colne Primary
Claire Smyth	Beckers Green Primary
Marie Staley	Moulsham Juniors
Kelly Stock	Burnham-on-Crouch Primary
Paul Sully	Beehive Lane Primary
Lisa Waters	East Hanningfield CE Primary
Mike Williams	Trinity St Mary's Primary
Linda Wiskin	The Cathedral School
Lyndsey Wood	St Cedd's CE Primary
Mike Wood	Elm Hall Primary
Justin Wrench	Great Bradfords Juniors

**In Attendance**

Pam Langmead	EPHA Professional Officer
Natasha Taylor	ELS
Gavin Freed	Juniper Education

**Apologies**

Spencer Bragg	Southminster Primary
Helen Castell	Writtle Infants
Alison Cole	St Peter's CE Primary, Coggeshall
Andrew Cumpstey	St Michael's Juniors
Zanya Farmer	Barnes Farm Infants
Sarah Ginzler-Mayer	St Joseph's and St Francis Catholic
Bridgette Gough	Feering CE Primary
Natalie Hawkes	Newlands Spring Primary
Stephanie Newland	St Margaret's CE Primary
Jinnie Nicholls	Bulmer St Andrew's/St Giles CE Primary
Amanda Reid	Perryfields Infants
Julie Sarti	Colne Engaine/Belchamp St Pauls
Carolyn White	De Vere Primary

Note: If your attendance or apologies have not been noted please contact the EPHA Professional Officer at [pam@langmead.me.uk](mailto:pam@langmead.me.uk) for amendment.

## MID EPHA AREA MEETING MINUTES 11 NOVEMBER 2021

### 1. WELCOME

Dawn Dack, the Mid Area Chair welcomed headteachers to the meeting, noting that this was the first in-person meeting for nearly two years because of the continuing Covid pandemic. She expressed her admiration for the extraordinary job that headteachers are doing, holding their schools together even though life has definitely NOT gone back to normal.

#### Welcome to the following Headteachers:

Jamie Bearman	St Peter's West Hanningfield
Lucinda Bellett	Richard de Clare Primary (Head of School)
Hannah Cagney	Bocking Primary
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Carolyn White	De Vere Primary (Head of School)

Dawn noted that no headteachers were leaving Mid this term, but she said goodbye and thank you to Cathie Bonich who has been a School Effectiveness Partner in Mid for several years. Before that Cathie was an Essex headteacher in West, and was a key member of the EPHA Executive (including being on the panel to appoint the EPHA Professional Officer!).

### 2. MID EPHA MEETING

At the start of the meeting a two minute silence was held to observe Armistice Day.

Dawn Dack, Chair of Mid EPHA, shared the following information:

- a) **The Autumn term EPHA newsletter**, including dates for the 2021/22 school year, was circulated to headteachers in advance of the meeting -these can also be found on the EPHA website [www.essexprimaryheads.co.uk](http://www.essexprimaryheads.co.uk).

b) **EPHA Annual General Meeting**

The EPHA Annual General Meeting took place on 30 September 2021 and the following headteachers were elected as officers for the coming year:

- Harriet Phelps-Knights (Janet Duke Primary) Chair
- Nick Hutchings (Hamilton Primary) Vice-Chair
- Nicky Barrand (Cherry Tree Primary) Executive Treasurer

They are supported by 36 headteachers across the county, representing their colleagues in different districts. The full Executive membership list, minutes of the AGM, and the Constitution and Financial Regulations are available on the EPHA website.

c) **EPHA Priorities for 2021/22**

At the AGM the headteachers who attended discussed the priorities for the Association for the coming year. It was agreed these should include:

- i. The Task Force priorities, particularly the "year of reading"
- ii. Continuation of the EPHA briefings delivered by the Professional Officer
- iii. Headteacher support and wellbeing

**d) Covid-19 Webcast with Director of Education and Director for Public Health**

The next webcast with Clare Kershaw and Mike Gogarty will be held on Wednesday 1<sup>st</sup> December, 9.30 am. This will be recorded as usual. The Professional Officer has forwarded a link to headteachers.

Another webcast will be held on Wednesday 12 January 2022, 1.30 pm – 2.45 pm, online – the Zoom invitation will be sent out later in the term.

**e) Conferences**

The annual Headteachers' conference will be held on Friday 25 March 2022 at Chelmsford City Race Course. Please note the change of date and venue, to enable us to accommodate everyone who wants to attend. The programme and booking form for the conference will be emailed to schools at the beginning of the spring term.

Next year's Deputy Headteachers' conference will be held on Friday 7 October 2022, at the Colchester Football Stadium.

**f) EPHA resources on the EPHA website**

A couple of updated checklists are available on the EPHA website:

Ofsted checklist following the notification phone call) <https://essexprimaryheads.co.uk/info-and-documents/ofsted/>

Safeguarding audit based on current Ofsted requirements <https://essexprimaryheads.co.uk/info-and-documents/safeguarding/>

**g) Gold Education – supply agency recommended by a number of schools.**

[Gold Education Recruitment](#)

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07830 427130

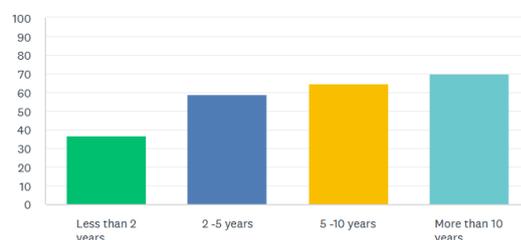
[Paul.Yates@golleducationrecruitment.co.uk](mailto:Paul.Yates@golleducationrecruitment.co.uk)

**3. EPHA HEADTEACHER WELLBEING SURVEY OUTCOMES**

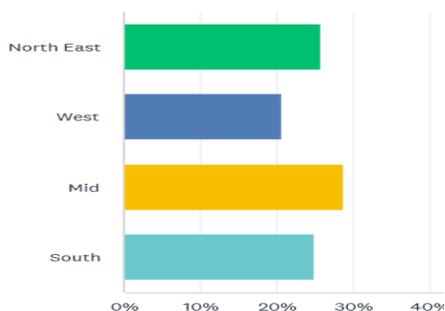
The EPHA Professional Officer gave a presentation on the outcomes of the recent EPHA headteacher wellbeing survey, which ran for 3 weeks in October /November. She shared the following outcomes, including a number of key quotes from the headteacher comments that were received.

235 Essex primary-phase headteachers took part in the survey (over 50%)

**Respondents- length of time as a headteacher.**



**Based in which quadrant?**



“As a new headteacher I find the job incredibly lonely. I work exceptionally long hours. I had always been a determined individual who wanted to become a headteacher, I am now regretting my decision.”

“Although I've been a HT for 12 years I've never felt so overwhelmed as I do at the moment.”

**Worklife balance rating**

4.2   
average rating



**How happy have you been in your professional role in the last 12 months?**

4.6   
average rating



**If you had your time again, would you pursue your current headship?**

- 63.14% said Yes
- 36.86% said No

“The management of Covid over the past 18 months has considerably affected workload for me as a Head, when I already have an extremely poor work life balance.”

“This has been the toughest time in my 15 years of headship. I am working in excess of 16 hours a day and most of the weekend just to stay on top of my workload.”

“Anecdotally, my son is 26. A few months ago, getting in from work I said 'I hate my job' and he said, 'In all my years, I have never, ever heard you say anything remotely like that about your work.’”

**Have you considered resigning in the last 12 months?**

- 60.59% said Yes
- 39.41% said No

“I absolutely love my job and feel very privileged to hold this position. However, the ridiculous pressure I feel from Ofsted following the stress of Covid, which is still with us, have made the job feel unmanageable. My stress levels are so high it makes me feel that I want to walk away from it all.”

“I consider myself to be a very positive, resilient person and I despair of people who like to dwell on the negatives of the job, however, it is extremely difficult to maintain this positivity and not get drawn into poor wellbeing. Only yesterday, I thought 'what else is there?' and if I wasn't the main earner at home,

would change careers. I don't have that as a realistic option.”

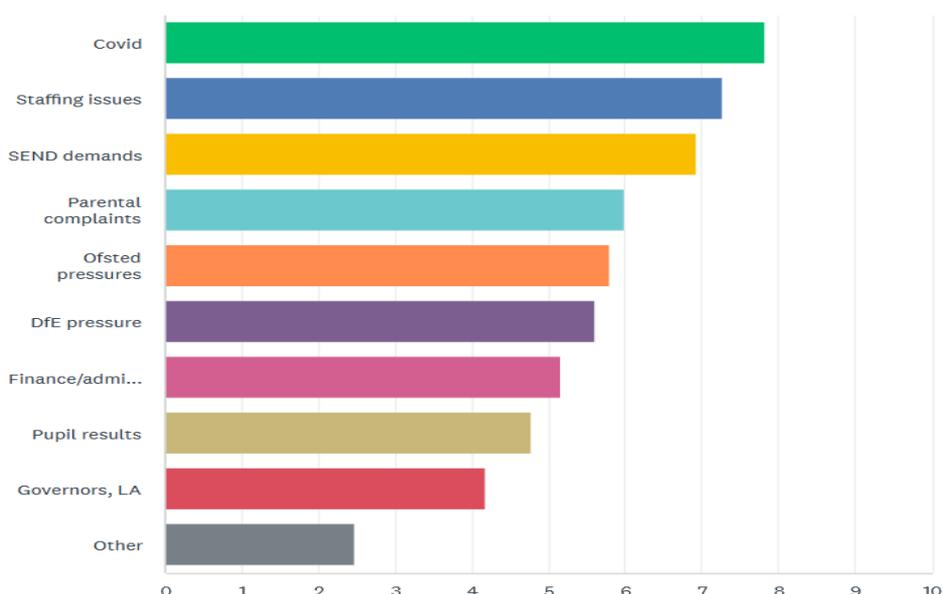
“The approach taken appears a binary one. Move into lockdown and all priorities are altered and the expectation that Heads are considered and supported, for their own wellbeing, is raised. **Exit lockdown and there is a climate of normality** in the expectations that **Heads can deliver, be held to public scrutiny, and provide recovery**, at a time when we have more Covid cases than ever before, more staff absence than ever before, a greater workload than ever before, and are still very much dealing with the reality of the day to day impact in the school.

I am concerned for my team, and every day have to accept my own vulnerability, and put it to one side. The old adage states that you have to look after yourself first, take dedicated time, make space ... but under such challenging circumstances this is exceptionally difficult, and my presence needed more than ever to be **the glue that holds the organisation together**.

**Exhaustion levels are significant**, and I think the gap between what is expected of me, and what we are able to deliver, is widening and adds to the stress. I know I will not be alone, or that this is a nationwide issue.

**Now is the toughest it has been.”**

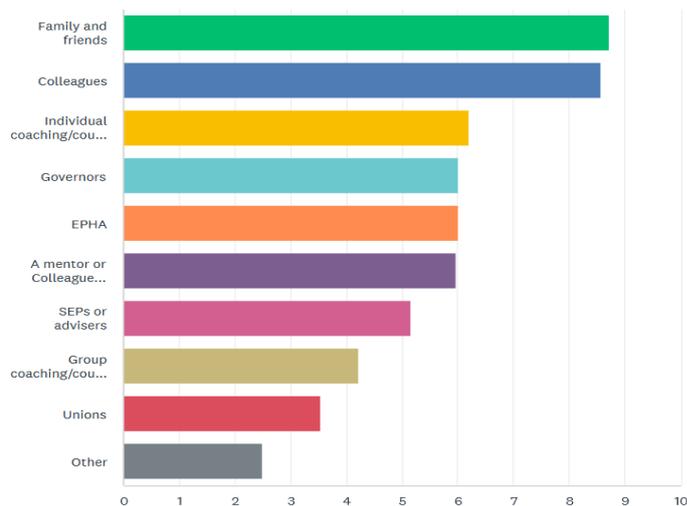
### What factors have caused you the most stress/anxiety at work in the last 12 months?



“It was incredibly hard to rank the stressors as it depends on the day, if I am being honest. I have never known a term as difficult as the first half of this term. It is the first time I have ever considered resigning from education completely.”

“I think the job is now so work heavy that it is impossible to do a good job without working 18 hours a day. No amount of coaching etc would change that unfortunately. I am a fairly positive individual who accesses and maintains my own mental health well but you cannot change the continuous pressures of Ofsted, changes, parents and paperwork; the pressures of managing Covid has also completely changed the job for me. It is like Ofsted and the LA have completely forgotten the pandemic has taken place and it is business as usual, except anyone actually working in school knows that this is not true with staff absence/wellbeing at its highest and **being one person trying to manage this is unachievable.**”

### What support helps?



### What support could EPHA offer?

EPHA plans to facilitate a range of support in addition to the current EPHA offer, which will include signposting or brokering practical help for heads in crisis, such as:

- Coaching or counselling – individually or in a group
- Colleague Support for any headteacher in need (not just new heads)
- Capacity help in a school – headteachers or deputies seconded to help add leadership capacity for a limited time
- Governance advice and support, including recommending clerks who can manage “statutory” meetings
- Legal support for complaints
- Bespoke training, including joint training on complaints for headteachers and governors

EPHA will also continue to work and lobby on behalf of all Essex Primary-phase headteachers, including sharing the results of this survey at a local and national level. Headteachers were encouraged to share the survey and the additional comments with their governors.

The Professional Officer noted that headteacher/senior leader wellbeing is a focus for the Education Taskforce, as well as being the number one priority for the NAHT this year. She is investigating what funding might be available to support headteachers in Essex.

### What additional support would help?

A number of additional suggestions were put forward by headteachers, many of which were focused on improved support for pupils with special educational needs. Suggestions included:

Encourage good practice in school: ensure that all staff are not responding to parent emails out of hours/weekends.

### SEND

- National PR and information around what parents should expect from mainstream schools, especially around 1:1 support, applying for EHCPs, exclusion.
- Hold other partners/advocates to account when they advise parents to “tell the school to apply for an EHCP”.
- Easier and wider access to parenting skills support (at all ages, not just the pre-school child) to reduce the number of parents who think that all poor behaviour equals SEN.
- More Special School places.
- Equal funding for children with SEND in mainstream and specialist provisions.
- Equal spread of high level EHCPs across all schools.
- Flow charts on where to ask for help on issues regarding alternative education routes.

Continued support and focus to reduce the power of Ofsted

#### 4. MANAGING PARENTAL COMPLAINTS

One of the huge stresses for headteachers is the impact of parental complaints – and particularly those that becomes personal and persistent. This section considered how parental complaints can be managed, and considers what measures could be taken to avoid a complaint escalating in the first place.

Natasha Taylor is a senior lawyer specialising in education law, working for Essex Legal Services. She was welcomed to the meeting. Natasha noted that, as a parent of children who are doing amazingly well in Essex schools, she was very sad to see and hear the outcomes of the well-being survey, and the impact that the pandemic has had on headteachers. On behalf of all the parents who DON'T complain, she extended a huge thank you, and said that she felt that most parents feel that schools are doing a fantastic job.

She reminded headteachers of the importance of trying not to take complaints personally (however difficult that may be). She noted that, as a lawyer, she experiences a great deal of hostility and has learnt not to take this personally. She noted that a parent's attitude is often due to other circumstances, perhaps other issues that are going on in their lives, general frustration, and perhaps even their own personality.

Natasha explained that she wanted to share some practical ways in which complaints could be managed and prevented from escalating. Her first piece of advice was, do not be afraid of closing down a complaint. As long as the governance process is correct and there is evidence in place to show that correct procedures have been followed, the school will be supported, even as far as the ombudsman or hearings. She reminded everyone of the importance of taking care when writing reports, as all comments in writing will be admissible.

The starting point is the school rules, including the Behaviour Policy. If you have applied the school rules correctly and appropriately, the school will be backed up.

Natasha stressed the importance of having an effective Complaints Policy in place, and making sure that it is understood and followed by everyone. She endorsed the EPHA model Complaints Policy, based on the DfE 2019 guidance, which includes reference to persistent and malicious complaints, and sets out what will and will not be tolerated by the school. This should give headteachers the confidence and the knowledge of how to act.

<https://essexprimaryheads.co.uk/info-and-documents/model-policies/>

It is also helpful for schools to have a Behaviour Contract with parents (could be a version of the Home School Agreement), which sets out the school's expectation of parents from the start.

Evidence is critical. Complaints tend to escalate fast and become unmanageable, particularly for primary schools, which are so accessible and open to parents. It is very easy for a parent to talk to a primary-phase headteacher, much more difficult to penetrate a secondary school! She stressed the importance of recording a note of any potentially problematic discussion or communication with a parent, perhaps retained on the child's file. Contemporaneous records of conversations are admissible and can be used, whereas simply trying to remember what happened months ago is questionable and is not considered good evidence.

Natasha noted the importance of communication routes, particularly when complaints are raised. She recommends writing a letter; this can be emailed, which provides a useful record of when a communication is sent, but it should be attached as a formal document (but check that they are happy

to receive a letter this way, otherwise use the post). Always ask the parent to confirm receipt of the letter. This type of correspondence should not be sent home in the child's book bag!

There are many different types of complaints and many ways in which those complaints are communicated, but whatever the issue headteachers and school staff are not there to be abused and they are perfectly in their rights to walk away from such a situation. The Section 5 Public Order Act Offence refers to insulting words or behaviour – quite a low threshold where the police should become involved. Schools should refuse to engage, and record that they have challenged the parent's behaviour. If the abuse persists and staff are threatened, the school should call the police.

She accepted that headteachers will be sometimes scapegoated and blamed for things that are not their fault, perhaps especially when there are other issues going on for the parent. Sometimes acknowledging that a parent is unhappy about something can be helpful and may deescalate the situation. (Sometimes that doesn't work!).

Because complaints may escalate through stages, it is essential that governors are aware of the Complaints Policy and procedures, and ideally have had training. They also need to understand the school rules and any home-school agreement that is in place. Schools need to have the backing of their governors.

It is also essential that clerking of any meetings is robust, and that the clerk understands the policy and procedures. It is not necessary to accommodate all of the parent's demands, as long as the school is reasonable and is following its own policy. However, it is inevitable that some parents decide to take a complaint all the way and that is when it is so important to have robust procedures.

Social media causes a great deal of anxiety. School staff are in the public arena and are therefore "fair game" for comment. There are certain things that simply need to be tolerated (gripes and moans), but if posts become libellous or abusive, Natasha suggested initially contacting the parent and offering them the chance to discuss their concerns or grievances. Often these people aren't prepared to confront the headteacher in person, although happy to hide behind a keyboard. If the comments are defamatory or personal Natasha suggests taking legal advice (e.g. from the ELS helpline), as there are specific tests to meet the high threshold to be able to take out an injunction. If the school or PTA manages a Facebook platform, they can remove comments from the site if they are defamatory or wrong in nature.

Natasha suggested that often the best policy is to ignore gossip, unless of course it involves a safeguarding concern or allegation, when it must be followed up. Jo Barclay noted that on occasion the behaviour of aggressive parents can present a safeguarding issue within the school itself and this can be stressful and frightening for staff and children alike. These situations must always be addressed and may add weight to the school's evidence. Jo also mentioned the impact of these situations on headteacher wellbeing, and noted that serious complaints can be a huge burden for heads and staff.

If necessary schools are able to ban parents from the school site, as long as they follow proper procedures and take legal advice (as this is a big step); banning letters should, for example, usually be preceded by a warning. Freedom of Information requests can be limited, although Subject Access Requests are particularly problematic.

Jo added that she has become aware that there is a trend for TikTok accounts being set up by, or attributed to, staff. She reminded headteachers of the importance of staff being careful and wary of any social media accounts set up in their name.

The Professional Officer offered to produce a 7-minute staff meeting on Managing Parental Complaints, to raise staff and governor awareness of the issue. In addition, EPHA will arrange longer training for Headteachers and Chairs/Governors in the spring term.

Natasha was thanked for her excellent advice and guidance.

## 5. USING THE APPRENTICESHIP LEVY FOR SENIOR LEADER PROFESSIONAL DEVELOPMENT

*This information was shared at the other three area headteacher meetings.*

Millions of pounds of schools' Apprenticeship Levy is being recouped by the Treasury – literally millions! A recent FOI request revealed that over £3m from just 3 Local Authorities' schools' Apprenticeship Levy funding had been returned to the Treasury. The Apprenticeship Levy should be seen as part of the strategic planning for professional development of the school's workforce. Even those schools that are not required to pay into the levy may be able to access funding to pay for apprenticeships.

Millions of pounds of Levy funds – which belong to LA schools and MAT academies – could pay for an amazing array of training for your staff, support your appraisal progress or strengthen your Talent Management strategy. The NCE is offering senior leaders the chance to access a L7 Masters programme through their January 2022 cohort. It can be fully paid for by the Levy.

A reminder of the timeline and history of the apprenticeship levy and the NCE involvement:

**2015** – Manifesto Commitment

**2017** – Levy announced

**2018** – NCE began programmes

**2019** – Ofsted and ESFA inspections

**2019** – [A guide to apprenticeships for the school workforce](#), DfE, Nov 2019 paper

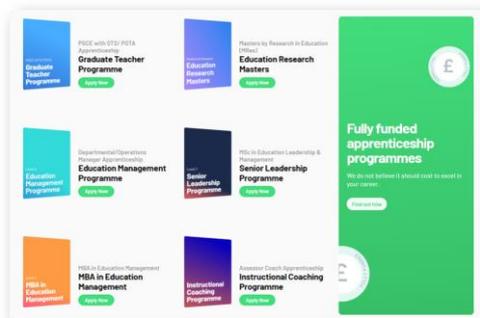
**2020** – circa. 1500 learners on apprenticeship programmes

**2021** – NCE portfolio development and building regional collaborations

**2021** – Budget commitment to increase apprenticeships impact

**2022** – NCE Regional Partnerships roll out

The NCE portfolio of fully funded apprenticeship programmes:



### Lever 7 Senior Leadership Programme

<b>For whom</b>	<ul style="list-style-type: none"> <li>• Current Senior Leaders in schools, Trusts or Local Authorities</li> <li>• Serving Headteachers, Trust Central Team members*</li> <li>• Aspiring Senior Leaders</li> </ul>
<b>Qualifications</b>	<ul style="list-style-type: none"> <li>• MSc in Education Leadership and Management</li> <li>• L7 Senior Leader Apprenticeship</li> </ul>
<b>Eligibility</b>	<ul style="list-style-type: none"> <li>• Bachelors Degree (2:2 or above)</li> <li>• GCSE (C or above) in English and Maths</li> <li>• Currently in a leadership role in school</li> </ul>
<b>Price</b>	<ul style="list-style-type: none"> <li>• £14,000 (funded by the apprenticeship levy)</li> </ul>

This is a dual-accredited apprenticeship programme, lasting 2 years and leading to an MSc in Education. NCE works with Essex Local Authority to draw down funding for the programme.

#### Module content:

- Foundation Module
- Strategy
- People Management and Development in Education
- Innovation and Change
- Finance, Governance and Risk in Education
- Research Methods and Project

#### Format

- 24-month programme
- First day of learning and five 2-day Professional Learning Days
- Assessment through 4 Essays, 2 Reports, 2 online Assessments, Dissertation and Strategic Business Proposal, Professional Discussion and a portfolio of evidence
- Support from dedicated Professional Learning Mentor
- Monthly engagement and 12-weekly Reviews (with Line Manager)

#### 20% Off-the-job training (OTJT)

The largest misconception surrounding apprenticeship programme relates to off-the-job training, and the assumption that staff need to be out of school one day a week. This is not the case.

Although the requirement cannot technically be fulfilled in day to day duties, if your employee is actively implementing, demonstrating, learning new skills learned on the course, then can log it as 20%.

#### Level 5 Education Management Programme suitable for

- Current middle leaders or aspirant senior leaders (2-5 years)
- School Business Managers
- For teaching and non-teaching leaders

#### Module content

- Leading People
- Personal Effectiveness and Decision Making
- Operational Management
- Finance and Project Management
- Managing People and Building Relationships

#### Format

- 22-month programme
- First day of learning and 13 seminars (½ days)
- Delivery from Andy Buck and ex-headteachers
- Assessment through a School Leadership Project, a portfolio of evidence and assignments

- Monthly engagement and 12-weekly Reviews (with Line Manager)

**Other programmes include**

Level 4 Instructional Coaching Programme, suitable for

- Early Career Framework Mentors & NQT Mentors
- HLTA, Cover Supervisors, in-school coaches or Pastoral support staff
- Subject Specialist or School Improvement Lead/Officer

The full presentation (NCE Strategic Partnership slides) can be found on the EPHA website at <https://essexprimaryheads.co.uk/meetings/termly-area/composite/>

**Contact**

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Gareth Alcott, Director of Strategic Partnerships

M: 07932 872226

T: 0208 221 9089

W: [www.nationaleducation.college](http://www.nationaleducation.college)

**6. JUNIPER PAYROLL**

Gavin Freed, CEO of Juniper Education was welcomed to the meeting. Gavin is the Executive Chairman of Juniper Education, who took over payroll from Essex County Council in April. *(NB Gavin attended three of the four headteacher meetings and these notes amalgamate the concerns and feedback expressed by headteachers and School Business Managers across the county.)*

Gavin stressed that relationships with Essex schools are incredibly important for Juniper Education, but acknowledged that they are currently under strain due to the ongoing problems with the payroll system. He assured headteachers that Juniper manages payroll effectively in other parts of the country and agreed that payroll should be a “sideshow, not a main event” in the life of an organisation. He stressed that no one wants to run a service that they are not proud of, and he apologised for the disruption, upset and increase in workload that the problems have caused for schools.

Juniper participated in a bidding process last November, and he suggested that ECC was keen to come to a swift conclusion when deciding a new provider. Juniper is keen to support Essex schools and many have bought into both HR and finance for years, which should provide continuity for schools. He noted that, as a provider, ECC was quite unique: historically there were numerous systems in place to support schools, including a central bank account system, pension management and payroll. In the last year there has been a separation of the three (including closing the central bank account system entirely) and this has caused huge change. However, there continues to be three partners in the system: schools, Juniper and ECC (who continue to manage pensions).

There was a slow contractual conclusion and ECC decided not run a parallel system with the new payroll system as would normally happen, instead choosing to transfer 280+ schools in one “big bang”, which required a huge data migration of 18,000 employees. This transfer was patently unsuccessful. Juniper had to create a uniquely new operating model for Essex schools, which has caused multiple problems.

Gavin reminded headteachers that the transition took place at the same time as lockdowns and the pandemic, causing unique staffing problems in their own team. Staff were required to work from home which had a negative impact on training, team working and communication, as well as the recruitment of staff. He noted that the relentless month-on-month pressure of managing a payroll system creates very few, if any, opportunities to create change and repair systems.

Gavin accepted that communication has been appalling, and Juniper has now introduced a new system

of named contacts and regular weekly slots for schools, so that queries and problems can be addressed in a timely and guaranteed way. For some schools this system has brought about improvements; however, some do not like such a regimented approach, and there are a number of schools that still do not have a named contact (or are unable to get through to them)>

In order to address the problems that have arisen since April, Juniper has engaged outside support and expertise, and the collaboration with ECC has improved. CR Payroll Solutions has been engaged for four months to address the current problems and to ensure that the payroll service is fit for purpose. CR Payroll has a reliable, long-term record of leading the successful delivery of payroll services and emergency cover to clients in the UK and Ireland. All of their payroll specialists are CIPP (UK) / IPASS (ROI) qualified, and they only recruit staff with 5+ years of payroll experience. Their aim is to take a payroll from failure to delivery, participating as a payroll expert on the project. Initially they learn the client's system and hear both sides of the project from the client (Juniper) and their customers (Essex schools). They agreed that communication and consistent contact is key.

Over the three meetings, headteachers shared examples of problems they have experienced and, in many schools continue to face. These include unmanageable and inconsistent deadlines, failures of the portal, poor or non-existent communication and numerous payroll mistakes. Many staff have been paid incorrectly, some tax codings have been wrong, some schools have received no pension reports since the transition. This has placed a huge stress on business managers in schools. Headteachers recognise the stress and challenges for the Juniper workforce, noting that at times they have spoken to team members on the verge of tears. However, the online training for schools has been poor, as the sessions have been delivered by a trainer who does not know the systems and therefore cannot answer any but the most basic queries.

Juniper Education is determined to fix the problems being experienced by schools, but Gavin explained that he has come to the conclusion that the workload resulting from the current number of contracts means that it is not possible to fix the problems as fast as everyone would like. A letter from Gavin sent to schools on 17 November set out an interim solution , and he shared this proposal at the meetings:

*We have engaged plenty of external help but inevitably there comes a point where more people create co-ordination challenges that create diminishing returns. More detail on the period to March is shared below. It is obvious that everyone would like this to be quicker and there will be some schools that simply cannot wait, we completely understand this and wish to do what we can to act in the greater good.*

*Therefore, I suggested in the meetings that I have attended so far that if some schools choose to move to an alternative provider now that we would support them in this by waiving any notice period and supporting migration through a separate team. The corollary of this is that working with a smaller number of schools will enable us to get to smooth running more quickly. Effectively this would happen by sharing some of our current workload with other payroll providers that it's clear should have happened in the first instance.*

*Several people asked about the challenges of migrating now but the answer to the risk lies in the scale, just as it does to our challenge. New providers taking on a manageable number of schools will have the bandwidth to thoroughly check all details at take on. There are open discussions that we are having with some of these providers.*

In answer to a number of questions, Gavin confirmed that Juniper Payroll could, realistically, hold onto about half of their existing schools, and effectively manage the system going forward. He confirmed that the transition of data for each school that decides to move to another provider would be overseen by a member of staff from Juniper Payroll, the school itself and a member of staff contracted to support the migration. The current workforce for Juniper Payroll will continue to manage the remaining schools (i.e. they won't reduce staff numbers), and the company will not take on any new schools at the present time.

Juniper is currently communicating with a number of new providers but will not and cannot dictate which payroll provider a school moves to, if they choose to go. It is, however, imperative that schools choose to move to a number of providers so that any one provider is not overwhelmed; it is becoming clear that a number of other payroll companies are capping the number of schools that they are taking on at any one time. Gavin stressed that Juniper is not cherry picking which schools they retain; the decision to stay or go is entirely up to each school. He acknowledged that the decision to change providers cannot be made instantly; if a school decides to move they need to find a new provider and go through a governance process, which may take time.

Gavin was asked if Juniper would reimburse schools for costs incurred during the last few months, such as overtime for finance and business managers. He explained that the original fee paid to ECC for the contract was substantial and Juniper has invested a huge amount into the business, including buying in specialist support in the last few months; the company is not in a financial position to be able to compensate schools.

A considerable number of headteachers said that, rather than moving providers, their preferred solution would be for Juniper to fix the problems and run an effective service. Gavin noted that the company did not want to lose customers, but this was the most expedient route in the short to medium term. Recently, four schools have offered to set up a working group to help Juniper iron out the issues that are being experienced since the transition to Juniper. This support has been welcomed.

One key issue is the introduction of automatic reconciliation, which will reduce the amount of time the finance manager/SBM spends on payroll each month. Gavin explained that they are working with Capita and FIMS and will get the information out to schools as soon as possible.

Gavin was thanked for attending the meetings and for being frank about the problems being experienced by Juniper and their customers. It was agreed that EPHA would work with them to try to resolve the issues for affected schools as soon as possible.

Contact details for Gavin Freed [gavin.freed@junipereducation.org](mailto:gavin.freed@junipereducation.org)

## 7. FUTURE DATES

### **MID headteacher meetings 2021/22 – The Lion Inn, Boreham**

Thursday 10 March 2022

Thursday 16 June 2022

### **Webcasts with Clare Kershaw and Mike Gogarty**

Wednesday 1 December 2021, 9.30 am – 10.45 am, online

Wednesday 12 January 2022, 1.30 pm – 2.45 pm, online

### **“Managing Complaints” – training for Heads and Chairs**

Thursday 10 February 2022, The Lion Inn, Boreham (afternoon, time to be confirmed)

Monday 28<sup>th</sup> February 2022, online, Zoom link to follow, 1.00 pm – 3.00 pm

*(The sessions will repeat the same content)*

### **Headteachers’ Annual Conference 2022**

Friday 25 March 2022 Chelmsford City Race Course

### **Deputy Headteachers’ Annual Conference 2022**

Friday 7 October 2022 Colchester Football Stadium