

**LA /ESSEX PRIMARY HEADS' ASSOCIATION WEST AREA**

**WEDNESDAY 11 MARCH 2020**

**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>		
	<b>DISTRICT AND EPHA AGENDA (a.m.)</b> <b>(Notes below)</b> <b>Isobel Barron, Chair</b>	<b>Welcome to the following Headteachers:</b> Renette Fourie                      Hereward Primary Emma Hodgkinson                  Flitch Green Academy (Acting Principal) James Kenyon                         Waltham Holy Cross Primary
	<b>WEPHA meeting</b> <b>Planning for your financial future</b>	Isobel Barron and Pam Langmead Gareth Evans, Financial Consultant, Wesleyan
p 2 -7	<b>AREA AGENDA</b> LA updates on current priorities including: <ul style="list-style-type: none"> <li>• Corona Virus</li> <li>• Outcome of SEND inspection and written Statement of Action</li> <li>• SEND workforce restructure</li> <li>• Sustainable Schools Strategy</li> <li>• Essex Pupil Premium Programme</li> <li>• Traded Services</li> <li>• Essex payroll</li> </ul>	Clare Kershaw
p 7	<b>Commissioning a future CAMHS contract</b>	Beth Brown
p 7 -9	<b>Ofsted Education Inspection Framework</b>	Karla Martin
p 9 -12	<b>Teaching Schools Computer Hub CPD Offer</b>	Katie Vanderpere-Brown
p 12-13	<b>Key dates</b>	<b>WEST meetings with the Local Authority officers 2019/20/21 -at The Stansted Centre (Weston Homes Business Centre) Takeley</b> Wednesday 17 June 2020 Wednesday 18 November 2020 Wednesday 10 March 2021 Wednesday 23 June 2021  <b>Headteachers' Annual Conference 2020</b> Friday 20 March 2020      Stock Brook Country Club, Nr Billericay  <b>Deputy Headteachers' Annual Conference 2019</b> Friday 2 October 2020      Colchester Football Stadium
*Page numbers refer to the full minutes (posted on the EPHA website) of the Spring term Area meetings with LA Officers and Headteachers.		

**LA /ESSEX PRIMARY HEADS' ASSOCIATION WEST AREA  
DISTRICT AND AREA MEETING  
WEDNESDAY 11 MARCH 2020  
ATTENDANCE**

**Present**

Ros Allsop	Clavering Primary	Sue McGuiggan	Holy Cross Catholic Primary
George Athanasiou	Great Sampford Primary/ West Vice-Chair	Lucy Mawson	Stebbing Primary Tany's Dell Primary
Gina Bailey	William Martin Schools	Bernadette Miele	Epping Primary
Dale Bateman	Coopersale & Theydon	Tracey O'Donnell	Pear Tree Mead Primary
Isobel Barron	Roseacres Primary/ West Chair	Christine Peden	Ashdon Primary
Nikki Batt	Moreton CE Primary	Simon Rance	Rodings Primary
Claire Berry	Birchanger CE Primary	Colin Raraty	Elsenham CE Primary
Linda Chesworth	Milwards Primary	Linda Reid	Bentfield Primary
John Clements	CEO LPT	David Rogers	St John Fisher Catholic Primary
Bryony Collins	Felsted Primary	Michael Ross	Little Hallingbury CE Primary/ St Mary's Hatfield Broad Oak
Casey Cox	St James CE Primary	Sonia Strickland	Radwinter CE Primary
Vicky Early	Harlowbury Primary	Linda Todd	Great Dunmow Primary
Mary Evans	Henry Moore Primary	Kevin Watts	Dr Walkers CE Primary
Renette Fourie	Hereward Primary	Nikki Willis	Farnham & Rickling Primaries
Elizabeth Gelston	Hatfield Heath Primary	Hannah	
Clare Griffiths	Dunmow St Mary's Primary	Wheatcroft	
Kim Hall	Henham & Ugley Primary		
Emma Hodgkinson	Fritch Green Primary	<b>In Attendance</b>	
Michelle Hughes	Thaxted Primary	Pam Langmead	EPHA Professional Officer
Chris Jarman	St Mary's CE Primary	Sarah Cowley	Henry Moore Primary
Ian Kendal	Our Lady of Fatima Trust	Sam Lambert	Milwards Primary
Alison Kerrell	Great Bardfield Primary	Christine Lee	Henry Moore Primary
		Victoria Marrow	The Learning Partnership Trust
		Gareth Evans	Wesleyan

**LA Officers**

Clare Kershaw	Director of Education
Nicola Woolf	Assistant Director West
Karla Martin	Head of Education West
Jacky Castle	SEP
Beth Brown	ECC
Chris O'Nions	SEND Quadrant Manager
Derai Lewis-Jones	Attendance Specialist
Daisy Alexander	Attendance Specialist
Karen Musgrove	ECC Early Years

**Apologies**

Ann Grisley	Limes Farm Infants
Rebecca Pine	Newport Primary
Julie Lorkins	St Andrew's North Weald

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.

## WEST EPHA AREA MEETING MINUTES 11 March 2020

### 1. WELCOME

Isobel Barron, the West Area Chair, welcomed headteachers to the meeting.

#### **Welcome to the following new Headteachers:**

Renette Fourie	Hereward Primary
Emma Hodgkinson	Flitch Green Academy (Acting Principal)
James Kenyon	Waltham Holy Cross Primary

### 2. WEST EPHA MEETING

a) **The Spring term EPHA newsletter** was circulated to headteachers at the meeting - this can also be found on the Newsletter page of the EPHA website [www.essexprimaryheads.co.uk](http://www.essexprimaryheads.co.uk).

b) **Equality Act training**

Following the success of the training on pupil exclusions, led by barrister Tanya Callman, EPHA has organised training on the Equality Act. There is one remaining date available on Monday 16<sup>th</sup> March. The cost will be £60 per attendee, and EPHA is subsidising this training. To book a place please contact the EPHA Professional Officer at [pam@langmead.me.uk](mailto:pam@langmead.me.uk)

c) **Essex Schools Broadband**

A reminder that Schools Broadband Service will cease on 31st March 2019. This is when the existing contract with DUCL will end and new suppliers will need to take over your broadband service. Nick Hutchings reminded headteachers that there is an annual requirement for schools to undertake a penetration test, which was previously funded under the DUCL contract.

d) **POWER**

The POWER project is a targeted early intervention project working across Southend, Essex and Thurrock (SET). POWER practitioners offer direct support to children and young people aged 8-13 and their parent/carers to help them develop ways of coping with challenging situations at home, school and in their local communities. POWER also seeks to support schools to develop effective methods to enable children and young people to be successful in school. Typically, the children and young people POWER seeks to help will be struggling to engage at school, may be truanting internally and will have had contact with or be known to the police, perhaps as a victim or a witness. However, they will not yet have been criminalised (i.e. they will not have been charged for an offence). Children and young people who are already being supported by Social Care, EWMHS or the Youth Offending Service are not eligible for support from the POWER project.

Contact

[Jethro.bogdanov@essex.gov.uk](mailto:Jethro.bogdanov@essex.gov.uk)

[Frederick.vanheerden@essex.gov.uk](mailto:Frederick.vanheerden@essex.gov.uk)

03330 138926

### 3. PLANNING FOR YOUR FINANCIAL FUTURE

Gareth Evans, Financial Consultant, Wesleyan

Gareth Evans reminded everyone of the importance of having financial planning conversations in advance of retirement. He explained that Wesleyan specialise in giving advice to specific groups, including teachers. They can offer help by supporting staff health & wellbeing/CPD events (where financial education is now considered a key aspect), to advising teachers' on their retirement options. He noted the link to the focus on wellbeing in the new Ofsted framework.

Gareth noted the recruitment and retention figures for teachers:

- ▶ Recruitment of initial teacher trainees has been below target for each year from 2012\*
- ▶ For the first time since 2011, more teachers left the profession (to November 2017) than joined

22% of Newly Qualified Teachers to the sector in 2015 were not recorded as working in the State Sector 2 years later

33% 5 year Out Of Service rate for 2012 entrants

40% 10 year rate for 2008 entrants

#### THE TRUE COST OF SCHOOL STAFF

- ▶ Staff pay is the single most expensive item in the school budget. It typically represents over 70% of expenditure.
- ▶ Add into the mix employers' contributions to occupational pensions, and this makes staff your school's biggest and most valuable resource.

#### THE REAL VALUE OF FINANCIAL ADVICE

- ▶ How financial advice & services can help schools support this resource

We've looked at some interesting (and scary) facts and statistics ... what can we take away from these?

? There aren't enough teachers joining the profession?

? Too many new teachers are leaving the profession?

? We're losing experienced teachers – many are staying in the sector but not teaching.

Unfortunately there isn't a magic wand, but there are ways that financial advice and information can help...

1> Demonstrating the full benefits of entitlement to the Teachers' Pension Scheme promotes this key employee benefit – how much would it cost to replace this benefit (i.e. 16.48% employer contribution, Death in Service, possible ill-health, guaranteed pension income etc). A key consideration when considering moving profession? This is particularly important for young/newly qualified teachers who may not fully appreciate the benefits.

2> If a teacher is considering moving to a part time role – they will have questions about the implications to their pension benefits.

By highlighting that there may be options for flexible/part time retirement – teachers may be encouraged to consider this option

#### UK life expectancy

The number of people aged 65+ in the UK is expected to rise by over 40% in the next 17 years to over 18 Million

Nearly 1 in 5 people currently in the UK will live to see their 100<sup>th</sup> birthday

By 2040, almost 1 in 4 people will be aged 65 or over

A baby girl born in 2011 has a 1 in 3 chance of living to 100, and a baby boy 1 in 4

Source: *Later life in the UK. Fact Sheet. AGE UK. April 2018*

The first step is to map out what retirement means to you personally – and you'll see at the centre of this process is you.

There are some simple questions you can ask to help define your objectives for retirement.

Answering these questions may not be as simple, however they are important in defining what your financial plan will need to look like.

Who do you want to spend time with in retirement? - Immediate and extended family? Friends, old or new? Who do you need to involve in your decision making? (e.g. if you want to spend more time or move closer to family, have you discussed this with them? What would happen if their circumstances changed, e.g. if they had to move? It's best to cover these points now, rather than when they might occur.)

What do you want to do with your time when you retire? What does your ideal lifestyle look like? It could also be that working in some capacity is still important to you, personally or financially. If early retirement is a consideration, what does that balance of time look like, and for how long? Where do you want to live and spend your time? The situation many people are in when approaching retirement is often a result of their working life and family situation to date. Retirement presents a great opportunity to start with a blank sheet of paper.

You may already have considered the location you want to be in and type of property. For example, are you close to family? Are you thinking about downsizing? As you will be spending more time at home, you may also want to consider access to your social life, living and transport costs, safety and access to care.

*Second homes* come into this category - do you already have or are you thinking of buying one? Is it still right for you – particularly if it is rented or you have been using as a holiday home.

When is the right time to retire? Would you like to retire today if you could, or want to continue working in some capacity?

Answering this question can be influenced your Teachers Pension Scheme, but you will have options about retiring early or working beyond that date. We cover the issue of timing a little later in the presentation.

Why are these things important to you? (It's important to understand your motivation when looking at your answers to the last few questions – prioritises essentials v. nice to haves)

How will you fund your lifestyle? This is the bit most often associated with financial planning, and involves looking at your assets and different sources of income. It needs to cover not just the early stages of retirement, but also the later stages in life.

So the who, what, where, when, why are really important – we then end on the how, the financial plan. (All elements required to have a robust plan).

You may not be able to answer all of these questions today, or even want to in your first year or two of retirement. That's fine, but you should have these questions in mind before accessing your pension benefits.

Some financial decisions can only be made once. Be careful you don't limit what you want to do in future (for example, opting out of the pension scheme).

Wesleyan can organize a work place presentation in a school at a time and day to suit them. Presentations are free, and are designed to provide important information to members of the Teachers' Pension Scheme and guidance on how to plan for a financially secure future, whatever their time of life. Financial Consultants can also arrange an in-school surgery day giving the opportunity for staff to have individual meetings.

**Gareth Evans**

**Financial Consultant**

**Mobile: 07795 427 738**

**Email: [gareth.evans@wesleyan.co.uk](mailto:gareth.evans@wesleyan.co.uk)**

#### **4. FUTURE DATES**

**WEST meetings with the Local Authority officers 2019/20 -at The Stansted Centre (Weston Homes Business Centre) Takeley**

Wednesday 17 June 2020

Wednesday 18 November 2020

Wednesday 10 March 2021

Wednesday 23 June 2021

**Headteachers' Annual Conference 2020**

Friday 20 March 2020 Stock Brook Country Club, Nr Billericay

**Deputy Headteachers' Annual Conference 2020**

Friday 2 October 2020 Colchester Football Stadium