School business management toolkit

Resources inside:
- NASBM professional standards user guide
- Task checklist for SBMs
- Budget year planner
- Template service level agreements

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Few roles in education have evolved as extensively and as quickly as those of school business management practitioners. Traditionally associated with looking after the budget, the school business management remit has rapidly expanded in recent years to include premises, procurement, marketing, recruitment and managing non-teaching staff. With increasingly rigorous accountability and greater focus on local autonomy, all schools require individuals with expertise in these areas to support the headteacher and governing body.

NASBM’s professional standards, launched in November 2015, reflect the integral role of school business management. The standards will not only prove useful in informing the recruitment and performance management of school business managers and their fellow professionals – in roles ranging from administrative officer to directors of finance and operations – but also recognise the importance of continuing professional development among this group.

At The Key, we currently have more than 6,500 school business management practitioner members who contact us for information, advice, case studies and other resources on everything from drawing up service level agreements to marketing the school to pupils and parents. To provide more targeted support to these members, we have recently developed a ‘school business managers’ zone’ on our website with essential resources that may prove useful to practitioners.

This toolkit showcases just a small selection of the school business management-related resources which can be found on our website at www.thekeysupport.com/SL. We hope that you and all those involved in business management in your school will find it useful support for some of the daily challenges of your role.

Fergal Roche
CEO, The Key

The National Association of School Business Management (NASBM) believes that all roles within the school business management profession should be underpinned by professional standards.

The development and launch of the NASBM professional standards, by and with the support of sector stakeholders and over 1,100 practitioners, at the end of 2015 demonstrated both the need and demand for such a professional framework.

The standards demonstrate the commitment and capabilities required to successfully manage a school and ultimately improve learning outcomes for pupils.

Since launching these professional standards, our focus has been to work with leading partners from across the country on the development of resources, tools and training to support their use and implementation and to give guidance to practitioners regardless of the stage of their career development journey.

We believe this new toolkit from The Key and NASBM will assist you in ensuring resources and skills are deployed effectively, and support the delegation of responsibility across the school structure. We hope that practitioners will find this toolkit useful and would welcome feedback from the sector.

Stephen Morales
Chief Executive, NASBM

Special offer available to NASBM members - see back cover

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NASBM Professional Standards

**LEADING SUPPORT SERVICES**

Overview
Lead, develop and coordinate support services, or your specialist function(s), to support outcomes for pupils across the school/trust by providing high-quality solutions.

Functions
- Strategic direction
- Provide leadership
- Appropriate use of public funds
- Operational effectiveness
- Service coordination
- Policy, procedure and process
- Legal, ethical and social context of governance
- Health, safety and risk
- Safeguarding
- Continuing Professional Development (CPD)
- Professional values and ethics

**PROCUREMENT**

Overview
Procure goods and services on a value-for-money basis (economy, efficiency and effectiveness) to support education delivery within the context of regulatory frameworks and legislation.

Functions
- Procurement strategy
- Benchmarking
- Tender management
- Collaborative buying
- Contract and supplier management
- Exit and re-procurement/closedown
- Joint arrangements
- Statutory frameworks and legislation including OJEU (Official Journal of the European Union)

**INFRASTRUCTURE**

Overview
Ensure the fundamental facilities and services necessary for the school/trust to function are maintained to drive sustainability, support teaching and learning excellence, assist in expansion and support community engagement.

Functions
- Asset management planning
- Space planning
- Strategic capital planning
- Capital projects
- Resources and facilities management
- Grounds maintenance
- ICT

**Please note:** The standards are non-mandatory and due to the variety of SBM roles in each setting, do not establish a baseline of expected performance. They therefore should not be used as a checklist or as a baseline, and any shortcoming with respect to the standards is not a basis for questioning competence or initiating capability.
HOW TO USE THE STANDARDS

The standards can be used to support:
- Self-assessment
- Recruitment
- Individual performance management
- Organisational development
- Training and development

To download a full version of the NASBM professional standards visit: www.nasbm.co.uk/professionalsstandards

VALUES AND ETHICS

NASBM and its members are committed to demonstrating the highest standards of personal and professional conduct, to providing professional leadership in their schools and communities, and to maintaining their professional competence.

To view the NASBM Code of Ethics please visit www.nasbm.co.uk

HUMAN RESOURCES

Overview
Human resource management ensuring regulatory and legal compliance.
Managing, supporting and developing staff to ensure delivery of the school’s/trust’s strategic priorities in line with the vision and School Development Plan (SDP).

Functions
- School/trust design
- Workforce planning
- Performance management and Continuing Professional Development (CPD)
- Human resource management

MARKETING

Overview
Ensure the development of a marketing and communication strategy which promotes the school/trust and defines the brand, aims and goals. Develop pupil recruitment, stakeholder engagement via appropriate communication channels and maximise income generation.

Functions
- Strategy
- Brand management
- Communication and promotions
- Income generation

FINANCE

Overview
Ensure the effective management, reporting and recording of the school’s/trust’s finances, including budget planning, monitoring, control and communication of financial information for decision-making.

Functions
- Manage school/trust finances
- Develop and implement strategy to resource and deliver the school’s/trust’s strategic objectives
- Influence business/finance decisions
- Lead the promotion of good financial management
- Lead and direct a finance function that is resourced to be ‘fit for purpose’
- Champion economy, efficiency, and effectiveness

BEHAVIOURS

Catalyst
Vision to methodically apply a vision of what will make a difference to the school/trust.

Decision maker
Vision to identify options, make recommendations and timely decisions.

Negotiator
CAPS ability to build and influence decisions to ensure engagement and trust among school/trust aims and objectives.

Advocate
Effort to promote both internal and external stakeholders.

Resilient
Able to overcome challenges and creates new and effective solutions.

Challenger
Courage, integrity and confidence to challenge others even if confronted with resistance.

www.thekeysupport.com/free
School business management toolkit
Checklist of tasks for school business managers

We worked with one of The Key's associate education experts, Terry Gillard, an experienced school business manager (SBM) to put together this checklist of tasks for SBMs.

Most of the tasks listed here apply to SBMs in maintained schools and academies, but this may vary according to the context of the school. Where a given task is statutory for either type of school, this is indicated below. Statutory deadlines are provided for tasks where the deadline is not typically subject to change each year.

The tasks are colour-coded to reflect the six disciplines of NASBM's professional standards for school business management practitioners, as shown below:

![LSS] Leading support services ![F] Finance ![P] Procurement ![I] Infrastructure ![HR] Human resources ![M] Marketing

Find more on our website

Members of The Key for School Leaders will find more information on the deadlines and requirements of each task listed here in the full version of this checklist on our website. To find this KeyDoc quickly, go to www.thekeysupport.com/SL and enter the reference number 4806 in the website search tool.

4806 | Search

Ongoing tasks

- [ ] LSS Liaise/network with other schools/SBMs and attend regular local events for SBMs to develop best practice in the role
- [ ] LSS Ensure individual healthcare plans (IHPs) are up to date; review where necessary
- [ ] F Review the operation and effectiveness of the school’s financial procedures; update the manual
- [ ] F Academies: ensure all statutory financial documents and records are up to date
- [ ] P Ensure all insurance policies provide adequate cover and obtain alternative quotes to be confident of getting good value for money
- [ ] I Maintain and update the asset register and inventory of all moveable non-capital assets
- [ ] I Review and update the lettings schedule
- [ ] I Review and update capital building programme and repairs/renovation schedule, ensuring work is on track to meet deadlines
- [ ] HR Monitor and maintain single central record data
- [ ] HR Advertise support staff vacancies (as required)
- [ ] M Liaise/network with local businesses for sponsorship/fundraising/other collaboration
- [ ] M Notify local media of any relevant school news
- [ ] M Advertise any school events open to the public
## Annual tasks

| LSS | Review latest school improvement plan (SIP) and other action plans; ensure deadlines for actions have been met |
| LSS | Conduct health and safety audit |
| LSS | Ensure all annual health and safety checks and inspections have been carried out, and that records of checks are safely stored |
| LSS | Ensure all policies and procedures are up to date and make arrangements for implementation across the school or trust |
| LSS | Ensure all records have been retained or disposed of according to record retention schedule |
| LSS | Check that the website is suitable for the current publication schedule and update as required |
| LSS | Report to governors on outcomes of old budget |
| LSS | Determine admissions arrangements |
| F | Academies: submit accounts return to Education Funding Agency (EFA) by 31 January |
| F | Academies: submit budget forecast to EFA by 31 July |
| F | Academies: submit audited financial statement to EFA by 31 December |
| F | Academies: publish financial statements on website by 31 January |
| F | Academies: ensure auditors have conducted annual financial audit by September/October in time for annual accounts return |
| F | Maintained schools: submit Schools Financial Value Standard to LA |
| F | Maintained schools: submit consistent financial reporting return to LA |
| F | Maintained schools: prepare for audit by LA (as required) |
| F | Prepare closure of previous year’s accounts statements; separate financial transactions from the old budget cycle from those for the new budget cycle |
| F | Prepare draft budget, including forecasts of staffing structure and pupil numbers |
| F | Obtain final budget funding details; prepare second-draft budget for discussion at finance committee meeting |
| F | Negotiate/allocate budgets for each department/Key Stage |
| F | Review long-term financial plan and align with SIP |
| F | Review tax liabilities (such as VAT and rating assessments) and any implications of charitable status (if applicable) |
| F | Review the school’s system for bidding for grants as they become available |
| F | Check that all insurance premiums have been paid |
| F | Submit reports to financial donors in line with their requirements (assume annually) |
| P | Carry out benchmarking exercise to ensure value for money in spending |
| P | Review all contracts for the provision of goods and services to the school. Put out to tender and let new contracts as necessary |
| P | Check services still provide best value (compare alternative suppliers/different service levels) |
| I | Review log of maintenance issues and check whether issues have been resolved |
| I | Ensure software licences are up to date via software audit |
| I | Conduct hardware audit and dispose of old equipment |
| I | Review server performance against new requirements and replace as necessary |
| I | Review infrastructure against forecast requirements and replace or add as necessary |
| I | Review telephone system and upgrade as required |
| HR | Review continuing professional development (CPD) programme and appraisal framework for all non-teaching staff |
| HR | Conduct appraisals for non-teaching staff |
| HR | Update staff handbook |
| M | Update and publish school prospectus and other records and publications for public information |
| M | Publish on website by 28 February in determination year, and send copy to local authority (LA) by 15 March in determination year |
Termly tasks

**LSS** Ensure all termly health and safety checks and inspections have been carried out, and that records of checks are safely stored

**LSS** Report to relevant governors/governors’ committees on health and safety issues and accident trends

**LSS** Ensure IHPs are up to date and liaise with health professionals regarding pupils’ general health, medical checks and any immunisation programmes

**LSS** Appoint fire marshals for the term

**LSS** Ensure fire marshals’ training is up to date

**LSS** Check pupil records are up to date, including information on year groups, special educational needs, looked-after children, eligibility for free school meals (FSM), medical and/or health needs

**LSS** Send out request to parents for pupil data updates

**LSS** Complete data collection for the school census

**LSS** Check policy review schedule and submit updated policies for governor approval

**LSS** Ensure requirements for publishing information online have been met and online information is up to date

**LSS** Ensure register of governors’ interests is up to date

**LSS** Update risk register

**LSS** Report to governors’ premises committee on any issues

**LSS** Report to governors’ staffing committee on resignations, staffing and recruitment, CPD and disciplinary issues concerning support staff

**LSS** Monitor and report to the governors’ finance committee on the state of the school’s finances

**F** Meet with the chair of the governors’ finance committee

**F** Ensure all eligible pupils are registered for FSM

**F** Ensure pupil premium expenditure is being tracked accurately; work with the headteacher to update governors’ finance and curriculum committees on pupil premium spending and impact

**F** Check spending is in line with the SIP and update budget and/or SIP as required

**F** Submit insurance claims for long-term sickness and maternity cover (may be termly or monthly)

**F** Provide FSM application forms to parents of new pupils

**F** Have auditor carry out internal financial audit

**P** Monitor all contracts to ensure performance meets the standards set

**I** Meet with contract managers as appropriate

**I** Maintain and update the asset register

**I** Renew lettings agreements or send termination letters in plenty of time

**I** Conduct premises risk assessments

**I** Check all computers are upgraded with the latest software (including anti-virus software and administration and finance systems)

**HR** Advertise teaching vacancies (where required) and oversee the recruitment of new staff

**HR** Complete processes for new staff, including Disclosure and Barring Service checks, payroll starter forms and induction
Monthly tasks

- Ensure all monthly health and safety checks and inspections have been carried out, and that records of checks are safely stored
- Academies: prepare budget monitoring reports
- Check that all accounting procedures are being followed, including staff procedures for signing off purchases
- Reconcile all bank accounts and create cash-flow forecast; share with the headteacher and governors’ finance committee
- Submit monthly VAT reclaim
- Process payments to suppliers, including monthly bills
- Prepare invoices for any goods and services provided by the school
- Post accruals, prepayments and other adjustments as required
- Close completed periods, after adjustments have been posted and reports produced
- Contact debtors with outstanding debts (including parents owing money)
- Submit insurance claims for long-term sickness and maternity cover (may be termly or monthly)
- Report any losses and submit insurance claims as required
- Enter this month’s training sessions in CPD records
- Ensure monthly payroll administration is completed and sent to payroll by the deadline
- Review sources of fundraising and identify grant opportunities
- Submit bids to grant-giving bodies

Weekly tasks

- Ensure all weekly health and safety checks and inspections have been carried out, and that records of checks are safely stored
- Order and process payments for all goods and services provided to the school
- Prepare invoices and collect fees/income for any goods or services provided by the school
- Complete informal cash-flow forecast, calculating ‘before’ and ‘after’ balances for the week
- Hold budget monitoring meeting with the headteacher

Daily tasks

- Process dinner registers and report to kitchen staff
- Maintain visitor records
- Ensure all daily health and safety checks and inspections have been carried out, and that records of checks are safely stored
- Record any breaches of site security
- Record any accidents or incidents in the staff and pupil accident books
- Check daily data back-ups have been made and are stored safely
- Record staff absences
- Hold return-to-work interviews with staff on first day back (as required)
This KeyDoc, a resource available from The Key for School Leaders, summarises information from the Department for Education (DfE) on all policies, procedures and other documents that legislation, statutory guidance and other forms of national guidance require schools to have. You will find more details on each requirement on the GOV.UK website.

### Key to the tables below

For each requirement we have set out which schools it applies to, using the following abbreviations:

- **MS**: maintained schools
- **Acad**: academies
- **FS**: free schools
- **IS**: non-state funded independent schools
- **SFC**: sixth-form colleges
- **FE**: further education with 16-19 provision
- **PRU**: pupil referral units
- **NMSS**: non-maintained special schools

### Statutory policies required by education legislation

<table>
<thead>
<tr>
<th>Policy/document</th>
<th>Types of school</th>
<th>Review frequency</th>
<th>Approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capability of staff</td>
<td>MS, PRU</td>
<td>Determined by the governing body</td>
<td>Can be delegated by the governing body to a committee or individual governor</td>
</tr>
<tr>
<td>Charging and remissions</td>
<td>MS, Acad, FS</td>
<td>Determined by the governing body</td>
<td>Can be delegated by the governing body to a committee, individual governor or headteacher</td>
</tr>
<tr>
<td>School behaviour</td>
<td>MS, Acad, FS, IS, PRU, NMSS</td>
<td>Determined by the headteacher</td>
<td>Headteacher</td>
</tr>
<tr>
<td>Sex education</td>
<td>MS, Acad, FS, PRU (not maintained nurseries)</td>
<td>Live document</td>
<td>Can be delegated by the governing body to a committee, a governor or the headteacher</td>
</tr>
</tbody>
</table>
### School business management toolkit

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### Policy/document Type of school

#### Complaints procedure statement
- MS, Acad, FS, IS, PRU, NMSS
  - **Review frequency**: Determined by the governing body
  - **Approval**: Can be delegated by the governing body to a committee, individual governor or headteacher

#### Special educational needs (SEN)
- MS, Acad, FS
  - **Review frequency**: The SEN information report should be updated annually and any changes made to the information during the school year should be updated as soon as possible
  - **Approval**: Full governing body or proprietor

#### Teacher appraisal
- MS, PRU
  - **Review frequency**: Determined by the governing body
  - **Approval**: Can be delegated by the governing body to a committee or individual governor

#### Teachers’ pay
- MS
  - **Review frequency**: Annually
  - **Approval**: Governing body

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### Statutory policies/documents required by other legislation

<table>
<thead>
<tr>
<th>Policy/document</th>
<th>Types of school</th>
<th>Review frequency</th>
<th>Approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data protection</td>
<td>MS, Acad, FS, IS, SFC, PRU, NMSS</td>
<td>At least every two years</td>
<td>Determined by the governing body</td>
</tr>
<tr>
<td>Health and safety</td>
<td>MS, Acad, FS, IS, PRU</td>
<td>Determined by the governing body, proprietor or local authority (LA)</td>
<td>Determined by the employer</td>
</tr>
</tbody>
</table>

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### Policies/documents referenced in statutory guidance

<table>
<thead>
<tr>
<th>Policy/document</th>
<th>Types of school</th>
<th>Review frequency</th>
<th>Approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>Child protection policy and procedures</td>
<td>MS, Acad, FS, IS, SFC, PRU, NMSS, FE</td>
<td>Annually</td>
<td>Governing body or proprietor</td>
</tr>
<tr>
<td>Policies and procedures for the Early Years Foundation Stage</td>
<td>MS, Acad, FS, IS, NMSS</td>
<td>Varies</td>
<td>Determined by the governing body</td>
</tr>
<tr>
<td>Statement of procedures for dealing with allegations of abuse against staff</td>
<td>MS, Acad, FS, IS, SFC, PRU, NMSS, FE</td>
<td>Determined by the governing body</td>
<td>Determined by the governing body</td>
</tr>
<tr>
<td>Supporting pupils with medical conditions</td>
<td>MS, Acad, FS, PRU</td>
<td>Determined by the governing body, proprietor or management committee</td>
<td>Governing bodies in maintained schools, proprietors in academies and management committees in PRUs</td>
</tr>
</tbody>
</table>

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# Other statutory policies/documents

<table>
<thead>
<tr>
<th>Policy/document</th>
<th>Types of school</th>
<th>Review frequency</th>
<th>Approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admissions arrangements</td>
<td>MS, Acad, FS</td>
<td>Arrangements to be determined annually. Any changes must be consulted on, and where no changes are made consultation is required at least every seven years</td>
<td>Full governing body or a committee where the school is an admissions authority</td>
</tr>
<tr>
<td>Accessibility plan</td>
<td>MS, Acad, FS, IS, SFC, PRU, NMSS</td>
<td>Every three years</td>
<td>Can be delegated by the governing body to a committee, a governor or the headteacher</td>
</tr>
<tr>
<td>Written statement of behaviour principles</td>
<td>MS, PRU, NMSS</td>
<td>Determined by the governing body</td>
<td>Full governing body or a committee</td>
</tr>
<tr>
<td>Central record of recruitment and vetting checks</td>
<td>MS, Acad, FS, IS, SFC, PRU, NMSS</td>
<td>Live document</td>
<td>Can be delegated by the governing body to a committee, a governor or the headteacher</td>
</tr>
<tr>
<td>Complaints procedure statement</td>
<td>MS, Acad, FS, IS, PRU, NMSS</td>
<td>Determined by the governing body or proprietor</td>
<td>Can be delegated by the governing body to a committee, a governor or the headteacher</td>
</tr>
<tr>
<td>Freedom of information</td>
<td>MS, Acad, FS, PRU (applies to LAs on behalf of PRUs)</td>
<td>Determined by the governing body</td>
<td>Determined by the governing body</td>
</tr>
<tr>
<td>Governors’ allowances (schemes for paying)</td>
<td>MS</td>
<td>Determined by the governing body</td>
<td>Can be delegated by the governing body to a committee, a governor or the headteacher</td>
</tr>
<tr>
<td>Instrument of government</td>
<td>MS</td>
<td>Determined by the governing body</td>
<td>Full governing body</td>
</tr>
<tr>
<td>Minutes of, and papers considered at, meetings of the governing body and its committees</td>
<td>MS, Acad, FS, PRU</td>
<td>Not applicable</td>
<td>Full governing body or committee as appropriate</td>
</tr>
<tr>
<td>Premises management documents</td>
<td>MS, Acad, FS, IS, SFC, PRU, NMSS</td>
<td>See the Federation of Property Societies’ guidance. Compliance Monitoring in Council Buildings</td>
<td>Can be delegated by the governing body to a committee, a governor or the headteacher</td>
</tr>
<tr>
<td>Equality information and objectives (public sector equality duty) statement for publication</td>
<td>MS, Acad, FS, PRU (applies to LAs on behalf of PRUs)</td>
<td>Every four years</td>
<td>Can be delegated by the governing body to a committee, a governor or the headteacher</td>
</tr>
</tbody>
</table>
### Policy/document

<table>
<thead>
<tr>
<th>Policy/document</th>
<th>Types of school</th>
<th>Review frequency</th>
<th>Approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>School information published on school website</td>
<td>MS, Acad, FS</td>
<td>Must be updated as soon as possible after a change and at least annually</td>
<td>Can be delegated by the governing body to a committee, a governor or the headteacher</td>
</tr>
<tr>
<td>Register of business interests of headteachers and governors</td>
<td>MS*</td>
<td>Determined by the governing body subject to the LA scheme</td>
<td>Determined by the governing body subject to the LA scheme</td>
</tr>
<tr>
<td>Register of pupils’ admissions to school</td>
<td>MS, Acad, FS, IS, PRU, NMSS</td>
<td>Live document</td>
<td>The proprietor, or can be delegated by the governing body to a committee, a governor or the headteacher</td>
</tr>
<tr>
<td>Register of pupils’ attendance</td>
<td>MS, Acad, FS, IS, PRU, NMSS</td>
<td>Live document</td>
<td>Can be delegated by the governing body to the headteacher</td>
</tr>
<tr>
<td>Staff discipline, conduct and grievance (procedures for addressing)**</td>
<td>MS, Acad, FS, IS, SFC, PRU, NMSS</td>
<td>Determined by the governing body in maintained schools</td>
<td>Full governing body in maintained schools. Can be delegated by the governing body to a committee, a governor or the headteacher in academies</td>
</tr>
</tbody>
</table>

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*Academies must also maintain a register of business interests, as set out in the Academies Financial Handbook (see below)

**Arrangements for internal whistle-blowing must be integrated into staff codes of conduct, as explained in the DfE’s inter-agency safeguarding guidance, Working Together to Safeguard Children

### Other policies required in academies

The Academies Financial Handbook, which sets out the financial requirements for academy trusts, also requires trusts to have:

- An approved set of accounting policies (see paragraph 2.2.14)
- An investment policy (paragraph 2.2.9)
- A competitive tendering policy (paragraph 3.1.3)
- A policy and register on the acceptance of gifts, hospitality, awards, prizes or benefits that might be seen to compromise the trust’s integrity (paragraph 3.5.1)

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Find more on our website

Members of The Key for School Leaders can download this KeyDoc resource from our website. To find it quickly, go to [www.thekeysupport.com/SL](http://www.thekeysupport.com/SL) and enter the reference number 991 in the website search tool.

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The procurement cycle

The Department for Education (DfE) has published guidance on procurement for all schools in England. Page 7 explains that the procurement cycle has three main stages:

- Planning
- Purchasing
- Managing a contract

Here, we look at each of these stages in more detail.

Planning

The guidance says on page 7 that because budgets are tight, schools should plan before making a purchase. It recommends that you:

- Make sure you know precisely what you want to buy, and that it will meet your school’s needs over time
- Think about whether you could loan equipment or share resources with other schools, which would remove the need for a purchase. You might also consider collaborating with other schools to increase your buying power
- Check whether any existing deals are in place through the local authority (LA) or a public sector framework
- Estimate the total value of what you are buying

The guidance also notes:

Value for money is not always about the lowest price. It’s about getting the right balance between quality and cost. Think about how you will measure these when you specify and evaluate your purchase.

Purchasing

The process for buying will depend on how much the contract is worth and what your LA’s procurement thresholds are. On page 9 of its guidance, the DfE says that typical thresholds are as follows:

- Less than £10,000 is a low-value purchase
- £10,000 to £40,000 is a medium-value purchase
- £40,000+ but below the relevant European Union (EU) threshold is a high-value purchase

Purchases with a value above the relevant EU threshold must follow the EU procurement process and be advertised in the Official Journal of the EU (OJEU).

The current EU thresholds are given on page 12. For “all goods and most services”, this is £172,514. However, the guidance adds:

Services used solely for the purpose of delivering education ... are subject to the higher light-touch regime threshold of £625,000 ...

More information about what qualifies for the ‘light-touch regime’ can be found on page 13. The threshold for the procurement of works is always £4,322,012.
The DfE guidance also has information on the tendering process and issuing invitations to tender. On page 15 it says you need to issue invitations to tender for high-value purchases, in addition to purchases above the EU threshold.

For low to medium-value purchases, the guidance says on page 9 that it is recommended to get written quotes from at least three suppliers.

The DfE has also produced purchasing 'checklists' for school business managers for low, medium and high-value purchases and procurements over £172,514. You can download these checklists from the GOV.UK website:

Managing a contract

On page 22 of its guidance on effective buying for your school, the DfE offers the following tips for managing high-value or medium-value contracts:

- Keep copies of all related documents, including quotes, written communications, any OJEU process documents, and contracts (and extensions or amends). This is a legal requirement
- Build a good relationship with your supplier
- Ensure the goods or services are delivered correctly, meeting your requirements
- Manage risks effectively – for high-value or business-critical contracts, carry out a risk assessment for your contract, keep a risk register and prepare a contingency plan
- If you think you may need to make changes to the contract, set up change control procedures in advance and agree them with your supplier
- If you need to end the contract, review the contract's end terms and conditions in good time and agree an exit strategy with your supplier

Writing a specification

For medium-value or high-value purchases, you must write a specification giving precise details of the goods or services you require. This will form part of the tender paperwork that you issue to potential suppliers.

On page 11 of its guidance on effective buying, the DfE, it lists key points for writing a specification. These include:

- State clearly the product/service that you require, and the quantity, quality, delivery requirements, and any relevant information about end use
- State whether the supplier has to meet any legal criteria (for example, relating to health and safety), and outline why and how
- Outline clearly the standards of performance expected
- Leave it to the supplier to decide how to provide the product or service, ensuring you specify only what you want the outcome of the purchase to be

It says that a specification "ensures that your school receives the right standard and scope of product or service".

Statement of requirement

For low-value quotes you will need to write a statement of requirement. This is usually about a paragraph in length. It is similar to a specification in that it communicates to your supplier what you require, focusing on the outcome rather than how you want the supplier to provide the goods or service.

For tips on writing a statement of requirement, see pages 9-10 of the DfE's guidance.

Special offer available to NASBM members' - see back cover
### Key to the planner:

<table>
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<tr>
<th>Acad</th>
<th>Academies</th>
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<th>Maintained schools</th>
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### Tasks

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<td>Make any final expenditures from the old budget</td>
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<td>Report to governors on the outcomes of the old budget, including the</td>
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<td>Review the original forecast of the number of children likely to come</td>
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<td>to the school in the next academic year. Forecast any changes in</td>
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Find more on our website

Members of The Key for School Leaders can download academy-only and maintained school-only versions of this planner from our website. To find these KeyDocs quickly and read our experts’ advice on what to consider when budgeting, go to [www.thekeysupport.com/SL](http://www.thekeysupport.com/SL) and enter the reference number 2430 in the website search tool.
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<tr>
<td>Cost any significant differences in the next budget, such as changes to the staffing structure, promotions, new literacy initiatives, additional classroom assistants, equipment refits, inflationary price increases, government policy changes affecting funding and building works</td>
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<td>Begin the planning process for the new school improvement plan (SIP) and cost plans against likely revenue or sources of funding</td>
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<td>Establish departmental budget requirements: general, Key Stage and subject. Forecast any changes required for the new academic year next September</td>
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<td>Review teaching staff and support staff roles, rates and full-time equivalents to build forecast of staff expenditure (while specific months are suggested here, some may wish to carry this out as an on-going process)</td>
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<td>Consider temporary and fixed-term contracts coming to an end, plus potential leavers</td>
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<td>Model pay progression for all staff including percentage increases, performance management, UPS/threshold, TLRs and take into consideration pensions and NI changes</td>
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<td>Draw up the first draft of the budget for the next year and extrapolate for the following two to four years</td>
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<tr>
<td>Start to discuss the new budget plan and possible costs with staff, governors’ committees and other interested groups. In particular, look forward for trends that may appear over the next few years and their main implications. For example, will the school see increasing or decreasing pupil numbers, or increasing/decreasing staff costs? How will inflation affect contracts? Plan for the repayment of any deficit</td>
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<td>Review and monitor in-year budget with staff and governors as relevant to committee meeting schedule</td>
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<td>Inform budget holders of indicative budget levels for the next year (this may vary depending on submission to an LA and approval timeframes from governors). Build a list of requirements to help monitor departmental budgets</td>
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<td>Ensure that ‘large resource’ expenditure is included in the budget and cash-flow forecast</td>
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<td>Ensure that all eligible pupils are registered for free school meals so that the school receives the correct amount of pupil premium funding including estimating 'Ever 6' PP funding for new intake (you may consider this an on-going process but with specific peaks of activity)</td>
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<td>Check estimated pupil numbers</td>
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<td>Review potential year groups and consider how many teachers and teaching assistants (TAs) will be needed in the next academic year</td>
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<td>Calculate the number of teachers, TAs and pupils in classes</td>
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<td>Calculate the cost of curriculum resources</td>
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<td>Continue to work on the SIP (its progress will affect budget planning, some may wish to consider this an on-going process)</td>
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<td>Review staff development costs (including any cover required) and prioritise future needs using the SIP and performance management targets</td>
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<td>Review recruitment/retention costs against the budget plan</td>
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<td>Report actual expenditures to budget holders on a monthly basis and discuss any variances</td>
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<td>Review payroll against budget on a monthly basis and report significant variances (create virements where appropriate)</td>
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<td>Review special educational needs costs against the budget</td>
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<td>Submit census data</td>
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<td>Check over/under-spendes</td>
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<td>Submit audited financial statements for the previous year to the Education Funding Agency (EFA)</td>
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<td>Submit accounts returns for the previous year to the EFA</td>
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<td>Publish financial statements and value for money statements for the previous year on the website</td>
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### Tasks

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<tr>
<td>Submit the new budget to the EFA for approval</td>
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<td>CFR data is prepared from previous financial year’s data. LA informs schools that the information is available on the Benchmarking website</td>
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<tr>
<td>Schools access the benchmarking data and compare their own data with similar schools or academies. The information is used in planning and reviewing staffing structures, contracts, services prior to budgeting planning</td>
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<td>This information is then presented to governors as a comparison to ensure that the school is achieving value for money</td>
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### Additional considerations for secondary schools

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<tr>
<td>Clarify the curriculum for Key Stage (KS) 3 and the possible curriculum for KS4, costing any proposed changes</td>
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<td>Complete option blocks for the sixth form</td>
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<td>Carry out a dummy-run option choice for the new sixth form and cost the choice pattern for of teaching staff required</td>
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<td>Look at the option choices for pupils from year 9 moving into year 10, year 11 into year 12, and year 12 into year 13</td>
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<td>Estimate sixth-form numbers</td>
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<td>Finalise and cost the sixth-form curriculum</td>
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School teachers’ pay and progression: summary table

This document is a summary guide to teachers’ pay, standards and progression as outlined in the School Teachers’ Pay and Conditions Document (STPCD) 2015. It is not exhaustive and summarises only national requirements and standards. It should be read alongside the original documents referred to below.

All page references relate to the STPCD. References to pay ranges exclude any weighting for the London area.

Who does the STPCD apply to?

The STPCD sets out pay and conditions for teachers in maintained schools. Teachers whose employment transferred to an academy at the point of conversion will also be covered by the STPCD. Academies may choose to renegotiate pay and conditions for existing staff, and can set their own pay and conditions for new staff.

Find more on our website

Members of The Key for School Leaders can download this KeyDoc, complete with links to all sources, from our website. To find it quickly, go to www.thekeysupport.com/SL and enter the reference number 6744 in the website search tool.
<table>
<thead>
<tr>
<th>Role</th>
<th>Pay range</th>
<th>Eligibility criteria</th>
<th>Possible pay allowances</th>
<th>Pay progression</th>
<th>Professional standards</th>
</tr>
</thead>
<tbody>
<tr>
<td>Headteacher</td>
<td>Leadership group pay range:</td>
<td>No national eligibility requirements</td>
<td>Temporary additional payments for “clearly temporary” additional responsibilities (pages 17-18)</td>
<td>Annual review</td>
<td>National Standards of Excellence for Headteachers (non-statutory)</td>
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<td>£38,598 to £107,210</td>
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<td>Teachers’ Standards</td>
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<td></td>
<td>Individual pay range set by the relevant body,</td>
<td></td>
<td></td>
<td></td>
<td>Any other set of standards applicable to the performance of that teacher</td>
</tr>
<tr>
<td></td>
<td>varying with size and profile of school, and the</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>responsibilities of the role (page 17)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deputy headteacher</td>
<td>Leadership group pay range:</td>
<td>Qualified teacher status (QTS) or qualified teacher learning and skills (QTLS) (page 66)</td>
<td>Acting allowance for acting up as headteacher</td>
<td>Annual review</td>
<td>Teachers’ Standards (pages 51-54)</td>
</tr>
<tr>
<td></td>
<td>£38,598 to £107,210</td>
<td></td>
<td></td>
<td></td>
<td>Any other set of standards applicable to the performance of that teacher</td>
</tr>
<tr>
<td></td>
<td>Pay range set relative to the headteacher, and taking into account the responsibilities of the role (page 17)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assistant headteacher</td>
<td>Leadership group pay range:</td>
<td>QTS or QTLS (page 66)</td>
<td>Acting allowance for acting up as deputy headteacher or headteacher</td>
<td>Annual review</td>
<td>Teachers’ Standards (pages 51-54)</td>
</tr>
<tr>
<td></td>
<td>£38,598 to £107,210</td>
<td></td>
<td></td>
<td></td>
<td>Any other set of standards applicable to the performance of that teacher</td>
</tr>
<tr>
<td></td>
<td>Pay range set relative to the headteacher, and taking into account the responsibilities of the role (page 17)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Leading practitioner</td>
<td>Pay range for leading practitioners:</td>
<td>QTS or QTLS (page 21)</td>
<td>Acting allowance for acting up in leadership role</td>
<td>Annual review</td>
<td>Teachers’ Standards</td>
</tr>
<tr>
<td></td>
<td>£38,598 to £58,677</td>
<td></td>
<td></td>
<td></td>
<td>Any other set of standards applicable to the performance of that teacher</td>
</tr>
<tr>
<td></td>
<td>Set by the relevant body, which must determine a pay range within the figures listed above for all leading practitioners at the school</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>The relevant body determines the salary for an individual leading practitioner within the range set (pages 22-23)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Role Pay range Eligibility criteria Possible pay allowances Pay progression Professional standards

**Teachers on the upper pay range**

Upper pay range: £35,218 to £37,871

QTS or QTLS (page 22)

Teaching and learning responsibility (TLR) payments
Special educational needs (SEN) allowance
Recruitment and retention allowance
Acting allowance for acting up in leadership role

Annual review
Pay decisions must be “clearly attributable” to the performance of the individual (pages 24-25)

Teachers’ Standards

**Teachers on the main pay range**

Main pay range: £22,244 to £32,831

QTS or QTLS (page 20)

TLR payments
SEN allowance
Recruitment and retention
Acting allowance for acting up in leadership role

Annual review
Pay decisions must be “clearly attributable” to the performance of the individual (pages 24-25)

Teachers’ Standards

**Newly qualified teachers (NQTs)**

Main pay range: £22,244 to £32,831

QTS or QTLS (page 24)

TLR payments
SEN allowance
Recruitment and retention
Acting allowance for acting up in senior leader roles

Annual review
Pay decisions must be “clearly attributable” to the performance of the individual (pages 24-25)

Teachers’ Standards

**Unqualified teachers**

Unqualified teacher pay range: £16,298 to £25,776

Working as a trainee teacher, overseas-trained teacher, or instructor (page 72)

Unqualified teacher allowance
Recruitment and retention
Acting allowance for acting up in senior leader roles

Annual review
Pay decisions must be “clearly attributable” to the performance of the individual (pages 24-25)

Teachers’ Standards

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Special offer: available to NASBM members - see back cover

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Marketing your school effectively

Marketing strategies for schools

Six-stage marketing cycle

An article in SMT Magazine, a publication focused on school management, says that since parents have an increasing amount of choice when it comes to finding a school, schools need to respond by using better marketing techniques to attract them.

The article describes a six-stage 'marketing cycle' that schools can work through to ensure they "stand out":

1. **Market research** – interviewing and surveying current and prospective parents and analysing the findings

2. **Meeting market needs** – for example, you could consider what your school does to meets the needs of prospective parents, and what it could do

3. **Message and brand development** – identifying three or four key statements about the school and a simple visual design for the website

4. **Evidence gathering** – regularly collecting news stories about the school that support your key messages

5. **Using mass media** – the stories gathered in the previous stage can be communicated to the local community through posters, social media and publications

6. **Relationship management** – keeping in touch with anyone who has shown interest in the school, whether they attended an event, asked for a prospectus or spoke to a member of staff

Guidance from NASBM:

**Why marketing matters to schools**

Your school is most likely using a number of marketing techniques already to engage with stakeholders, recruit pupils and market your school to ensure financial sustainability and therefore maintain high-quality learning opportunities for pupils.

There might be a number of areas, however, where you could make improvements, considering your overall vision and goals, and how you plan to achieve these.

We say that, marketing is about:

- Ensuring the development of a marketing and communication strategy which promotes the school/trust and defines the brand, aims and goals … develop(ing) pupil recruitment, and stakeholder engagement via appropriate communication channels and maximis(ing) income generation

So, what are the areas you might want to look at to improve your marketing strategy and the areas within it?

- When engaging with stakeholders, for example, are you advertising in the local press?
- When developing events like the school fete, are you linking up with local businesses to procure services? If you are, is it working well for you?
- Are you also advertising events in the local press, and what deals can you get for doing this? Are these branded as the school fete, or as a community event taking place in the school? The community event approach, for example, might work better for you

These are the kinds of questions schools will need to increasingly ask themselves, as pupil numbers are set to rise and competition in local areas will continue to grow. A sound marketing strategy and good communication channels with identified stakeholders is a must for schools.
12 marketing tips

Sounding Board, a marketing and communications company based in the United States, has published a list of 12 marketing tips for schools. These include:

- Creating a parent advocacy group
- Engaging local media
- Co-operating with feeder schools to remind parents of open days
- Updating the school website
- Creating a marketing club organised by students

The website makes references to the American school system which will not be relevant here, but you may still find the tips useful. You will find further information on each tip here:

Building a marketing and communications strategy

Developing a marketing strategy

Manchester Metropolitan University's School Business Management website has a presentation with tips on marketing a school, created by the school business manager of Churchill Community College in North Tyneside.

Slide 8 suggests the following process for schools to follow when developing a marketing strategy:

1. Agree a vision
2. Identify your 'unique selling point'
3. Devise a mission statement
4. Audit your existing situation and find out the local community’s perception of the school
5. Set up a marketing and/or publicity team
6. Agree actions to realise the school's vision
7. Implement these actions
8. Monitor and evaluate the success of the actions

More details about each step can be found on slides 9-20 of the presentation.

Internet-based marketing

Please note that mention of specific social media platforms or commercial providers in this article does not constitute an endorsement from The Key.

Social media for schools

The Guardian has a brief guide to social media for schools written by Matt Britland, who was head of the ICT department at Kingston Grammar School in Kingston upon Thames when the article was written.

His recommendations include using a ‘broadcast’ account on Facebook as a means of one-way communication with parents. He also says that schools can use an RSS feed to link website updates to a Twitter account.

This will automatically add a tweet to the Twitter account when new material is added to the website, thereby keeping parents who use Twitter informed and up to date.
Digital marketing company, School Website, says that Twitter can be used to “promote the school’s brand” and give it a “voice”. It says that schools might tweet about:

- Special events
- Success stories
- Sports games
- Exam dates
- School closures on snow days

To set up a Twitter account, visit the Twitter homepage.

Identity Studios, an online marketing company, has an article on how schools can use Facebook effectively. It says that a school's Facebook page can:

- Share information on current and upcoming events
- Make school announcements
- Share photos and videos of students' work, experimental learning activities and individuals recognised for excellence
- Work as a recruitment tool to communicate with potential job applicants

Schools can create a Facebook page here:

Wikipedia

You may wish to create or update your school's page on Wikipedia.

Most pages on Wikipedia can be edited by anybody. Information on creating and editing articles on the website can be found here:

This is an extract. Members of The Key for School Leaders can read the full article with links to all sources, on our website. To find it quickly, go to www.thekeysupport.com/SL and enter the reference number 181 in the website search tool.
### KeyDoc template: Asset register

**Notes:**
- For assets of small value, such as classroom chairs and tables, check that all are present in the location. Missing items need a new line explaining that they have been disposed of.
- If the asset is not present in the location, check other locations and record it here, otherwise it will be assumed that it has been disposed of. There will be a policy on asset disposal, listing the approved methods (for example, recycled, sold, thrown away).

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**Search**

1572

**KeyDoc template: Asset register**

<table>
<thead>
<tr>
<th>Date bought</th>
<th>Equipment type and description</th>
<th>Make/model no.</th>
<th>Serial no.</th>
<th>Quantity</th>
<th>Owner (if leased)</th>
<th>Order no.</th>
<th>Supplier</th>
<th>Cost when bought</th>
<th>Location of asset**</th>
<th>Date and reason for disposal</th>
<th>Present during asset check</th>
<th>Method of disposal ***</th>
<th>Value when disposed</th>
<th>Amount received when disposed</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/02/14</td>
<td>Silver laptop</td>
<td>S50A102</td>
<td>12345</td>
<td>1</td>
<td>Owned</td>
<td>5243</td>
<td>Supplier C</td>
<td>£500</td>
<td>Location 2</td>
<td>N/A</td>
<td>Yes</td>
<td>Recycled</td>
<td>£250</td>
<td>£250</td>
</tr>
<tr>
<td>15/08/10</td>
<td>Children's chairs (red)</td>
<td>32</td>
<td>Owned</td>
<td>32 x £25 = £800</td>
<td>32 x £5    = £160</td>
<td>Furniture</td>
<td>Location 1</td>
<td>N/A</td>
<td>Location 1</td>
<td>N/A</td>
<td>Yes</td>
<td>Sold</td>
<td>£0</td>
<td>£0</td>
</tr>
</tbody>
</table>

*For assets of small value, such as classroom chairs and tables, check that all are present in the location. Missing items need a new line explaining that they have been disposed of.*

**If the asset is not present in this location, check other locations and record it here, otherwise it will be assumed that it has been disposed of.**

**There will be a policy on asset disposal, listing the approved methods (for example, recycled, sold, thrown away).**

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**Search**

1572

**KeyDoc template: Asset register**

<table>
<thead>
<tr>
<th>Date checked:</th>
<th>Checked by (name):</th>
<th>Signature:</th>
</tr>
</thead>
</table>

We created this KeyDoc with one of The Key’s associate education experts, Terry Gillard, an experienced school business manager. 

**Date checked:**

**Checked by (name):**

**Signature:**

---

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Our rich network of over 100 associate experts provides us with specialist insight and advice that is not readily available elsewhere. We work with experienced headteachers and governors, subject specialists, school improvement partners, and experts in areas including inspection and accountability, special educational needs, school finance, law, and corporate/voluntary sector governance.

All of our experts are up to date with the latest education initiatives in their specialist areas. As well as guidance, they offer case studies and practical resources for members, such as observation schedules, self-assessment templates and interview questions. They also contribute to our events, leading workshops, panel discussions and highly rated one-to-one ‘surgery’ sessions with delegates. The following experts contributed to resources in this pack:

**Terry Gillard** is an experienced school business manager (SBM) who has worked in several primary schools.

**Marilyn Nathan** is an education consultant who specialises in leadership and management development. She has experience of inspecting both primary and secondary schools, and has acted as an external adviser for headteacher reviews.

**Martin Owen** is a qualified chartered accountant (CPFA). He has more than 20 years’ experience of working with schools to improve their governance, leadership and management of financial, business and operational processes.

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