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GOVERNORS CONFERENCE 2026

Governing for Impact: Finance,
Transitions and Leadership

Conferences by BDSIP



GOVERNANCE HANDBOOK



2026 - 27

Governance Handbook 2026–27

Your essential guide to effective school governance.

The **BDSIP Governance Handbook** brings together practical guidance, useful questions and ready-to-use resources to help governors and governing bodies navigate the year with confidence.

Whether you're a **new governor**, an **experienced chair** or a **member of a governing body**, this handbook provides a valuable reference point across key areas of governance, including effective governance, school finances, leadership and performance management, recruitment, complaints, and governor training and development.



**Scan to Download a copy including
editable templates**

Why Purchase BDSIP's SIP Service?

The role of a SIP is a supportive one. Their job is to provide:

- ✓ **Strategic guidance** — Align priorities, sharpen SMART targets and challenge ambition.
- ✓ **Monitoring and evaluation** — Set milestones, review progress and analyse performance data.
- ✓ **Capacity building** — Identify development needs and provide CPD, mentoring and coaching.
- ✓ **Collaboration** — Share good practice and strengthen partnership working.
- ✓ **Governance** — Strengthen accountability, progress reporting and data literacy.
- ✓ **Resources and risk** — Align staffing, time and funding; manage barriers and mitigation.
- ✓ **Sustainability and long-term impact** — Embed change, plan succession and evaluate long-term outcomes.





Rekha Bhakoo

Specialisms:

- Improving outcomes
- Inclusion
- Mentoring new leaders
- Preparation for inspection



Martin Grant

Specialisms:

- Early Years
- Teaching pedagogy
- Curriculum development



Tom Hart

Specialisms:

- Curriculum design
- Inclusion
- Schools in difficulty
- Preparation for inspection

New
to
BDSIP!



Shirleyann Jones

Specialisms:

- Schools in difficulty and rapid improvement
- Senior leadership team development
- Coaching headteachers and senior leaders

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Jason Philipsz

Specialisms:

- Preparation for inspection
- Setting up an alternative provision & inclusion
- Mathematics

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Rowen Prigg

Specialisms:

- Setting up an alternative provision & inclusion
- Ofsted/SIAMS preparation
- Leadership coaching

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Astrid Schon, MBE

Specialisms:

- Inclusive leadership
- Alternative Provision
- School Improvement
- Leadership coaching

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Rose Taunt

Specialisms:

- Schools in difficulty
- Early Years
- Early reading and writing



Steve Wilks

Specialisms:

- Recruitment
- Senior and middle leadership development

DRIVING IMPROVEMENT THROUGH PARTNERSHIP

Strategic, expert support to strengthen leadership, drive progress, and enhance outcomes for all learners. Choose from 3 or 6 days of dedicated support from an experienced School Improvement Partner, tailored to your school's context and priorities.

Your dedicated School Improvement Partner provides:

Data-Driven Planning & Evaluation

In-depth reviews and evidence-based plans to track progress and guide your next steps

Expert Challenge & Support

Fresh insight and constructive challenge to drive improvement and strengthen accountability

Stronger Leadership & Governance

Support the empowers leaders with the tools and external expertise needed to lead effectively

Sustained Progress & Long-Term Impact

Structured input to foster continuous development and measurable improvement outcomes

A Collaborative Partnership

Work alongside a trusted adviser committed to understanding your school and supporting its success

School Improvement Partner Programme	3 days	£3,325*
	6 days	£6,650*

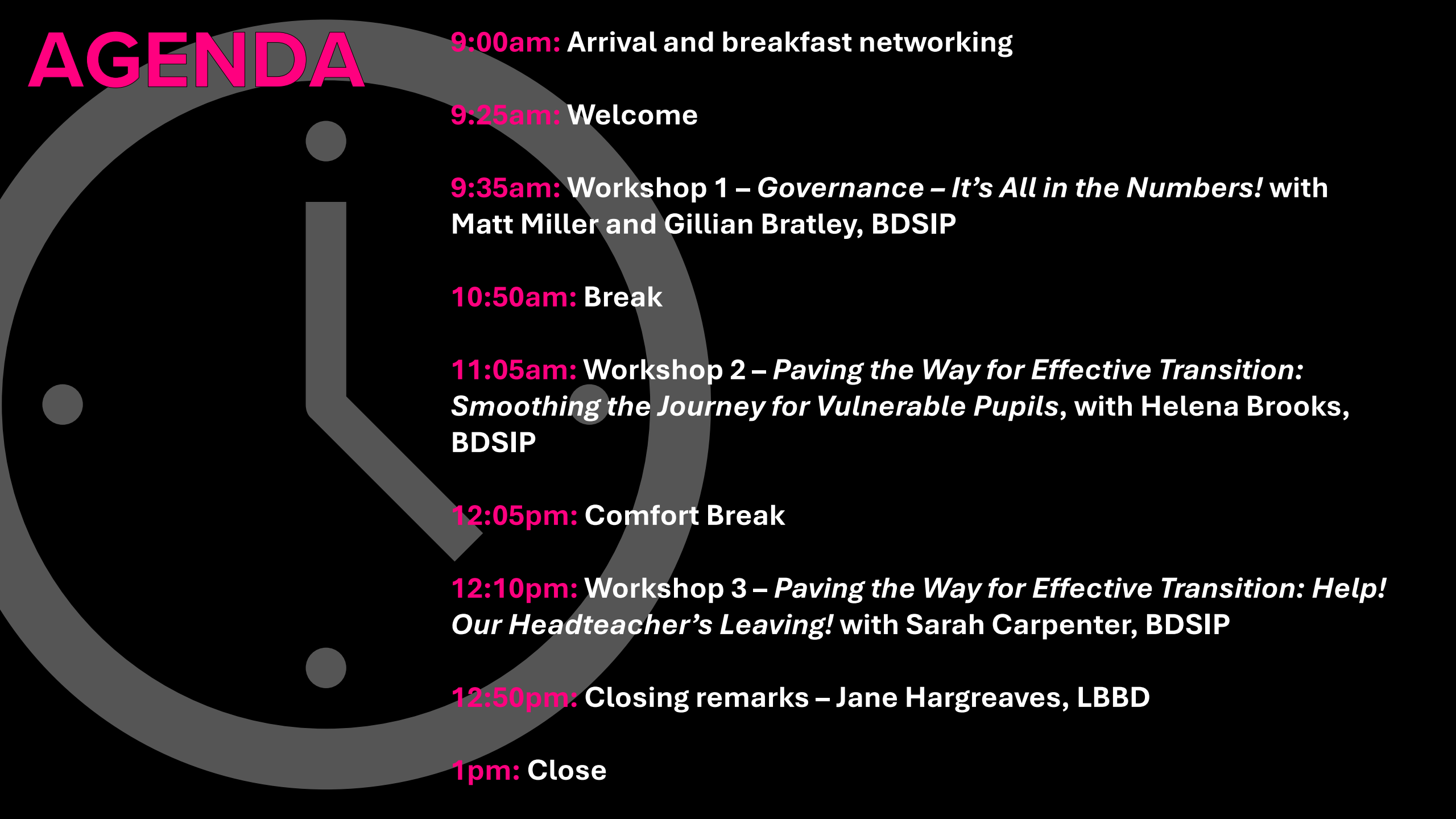


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AGENDA



9:00am: Arrival and breakfast networking

9:25am: Welcome

9:35am: Workshop 1 – *Governance – It's All in the Numbers!* with Matt Miller and Gillian Bratley, BDSIP

10:50am: Break

11:05am: Workshop 2 – *Paving the Way for Effective Transition: Smoothing the Journey for Vulnerable Pupils*, with Helena Brooks, BDSIP

12:05pm: Comfort Break

12:10pm: Workshop 3 – *Paving the Way for Effective Transition: Help! Our Headteacher's Leaving!* with Sarah Carpenter, BDSIP

12:50pm: Closing remarks – Jane Hargreaves, LBBD

1pm: Close



Workshop 1: Governance – It's All in the Numbers!

Financial Oversight, Challenge and Strategic Decision-making for Governors

Matt Miller MBE (*Matt Miller, National Leader of Governance Advocate*)
& **Gillian Bratley** (*Advisory Teacher Primary ICT & Assessment, BDSIP*)

What Keeps Heads and Governors Awake at Night?



What are the biggest financial pressures affecting schools today?

Workshop Aims:

By the end of this session governors will be able to:

- ✓ Understand their school's financial position and key budget pressures
- ✓ Know what financial information they should receive
- ✓ Scrutinise budget monitoring reports effectively
- ✓ Connect financial decisions to pupil outcomes
- ✓ Ask strategic questions about value for money
- ✓ Recognise effective challenge and assurance practices



Why Financial Oversight Matters

Governors are responsible for:

- Overseeing financial performance
- Approving annual budgets
- Monitoring expenditure against plans
- Ensuring money is well spent
- Supporting the best possible outcomes for pupils

NGA states that every governor should understand their school's financial position, not just finance committee members.

Understanding Your School's Financial Position

Income

- Core funding
- Additional grants
- School-generated income

Expenditure

- Staffing
- Premises
- Curriculum resources
- Support services

Financial Health

- Surplus/deficit
- Reserves
- Cash position
- Three-year forecast

NGA recommends regular review of reserves, pupil projections and multi-year forecasts.

The Biggest Number in the Budget

Staffing

Staff costs typically account for: **75 to 80% of a school's budget.**

Discussion:

If staffing is 80% of expenditure:

- What does this mean for budget flexibility?
- Why are staffing decisions strategic decisions?

What Reports Should Governors Receive?

NGA recommends budget monitoring reports are reviewed at least six times per year.

Reports should include:

- ✓ Original budget
- ✓ Current budget
- ✓ Actual spend to date
- ✓ Forecast year-end position
- ✓ Variances
- ✓ Commentary
- ✓ Risks

Anatomy of a Budget Monitoring Report

The Monitoring Report should include each of the following areas:

These are the three
key areas to focus
on:



Area	What to Look For
Budget	What was agreed?
Actual	What's happened so far?
Forecast	Where are we heading?
Variance	What's changed?
Commentary	Why has it changed?

The forecast is often the most important figure because it helps governors understand where the school is likely to finish financially.

It is important to **focus on trends**, not individual transactions.

What Is a Significant Variance?

NGA suggests boards define what counts as significant.

Examples include:

- More than 3%
- Greater than £5,000

Governors should understand:

- Why it occurred
- Whether it was avoidable
- Future implications
- Management response

Governors as Strategic Questioners

Not:

✗ "Can I see every invoice?"

Instead:

- ✓ "Why is staffing expenditure forecast to exceed budget?"
- ✓ "What is driving this variance?"
- ✓ "What action is being taken?"

Activity: Spot the Questions

Task:

In groups, identify:

- Three challenge questions
- Three points requiring assurance

Brook Street Primary School Finance Report

Reporting period: Month 6 budget monitoring report

Additional context:

School type: Maintained primary school

Pupil numbers: 412 on roll, 18 fewer than budgeted

Overall position: Forecast in-year deficit of £74,000 against an approved balanced budget

The school has £168,000 in revenue reserves at the start of the year. If the forecast deficit is realised, reserves will reduce to £94,000. The headteacher has reported that staffing levels are under review, but no formal savings plan has yet been presented to governors.

Budget Area	Original Budget	Forecast Outturn	Variance	Commentary
Staffing	£2,140,000	£2,226,000	£86,000 overspend	Additional supply cover, two unfunded support roles continued from last year, and higher-than-budgeted agency costs.
Curriculum resources	£118,000	£86,000	£32,000 underspend	Planned phonics resources and computing equipment purchases deferred to the spring term.
Premises	£214,000	£221,000	£7,000 overspend	Emergency boiler repairs completed in September; no further major works currently forecast.
Income	£2,985,000	£2,940,000	£45,000 reduced income	Lower pupil numbers have reduced funding forecast; lettings income is also below target.
Overall forecast position	Balanced budget	£74,000 deficit	£74,000 adverse variance	Leadership proposes using reserves while developing an in-year savings plan.

Discussion prompts:

- What is driving the staffing overspend, and which elements are recurring rather than one-off?
- What is the impact of deferring curriculum spending on school improvement priorities and pupil outcomes?
- How realistic is the revised income forecast, particularly around pupil numbers and lettings?
- What savings options are available, and what risks or trade-offs would they create?
- What level of reserves does the board consider appropriate, and how quickly would reserves need to be rebuilt?
- When will governors receive a costed recovery plan with clear actions, owners and timescales?

Budget Setting – The Governor's Role

Key Responsibilities:

- Reviewing the school's financial position
- Challenging assumptions
- Considering risks
- Approving a balanced budget

Governors must understand the assumptions behind the figures.



Scrutinising Budget Assumptions

NGA's recommended questions include:

- Have staffing changes been included?
- Are pay awards accounted for?
- Are pupil projections realistic?
- Are income assumptions realistic?
- Is there sufficient reserve capacity?



Linking Finance to School Improvement

What difference will this spending make?"

Examples of impact of spending decisions:

Spending Decision	Intended Impact
Literacy programme	A rise in reading outcomes
Attendance support	Improved attendance rates
Pastoral staffing	A positive impact on behaviour and inclusion
CPD investment	Improvements in the quality of teaching

Budgets should align with school priorities, but how do you know what your priorities are?

Using the Inspection Data Summary Report (IDSR) to Identify School Priorities

Ofsted use the IDSR to prepare for inspection.

“The Inspection Data Summary Report (IDSR) summarises and analyses the data that is available about a school... to guide inspectors’ conversations with school leaders. It is not meant to provide a complete picture of a school or any judgement or assessment of a school.”

Governors can use it to prepare for strategic conversations.

Structure of IDSR

- Context of the school
- Attendance and behaviour
- Links to alternative provision
- Achievement
- Report card
 - Displays data that will eventually be presented alongside the inspection report

Example primary IDSR

Release date: 1 September 2026

[IDSR news page](#)

[IDSR guidance](#)

▶ [Important information](#)

School details

[The trust](#)

School details

URN: 8888888 LAESTAB: 8888888

Local authority: NA

Phase of education: NA Type of education: NA

[Ofsted: find an inspection report](#)

[Ofsted: explore an area](#)

[Get information about this school \(GIAS\)](#)

Contents

- [Context of the school](#)
- [Attendance and behaviour](#)
- [Links to alternative provision](#)
- [Achievement in phonics and at key stage 2](#)
- [Report card](#)
- [Annex](#)

Three-Step Approach

What stands out?

Spot



Why is this happening?

Ask



Should this influence school improvement planning?

Prioritise



Context

- School characteristics
 - FSM
 - EAL
 - CIN
 - Stability
 - Deprivation
- Ethnicity
- SEN
- Year group breakdown
- Staffing

	2024	2025	2026
School number on roll	Well above average 563	Well above average 552	Well above average 510
School % FSM6	Above average 36	Above average 37	Above average 36
Local area % FSM6	Close to average 31	Close to average 31	Close to average 34
School % SEN support	Close to average 16	Close to average 15	Close to average 14
Local area % SEN support	Close to average 15	Close to average 13	Below average 13
School % EHC plan	Close to average 3	Close to average 5	Above average 7
Local area % EHC plan	Close to average 3	Close to average 5	Above average 7
School % EAL	Close to average 24	Close to average 24	Close to average 26
Local area % EAL	Close to average 20	Close to average 22	Close to average 22
School % CIN*	Well above average 8	Above average 7	Close to average 5
Local area % CIN*	Well above average 8	Well above average 8	Above average 6
School % stability	Below average 80	Close to average 81	Close to average 82

Spot – Ask – Prioritise

Achievement at KS2 – All Pupils

	Versus national average				Versus similar school average [*]			
	2023	2024	2025	3-year average	2023	2024	2025	3-year average
RWM expected standard	Below (non-sig)	Below (non-sig)	Below (sig-)	Below (sig-)				
Reading expected standard	Below (sig-)	Close to av. (non-sig)	Below (sig-)	Below (sig-)				
Writing expected standard	Below (sig-)	Below (sig-)	Below (non-sig)	Below (sig-)	Below (non-sig)			
Maths expected standard	Close to av. (non-sig)	Close to av. (non-sig)	Below (sig-)	Close to av. (non-sig)		Above (non-sig)		

Spot → Ask → Prioritise

Achievement at KS2 – Disadvantaged

	Versus national average				Versus similar school average*			
	2023	2024	2025	3-year average	2023	2024	2025	3-year average
RWM expected standard	Close to av. (non-sig)	Close to av. (non-sig)	Close to av. (non-sig)	Close to av. (non-sig)	Above (non-sig)	Above (non-sig)		Above (non-sig)
Reading expected standard	Close to av. (non-sig)	Above (sig+)	Close to av. (non-sig)	Close to av. (non-sig)		Above (sig+)		Above (non-sig)
Writing expected standard	Close to av. (non-sig)	Close to av. (non-sig)	Close to av. (non-sig)	Close to av. (non-sig)		Above (non-sig)		
Maths expected standard	Close to av. (non-sig)	Close to av. (non-sig)	Close to av. (non-sig)	Close to av. (non-sig)		Above (non-sig)		Above (non-sig)

Spot → Ask → Prioritise

Achievement at KS2 – Disadvantaged

Disadvantaged pupils - Reading expected standard

Year	Cohort	School	Vs national disadvantaged		Vs national non-disadvantaged			Vs similar schools disadvantaged*		Year group context
			Average	Banding	Average	Gap	Gap Trend	Average	Banding	
3-year	129	65%	62%	Close to average (non-sig)	80%	-15	Not applicable	55%	Above (non-sig)	Not applicable
2025	45	61%	63%	Close to average (non-sig)	81%	-20	Widening	58%		-
2024	38	79%	62%	Above (sig+)	80%	0	Narrowing	57%	Above (sig+)	-
2023	46	57%	60%	Close to average (non-sig)	78%	-21	Not available	56%		High - FSM

Focus on Achievement

What to look for:

- Progress and attainment measures
- Subject strengths and weaknesses
- Strengths and weaknesses of different groups

Strategic question:

- Which subjects should be a school improvement priority?

Improvements have educational and financial implications

Other Areas of IDSR

Disadvantaged Pupils

- Attainment gaps between disadvantaged and non-disadvantaged pupils
- Trend over time
 - *Is pupil premium spending securing sufficient impact?*

SEND

- Outcomes and relative performance against similar schools
 - *How effectively is the school meeting the needs of pupils with SEND?*

Attendance

- Attendance and exclusion indicators
 - *Are attendance or behaviour issues limiting pupils' success?*

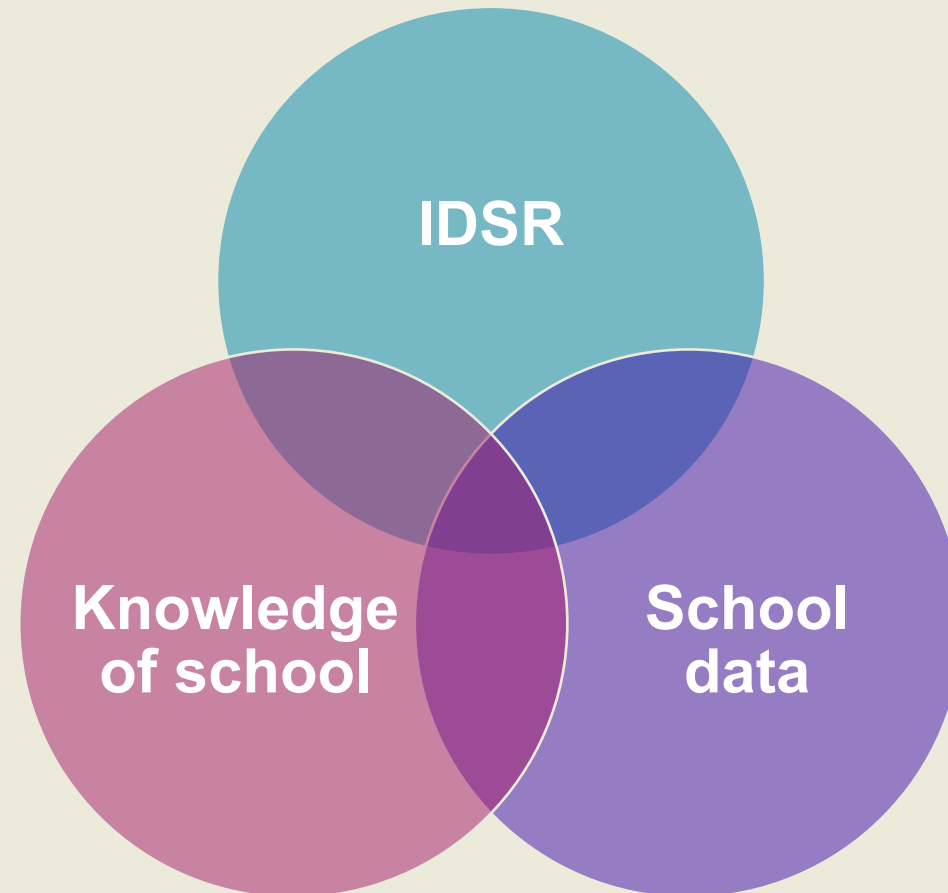
Using the IDSR to Identify School Priorities

Three step approach:

Spot: What stands out?

Ask: Why is this happening?

Prioritise: Should this influence school improvement planning?



Making Sense of the IDSR – additional train

A Governor's Guide to Strategic Challenge and School Improvement



Tuesday 19th January



5:30 – 7:00pm



Free to all schools



<https://tinyurl.com/gov-idsr>



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Value for Money: Three Lenses

Are we
buying
wisely?

Economy



Are
resources
used well?

Efficiency



Is it
improving
outcomes?

Effectiveness



Benchmarking

The DfE expects schools to benchmark spending annually.

Governors should ask:

- Why are we spending more than similar schools?
- Is there evidence this delivers better outcomes?
- Are savings opportunities available?

Effective Challenge and Assurance

Strong governance looks like:

Challenge

- Asking probing questions
- Testing assumptions
- Seeking evidence

Assurance

- Understanding risks
- Monitoring actions
- Evaluating impact

Activity: Scenario

School A

- Falling pupil numbers
- Forecast deficit in 2 years
- Staffing costs = 82%
- Reserves reducing

Discuss:

- What would you ask?
- What assurances would you need?

Five Questions Every Governor Should Ask

- What are our biggest financial risks?
- Are we on track to meet budget?
- What explains significant variances?
- How is spending improving outcomes?
- Is our financial position sustainable?

Strategic Financial Leadership Programme

Practical Finance & Resource Management for Headteachers, School Business Leaders and Governors

**Free In-Person
Training**

BDSIP



A FREE, fully funded four-stage progressive programme designed to build the financial confidence, expertise and strategic capability of Headteachers, School Business Leaders and Governors, strengthening financial sustainability and creating greater organisational capacity.



Eastbrook School, Secondary Building, Dagenham Road, RM10 7UR



Morning Session: 10am - 12.30pm

Afternoon Session: 1.30pm - 4pm

Please arrive 15-30 minutes early to allow for registration



12.30 - 1.30pm

All delegates attending either the morning or afternoon sessions are invited to stay for a networking lunch



15 October 2026

Understanding & Utilising Integrated Curriculum & Financial Planning (ICFP)

[Book AM Session](#)

[Book PM Session](#)



26 November 2026

Leading Integrated Curriculum & Financial Planning (ICFP) Together

[Book AM Session](#)

[Book PM Session](#)



28 January 2027

Financial Planning & Budget Assumptions

[Book AM Session](#)

[Book PM Session](#)



18 March 2027

Strategic Planning & Operational Leadership

[Book AM Session](#)

[Book PM Session](#)



Delivered by
Rebecca Beaver

- ISBL CEO award for Exceptional Contribution to School Business Leadership (2023)
- DfE School Resource Management Adviser (SRMA)
- Education Consultant
- Fellow of the Institute of School Business Leadership (FISBL)



Supported by
Claire Keefe

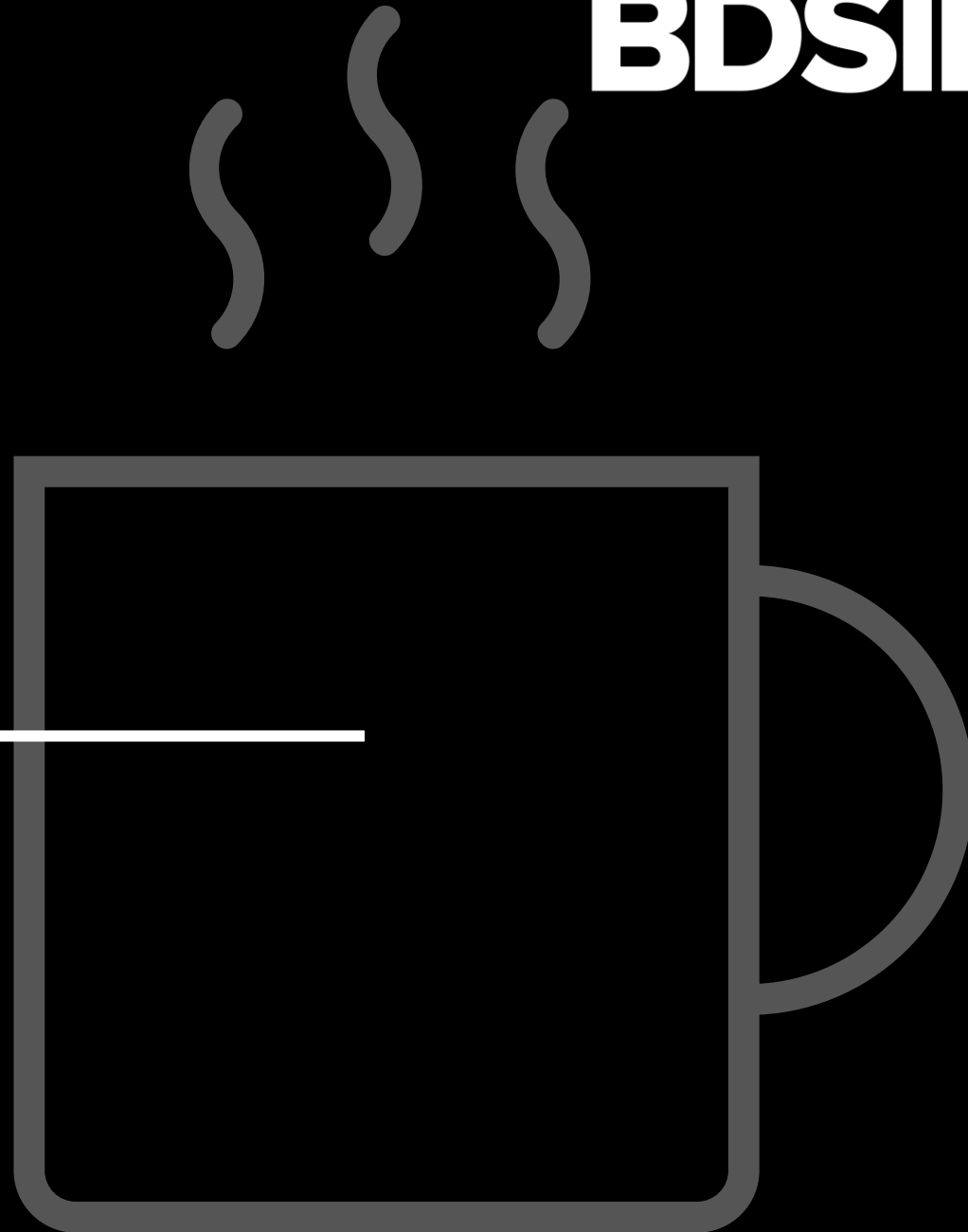
- Executive School Business Leader, Barking Abbey and Eastbrook Schools
- DfE School Resource Management Adviser (SRMA)
- Fellow of the Institute of School Business Leadership (FISBL)

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COMFORT BREAK

15 minutes





Workshop 2: Paving the Way for Effective Transition: Smoothing the Journey for Vulnerable Pupils

Helena Brooks *(Senior Education Adviser, BDSIP)*

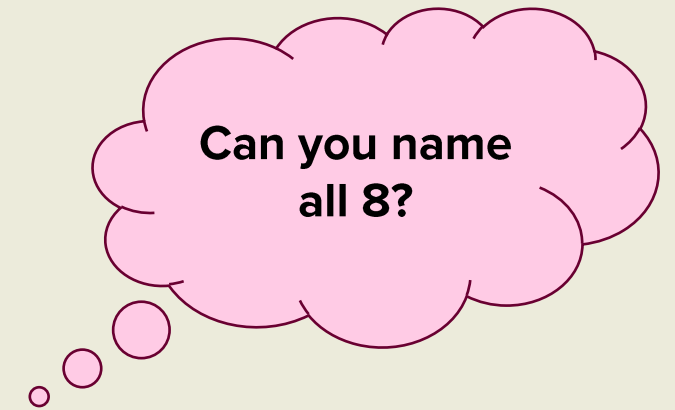
Session Aims

- **By the end of the session, governors will be able to:**
- **Identify** key vulnerable groups who may require additional support during transition.
- **Recognise** the key transition points across a child's educational journey.
- **Understand** what schools should consider when planning effective transitions.
- **Consider** how transition approaches may need to be adapted for different groups of pupils.
- **Identify** how governors can provide effective challenge and support to ensure transition is planned and evaluated effectively.

Session Outline

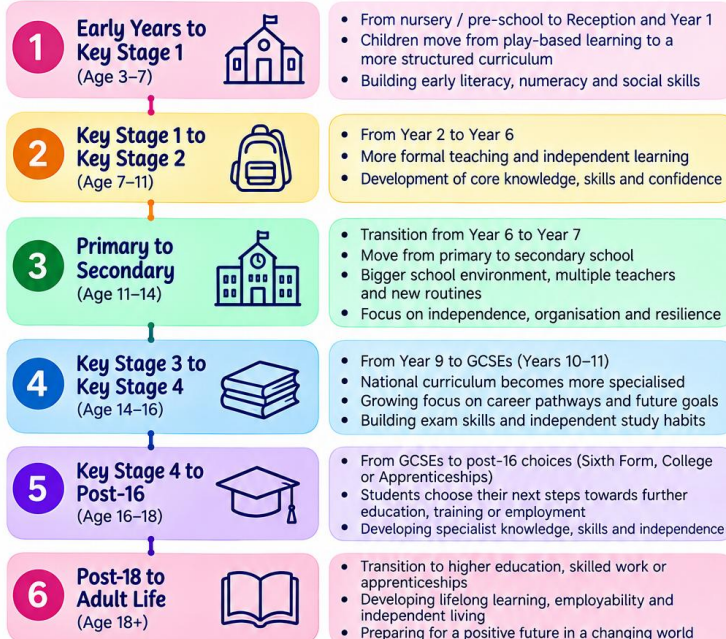
- **Understanding vulnerability**
 - Who are the key vulnerable groups?
 - What vulnerable groups are represented in our schools?
- **Understanding transition**
 - What are the key transition points across a child's educational journey?
 - What can make transitions successful or challenging?
- **Planning effective transitions**
 - What should schools consider when planning for transition?
 - How might approaches need to be adapted for different groups?
- **Research and local context**
 - Key research and policy evidence, including *Every Child Achieving and Thriving* (2026)
 - Relevant Ofsted research and subject evidence
 - What is already happening across Barking & Dagenham?
- **The governor's role**
 - How can governors support and challenge their school?
 - What questions should governors be asking?

What are the Key Transition Points in a Pupils Academic Journey?



What Transitions are key to a child's academic journey?

Smooth transitions build confidence, resilience and lifelong learning.



Key Principles for Successful Transitions



Every transition is a step in a child's learning journey – with the right support, every child can thrive.

Home
Nursery
EYFS
KS1
Year 6
KS3
KS4
Post 16



Nursery
EYFS
Year 1
KS2
Year 7
KS4
Post 16
Adult Life

What key things do schools need to take into account when preparing children for any transition?



New Classroom
New Peers
New Smells and Sounds
New Separations



New Adults
New Rules
New Routines
New Identity

What Might Children be Thinking?



Do I belong?

Do they know me here?

What if I get it wrong?

What if I get upset?



New Classroom

What happens next?

What do they mean?

Where are the toilets?

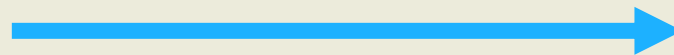
Will I get to go home?

Transition and Adolescence

What is adolescence?

- *The phase of life between childhood and adulthood, from ages 10-19*
- *A unique stage of human development and important time for laying the foundations of good health and mental health for life*

Adolescence is a time where
change is the norm



Many adolescents will be going
through several transitions at
once

What can transition from Primary to Secondary look like?



What transitions through adolescence might we consider?



Transitions Through Adolescence

A developmental journey from childhood to adulthood



The 3 Types of Transition

Understanding how change happens in education



Vertical Transition

Movement between different age phases or stages of education.

Examples:

- Nursery → Reception (EYFS)
- Primary → Secondary
- Secondary → Sixth Form / College



Key Benefit:

Helps children and young people move smoothly between different key stages of their education.



Horizontal Transition

Movement between different types of education at the same age or stage.

Examples:

- Moving from a mainstream school to a special school (e.g. ARP)
- Transition from school to home education
- Moving between different settings (e.g. primary to independent school at the same age)



Key Benefit:

Ensures the right setting or support is in place for a child's specific needs at the same stage.



Internal Transition

Movement within the same school, setting or phase.

Examples:

- Moving from EYFS to Key Stage 1 within the same primary school
- Transition from Year 6 to Year 7 within the same school
- Changing class groups, teachers or learning settings within a school



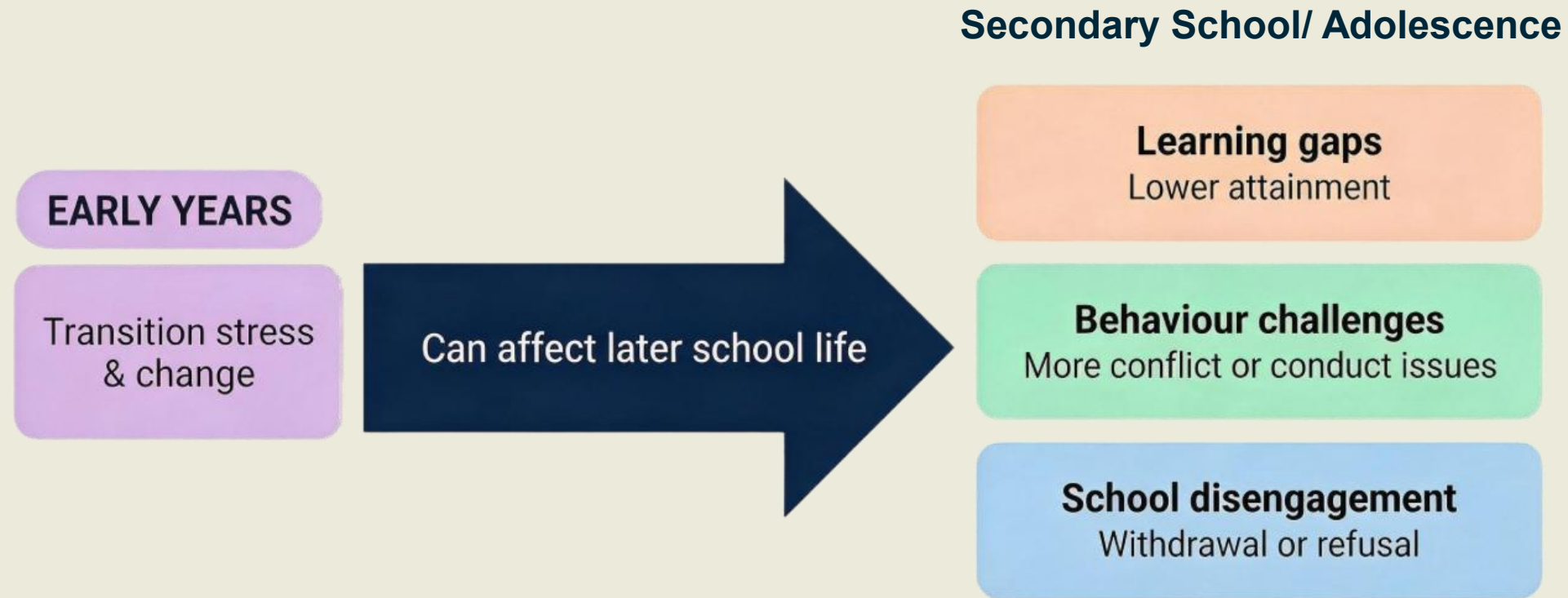
Key Benefit:

Supports a child's continued progress by helping them adapt to new routines, expectations and environments within the same school.

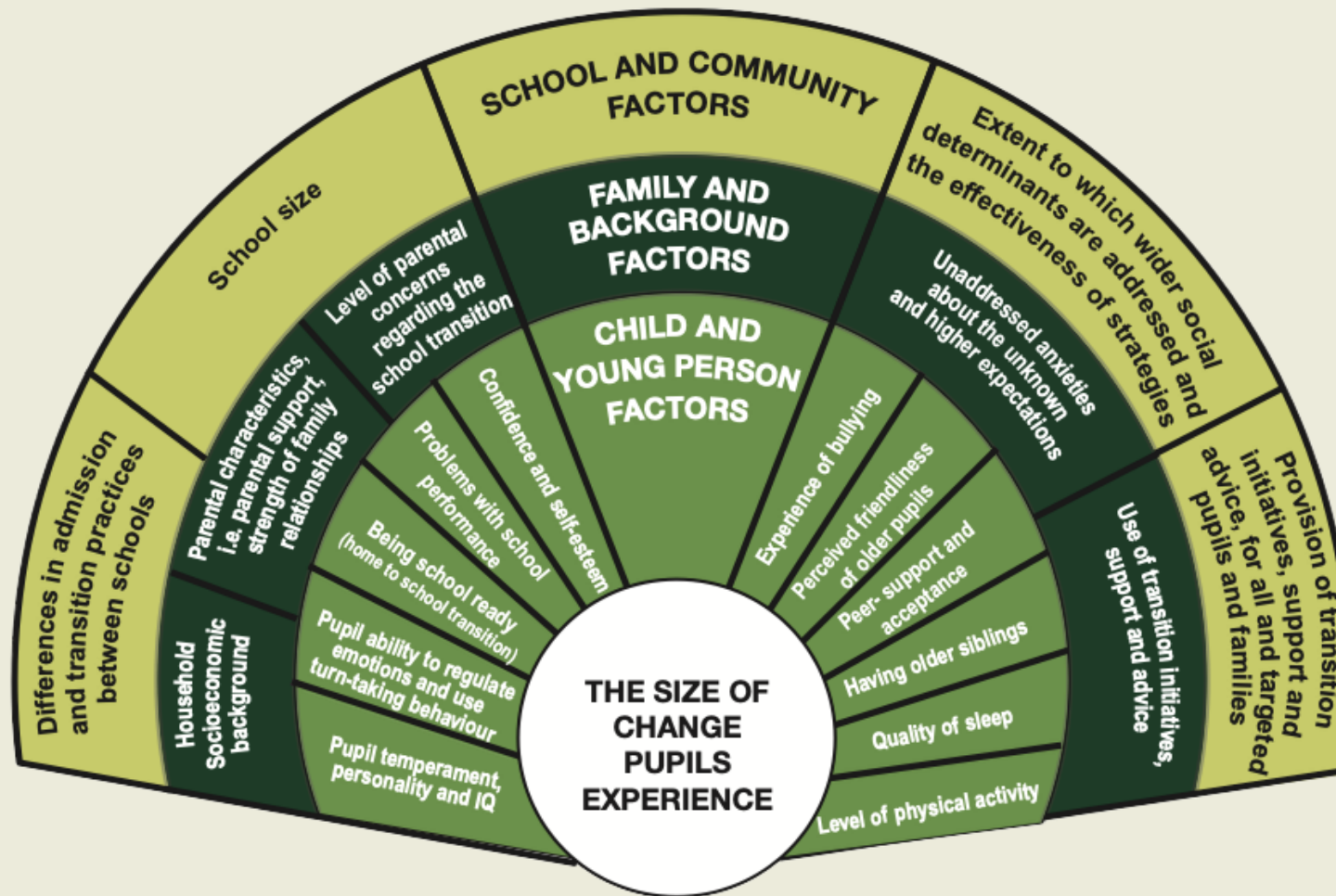


All three types of transition play a vital role in helping children feel confident, supported and ready for their next step – wherever that may be.

What happens if we get it wrong?



What makes transition vulnerable?



Do you know your schools vulnerable groups and what makes their transition vulnerable?

What are your main vulnerable groups in your school?



How is this
information
shared with you?

Factors affecting transition? – DFE 24-25

Vulnerable group	Primary transition barrier	Updated official indicator
 FSM / disadvantaged	Fewer resources, more stressors, and less access to enrichment and transition support.	51.3% reached a good level of development (GLD), compared with 72.5% of non-FSM children.
 SEN	Greater communication, sensory, cognitive, and self-regulatory demands during change.	20.6% reached GLD, compared with 76.5% of children with no SEN provision; for children with an EHC plan, 4.0%.
 EAL	Language, communication, and adaptation to formal classroom routines.	64.7% reached GLD, compared with 69.9% of children whose first language is English.
 Looked after children	Accumulated relational, environmental, and educational disruption.	42.9% of children looked after for at least 12 months reached GLD, compared with 68.3% overall.
 Disrupted provision / AP	Interrupted routines, curriculum continuity, and peer networks.	65.4% of pupils in state-funded AP schools are eligible for FSM, compared with 26.5% overall.

How can your schools make a difference?

Ensure a whole school understanding of the brain and how it works

Make considerations to revision, cognitive load, metacognition, resilience thinking, cognitive psychology, executive functioning, developmental psychology

Adaptations to meet need

Implement Zones of Regulation, Mind up, universal design for learning, Thrive, Trauma Informed practice

Self-regulation zones

Approaches to support children to be ready for learning

Implement Emotional Regulation strategies and understanding

Research evidence based pedagogical approaches

Belonging

Pupils feeling warm, safe
and valued



Feel
connected



Feel safe
and supported



Feel valued
for who they are



Have a sense
of purpose



Build positive
relationships

A strengths based re-framing for schools

 Often framed as...	 Can also be harnessed as...
1 Reward-seeking	1 Motivation and learning from meaningful feedback
2 Risk-taking	2 Exploration, discovery and independence-building
3 Peer sensitivity	3 Belonging, solidarity and prosocial influence
4 Emotional intensity	4 Moral urgency, commitment and care
5 Identity questioning	5 Self-authorship and future-building

Education is about learning, but also about...



Building knowledge, skills and confidence for life.



Feeling safe, valued and accepted for who you are.



Having a voice, making choices and helping to shape your own path.



Exploring who you are, your values and your place in the world.



Using technology safely, responsibly and critically.



Developing the skills, mindset and resilience to create a better, more sustainable world.



School leaders have an important role to play.

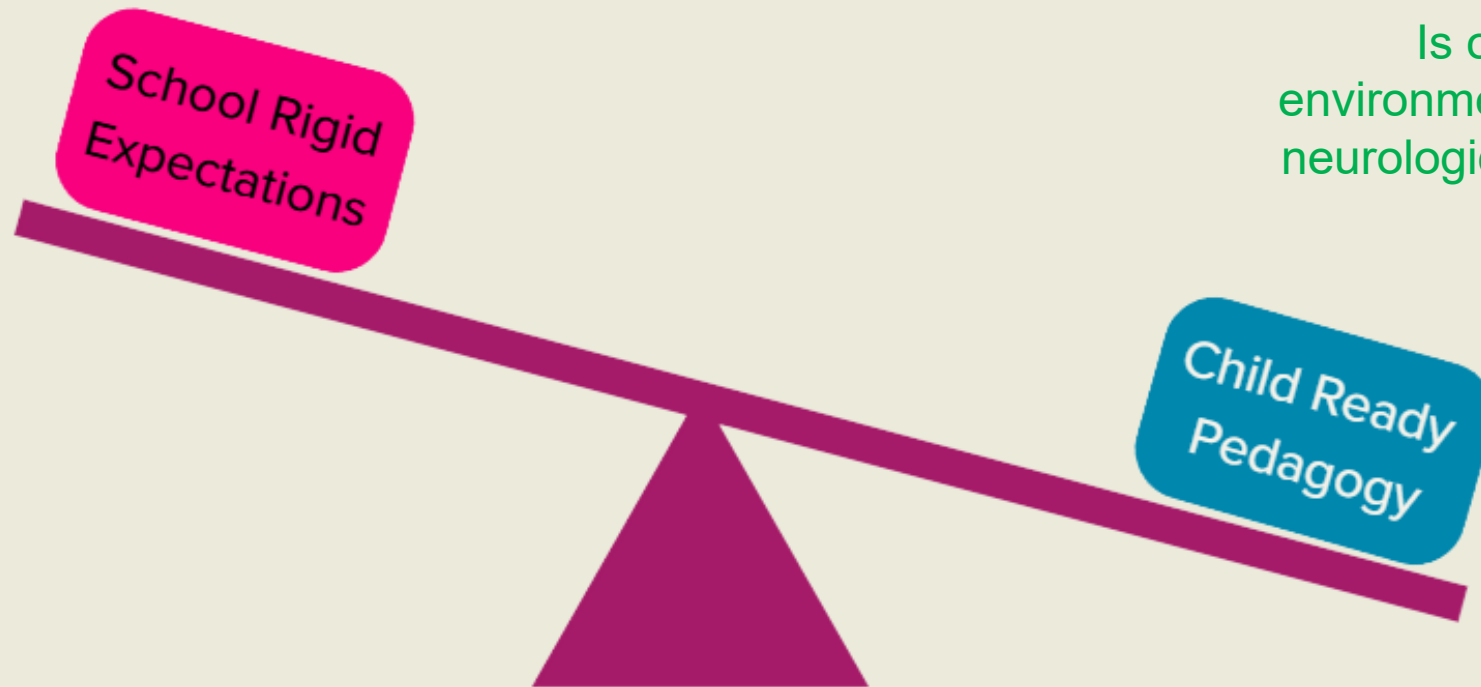
By creating the right culture, opportunities and support, they help every young person thrive — not just in school, but in life.

What does good practice look like?

- Base policies on neurological informed research
- Treat transitions as psychological stressors
- Acknowledge that unmanaged vertical and horizontal transitions are associated with prolonged bottom-up attention and learning
- Engineer continuity
- Use key persons, show and tell, transitional objects and evidence based interventions to buffer stress and reduce socio-economic disparities
- **KNOW YOUR CHILDREN!!**

What Key Questions might you now ask in Governor meetings to find out how your schools understands transition?

~~Is this child ready for our
school expectations?~~



Is our school
environment ready for the
neurological reality of this
child?

Readiness is not just in the child, children arrive with different histories, schools can help create readiness.

Exploring Transition Processes at Your School

Effective governor challenge: Transition

Governors should explore whether the school:

- Identifies vulnerability early and has a clear process for tracking pupils through transition.
- Gathers and shares relevant information before pupils arrive, including SEND, medical, behaviour and safeguarding information.
- Adapts transition arrangements to meet the needs of different groups, including pupils with SEND, EAL and high anxiety.
- Plans support from day one, with clear interventions or adaptations for identified pupils.
- Works effectively with parents and carers, including where there are concerns about risk or disagreement.
- Provides effective handover between settings, particularly for pupils moving to secondary school.
- Reviews impact, rather than assuming that a successful transition has taken place simply because the pupil has arrived.



How do you know that transition is working for your most vulnerable pupils?

What Might Governors Expect to See

Evidence of effective transition

Governors could ask to see examples such as:

- An anonymised transition tracker showing vulnerable pupils, key actions, named staff and review dates.
- Evidence of pre-entry information gathering, such as visits, SEND information, medical information and behaviour plans.
- Examples of adapted transition arrangements for pupils with additional needs - e.g. smaller visits, sensory visits or familiarisation activities.
- Evidence that support begins promptly and is reviewed at agreed points, such as 4 and 12 weeks.
- Examples of structured handover arrangements between settings, including meetings, records, taster days and relevant reviews.
- Evidence of how safeguarding considerations are incorporated into transition planning and decision-making.
- Evidence of parent/carers engagement, particularly where there are disagreements or safeguarding concerns.

Schools shape adulthood and therefore are supporting the future of our society ...



The Inclusion Strategy and Governors

Developing an inclusion strategy using the inclusive mainstream fund – What is it?

An inclusion strategy is a published document setting out how your school identifies and addresses the barriers to learning and participation faced by pupils across your cohort, not only those with SEND, but also groups such as pupils eligible for pupil premium, young carers, pupils with English as an additional language, and others who may face additional barriers.

It explains what you're funding to alleviate these barriers, drawing on your Inclusive Mainstream Fund (IMF) allocation alongside your core and notional SEN budgets, and sets out the outcomes you expect that funding to achieve.

In practice, it functions as the strategic thread connecting your SEND provision, pupil premium strategy and wider school improvement priorities into one coherent, evidenced approach to inclusion, rather than three separate documents pulling in different directions.

What does your school need to do?

- Publish on the school website by 31st December 2026
- Ensure that the strategy details activities that leaders have invested to alleviate barriers to learning and participation, and budgeted costs.
- Ensure the strategy explains how the school plans to use the inclusive mainstream fund (IMF) grant alongside its core budget and notional SEN budget to build a strong core offer.
- Ensure the IMF allocation is spent inline with the Dfe's 7 principles of inclusion

The seven principles, what they mean and what they look like in practice

High Expectations for All

What this means: *Leaders set ambitious outcomes for every pupil, including those with SEND and those who are disadvantaged*

In practice: *Publish clear, measurable expectations (e.g. progress targets for language/reading), include these in the strategy's success indicators, and show how classroom practice is adapted to maintain challenge.*

Early and accurate identification of need

What this means: *Needs are identified quickly using simple universal screens, observation and teacher judgement so support starts early.*

In practice: Record a baseline language screen / behaviour baseline in the strategy and name the screening tool and timeline.

A strong universal offer (high-quality adaptive teaching/Universal Design for Learning)

What this means: Most pupils' needs are met first through better classroom teaching rather than immediately through withdrawal.

In practice: Name one classroom change (e.g. adjusted sequence, visual scaffolds, teacher CPD) as the universal action and cost it.

Targeted, evidence-based interventions that add to the universal offer

What this means: *Small-group or specialist programmes are used when universal teaching is insufficient and are clearly time-limited with exit criteria.*

In practice: Describe the targeted intervention, group size, entry/exit criteria and expected measurable gain (e.g. NELI: +1 on language screen for X weeks).

Reasonable adjustments and accessible environment

What this means: *The school removes barriers in the physical and sensory environment and adapts policies so pupils can access learning and participation.*

In practice: *include any small capital or space changes (sensory corner, regulation room) or policy adjustments and cost them; link to sustainability.*

Partnership with parents, specialists and local SEND networks

What this means: *Families, health partners, school support services and local schools collaborate and influence planning and evaluation.*

In practice: *Record who will be contacted, any planned multi-agency involvement, and how parents will be consulted and informed of outcomes.*

Accountability, monitoring and continuous improvement

What this means: *Leaders and governors monitor impact, use data to refine approaches and publish the strategy annually.*

In practice: *State the monitoring checks (6-week implementation; termly impact measure), named SLT and governor reporting dates.*

Governor Roles in Monitoring the Strategy

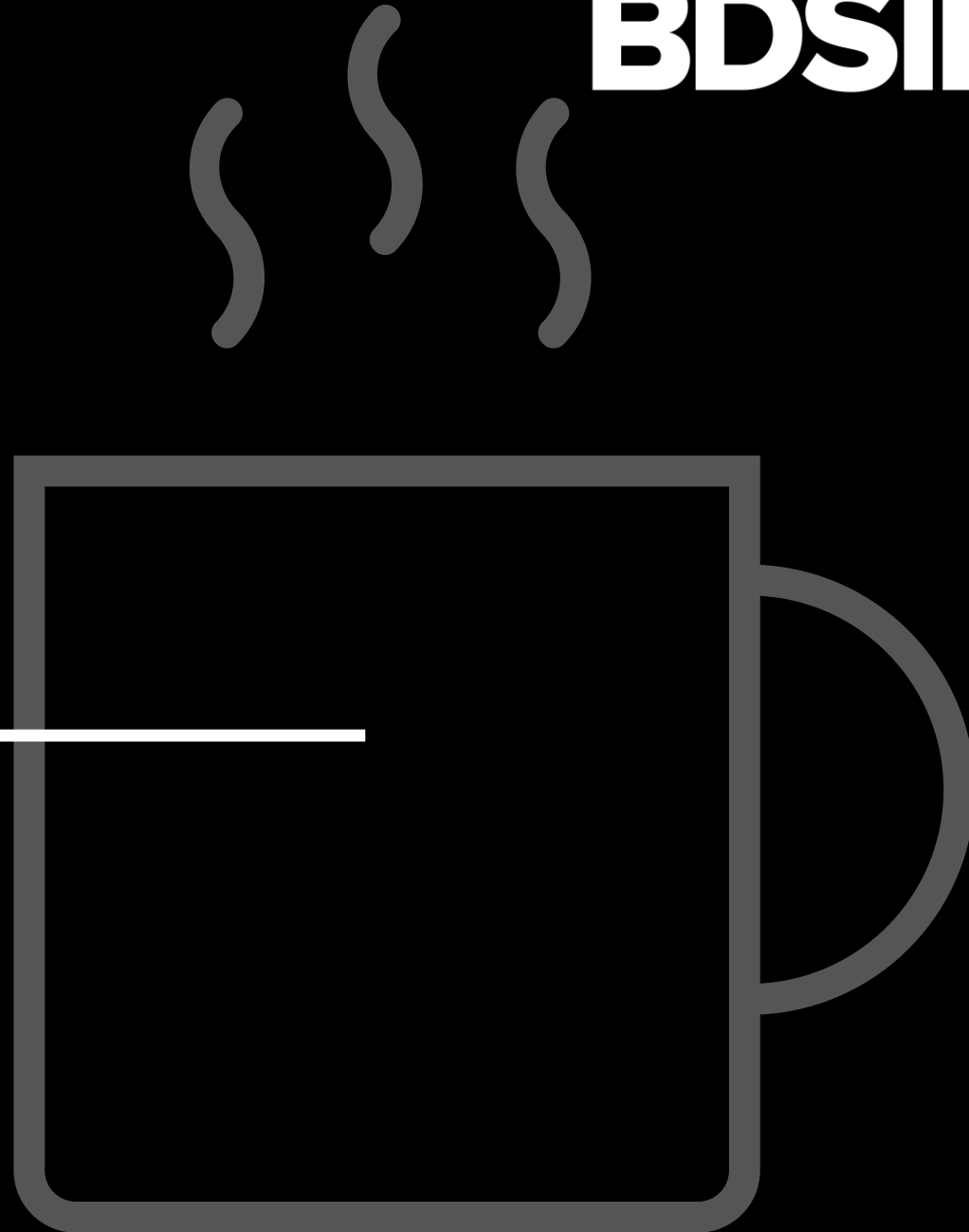
- Work with your school leaders to really understand the barriers faced by vulnerable pupils in your school community
- Work together to review financial allocations and ensure that IMF grant is being used to support barriers to learning
- Regularly review pupil progress, assessment data, and attendance patterns to ensure targeted interventions close achievement gap
- Ask questions around implementation of the inclusion strategy
- Ensure you have a named Inclusion Governor
- At least one focused governor monitoring visit per year linked to an inclusion priority
- Ratify the strategy as you would other school policies

What might Governors Expect to See

- Clear measurable outcomes outlined in the strategy
- Data that shows progress for vulnerable groups identified in the strategy
- Demonstrable impact of targeted spending
- How the school identifies barriers to learning in its cohort and uses high-quality evidence to choose approaches.
- How mainstream teaching has been adapted for pupils with additional needs (universal provision before specialist interventions).

COMFORT BREAK

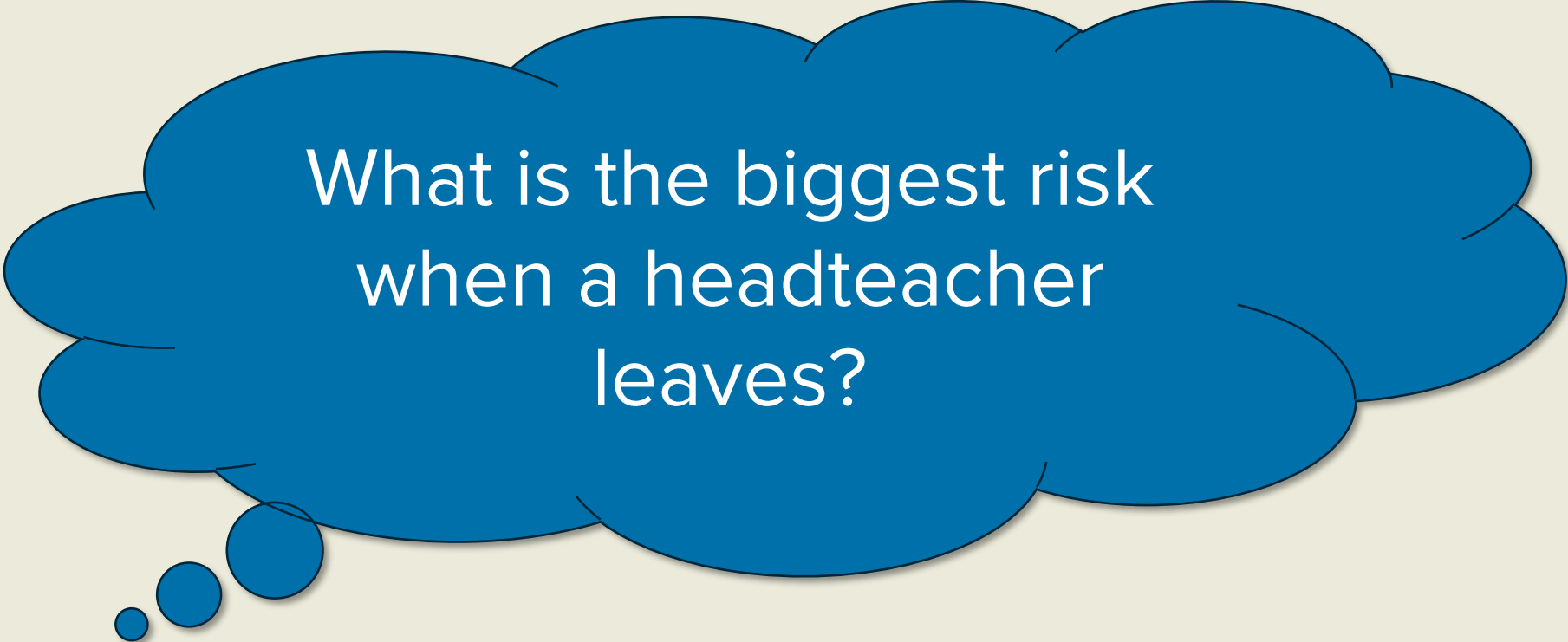
5 minutes





Workshop 3: Paving the Way for Effective Transition - Help! Our Headteacher's Leaving!

Sarah Carpenter (Senior Education Adviser, BDSIP)



What is the biggest risk
when a headteacher
leaves?

- Change in school culture
- Drop in standards
- Safeguarding issues
- Low staff morale
- Reduced community confidence



These are the inherent risks of rushing; unclear criteria; or weak panel preparation.

The Role of the Governing Board

The governing board remains accountable for:

- Setting the strategic direction and defining the leadership the school needs.
- Agreeing the recruitment panel, decision-making arrangements and evidence criteria.
- Ensuring the process is fair, transparent, inclusive and properly documented.
- Keeping safeguarding and risk management central throughout.
- Making, recommending or ratifying the appointment in line with the school's governance arrangements.

Support does not remove accountability. HR, the LA, trust, external adviser may provide operational guidance and challenge; governors must understand which decisions remain theirs.

Plan Before you Advertise

1. **Notify and seek advice:** Contact the Director of Education and Schools' HR.
2. **Stabilise:** confirm interim leadership, confidentiality and communications.
3. **Clarify authority:** agree the panel, delegated powers, ratification route and conflicts of interest.
4. **Set the timetable:** work backwards from the preferred start date and allow time for checks and notice periods.
5. **Secure support:** identify HR, governance, school improvement and safer recruitment expertise.
6. **Agree evidence:** create criteria and scoring arrangements before applications are considered.
7. **Keep an audit trail:** record decisions, reasons, scores and follow-up actions.

What Does our School Need Next?

Build the brief from evidence:

- School context, phase, size and community.
- Current improvement priorities, outcomes and inspection findings.
- Financial position, staffing challenges and organisational capacity.
- Stakeholder views, including pupils, staff and families.
- The school's values, strengths and non-negotiables.

Separate three things:

1. **Essential criteria:** evidence a candidate must demonstrate.
2. **Desirable qualities:** useful but not decisive.
3. **Personal preferences:** assumptions that may introduce bias.

Consider: Are we recruiting for the school we have had, or the school we need next?

Attract and Assess the Right Field

Advertisement & Recruitment Pack

- Present the school's vision, values, strengths and challenges honestly.
- State the role, expectations, selection stages and timeline clearly.
- Make the information accessible and welcoming to a broad field.

Shortlisting

- Apply the agreed criteria consistently and record evidence.
- Look for demonstrated impact, not confident claims alone.
- Address gaps, inconsistencies and safeguarding concerns appropriately.

Assessment

- Use tasks that test the criteria: leadership, safeguarding, curriculum, finance, people, communication and community engagement.
- Triangulate applications, tasks, interviews and checks; no single activity should determine the decision.

Putting it into Action: Stop, Proceed or Seek Advice?

Weak field: Only two applicants meet most criteria. The school wants someone in post quickly.

Internal candidate: A well-regarded deputy applies, and several panel members have worked closely with them.

Scenarios

Panel disagreement: Scores are close, but members interpret the evidence differently.

Reference concern: A reference raises a late, ambiguous concern that was not evident elsewhere.

Test your Responses against Four Principles:

- **Fairness:** Would every candidate be treated consistently?
- **Evidence:** What information supports the decision, and what is still missing?
- **Safeguarding:** Have concerns been explored, recorded and escalated appropriately?
- **Governance:** Is the decision being taken by the right people with appropriate advice?

Your task (4 minutes)

1. What are the immediate risks?
2. What should the panel do next?
3. What evidence, advice or documentation is needed?
4. Prepare one sentence explaining the decision.

Test your Responses against Four Principles:

- **Fairness:** Would every candidate be treated consistently?
- **Evidence:** What information supports the decision, and what is still missing?
- **Safeguarding:** Have concerns been explored, recorded and escalated appropriately?
- **Governance:** Is the decision being taken by the right people with appropriate advice?

Key Message:

Pause where evidence is insufficient. Do not allow urgency, familiarity, confidence or group pressure to substitute for robust evidence.

From Preferred Candidate to Successful Transition

Before appointment is confirmed:

- ✓ Complete references, required checks and follow-up on gaps or concerns.
- ✓ Confirm that the evidence supports the criteria and agreed decision route.
- ✓ Record the rationale, any conditions and next steps.

Plan the transition early:

- ✓ Agree communication with staff, pupils, families and partners.
- ✓ Arrange handover, access to key information and early relationship-building.
- ✓ Set an induction plan linked to school priorities and development needs.
- ✓ Clarify governors' roles in support, challenge, performance management and wellbeing.

Four Questions to Take Back

- 💡 What does our school need from its next headteacher?
- 💡 Are we clear about our role, authority and decision-making route?
- 💡 How will we make the process fair, evidence-based and safeguarding-focused?
- 💡 What support and expertise do we need to run it well?

Write down one action you will take or one question you will ask your board.

Recruit for the school's next chapter
- not simply to replace the person who is leaving.

Governor Accredited Programme 2026-27

Delivered by Matt Miller MBE



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06/10 - Module 1: Roles and Responsibilities of Governors - “Knowing my school”

10/11 - Module 2: How data supports school improvement and self-evaluation in schools - “What governors need to know and why”

09/12 - Module 3: Safeguarding - ‘Understanding and promoting a culture of vigilance’

02/02 - Module 4: Enabling equality, diversity and inclusion: ‘A fairer system for all’

02/03 - Module 5: Building relationships: ‘Managing conflict and the art of challenge’

25/03 - Module 6: Preparing for Ofsted - ‘How to demonstrate impact of governance to inspectors’

CLOSE

Thank you for attending our
Governors' Conference 2026

Share your thoughts:

