

## Account of practice:

### Middle leadership and budget management

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Helen Bingham, Early Years and Key Stage 1 Leader, Sandy Hill Academy, Cornwall

The account illustrates how, as a new middle leader in a primary academy, Helen Bingham developed appropriate management skills to work within the academy's policies. In particular, it explores how Helen manages staff performance and professional development and how she considers the financial implications of the requests and decisions she makes.

Sandy Hill is a primary academy in Cornwall, with just over 300 pupils in classes from Early Years to Year 6. The number of pupils eligible for free school meals is below the national average. Helen has taught at Sandy Hill for over 10 years, starting out as a class teacher. She became Early Years and Key Stage 1 Leader in November 2010. When Helen took up her new post, improving and developing Early Years practice was a priority in the school action plan. She explains:

Early Years is very much about the free flow between the inside and outside area and child-initiated learning. That wasn't happening before I became the leader.

Initially, in terms of implementing school priorities and leading change, Helen found that being promoted to a middle leadership position from within the school, rather than being an external appointment, caused her some difficulties:

When staff have been here for some time, they don't necessarily see you as a leader, so my biggest challenge has been growing into the role rather than being taken on in that role.

After a year in post, Helen feels that she is firmly established as team leader and is in a position to move Early Years provision forward in line with the school action plan. She achieved this through:

- having the support of the headteacher, who has always referred staff to Helen if they approached the head on matters that were part of Helen's new responsibilities
- being seen to lead on new initiatives
- taking responsibility for carrying out performance reviews with members of her team
- identifying and meeting staff training needs

### Essential skills for middle leaders

Helen identifies the following as essential skills for a middle leader if school priorities are to be implemented in a team.

#### Effective communication

Helen emphasises the importance of bringing her team together to share her vision, and to explain and discuss the rationale for change:

Since I've been Early Years leader, I've introduced staff meetings for the Early Years team because on our school site, the nursery is on one side of the school and reception [class] is on the other, and yet we all need to share the same values, visions and goals. Some people really embrace change; others take a bit of convincing that change can be a good thing. So, I think that the biggest challenge for a new leader is showing that the change is for a reason and it's going to have a good effect.

Team meetings are also used to disseminate good practice.

Helen feels that, as a middle leader, it is important to be approachable so that members of the team feel able to come and discuss any issues. However, she is unafraid to challenge poor practice directly:

I make time to tell staff what I'm going to speak to them about so that they don't worry. And then I will have an open conversation about the issue and see what the best way forward is and what other help they might need.

## Identifying training needs

Through the academy's performance review system, staff skills are audited each year to ensure that they have the necessary knowledge and skills to play a full part in the implementation of new initiatives. Training or support is provided, where necessary, funded through the academy's continuing professional development (CPD) budget. Helen is responsible for the performance reviews of staff in her team and for identifying their training needs.

## Meeting training needs

In addition to specifying CPD to meet needs arising from individual performance reviews, every half-term Helen also organises a training session focused on issues that are specific to her team. When planning CPD for individuals or for the team as a whole, Helen's first priority is to identify CPD activities that will be most effective and that will deliver the best outcomes for pupils: "It depends what will deliver the best outcomes. At the end of the day we want an outstanding teaching environment," she explains.

## Evaluating the effectiveness of training

Helen monitors improvements in practice and tracks progress towards CPD targets through lesson observations and scrutinising pupils' work. She adds: "Are you seeing improvements? Are levels rising? Is children's behaviour improving? If it's not working effectively, why not?"

## Working within a budget

Although Helen contributes to the overall action plan for the academy and helps to determine priorities, she is not involved in any discussions about the extent of the academy budget, nor how it is allocated to support whole-school priorities. Like other staff, she receives her class allocation and is responsible for spending that. Whenever she needs anything outside the class budget, she has to approach the headteacher. Helen is not fazed by this, however: "I'm never shy of asking for it! I have the attitude, if you don't ask then you don't get. They can always say 'no'".

The CPD budget is administered by the headteacher. Helen has no specific team allocation and must request the resources she requires. Cost-effectiveness is an important consideration. For example, rather than sending staff on expensive training courses, Helen often draws upon in-house experts to lead staff training. As well as being less expensive, Helen feels that such training helps strengthen her team:

We don't always go for external training. Sometimes, for example, I'll provide the training or we do paired work where we have a buddy that we observe, or we might visit another school. This kind of training has been really, really vital in bringing the team together.

Similarly, where Helen's informal monitoring of practice within the team indicates that only particular members of staff will benefit from training, she targets resources:

Some of my [teaching assistants] this year have struggled with behaviour management, so we provided training for some on that. Not for everybody, because it was a priority for the nursery rather than reception and not everybody there needed it and so that wouldn't be cost-effective.

Despite having no strategic involvement with the overall budget for the academy, as a middle leader, Helen has been responsible for some major projects with significant budgetary implications. In these cases, either Helen was given a budget and asked to bring the project in within it, or she was given no indication of the funds available but instead asked to cost what was needed to give best value for money and then to present the costs to the senior leadership team for approval. She explains how this works:

About three years ago, we developed the reception [class] and I had £30,000 to spend then but, normally, we don't get a set budget for each area. So, if I'd like to spend some money on developing, say, the inside and outside areas of the nursery, I'll draw up a plan and cost it and I'll go to the head and say to her, 'This is what I'd like to do. These are the reasons and outcomes I expect from doing that and this is how much it will cost,' and then she makes the decision about whether to proceed.

Helen takes her responsibilities for obtaining best value for the academy's money very seriously. For example, for her latest proposal to develop the inside and outside areas for the nursery, Helen:

- visited other schools with the Early Years governor to compare nursery provision, consider possibilities and decide on what would be best for the academy
- discussed options with her team and, supported some members to understand why change was necessary:  
It's really hard when people say, 'Oh, well, we don't do it like that here'. I really had to push for this and show examples of other nurseries doing it and the impact it had for pupils. And it really was me supporting everybody to understand the reasons and the importance of the change until they were all on board.
- contacted companies to ask for quotes and selected those that gave best value
- liaised with the academy's business manager to obtain quotes for structural elements, such as flooring, decorating and so on
- put a case to the headteacher, justifying the choices made both in educational terms and in terms of value for money

Helen first recognised the importance of understanding a school's budget when she completed the Middle Leadership Development Programme with the National College:

As part of the course, we went to another school and looked at its budget and that was really interesting. I think every teacher should know how the budget works and how spending is justified. It would help them to understand, maybe, why they can't have a new teaching assistant or a particular resource.

So far, none of Helen's requests has been turned down on budgetary grounds, but the absence of an Early Years funding allocation reduces the amount of control that she feels she has as a middle leader. She is keen to get more involved:

I'd like to be involved with discussions about the academy's budget and I think that probably will come, but at the moment it's just been so busy, and because we've only been an academy for just over a year, things have been changing quite quickly.