

# North Lanarkshire Council

## Report

### Education and Families Committee

approval  noting

Ref AM/JP

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### Developing Executive Headships

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#### Executive Summary

This paper proposes a systematic approach is taken to implementing Executive Headship arrangements across North Lanarkshire Council schools. It outlines the principles that would govern the roll out of Executive Headship, including the business case that would support such decisions by the Senior Leadership Team in Education and Families.

This work is designed to strengthen pathways to and through headship and overall, to strengthen leadership and management in schools. The piece of work connects to the other report being presented to Committee on *Empowering Clusters to Achieve Change*.

This piece of work is being brought forward in context of the longer term ambitions expressed in the Plan for North Lanarkshire and the Community Investment Fund, which drives towards more integrated establishments within Town and Community Hubs. It is therefore an important step towards such models.

The development of Executive Headships is the route to achieve an agreed saving of £438,000, relating to what was termed in the budget process, *Management Models for Future Campuses*, scheduled to be implemented by August 2020 – 2021.

The development of Executive Headships draws on lessons learned during the COVID19 emergency phase, where head teachers have collaborated to operate Community Hubs.

#### Recommendations

It is recommended the Education and Families Committee :

1. Note the content of this report, which aligns to the budget decision to review *Management Models for Future Campuses*;
2. Approve the proposed models of Executive Headship as described in Section 2;
3. Approve that a planning process will take place to identify establishments that should align within future Executive Headships; and
4. Approve that further consultation takes place with stakeholders on the future development of Executive Headships in North Lanarkshire.

#### The Plan for North Lanarkshire

Priority Enhance participation, capacity, and empowerment across our communities

Ambition statement (7) Enhance collaborative working to maximise support and ensure all our children and young people are included, supported, and safe

## 1.0 Background

1.1 North Lanarkshire Council currently operates three shared headship arrangements in place within the Primary and Additional Support Needs Sector:

**1) Banton Primary School & Chapelgreen Primary School**

(Permanent Shared Headship since 2015)

**2) Carnbroe Primary School & Sikeside Primary School**

(Temporary Acting Shared Headship from January 2018 until the new build is finalised)

**3) Fallside/Portland/Willowbank Schools**

(Permanent Shared Headship since August 2018 as part of Special Management Restructure)

1.2 Education and Families have introduced two additional shared headships, initially on a temporary basis, this session. These both develop the proposed future model and strengthen practice in relation to recommendations of the ASN review:

**1) Clydeview School and St Bernadette's Primary School**

(Acting Shared Headship with a DHT in each school since March 2020)

**2) Redburn School and Mavisbank School**

(Acting Shared Headship since March 2020)

Importantly, these arrangements have been put in place to ensure that there is sustainable leadership in place in ASN schools which are affected by long term absence, or in which there have been challenges with recruitment.

These two examples have operated as test of change models for the principles and change models established in the main report of this paper. This includes revision on a temporary basis of the overall management structures of these establishments.

1.3 As part of the budget planning for 2021 – 2022, which has been agreed on an indicative basis, work is being progressed to enable a more systematic and planned approach to Executive Headship be adopted, based on clear principles and on a much greater scale than was previously done. This included a planned saving around management structures for future campuses, which had a value of £438,000 to be delivered in that financial year.

1.4 One of the key drivers for future Executive Headship models is to strengthen leadership pathways, especially for those aspiring to be head teachers (by creating more DHT posts) and those in headships already who aspire to take on wider responsibilities. All of this is further supported by strengthened leadership development programmes which have been reworked in 2020 by colleagues in Education and Families and the Talent and Organisational Development team.

- 1.5 The overall approach to leadership pathways was signposted to the Education and Families Committee in February 2019, as part of a report on the creation of a plan for the new Directorate, which established a number of clear principles for future activity, including one which stated an intention to, 'create leaders who oversee complex establishments and services'.
  - 1.6 Lastly, in the Plan for North Lanarkshire briefing sessions which have been delivered to over 2000 staff between August 2019 and February 2020 there was a clear understanding given that the future of school management was to be organised on the basis of town and community hubs, with integrated campuses inherent in this. Management models for future campuses, including Executive Headships, as described in the following report, are therefore required.
  - 1.7 In the Policy and Strategy Committee of March 2019, the Council reaffirmed its commitment to the Community Investment Fund and to more integrated service delivery within town and community hubs. The realignment of management models on the basis described in Section 2 services this requirement.
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## **2.0 Report**

### **Developing Leadership**

- 2.1 A key driver for Executive Headship is to develop and strengthen leadership and management in schools. This is the most important factor in school improvement and in ensuring all young people in North Lanarkshire achieve to their full potential.
  - 2.1.1 Previous savings in primary management structures have reduced the numbers of Depute Head Teacher posts and, as a consequence, the leadership pathway to headship is a more complex one to navigate. Whilst there is a career structure in place, the flattened hierarchy in primary means the jump from Principal Teacher to headship is challenging for many to make. As a consequence, there are fewer candidates coming forward for headship. In two key recruitment processes for large and attractive schools in North Lanarkshire recently, there were only two candidates.
  - 2.1.2 Additionally, many experienced primary head teachers are capable of taking on a greater level of challenge. There can be a ceiling placed on the careers of such colleagues, many of whom are capable of running more complex organisations and coping with a wider range of challenges.
  - 2.1.3 Any planned revision of management structures in primary needs to ensure that the pathway to headship and through headship is strengthened. Therefore, what is proposed in the remainder of this paper is, in effect, a strengthened career pathway for current and future school leaders.

### **Developing Executive Headship Models**

- 2.2 The permanently established shared headship models that exist in a number of schools in North Lanarkshire predate the Plan for North Lanarkshire and its broad vision for improvement. These are single models, which are relatively simple in nature and scope. They have tended to be implemented in situations where

recruitment has proved difficult. They have simply reduced head teachers, without adding in Depute Head Teacher capacity. However, they create a policy context in which future models for Executive Headship can evolve further.

- 2.2.1 The term Executive Headship is used as an ‘umbrella term’ to cover a range of complex management models which could apply across a range of establishments. Evolving a strategy to expand Executive Headships at scale, involves them being seen as an attractive model for school leaders, with significant opportunity and kudos.
- 2.2.2 Executive Headship models need to take account of the management structures of the schools which would become associated with one another within an Executive Headship arrangement. The proposal is that rather than two schools with Heads and Principal Teachers, there would be more Executive Head arrangements with a single Heads and more Depute Heads, with an overall increase in management capacity, whilst achieving a saving.

### **Exemplar One: Smaller Schools with Roll up to 299**

Schools with rolls up to 199 pupils are entitled to 1xHT and 1xPT. The management entitlement based on a school roll of up to 299 pupils is 1xHT and 2xPT.

In this exemplar, School A (roll of 62) and School B (roll of 62) are brought within a shared headship equating to a roll of 124. Based on the proposal to allocate a DHT post as part of the shared headship arrangement, could be as follows:

	A	B	New Shared Head Structure
HT	1.00	1.00	1.00
DHT	0.00	0.00	1.00
PT	1.00	1.00	2.00

### **Exemplar Two: Larger Schools with Roll in Excess of 299**

Schools with roles between 200 and 299 have a management entitlement of 1xHT and 1xPT. Schools with rolls in excess of 299 have a management entitlement of 1 x HT, 1xDHT and 1xPT.

School C has a roll of 245 and School D has a roll of 303. A shared headship arrangement could operate as follows:

	C	D	New Shared Head Structure
HT	1.00	1.00	1.00
DHT	0.00	1.00	2.00
PT	2.00	1.00	3.00

**Importantly, such modelling would underpin consultation with trade unions and head teachers, as well as inform future savings planning. Models may flex following this process.**

- 2.2.3 'Try before you buy' arrangements should initially be put in place to allow head teachers to build the confidence of communities that they may have to engage with. This would be the case in circumstances where a head teacher of one school is asked to initially act as Executive Head in that school, plus another. Public reassurance is an important step to establishing new models and building trust and confidence among stakeholders.
- 2.2.4 Executive Headship also needs to work to mutually reinforce the other Directorate policy of strengthening cluster working and the collaboration of schools in localities. Therefore, where possible, Executive Headships will be arranged on a cluster basis, and will involve geographical proximity where they do not.
- 2.2.5 Executive Headship will respect the legislation of the 1918 Education Act, which established Catholic schools within the state sector in Scotland and that such schools would be led by Roman Catholic Head Teachers with church approval. Consultation with the relevant Diocesan representatives will be part of the process of establishing future Executive Headship models, where required, as per existing arrangements.

### **Executive Headship in Campuses / Hubs**

- 2.3 There is a unique opportunity at present, created by the policy evolution of the Community Investment Fund, to reconsider current school and centre management arrangements, where there is more than one council entity within a campus complex.
  - 2.3.1 North Lanarkshire Council has a number of existing campuses with a range of facilities collocated within them. These will be reviewed as a priority and, where appropriate, planning will be put in place to establish a Campus Executive Head, who can drive forward improvements relating to how the campus as a whole meets the needs of its surrounding community.
  - 2.3.2 The current operating models for campuses have some strengths in ensuring that the schools and centres within them are managed effectively. However, such models do not necessarily encourage the integrated planning and thinking that are at the heart of the Plan for North Lanarkshire.
  - 2.3.3 Although there has been some good practice in integrating activities within campuses, with clear examples of coordination with partners taking place, too often establishments in campuses have remained relative silos. By decluttering existing arrangements, it is intended to strengthen the lines of responsibility and put the needs of communities at the heart of our planning for the future, as well as to bring collocated establishments into greater alignment.
  - 2.3.4 Work is being brought forward in Education and Families to develop new operating models for the campuses envisaged in the Community Investment Fund. However, Campus Executive Heads are an important step in the right direction.
  - 2.3.5 In the COVID19 emergency period, Education and Families staff, in partnership with other council teams and services have made significant strides to develop and test Community Hub management models, which help to create a template for future activity and also to build confidence in the professions which have contributed to their success.

## **Recapping the Principles**

2.4 When determining the specific arrangements for Executive Headships in North Lanarkshire Council schools in future, clear principles, in order of priority should be applied. These are described in this section.

### **2.4.1 A Community Case**

There should be alignment of schools within clusters as far as possible, or at least on the basis of geographical proximity, to allow head teachers to provide a real and visible presence in affected schools and build community relationships.

### **2.4.2 An Improvement Case**

The opportunity should strengthen overall the leadership of the schools involved and realise important benefits from allowing practitioners in schools to work more collaboratively with a wider group of colleagues, as part of an enhanced staff team.

### **2.4.3 A Leadership Case**

There should be resultant leadership and management development opportunities for leaders and aspiring leaders of our schools, with natural opportunities created to realise and recognise their strengths.

### **2.4.4 A Business Case**

There should be a clear business case for each model developed so as to make a contribution to the overall financial burden faced by North Lanarkshire Council. This involves quantifying the saving inherent in each model and how far they enable the achievement of the target saving of £438,000 in 2021 - 2022.

### **2.4.5 A Service Change Case**

There should be an opportunity in all of these models to devolve increased powers and responsibilities to Executive Heads, so as to realise the ambitions of the Plan for North Lanarkshire. This might include the realisation of other Council priorities within that plan. Future policies, such as the Review of the Devolved School Management Scheme, should align to any such developments.

## **Consultation with Stakeholders**

2.5 It should be noted that all options will be fully considered from a locality perspective, encompassing the planning for children, families and communities, in terms of fit for purpose models and suitability in practice.

2.5.1 Where models are deployed they should align to council priorities and should enable the principles established in this paper to be realised. This will be used to determine the most viable options to progress.

2.5.2 The next steps in consultation will be to:

- Explore further the proposals in this paper with trade unions and other stakeholder groups
- Plan an Outline Model for the Future of Executive Headship in North Lanarkshire, based on the Community Investment Fund Logic model and wider Council planning
- Accelerate this model where possible, through testing arrangements where circumstances permit, and where opportunities arise, so as to enable effective succession planning for schools.

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### **3. Equality and Diversity**

3.1 There are no actions required per the Fairer Scotland duties in the report.

#### **3.2 Equality Impact Assessment**

An Equality Impact Assessment has been started and will be reviewed dependent on developments.

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### **4. Implications**

#### **4.1 Financial Impact**

4.1.2 During the recent Council budget setting process a savings proposal of £0.438m in relation to Management Models for Future Campuses was agreed and is scheduled for implementation from August 2021. The actions outlined above details how this saving will be implemented across a number of management models. The savings value will be tracked through to full implementation and updates will be provided in future monitoring reports. It is recognised that a number of staff could leave the service under early retirement arrangements. These costs have been included in the Council's Change Management planning.

4.1.3 The saving linked to each Executive Headship model would be determined by the precise make-up of each management team. The financial information linked to each of these models will be updated on a case by case basis.

#### **4.2 HR/Policy/Legislative Impact**

4.2.1 Management Circular F20 and Agreed Procedures for the Redeployment of Promoted Teaching Staff will be relied upon to facilitate the implementation of Executive Headship models.

4.2.2 The Premature Retirement Scheme will be available to support the early release of affected surplus staff members, subject to associated costs.

4.2.3 The application of the national job sizing toolkit for all associated promoted posts will be used to ascertain the financial cost to the promoted post structure. The outcome of this activity will not be known until a full appreciation of contributing factors are determined, such as whole school data and the number of associated establishments, all of which influence job sizing outcomes.

4.2.4 A bespoke training and development programme for all promoted post holders requires to be developed to ensure new ways of working, systems and culture is established. The Talent and Organisational Development Team will be relied upon to work in partnership with the Education & Families Service in this regard.

#### 4.3 Environmental Impact

There are no specific environmental impacts.

#### 4.4 Risk Impact

The Service has undertaken a detailed assessment of risks and issues linked to this project. Regular reports on project risks and mitigation will be presented to future Project Boards.

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### 5. Measures of success

5.1 Successful implementation of the revised management model for future campuses.

5.2 Newly developed career pathways for head teachers to include executive headships.

5.3 Greater alignment with Plan for North Lanarkshire community hub model.

5.4 Achievement of budget savings target in line with approved budget savings agreed by Council, March 2020.

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### 6. Supporting documents



**Anne Munro**

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