



Department
for Education

Exploring flexible working practice in schools

Pilot school summaries – November 2020

CooperGibson Research



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Introduction

The Department for Education (DfE) has committed to promoting flexible working with schools. Following the DfE flexible working summit in October 2017, the DfE made a public commitment to ‘carry out research looking at changing recruitment practices in schools, to inform our guidance about how schools can introduce flexible working’. The [Teacher Recruitment and Retention Strategy](#) (January, 2019) reinforced the DfE’s commitment to support schools to implement flexible working. Amongst other initiatives, the strategy stated a commitment to further research to support schools to implement flexible working.

Taking forward their commitment, the DfE commissioned CooperGibson Research (CGR) to gather evidence on the experiences of flexible working in schools and ways in which these practices may be supported. The outputs of this research are summarised below with links to relevant reports.

Overview of the research

The research study aimed to:

1. Fill gaps in evidence on flexible working practices in schools, including attitudes and perceptions towards flexible working among teachers and senior leaders, and gather information on good practice.
2. Build on existing practice and knowledge emerging from the research to pilot approaches to flexible working with a small number of schools.

It encompassed several stages of quantitative and qualitative data collection:

- A review of literature to identify existing evidence on flexible working practice in schools and from comparable sectors, in England and internationally. For the published literature review, see: CGR (2018), [Flexible working practice in schools: literature review](#), DfE.
- An online survey of 2,896 senior leaders and teachers, to understand existing approaches to flexible working practice in schools, perceptions and experiences of flexible working. For the survey findings report, see: CGR (2019), [Exploring flexible working practice in schools: Interim report](#), DfE.
- In-depth interviews with 50 teachers and leaders to explore current flexible working practices in relation to school context in greater depth. For the published report, see CGR (2020) [Exploring flexible working practice in schools: final report](#), DfE.

- A pilot of flexible working practices with six schools to trial approaches to designing and implementing, or promoting flexible working practice in school. The pilot culminated in six pilot school summaries, which are the focus of this document.

The pilot of flexible working in schools

The pilot took place between March and October 2019. Six schools were selected from those who completed the preceding online survey and indicated that they would be willing to participate in a trial of flexible working practices. The schools were selected on the basis of including a mixture of phase, type of school, different contexts and locations. In addition, schools were selected where they had identified either an interest in developing their flexible working practice, challenges and issues that they would like help with, and/or where they had identified some forms of flexible working that they would be willing to trial.¹

The six participating schools were offered a package of support, including human resources (HR) and education consultants who worked with the schools to explore flexible working options, and relevant challenges and solutions. Together, the schools and consultants formed action plans and support was provided to the schools throughout the duration of the pilot.

To provide evidence, school staff took part in depth interviews at the outset to explore existing approaches to flexible working in their school, aspirations for introducing flexible working practices, and key challenges and support required. End of pilot interviews also took place to gather evidence on the impact of any activity and changes that had taken place, including what worked well and less well, key successes and challenges, and lessons learned.

Feedback gathered during the interviews with pilot schools was synthesised with the broader telephone interviews conducted with 50 schools. This was included in the final report and covers themes such as approaches to flexible working, how flexible working is implemented in schools, and the benefits and challenges of doing so.

Summaries of flexible working practice in pilot schools

The focus of the pilot was to explore what steps schools can take to effectively embed flexible working procedures, and design and prepare for the implementation of flexible working roles. As such, the pilot focused on preparing schools for introducing flexible

¹ For further details of the schools involved, see CGR (2020) [Exploring flexible working practice in schools: final report](#). DfE, p.18.

working arrangements, and introducing or trialling arrangements where this was appropriate (for example, where the schools had some flexible working requests already in place). In some cases, the schools did not have any current flexible working requests to manage, but did have challenges they needed to address. This included forthcoming multiple requests for flexible working, job shares that were not successful, and lack of awareness and understanding among staff of the processes in making or considering a request.

Out of this pilot, six school summaries were developed, and this document presents these summaries. Each describes what steps were taken by the participating schools to enable flexible working to take place, and the experiences of those involved. In doing so, they provide examples of how flexible working can operate within different school contexts, including at senior levels. They also show what overarching approaches can be taken to address key challenges, and highlight early outcomes and benefits of the changes that have taken place within the schools. As such, they may serve as examples of practice for other schools to consider.

Resources for schools (developed through the pilot)

During the pilot, schools expressed a need for additional materials to inform their understanding of how to introduce flexible working, formalise procedures, communicate their approach to flexible working to their workforce, and key considerations for certain types of flexible working. As a result, a set of materials were produced by CGR with help from HC Associates (human resources (HR)) specialists and Waterman Learning (education consultants), in liaison with the DfE.

Some of these resources are referenced in the following summaries. The three core resources are included as an appendix document alongside the final research report and this summary report, to serve as a reference point for readers. The schools participating in the pilot also felt that these materials might be useful for other schools to access and use. The resources are therefore presented as example templates that schools may wish to adapt and use to suit their needs.² Please note that these are pilot resources and not official DfE resources. The DfE's official guidance and resources on flexible working can be found [here](#).

² See CGR (2020) [Exploring flexible working practice in schools: research appendix - Example resources for pilot schools](#). DfE. This includes three template documents produced for schools during the pilot.

School summary 1: Laying the foundations for a flexible working culture

Summary

Traditionally, a primary school headteacher had dealt with flexible working requests on a case-by-case basis. Although this had enabled them to respond to each individual's personal set of circumstances, they felt that that this approach had created inconsistency across the workforce. A new flexible working policy was developed and presented at staff briefing sessions at the beginning of the new academic year, allowing staff to clarify their understanding of the procedure and key considerations when making a request. This helped to formalise processes and offered a means to create a culture of transparency towards flexible working, addressing misconceptions and embedding structured and sustainable ways of working going forward.

School context

A large local authority maintained primary school in an urban area, employed a relatively young cohort of teachers, including several early in their careers, and was rated 'Good' by Ofsted. Several members of staff began working flexibly (prior to and during the pilot period) and the headteacher anticipated receiving further requests throughout the year as part of restructuring. Although there was a formal flexible working policy in place, it was not clear how aware staff were of this process and how to manage arrangements so that they were sustainable.

Focus of the pilot

The headteacher was supportive of the idea of flexible working but wanted to develop clearer awareness across the school in terms of what 'flexible working' meant in practice: *'[Staff] don't naturally come forward with flexible working as a proposal. If someone said "part-time" to them, they would [understand what that looked like]. If you said "flexible working", they wouldn't'*. As requests were dealt with on a case-by-case basis, it was important to ensure that the formal process of requesting and working flexibly was better understood by all.

The challenges of flexible working

The headteacher felt that the flexible arrangements in school were working well but said *'when other strains are put on the system, that is when we feel it'*. For example, the headteacher was very happy with a member of the school business support team working compressed hours, but when this member of staff required time off for other commitments it put further pressure on the school. More broadly, at the time of the pilot, the school was anticipating further flexible working requests, but felt they needed to formalise processes first to ensure arrangements could be embedded sustainably. The headteacher said, *'In a school of this size, and with the number of high needs students we have, we have to be confident that we can continue to provide a safe environment and a quality education'*. They regarded managing this as *'being flexible both ways'*; with full-time staff being willing to support their colleagues when needed and vice versa, which required a formal process that was understood by all staff.

Developing flexible working practices

During the pilot, the school was supported to devise a new and bespoke flexible working policy, and a formal form for staff to complete when requesting a change in working patterns. As well as setting out the practical procedures involved in making a request, the policy and associated paperwork explained the reasons why someone might request flexible working, and the considerations that go into making it work. This included those making a request considering the implications for colleagues and the school, and suggesting potential solutions where responsibilities may need to be covered by others. The document was circulated to staff and mentioned in staff briefings to raise awareness across the workforce.

In addition, probationary periods and regular reviews were built into new flexible working contracts. This enabled the headteacher to continue to support the staff whilst also managing the needs of the school and ensuring some sustainability in capacity. A job share toolkit was also created which outlined the benefits of job sharing, the potential risks and how to mitigate against them. It provided a bank of useful questions to consult when considering how a job share will work and made recommendations about handover processes and review periods.³

Outcomes and impact

- **Supporting strategic reviews:** Considering options for flexible working was part of a wider process of staff restructure and review, which included realigning roles

³ This job share toolkit is available at: CGR (2020) [Exploring flexible working practice in schools: research appendix - Example resources for pilot schools](#). DfE.

and responsibilities to reflect the current context of the school. By adding probationary periods to all new flexible working arrangements, the headteacher could review *'and check in with people to make sure that it is still working [for them and the school]'*. This was felt to be easier from a management perspective, especially when trialling innovative approaches (such as a pastoral lead working nine in every ten days and alternating their day off each fortnight).

- **Raising staff awareness:** By educating staff about the types of flexible working possible, this was felt to be a positive step towards creating a culture based upon clarity and transparency. Staff working flexibly also began to show a clearer understanding of the reasons for the introduction of a new flexible working policy, particularly in relation to being flexible in their own flexible working. One commented, *'I am mindful of the balance that has to be struck between my needs and those of the school'*.
- **Promoting wellbeing:** Those working with flexible arrangements felt that they were able to use their time more efficiently. When reflecting on working compressed hours, one member of staff said that the arrangement made a considerable difference: *'I get so much done because I am in early, before most people arrive'*. Another part-time member of the senior leadership team (SLT) had wanted to achieve *'a healthy work/life balance'*, which flexible working enabled them to do.

School summary 2: Reducing a headteacher's working hours

Summary

The headteacher of a small primary school was very supportive of flexible working, granting a number of part-time and job share roles. The headteacher felt that they would like to work part-time as they saw this as an opportunity to improve their work/life balance, whilst upskilling the deputy headteacher by sharing some leadership responsibility with them. Being part of a network of schools and sharing leadership with one deputy headteacher across different schools had created challenges in finding time for strategic planning, which had to be considered as a part of the flexible working changes. The schools therefore worked through a series of contractual and operational considerations to find a solution that suited the needs of all.

School context

This school, part of a network of small rural primary schools, was rated 'Outstanding' by Ofsted and already had several flexible working arrangements in place (such as homeworking, part-time and job share). The schools shared one headteacher and one teaching deputy headteacher, who each spent the week sharing their time between the school sites. The headteacher sought to work flexibly in order to improve their work/life balance. In order to achieve this effectively, a clear strategy needed to be agreed with the deputy headteacher, and implemented and communicated to the wider school.

Focus of the pilot

The headteacher wanted to reduce their post to four days per week, with the deputy headteacher reducing their teaching and planning, preparation and assessment (PPA) cover commitments to take on more leadership responsibility instead. The contractual and logistical implications of the deputy headteacher dropping their teaching workload required careful consideration and support. In addition, the school did not have a flexible working or job share policy in place and, therefore, processes needed to be formalised.

The challenges of flexible working

It was necessary to review contractual arrangements, to ensure that all changes followed the appropriate legal processes. Teachers' pay and conditions and staffing regulations required detailed review, along with close liaison with the Trustees of the school network

to ensure that the business case for the change was clear.⁴ The headteacher also had concerns regarding the budgetary implications of the changes, as the saving from the headteacher's reduced salary would be offset by the increase in the deputy headteacher's salary plus the cost of covering the deputy headteacher's teaching and PPA cover across the schools. As this was a small number of hours to cover, it was challenging to see how an additional teacher would fit into the team for one day per week. The reduction in salary for the headteacher also needed their personal consideration and was an ongoing concern, in terms of how this would impact domestic finances and their final salary pension. Other forms of flexible working were considered, such as homeworking, but the headteacher felt that working part-time would provide a non-working day which suited their needs better and would improve their work/life balance.

Developing flexible working practices

At the start of the pilot, the proposed arrangement had not been discussed with the deputy headteacher. Following the first meeting to plan the pilot, and a discussion between both parties, they both became on board with the proposal. They achieved this by discussing the implications of the proposed arrangement, particularly for the deputy headteacher. This included consideration of the impact of potential additional leadership duties, the need to reduce teaching and/or cover responsibilities to compensate and manage workload, and the opportunities presented for the deputy headteacher to work at a higher level and be more involved with whole school planning. Through the support of a human resources (HR) consultant provided during the pilot, they discussed and agreed: the contractual changes required, whether the deputy would become acting headteacher or headteacher, and whether there would be any concerns raised over the fact that the part-time headship had not been advertised as per staffing regulations advice.

The headteacher was provided with an Excel spreadsheet from the HR consultant with a model to calculate salary variances caused by the changes in hours for the deputy headteacher, and teaching or support staff who would take over the deputy headteacher's teaching and PPA cover responsibilities. The deputy headteacher was appointed as acting headteacher from the start of the academic year, one day per week for a temporary one-year arrangement. It was agreed the headteacher would maintain primary control and responsibility. The changes in working arrangements were aligned with the start of the academic year to minimise disruption to the timetable, staffs' existing

⁴ With the complexities of the headteacher and deputy headteacher managing several schools in the network, which had different designations (e.g. voluntary controlled/voluntary aided), it was important to understand the legal position and freedoms of the governors in terms of not advertising the one day per week headteacher vacancy. The root of the legislation is explained in the [School Teachers' Pay and Conditions Document](#) (2019), the [School Staffing \(England\) Regulations 2009](#) and [Staffing and employment: advice for schools](#) (DfE, 2018). The Governing Body is required to consider whether good business reasons exist to justify not advertising a vacancy.

responsibilities, and to pupils. The arrangement was to be reviewed at the conclusion of the trial. The headteacher and deputy headteacher both received written confirmation of the change to their contracts.

The intended changes were communicated to senior staff in each school via existing meetings. Assistant headteachers then disseminated this to all staff in their schools. The headteacher notified parents/carers by adding detail of the expected change into their welcome letter; *'I said there will be an adjustment to leadership and explained in a professional way of how we were increasing the deputy headteacher's capacity so they could see there would be no detriment to the schools.'* The headteacher noted that they had not received any negative comments or concerns from staff or parents/carers regarding their reduced working hours. They felt that the structure of the network and sharing of the two senior leaders across schools had enabled their change in working hours because staff, parents/carers and pupils were already used to the headteacher and deputy headteacher not being in school every day.

Across the network of schools, the deputy headteacher's teaching hours and PPA cover time were covered in a range of ways. This included a part-time teacher agreeing to increase their hours, a higher-level teaching assistant (TA) leading PPA sessions, and a supply teacher covering PPA on a fixed-term basis during the trial.

They planned to trial the arrangement for one year. Governors were keen to review the arrangement as part of headteacher's performance management review. It was important for all involved to ensure that time was given to considering how well the trial had gone once it concluded.

During the pilot, the school network was also provided with guidance documents for 'managing job shares' and 'dealing with flexible working requests' to raise broader awareness of flexible working procedure across the network.⁵

Outcomes and impact

- **Better teamworking:** Both senior leaders commented that they had more time for strategic planning; *'Now, at least once a week, we can be in the same school. We have realised that is important. We are meeting and talking and not working in isolation. [Other members of the SLT] like that we are being more strategic'*.
- **Succession planning:** The deputy headteacher had gained experience by attending meetings and managing situations that would otherwise fall to the

⁵ These resources are available via: CGR (2020) [Exploring flexible working practice in schools: research appendix - Example resources for pilot schools](#). DfE.

headteacher. They were gaining experience which would be useful if they were to consider a headship in the future. The deputy headteacher reported feeling more responsible for the running of the school, whilst the headteacher reported an improved work/life balance.

- **Increased visibility:** As the two leaders held meetings or carried out joint work at specific school sites, staff reported that they saw the leadership team more. However, some administrative staff found it more difficult to accept the new arrangements, where they needed to work with both senior leaders. The headteacher felt that, on reflection, plans for the new arrangements could have been shared with key administrative staff at an earlier stage.

School summary 3: Managing flexible working in a special school

Summary

Senior leaders of a special school wanted to explore opportunities for improving the work/life balance of their staff through flexible working practices. This led to a strategic review of all aspects of school life, including formalising policies for flexible working, reallocating teachers' working hours, redesigning the school timetable, and reviewing the roles and responsibilities of the wider workforce.

School context

A large special academy in an urban location, was part of a Multi-Academy Trust (MAT). Rated 'Good' by Ofsted, the school was providing education for pupils with complex medical and physical needs. Due to the context of the school and the needs of its pupils, staff typically worked very long hours, including late into the evenings and during weekends. As a result, the most common flexible working request was from teachers who wished to leave earlier or start later. Therefore, the senior leadership team (SLT) were keen to look at ways to encourage a better work/life balance across the workforce.

Focus of the pilot

At the start of the pilot, there was no formal flexible working policy in place at the school or across the Trust more widely. Occasional flexible working requests had been made and agreed informally. A recently introduced policy on extraneous leave⁶ had resulted in a reduction in the staff sickness absence rate. This prompted senior leaders to review other policies to clarify teacher working hours, arrangements for job sharing and dealing with flexible working requests. Members of the SLT were keen to look at options to encourage a better work/life balance.

The challenges of flexible working

The key challenge for this school resulted from the long working hours culture which led to teachers regularly remaining on-site late. Teachers were expected to deal with all aspects of the pupils' care and education, including greeting them from transport in the morning and discharging them at the end of the school day. Thus, if staff requested

⁶ Leave of absence for reasons other than personal illness.

flexible working to enable them to drop their own children off at school, or to leave early to collect them, this was often difficult to accommodate. During the pilot, it was identified that teachers were working longer than their directed hours.⁷

Developing flexible working practices

A human resources (HR) adviser⁸ worked with the school to examine the way in which directed time was allocated. On review of job descriptions, it was agreed that teaching assistants (TAs) were already working to job descriptions and grades that gave them responsibility for the 'care aspects' of the pupils' day, and so it was decided that TAs could manage the transfer of pupils from and to transport, with one teacher supervisor available on a rota basis. This reduced teachers' directed hours and freed up teachers' time at the beginning and end of the school day.

'We modelled different methods and came up with one where teaching assistants supported students from 3:15pm, where teachers had normally been involved and in reality, it is just a duty to keep them safe until they get onto transport, so that is not a teacher role. We changed their duties and freed teachers up from 3:15pm so have they now have 52.5 hours of flexibility over the year for various meetings etcetera.'

The school introduced a new policy allowing teachers to arrive on site later and leave earlier. The timetable was also redesigned, taking into consideration staff ratios, so that teachers' planning, preparation and assessment (PPA) was taken at the beginning or the end of the day wherever possible. This made it easier for teachers to work flexibly for example by working their PPA time at home before or after school.

A flexible working policy⁹ was developed to suit the school, including clear steps to follow when requesting and managing flexible working. It explained statutory rights of employees, and the duty of employers to consider requests. An additional document was

⁷ The majority of publicly funded schools in England operate according to the School Teachers' Pay and Conditions Document (STPCD) which states that a classroom teacher can be directed by the headteacher to work for up to a maximum of 1,265 hours over 195 days of the year (these limits do not apply if staff are paid on the leadership range). The directed time element of teachers' working hours is directed by the headteacher to work at school and can include for example, timetabled teaching, planning preparation and assessment (PPA), plus attending meetings such as faculty or parental meetings. Contractually teachers work additional hours at a place and time of their choice to complete the rest of their duties, such as planning and marking. Further details are provided in the [School Teachers' Pay and Conditions Document](#) (2019), see para 51.

⁸ Human resources (HR) and specialist education consultants were available to schools, funded as part of the pilot.

⁹ This resource is available via: CGR (2020) [Exploring flexible working practice in schools: research appendix - Example resources for pilot schools](#). DfE.

drafted and a presentation given to staff, to provide guidance to managers and staff on teachers' contractual working hours, as this had not been well understood previously.

Outcomes and impact

- **Changing philosophy:** A senior leader acknowledged that the changes introduced through the pilot were small shifts in policy and working arrangements rather than significant changes to working practices. However, following informal feedback from staff, these changes were felt to be effective and beneficial across the teaching and wider staff team. In addition, as a result of these changes and of being involved in the pilot, the senior leader had experienced their own change in mindset *'It was a mental shift for me...I was always the one to stay late, the last to leave.'*
- **Responding to requests:** Reviewing staff directed time and the school timetable had made the senior leader more aware of each staff member's use of allocated time, thereby making flexible working requests easier to respond to.
- **Changing school culture:** Staff at all levels reported that the pilot had supported a positive change in the long hours culture; they now felt able to leave earlier and to ask for flexible working. Teacher meetings finished earlier, and staff were rarely at school after 6pm. Greater clarity on the allocation of directed time hours enabled staff to manage their time more efficiently when arranging meetings and calling parents/carers. *'Teachers appreciate they are now able to get on with other jobs and duties, like making calls to parents from 3:15pm whereas they used to have to wait to 3:45pm, after the children had gone.'* In the spirit of openness and encouraging wellbeing, managers proposed to remind staff annually about the right to ask for flexible working and options to consider teacher working hours.
- **Developing support staff:** An unintended benefit of the pilot was that TAs took on more responsibility, working more autonomously and developing their skills. This had not caused any concern for parents/carers; as TAs were a consistent presence in managing pupil care, communication with parents/carers was more efficient, and TAs reported enjoying the additional responsibility.
- **Communicating with parents/carers:** The new working arrangements meant that telephone calls to parents/carers of pupils travelling on school transport could be made by teachers before the pupils arrived home. This helped parents/carers and all concerned to manage pupil difficulties, feeding back between school and home more efficiently.

School summary 4: Preparing a case for co-headship

Summary

With a proven track record of driving progress, and having developed a strong culture of flexible working across the rest of the school workforce, a headteacher and deputy headteacher requested bespoke support in developing their application for co-headship. They felt that they could provide a stronger leadership offer by drawing on their complementary skills and knowledge, and looked for advice in communicating this effectively to Trustees.

School context

A small primary academy in an urban area, part of a Multi-Academy Trust (MAT) and rated 'Good' by Ofsted, had developed a strong flexible working culture in the past five years, for example through implementing processes such as flexible hiring.¹⁰ A range of flexible working practices were already in place across the school, including part-time, job share and allowing staff to leave early for family or other care responsibilities. Many staff working flexibly also held some form of leadership responsibility, paving the way for the headteacher and deputy headteacher to consider making their own request for co-headship to the Trustees of the MAT.

Focus of the pilot

The headteacher and deputy headteacher specifically wanted support with developing their own application for flexible working. More broadly across the school, a large piece of work had already been undertaken to change the culture towards flexible working. This included consultation with parents/carers to explain the potential impact on class teaching and how this would be managed through shared planning times, communications books for parents/carers to use whose child was being taught by a job share partner, and delegating teaching and learning responsibility across a range of staff.

The challenges of flexible working

The two senior leaders were aware that a compelling case would need to be put forward to address any potential concerns around ineffective co-headships, particularly related to perceptions of poor communication and a lack of shared levels of accountability. They

¹⁰ Flexible hiring means that opportunities for flexible working arrangements are clearly stated in job adverts and will be considered for all roles.

thought that the case would need to be supported by research and demonstrate clearly how the role would be managed between them. As one commented at the start of the pilot: *'If you talk about it clearly and put things in place beforehand, then things can work. So, we are at that stage - taking a few steps back so we don't go into it blindly'*.

Developing flexible working practices

To help them prepare their application, the pair drew on their existing school network to look at different models of co-headship and to access case studies. They visited co-heads in another school and sought advice about the application process and the day-to-day experience. This helped them to realise that some good practice was already taking place that they could draw from as a part of their proposal. They then felt ready to devise an application based on what they wanted their co-headship to look like, and what they understood could work. As part of the pilot, they utilised human resources (HR) advice and used an education specialist¹¹ as a critical friend to share ideas and consider every angle, which they detailed in a co-headship proposal (described in the paragraph below); *'Co-leadership should be planned backwards, looking at why did [a previous one] go wrong, and what [measures] to put in place to make sure it doesn't happen again. It is about having a plan, contingency plans and mitigation'*.

From this they created a co-headship proposal. It included: the rationale of co-headship, the advantages of a co-headship for all stakeholders in the school, key considerations including projected costs and savings, the proposed distribution of operations and responsibilities, implications for accountability, performance management and remuneration, and other considerations such as complaints, non-working days, exit strategies (in the case of one of the headteachers leaving the school/Trust), and future-proofing the agreement.

Future opportunities

Both the headteacher and deputy headteacher felt a co-headship would enable them to continue to lead the school effectively whilst also building in time to be more forward-looking in terms of career development. For the deputy, this meant having support in their first headship role and, for the headteacher, having time to engage with wider education networks and build partnerships. They also foresaw benefits for the school *'[even with an overlapping day], you get two for the price of one because of the value you are adding. We know from experience, you get so much more than you are paying for'*. The headteacher and deputy headteacher felt that they were setting an example to other school leaders to *'find the courage to ask for [flexible working]'* and to help shift mindsets

¹¹ Human resources (HR) and specialist education consultants were available to schools, funded as part of the pilot.

across the sector. By devising a co-headship proposal, they had been able to share what they had learned with their colleagues. As a result, other members of the leadership team became interested in the potential of creating a co-headship.

School summary 5: Embedding flexible working into wider school policies and strategies

Summary

Senior leaders of a large secondary academy wanted more clarity about the statutory duty of the academy, as the employer, to consider flexible working requests, and the senior leadership team's (SLT's) ability to balance the needs of pupils against the rights of staff to ask for flexible working. They were keen to provide clear information to teachers in particular, so that staff understood their responsibility to propose workable solutions to any request they submitted.

School context

A large secondary academy based in an urban area, rated 'Requires Improvement' by Ofsted, was in the process of developing a new staff wellbeing strategy as part of their school development plan. The SLT were interested in finding out how flexible working could fit into this process. Several teaching staff were already working flexibly, predominantly via part-time arrangements, and senior leaders were finding it difficult to consider each individual request for flexible working, manage expectations, and balance timetabling requirements.

Focus of the pilot

At the start of the pilot, the school had a flexible working policy in place, but this was out of date and focused on carers' leave for teachers who were parents/carers. Therefore, the SLT wanted to develop a new flexible working policy, as part of their new staff wellbeing strategy. They also wanted to improve guidance for staff on job sharing, so that staff and managers could access clear information detailing what was possible and the application process to follow. The SLT also thought it important to provide a guide to staff going on maternity leave to suggest that they plan ahead and apply early to work flexibly, if they might want to change their contract on return to work.

The challenges of flexible working

The school had a complex two-week timetable created in January for the following September by an external contractor that they commissioned. This made it difficult to accommodate flexible working requests received after the autumn term (September to December) for the start of the following academic year in September. The SLT believed some staff requests were too demanding, for example, with some teachers making requests suggesting that teaching assistants (TAs) could permanently fill gaps in teaching timetables. They felt that teachers did not always appreciate the difficulty of agreeing to their requests whilst balancing the needs of pupils and colleagues.

Developing flexible working practices

During the pilot, the school worked with an external human resources (HR) adviser¹² to adapt a flexible working policy to suit the school, a home working policy template and job share toolkit.¹³ The school adopted a maternity pack created by the HR adviser, which offered clear guidance about timescales for requesting flexible working. In addition, a new process was devised for dealing with flexible working requests from teachers. This involved the teacher being required to make the request, then work with their line manager and the school HR manager to examine the impact of the request on the timetable, their classes and colleagues. Following this, a proposal considering all stakeholders would be submitted to the headteacher and, in cases of appeal, governors.

A staff wellbeing action plan was developed alongside the school development plan. It covered priorities such as measuring wellbeing in school and acting on the findings, improving staff awareness of wellbeing and steps taken to develop this area, identifying wellbeing issues earlier to allow intervention, reducing staff workload, and enhancing wellbeing through facilities/services. Flexible working was integrated into the plan. It included actions to raise awareness of, and deliver staff training on, flexible working legislation, and the academy's position and process regarding making flexible working requests. The plan also committed to develop flexible working practices to support staff to achieve a good work/life balance. The strategy included use of a staff wellbeing survey, with results and a report posted on a dashboard for senior leaders to interrogate. The senior leaders planned to create an action plan based on priority areas identified through the dashboard to improve staff wellbeing, including flexible working, and then disseminate the survey findings and action plan to staff.

¹² Human resources (HR) and specialist education consultants were available to schools, funded as part of the pilot.

¹³ These resources are available via: CGR (2020) [Exploring flexible working practice in schools: research appendix - Example resources for pilot schools](#). DfE.

Outcomes and impact

- **Clarifying processes:** Updated policies for flexible working and absence management were launched alongside the new staff wellbeing strategy, and new mechanisms for dealing with flexible working requests. This was intended to help everyone to be aware of the roles and responsibilities of all parties when making a flexible working request. It was important that all staff worked together to identify the impact on the school of a flexible working request, and potential solutions. Senior leaders noted that *'expectations may be more grounded in the future'*, as staff requests were more likely to consider the wider implications of their proposed change in working arrangements, and accommodated if a clear policy and procedure was put in place.¹⁴
- **Providing up-to-date information:** The new maternity pack was implemented immediately with two members of staff, which included clear guidance regarding early notice of flexible working requests. By making it clear to staff that requests are easier to agree when they are submitted before January for the following September, the school anticipated more positive outcomes to flexible working requests.
- **Aligning flexible working and wellbeing:** The strategy is included in the annual review cycle and thus will remain a key feature of the school development plan.

¹⁴ At the time of the final interviews for the pilot, this school had just launched their wellbeing strategy. It was therefore too early to comment on impact of the changes that had taken place. The points expressed by senior leaders were around anticipated impact.

School summary 6: Job sharing for phased retirement and succession planning

Summary

A job share enabled two members of a senior leadership team (SLT) to make professional choices that supported their personal goals. For the deputy headteacher, this meant slowing down towards retirement whilst allowing the assistant headteacher to shadow the role. For the assistant headteacher, this provided access to professional development that stopped them from looking for promotion elsewhere. However, the SLT felt that existing job share practices were too informal, risking the arrangements not being as successful as they could be. A job share toolkit was therefore implemented to formalise the process for job share arrangements within the school.

School context

A medium-sized secondary academy in an urban area had undergone a range of staffing and leadership changes in recent years. Rated 'Good' by Ofsted, all members of the SLT were working part-time, with a deputy headteacher doing so as part of a phased retirement plan.

Focus of the pilot

When the deputy headteacher first requested to reduce their hours, the headteacher saw an opportunity to develop the team. The deputy headteacher reduced their hours to three days per week, whilst at the same time training up another member of SLT to gradually take on elements of the deputy headteacher role over time. The opportunity was advertised internally to staff, and an assistant headteacher was appointed into the role for two days per week. Timetables had been adjusted to make these arrangements possible. However, there were challenges for the school in establishing effective working processes and ensuring that contractual issues were agreed appropriately.

The challenges of flexible working

Members of SLT felt that the job share was a positive solution for the school but were concerned because there were no formal agreements in place. This meant that the job share relied on the goodwill of both people to communicate effectively and share tasks fairly. The assistant headteacher noted that *'the success [of a job share] is contingent on that relationship'* being effective. However, this informal nature of the arrangement left

both parties, and the school, quite vulnerable. It was therefore agreed as part of the pilot that this job share arrangement should be formalised. There were two strands of work:

1. **Operations and logistics: how the job share would work in practical terms**, including: handover procedures, dealing with emails, sharing an office, lines of responsibility and accountability.
2. **Personnel and human resources (HR): informing governors and gaining their approval on the adjustments required for the job share arrangement**, including changes to: areas of delegated responsibility, job descriptions, pay and conditions.

Developing flexible working practices

Drawing on educational and HR consultancy support provided through the pilot, the school implemented a job share toolkit.¹⁵ This document would play a core role in formalising the process for job share arrangements within the school. It outlined the rationale for job sharing, the benefits and challenges, and made suggestions about how to make job shares work, practically and contractually. It included the results of evidence-based research, and outlining the steps that could be taken towards successful job shares with key questions and considerations (around accountability/handover, assessment, communications, wider school duties, losing a job share partner and cost implications). The job share toolkit was used by the two partners to clarify effective working practices in relation to training and handover routines in particular.

This was presented to governors as a document that could be used by them as well as the SLT. Once approved by governors, it was agreed that the document would be shared with the wider staff body to assist with future job share and flexible working requests. As well as supporting the job share at senior level, the school felt that the toolkit could be used for other members of staff who might request flexible working in the future.

Outcomes and impact

- **Staff retention:** The formalised job share arrangements enabled clearer working practices, such as handover procedures, managing email communication and accountability, to be discussed between both partners. The deputy headteacher would be able to work towards their retirement whilst sharing their skills, supporting the SLT and ensuring that staff and pupils were not adversely impacted by the loss of their experience: *'The arrangement is working because it is retaining me in the profession. And it has energised me in a way that might not have*

¹⁵ This job share toolkit is available via: CGR (2020) [Exploring flexible working practice in schools: research appendix - Example resources for pilot schools](#). DfE.

happened otherwise'. Likewise, the assistant headteacher said that the opportunity to upskill had informed their decision to stay at the school.

- **SLT as role models:** The headteacher wanted to communicate to staff that the school had a 'family' ethos and would accommodate requests wherever possible. A full-time senior leader agreed that SLT job shares were an inspiration: *'If I ever needed to request a similar kind of working pattern, I wouldn't be afraid to ask'*.
- **Skills development:** The job share created a unique opportunity for the assistant headteacher, who was able to train on the job, widen their experience and prepare for future headship. The deputy headteacher's main responsibility was curriculum, so the assistant headteacher began to learn how to design a curriculum, how to construct a whole school timetable and how to run the school's options process.



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