



Department  
for Education

# **School workforce planning**

## **Guidance for schools**

**December 2023**

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## Summary

This publication provides non-statutory guidance from the Department for Education on workforce planning, practice and deployment in schools and trusts.<sup>1</sup> It has been produced to help leaders to deploy their workforce effectively and efficiently. It aligns to the wider [schools resource management](#) (SRM) agenda which aims to support schools and academy trusts in investing and targeting valuable resources as effectively as possible to secure the best outcome for pupils, and value for money for the taxpayer.<sup>2</sup>

## Who is this publication for?

This guidance is for school and trust leaders, or anyone with a strategic leadership responsibility in a school or trust. This includes:

- headteachers, executive headteachers and similar roles
- academy chief executive officers
- chief financial officers and chief operating officers
- school business professionals
- governors and trustees

All schools and trusts can benefit from using this guidance, but we encourage adapting its purpose to take local context into account. This might mean using it to benchmark current workforce practice against that more widely in the school system, or as a guide for a full review of workforce deployment. This guidance has been developed in partnership with school leaders.

## Main points

All schools and trusts are different and are run in different ways: leaders make decisions about their workforce based on their context and pupils needs. Leaders have a duty to ensure their school finances are robustly managed and their efforts ultimately contribute to achieving optimal pupil outcomes.

With the support of the sector, we have identified a number of principles that leaders can use to guide their workforce planning, decision making and deployment in an effective and efficient way that works for their context.

These principles are:

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<sup>1</sup> The term 'trust' refers to an academy trust throughout

<sup>2</sup> [School Resource Management \(publishing.service.gov.uk\)](https://publishing.service.gov.uk)

1. Have a clear school vision, underpinned by a people strategy.
2. Invest in the development of people.
3. Review working practices to ensure staff can focus on what matters.
4. Be data and evidence led when making decisions about staffing.
5. Be creative, saving where you can to invest elsewhere.
6. Have a culture, system and processes that enable staff to be deployed flexibly across schools.

It is important to note that the [School Staffing \(England\) Regulations 2009](#) as amended and the Education (Independent School Standards) Regulations 2014 remain in force, and that schools should be aware of the responsibilities placed upon them to comply with applicable legislation within the regulations.

## Have a clear school vision, underpinned by a people strategy

People are the biggest asset in our schools, with schools spending on average over 70% of their budget on workforce. Quality of teaching is the single most important in-school factor in improving outcomes for children, and all staff contribute to the effectiveness of a school. The most important influences on a teacher's working life are found in their own school. Where a school's culture is right, teaching is an inspiring and rewarding job.

School leaders are responsible for creating this culture. In the most effective schools, leaders are clear about their purpose and vision, and they ensure all members of the workforce know how they contribute to pupils' learning. Leaders ensure their staff are well trained, deployed effectively and held accountable for pupils' learning and wellbeing. They do this through effective curriculum planning, delivering high quality professional development, HR processes, wellbeing practice, succession planning, performance management arrangements and support. This is often underpinned by a people strategy which drives workforce planning and allows leaders, schools and academy trusts to support all members of the workforce to realise their full potential.

The Department has published an education [staff wellbeing charter](#), a declaration of support for, and a set of commitments to, the wellbeing and mental health of everyone working in education. A range of resources, tools and guidance on [promoting and supporting mental health](#) are available to support the education sector.

## **The Tapscott Learning Trust – Newham**

Clarity of purpose is key. Too often schools try to be all things to all people. It is hard to say what you prioritise (and, therefore, by definition what you don't) with such diverse communities but it is crucial to very clearly state your approach.

The Tapscott Learning Trust is committed to ensuring all schools have the autonomy to respond to their context and community. One of our schools – Kensington Primary – has the vision, 'A place everyone loves to be'. This unambiguously sets out the school's priorities, which are then lived through every decision and interaction.

At Kensington, we have very high levels of trust in our teams and this is demonstrated through allowing flexibility in how they teach, no formal monitoring, and flexible timetables. In a fast moving world, we strive to support and develop our workforce, equipping them with the necessary knowledge and skills to provide a high quality education for all our children. Our Trust Training Hub provided training for over 1,000 staff last year through our internal development sessions and external delivery of accredited national programmes (ECTs, NPQs, AET, Team Teach and Apprenticeships). We have supported over 30 members of staff towards the new NPQs, as well as guide Newham-wide cohorts through their ECT induction programme. Our investment into a bank of accredited facilitators has enabled us to roll out key programmes in areas of need for all staff across the trust in Autism and Positive Behaviour Management.

Creating the right culture is hard work and takes commitment. Communication is fundamental. At Kensington, we have regular meetings with teams to get open, honest feedback on all areas of school life. But it is the day-to-day interactions that really matter. Our culture is based on being positive and supportive and carefully considering what we are doing and why. This has allowed us to cut unnecessary workload and give everyone a genuine voice in the school's development.

All of this has meant a 97% retention rate across the Trust. In a recent research study by the University of Manchester for Well Schools, staff showed comparatively very low levels of emotional exhaustion and very high levels of personal accomplishment.

**Ben Levinson OBE Executive Head Teacher**

**Kensington Primary School**

## Invest in the development of people

Teacher recruitment and retention is a national challenge, which requires leaders to creatively implement, high-quality professional development for their workforce and school effectiveness. Leaders should support all staff with their development to ensure they have tailored development opportunities for staff, that are aligned to their specific needs. In the Schools White Paper, the department committed to 150,000 funded training scholarships for National Professional Qualifications. The department has developed NPQs for executive and school leaders to offer leadership training that includes prioritising, allocating and managing resources and will continue to review and look to improve these to reflect the changing roles of school leaders.

Teachers and leaders employed in a state-funded school or a state-funded 16-19 organisation in England can access these free scholarships to develop their expertise. We encourage schools to take advantage of [NPQs scholarships](#).

Effective trusts organise and run their own evidence-based PD, leveraging and cascading expertise across the trust more widely to address workforce development needs.

This 'in house' support can be cost-effective or even cost-neutral. Technology allows staff from multiple locations to meet virtually without the time and expense involved in moving location; resources can be bespoke and inexpensive, if required at all; and peer learning rather than outsourcing can be simpler to organise and effective.

## HEART Academies Trust – Bedford

At HEART Academies Trust we employ over 350 members of staff. We strive to retain staff and ensure everyone has a path of development, so they know their career is valued.

At Bedford Academy specifically, we have implemented a bespoke co-coaching pair and triad model - to improve practice in the classroom. In addition to this, we have set up a partnership with Bedford University and set up a school led research hub to support not only staff development but also action research. We run optional Shadowing and Coaching Programmes where staff can shadow another member of staff in any role or be coached by a Specialist Coach. This supports with career satisfaction, mindset, wellbeing, personal growth and continuing professional development (CPD). We've developed tools to share good practice: designing an Expert Teacher Directory from Quality Assurance activities and a Teaching Standards video library from excellent models captured in observations to celebrate successes.

We want the experience for staff to be better because they work at a school or within the central team of a multi academy trust (MAT). An example of this is how we support our early career teachers (ECTs) through the early career framework (ECF). The central team supports mentors with observations and developmental feedback. It also allows the ECTs to collaborate with each other, so they have others around them during their induction. We strive to support colleagues through national qualifications such as national professional qualifications (NPQs) so that they gain accredited qualifications to enhance their leadership journey.

One of our areas of focus has been providing opportunities for existing staff to train to become teachers. We have been fortunate enough to have great relationships with Teach First and a local initial teacher training (ITT) provider and we can link our colleagues to their programmes. In other cases; we have identified potential early on and ensured they have had the support to gain additional qualifications such as an undergraduate degree. This is not a quick fix to the recruitment challenge, but by identifying staff with the ability to become excellent teachers of the future and investing in them over a period of time, the staff feel valued to equally commit to the school and MAT which supports our retention of staff.

An example of this is a member of staff employed as a learning support assistant (LSA). The school then supported them while completing their degree at university. During this time, their role moved to an unqualified teacher gaining more experience of teaching so their application for ITT was accepted. On achieving QTS this colleague has started their teaching career and middle leadership is in their near future. We have also been able to deploy staff to different phases owing to being in a MAT. Again, an LSA at our secondary school was supported to complete their ITT at one of our primary schools after expressing a greater passion for primary education.



Overall, we are proud that staff want to work at our schools and with our MAT. We want to provide an environment that nurtures our staff so they commit to not only the organisation but providing a stable and excellent educational experience for the students in our care. This is reflected in our staff turnover. In terms of impact, in 2018-2019 total labour turnover at Bedford Academy was 13% and has been reduced to 5% in 2020-2021.

**Anna Crawte School Improvement Director**

**Laura Fordham Deputy Head Bedford Academy**

## Review working practices to ensure staff can focus on what matters

School workload is a key challenge and high workload is cited as the most important factor behind staff considering leaving the profession. Even high-performing schools and trusts can make operational adjustments and improvements that support their workforce to work more efficiently and effectively.<sup>3</sup>

A culture of continuous improvement can improve efficiency and effectiveness. This includes appropriate use of technology including generative AI. For example, leaders empowering staff to review their own activity allows them to identify value-add and non-value-add activities and remove the latter and focus on the former or sharing curriculum and best pedagogical and non-pedagogical practices thereby saving workforce time. The department's [School workload reduction toolkit](#) has tools to help with this.

Through their scale and organisational structure, trusts offer further opportunities to streamline working practices and responsibilities. As schools work together and collaborate, leaders can:

- Consolidate similar responsibilities held across multiple posts to avoid duplication
- Centralise data input and management systems to reduce administrative responsibilities and freeing up time to support activities that support pupil outcomes

These all allow staff to focus on what matters: supporting pupils

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<sup>3</sup> NASBM (NASBM (2016), now the Institute of School Business Leadership) – [Guidance for improving school financial outcomes](#)

## **Matrix Academy Trust - West Midlands**

Continuous improvement through collaboration is one of our core trust values. It's the focus of our annual staff awards event, which brings together all of our 850 colleagues, as well as something we spotlight in our monthly trust-wide video briefing. Celebrating this value in this way helps keep it high profile, reinforcing the culture we live and breathe in our schools, day in day out.

Our School Improvement Team, which works across all of our schools, has been fundamental for ensuring collaboration happens and we avoid duplication.

The Team is currently around a dozen members strong and growing as we take on more schools. The centrally employed core team is supplemented with specialists seconded a day a week from across our schools. This approach recognises that all schools have capacity to give and can contribute to others, wherever they are on their improvement journeys.

All of our schools have access to expert support and challenge in all aspects of school life, including behaviour, safeguarding, curriculum, SEND, data recording and reporting, mental health, personal development, recruitment, staff workload and wellbeing. We conduct supportive reviews on all of these aspects, helping leaders to sift through all possible actions to pinpoint those which will lever the most improvement. Using the approach codified in the DfE Workload Reduction Toolkit, we challenge teaching staff to identify things which don't have an impact on learning and reduce or remove them entirely.

We do not want our headteachers wasting their energies on finding the most competitive insurance rates or deciding which company's photocopiers to use. Back office operations like these are centralised, allowing our school leaders to focus on what's really important: the quality of education.

**David Lowbridge-Ellis MBE – Director of School Improvement**

## **St Barnabas CE First & Middle School, MAT - Worcester**

At St Barnabas we believe culture eats strategy for breakfast and as such have embodied an ethos that ensures all activities and tasks completed outside of face-to-face contact with pupils are designed to improve outcomes for them. If it takes a long time and doesn't have a high impact on the education of the pupils, we stop doing it.

'Doing Less, Better,' ensures that over burdensome bureaucratic tasks are removed if they don't have a positive impact on pupils. Reducing workload isn't a tick box exercise and all school improvement activity is seen through this lens.

Using the DfE Workload Reduction Toolkit enables us to challenge our thinking with tightly focussed questions in each of the areas. When reviewing policies and practices we draw on some of the case studies to evaluate whether it's something which could have impact if implemented in our school.

Being part of a multi academy trust who are passionate for all their schools to be 'great places to work,' enables us, as an executive team, to reduce administration of non-curriculum-based tasks, and increased the sharing of resources and professional development for staff.

**Elizabeth Whetham MBE Executive Headteacher**

## Be data and evidence led to guide staffing and decisions

Effective leaders use data and metrics to explore and inform their workforce planning.

We encourage schools to use [Integrated Curriculum Financial Planning \(ICFP\)](#) and its metrics as a starting point. It can result in a more productive, efficient use of staff time across a school or MAT. Schools may wish to consider other data alongside this. For example, the department's [Schools financial benchmarking](#) and [View my financial insights](#) (VMFI) tools offer school- and trust-level metrics such as total expenditure, workforce numbers and spend per pupil.

Analysing data sources allows comparison to other settings, the identification of any outliers and reasons for this. Leaders can then put in place plans to ensure the optimum use of resource and workforce profile for their school(s). This might mean recruitment where there is a cohort need, employing more flexible, central resource or rationalising across settings.

### **NEXUS MAT – Rotherham**

ICFP forms an intrinsic part of the budget setting process at Nexus MAT, with finance professionals in the central trust utilising this to help shape resourcing decisions for the next financial year, in partnership with headteachers, before this is submitted for approval by trustees. This also ensures that trustees have a benchmarking system in place to enable informed governance decision making.

For special schools in particular, it can be very complex to compare and contrast like-for-like settings. However, the schools financial benchmarking toolkit allows for broad comparisons of schools with similar designation, and this provides further points of consideration for trustees when seeking assurance that value for money is being secured.

Context is key when utilising any and all toolkits, and it is therefore essential that detailed knowledge of pupils and their needs accompanies any financial modelling and benchmarking that is reported to trustees. However, the complimentary combination of toolkits like ICFP and contextual narrative makes for a more informed holistic picture, which adds value to the overarching performance of trust governance at Nexus MAT.

**Warren Carratt – Chief Executive Officer**

## Be creative, saving where you can, to invest elsewhere

Making savings where inefficiencies are identified, allows for targeted investment in other places. This could include workforce savings where appropriate.

The department's [SRM strategy](#) has a range of [tools](#) to support getting the best value for money from non-staff spending. These include:

- a free, confidential visit from one of the department's [school resource management advisers](#) (SRMAs), experts in school resource management and provide tailored advice and support
- department approved frameworks for purchasing goods and services e.g. CCS [agency supply deal](#) which supports schools to get value for money when hiring agency supply teachers and other temporary school staff
- [Get Help Buying for Schools Service](#) and [guidance on estates management](#)
- [Teaching Vacancies](#) is a free job-listing service from the Department for Education available to all schools and academy trusts in England
- [Digital and Technology Standards](#) to support staff use the right digital infrastructure and technology

The unique scale and structure of MATs offers opportunities for efficiencies, and creativeness which can support this. Effective trusts and leaders:

- Organise staffing and recruitment at trust level, helping to avoid unnecessary workforce costs;
- Invest in specialist roles, such as procurement experts who can negotiate better deals when buying at a greater scale or technology experts who can manage digital infrastructure and services across the trust.

Over time, savings from initiatives like these can become considerable. This can then be used for investment on a wider scale, such as the maintenance of the estate or a dedicated central support team for a curriculum priority.

A range of case studies illustrating how school resource management tools and guidance have helped schools and academy trusts achieve better value for money from their resources can be found [here](#).

## Have a culture, system and processes that enable staff to be deployed flexibly across schools

Teaching and non-teaching staff are deployed flexibly across schools in multi-academy trusts (MATs).<sup>4</sup> This should be planned and implemented in a structured manner to ensure resource is appropriately deployed. Trusts that use this approach have identified several personnel and organisational benefits:

- Support staff who want to develop their career or gain experience
- Driving school improvement
- Spreading best practice
- Filling a gap in pedagogical or non-pedagogical expertise
- Better use of existing resource and expertise
- Avoiding burdensome and costly recruitment exercises
- Allows trust to broaden the curriculum

Trusts facilitate this movement by having trust-level contracts and using them appropriately. They also establish a collaborative and inclusive culture with shared systems and processes across schools, this ensures that staff can make their impact more easily and that the benefits are felt immediately. The trust technology infrastructure enables cross site communication, strategy development and teaching.

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<sup>4</sup> NFER research [nufs02.pdf \(nfer.ac.uk\)](#)

## Star Academies – Blackburn

Star Academies has developed a range of roles that involve staff working across several schools in proportion to organisational needs, thereby retaining its most effective and inspirational practitioners within classrooms and equipping them with the skills and opportunities to secure career progression. Sharing expertise across the trusts, ensures that school improvement is led by schools themselves. To achieve the balance between schools' needs and individuals' professional growth, we have developed curriculum excellence fellow roles for gifted teachers who demonstrate the capacity and ambition to extend their influence beyond their own schools.

**Curriculum excellence fellows** have been recruited in both primary and secondary phases, by their 'home' schools to provide bespoke support in their specialist national curriculum subjects; they are passionate about their academic disciplines and can model subject-specific pedagogy for the benefit of colleagues. They spend 60-80% of their working week in their own 'home' schools, where they continue to teach. The remaining 20-40% of their time is spent writing curriculum materials, facilitating subject leader networks (which enable leaders' implementation of the curriculum) and organising specific master classes for teachers. On occasion, curriculum excellence fellows directly support teachers in other schools using instructional coaching techniques. The recipients of support are at different points on their own professional journeys and benefit from focused, individualised support that also helps to embed the Star curriculum and teaching methods.

The trust commissions part of the fellows' time for central work and reimburses the 'home' school to facilitate high quality cover arrangements. These teachers are firmly rooted in the development of exemplary practice and are able to maintain and extend their direct impact in their own classrooms without needing to seek employment elsewhere to gain salary enhancement.

**Subject improvement leads** have been appointed to drive improvement in the core subjects in its secondary schools. These are highly effective teachers and leaders who are appointed to support schools within geographical clusters. They typically work with departments in which there are identified needs. Their time is spent supporting planning, delivery, and assessment in order to raise standards rapidly. They focus on mentoring subject leaders to be able to sustain improvement. Subject improvement leads have trust-level contracts and do not have a 'home' school, so they can be deployed flexibly during the full working week.



School business managers with expertise in both human resources and finance are increasingly difficult to recruit. Star has addressed issue by recruiting **finance partners** with proven track records in financial management who are given trust-level contracts and deployed across geographical clusters of schools. Finance partners spend their time supporting leaders in their assigned schools and they report to the trust's chief financial officer. Their expertise supports schools' operations, provides the centre with timely and robust information and enables the business support staff within schools to focus on the plethora of other tasks requiring their attention. The finance partner model brings benefits in terms of efficiency and effectiveness.

The next stage of Star's people strategy is focused on building the career pathways of professional services staff.

**Sir (Mufti) Hamid Patel - CEO**



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