



# School Partnership Toolkit

Guidance for School Leaders and Governing Boards  
when considering school partnerships.



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# The Camden Context

**London schools are encountering escalating challenges to maintain their viability as autonomous institutions. Several factors contribute to this increasing difficulty.**

A significant determinant is falling pupil rolls. Over the last 5 years there has been a significant reduction in demand for school places within Camden and the wider London area. Since 2018 the Council, has removed 10 forms of entry from the reception intake, responding to a reduction in birth rates of over 30% across the borough. The forecast data continues to show suppressed birth rates within London and Camden alongside the continued effect of reductions in families moving into Camden during the COVID period.

The observed decline in demand for school places brings implications for budgetary stability and the maintenance of educational quality. Given that funding allocations are typically predicated on a per-pupil basis, even marginal reductions in enrolment can create new financial challenges.

Maintained schools operating with a financial deficit are mandated to balance budgets and eradicate any accumulated debt within a three-year timeframe, contingent upon the formal approval of a remediation plan by the Local Authority. Failure to adhere to these stipulations places such schools at heightened risk of potential closure.

Within smaller, stand-alone primary schools, the provision of effective leadership across the entirety of the academic curriculum can pose a considerable pedagogical challenge. With individual teaching staff frequently assuming responsibility for the leadership of multiple subject domains, ensuring subject-specific expertise and pedagogical consistency can prove particularly difficult.

The increasing prevalence of pupils with Special Educational Needs and Disabilities (SEND) constitutes a further significant challenge. The financial constraints often experienced by smaller primary schools can impede their capacity to sustain dedicated specialist SEND Coordinator (SENDCO) roles.

Moreover, smaller educational institutions typically offer comparatively lower remuneration packages for headteacher positions than their larger counterparts, potentially compromising their ability to attract and retain highly experienced senior leadership.

To address these challenges, schools are increasingly exploring collaborative structures. This toolkit provides school governors and leaders with practical resources, case studies of existing Camden school partnerships and questions to consider when examining the different types of partnerships schools can form whilst remaining an LA maintained school.

# What do we mean by partnership?

**Collaboration can take many forms from sharing professional development opportunities, to co-designing lesson plans, to peer evaluation. Building a collaborative and federating system is one of the four foundations of Building Back Stronger.**



Collaboration within, across and beyond schools is an essential element of change and is fundamental to the success of this strategy. Educational research indicates that collaboration invariably yields better results for individuals, for leaders and for organisations. This is the case for both children and adults. A collaborative system needs collaborative processes, practices and structures to support it."

**Building Back Stronger, 2022**

The current education system in Camden is characterised by high levels of cooperation and collaborative working between schools, a strong sense of place and low levels of academisation, enabled through Camden Learning.

In Building Back Stronger, Camden's education strategy to 2030, Camden made building a strong place-based system one of its four foundations for achieving its vision. In the words of the strategy, "We believe that schools work better if they know and are embedded in their local community. We see schools as part of the glue that holds communities together and helps develop mutual support and solidarity across communities... over the last few years, the Council has invested in developing a place-based, school-led partnership: Camden Learning. It saw the potential of a school-led partnership for increasing coherence and reducing the risks of fragmentation – so that no school is left to struggle alone."

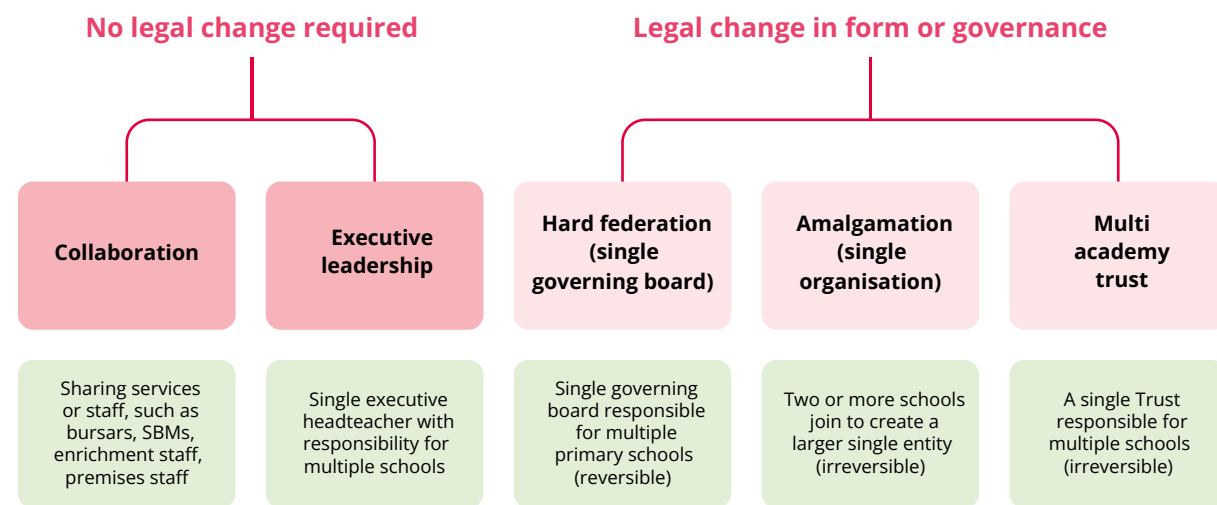
# What are the different models of partnership?

Schools in Camden represent a range of different partnership models. Each one offers different benefits and challenges. Informal collaborations provide flexibility but may lack impact, while more structured partnerships like hard federations and amalgamations offer unified leadership and governance but may reduce individual school autonomy.

School governors and leaders should carefully consider the implications of each model to determine the best fit for their context and goals.

School partnerships can be presented on a continuum from informal collaborations to more structured partnerships such as hard federations.

## Models of Partnership



## Informal Collaborations

It is recognised that not all headteachers or governors see the need for a rapid and large-scale move towards more structural forms of partnership working. Almost all schools in Camden are engaged in meaningful collaboration and, for many schools, continuing to find opportunities to share learning and deepen practice remains the priority. This does not require schools to consider any structural changes to leadership, governance or how they employ staff or deploy resources. For some, the potential benefits of more structural forms of partnership working are tempered with anxiety about the potential loss of individuality of their school and the close connection to their community. There is also a wide variety of views expressed by individual school leaders of how they see their own role in the wider education system, with some very clear that they believe they can be most effective as a headteacher of a single school and others more interested in the opportunities that executive headship, across two or more schools, might bring.

Informal collaborations involve schools working together on a voluntary basis without any formal legal agreements. These partnerships are often based on mutual interests and shared goals. Each school maintains its own governing board, headteacher and leadership team. There is no formal governance structure overseeing the collaboration, for example schools may share resources such as bursars, school business managers (SBMs), enrichment staff or premises staff or collaborate on training sessions and workshops for staff development.



## Informal collaborations

**The long-standing 135 Partnership was initially formed in 2015 and has always operated as an informal partnership without binding obligations. It began with a group of like-minded school leaders coming together partly by chance: in this instance, a conference where they began collaborating on an approach to writing moderation. The success and goodwill arising from this prompted further collaboration which has continued to grow and develop.**

More recently, particularly close leadership links have been formed between Gospel Oak and Netley. Some four years ago John Hayes, headteacher of Gospel Oak for many years, was appointed executive headteacher of Netley. He spends 40% of his time at Netley and 60% at Gospel Oak, with the framework for this relationship provided by a Memorandum of Understanding. John sees his role at Netley as a combination of advisor, coach and mentor, whereas his role at Gospel Oak involves more day-to-day operational management. The schools serve very different communities and face different challenges, but the shared leadership and collaborative working between them has brought benefits to both, in terms of mutual support, shared understanding of needs, and agreed ideas about curriculum development and delivery.

One key early undertaking by the wider 135 Partnership was its work on collaborative inquiry. This brought the partnership schools together to discuss school improvement needs and to provide supportive mutual challenge, enabling emerging issues to be addressed and tackled in non-threatening ways. The Covid lockdown inevitably interrupted this, but it remains a powerful tool for the partnership.

### The 135 Partnership:

Gospel Oak Primary School, Netley Primary School, Robson House Primary Pupil Referral Unit, Fleet Primary School, Rhyl Primary School, Primrose Hill Primary School

Ideas for collaborative themes and projects emerge from regular meetings held by the school leaders, where discussion generates priorities for further development. Amongst these for the near future are: SEND; training teaching assistants; writing moderation; development for child and family support workers; and, of course, budgets.

Financial gains from the wider partnership are limited, but the benefits for the pupils, parents, families and communities served by the schools have been significant. Examples of family support arranged through the partnership have included food hubs, school clothing hubs and support for cost-of-living grant applications. Ofsted reports note the high quality of education offered in all the schools, while feedback from the schools' child and family support workers confirm the positive views of families and the community.

The development of informal partnerships like these are more organic than prescribed. There are undoubtedly advantages in the autonomy still held by individual schools, but there are disadvantages too. While movement of teachers between schools does happen, it is less straightforward than in "hard" partnerships. It is also more difficult to set up the kinds of shared posts that bring financial and productivity savings, such as business managers, admin support and premises managers. The potential for more formal ties remains a background subject of consideration among the schools, but there are no plans for taking this forward at present.

One of the biggest challenges, perhaps, to such partnership working is that of capacity – the space and time to work collaboratively with others on top of the day job particularly at a time of reduced resources and falling rolls. However, the potential benefits to all stakeholders of being able to share ideas, innovate and experiment in a collaborative, supportive framework are seen by the schools as immense and essential to improving educational outcomes.



## Structural Partnerships

Structural partnership is an umbrella term that was originally coined by the School Future Options Group, a working group made up of local school leaders exploring partnership in Camden, to describe a partnership between schools which has a formal basis, for example a written memorandum of understanding between the schools involved, and goes beyond the sharing of practice or ideas to facilitate the sharing of staff, money or other resources such as buildings.

Structural partnerships are established with a view to the schools involved working together over the medium to long term and may have features such as shared leadership. Entering a structural partnership does not change the legal status of the schools in question, unless they become a federation or join a multi academy trust (see below). The participating schools would therefore maintain their existing governance arrangements.

**Structural partnerships offer many potential benefits from more informal working. These include greater opportunities for:**

- The sharing of teaching and support staff across more than one school.
- Redesigning the roles of non-teaching staff including school business managers, school site officers and IT support.
- Developing and retaining middle leaders through working across more than one school.
- Creating stronger locality hubs, bringing together therapy, social work, school nurses, adult learning across a group of schools.
- Growing the expertise of governors through working across multiple schools.
- Maximising support for children and young people with SEND across a cluster of schools.
- Developing cross-phase partnerships supporting transition or inclusion (or both).
- Bringing greater financial sustainability through pooling or sharing resources, particularly for one form entry primary schools.
- Reducing staff workload, for example in developing school policies.

Reference: [Guide to Setting Up Partnerships \(GOV.UK\)](#)

## Two School Partnership

Eleanor Palmer Primary School,  
Hawley Primary School

**Executive Headteachers:** Sally Hill  
and Natalie Stevenson

The relatively new partnership between Eleanor Palmer and Hawley was set up as time-limited (two years). As often happens in the formation of school partnerships, a headteacher retirement was a factor in timing, along with the physical proximity of the schools. A partnership between the two schools offered the potential to align and hone an exceptional curriculum, for staff to collaborate and progress in their careers, and for financial savings at a time when schools everywhere are faced with budgetary challenges.

The route to the partnership was facilitated by Camden Learning. Informal discussion through Camden Learning led to an invitation to all Camden schools for expressions of interest in providing Executive Leadership at Hawley. This resulted in a formal proposal for the Eleanor Palmer and Hawley partnership that was welcomed by the Governing Boards of both schools. The schools see themselves as partnered rather than federated, working together but still independent in this first phase of collaboration.

Natalie Stevenson and Sally Hill had shared the headteacher role at Eleanor Palmer for some five years and continue to do so. From September 2024 they were also appointed joint executive headteachers at Hawley. One immediate benefit was the capacity to rationalise their headteacher duties and spread leadership between the schools. Whereas they had been providing three days each as co-headteachers, Sally now went full-time, which increased total input to eight days: five days as co-headteachers at Eleanor Palmer and three days of executive leadership at Hawley. A partnership committee, including chairs and other governors from both schools, has helped to ensure joint aims and direction during a stretching first year. Also, one of Camden Learning's professional partners has provided regular external support to the executive leadership.

The benefits of the partnership have been many, even within its first year. For example, the focus on curriculum development at both schools – always strong – is even sharper, contributing to staff development. Staff seeking career progression have stayed because of the increased opportunities offered through the partnership. The Eleanor Palmer acting deputy head, for instance, was appointed head of school at Hawley and one of Eleanor Palmer's senior teachers has become maths and music lead across the partnership. Year group teachers and subject leaders have benefitted from sharing, joint planning and moderating assessment together, while greater staff flexibility allowed a Hawley teacher to spend one day a week at Eleanor Palmer when needed, rather than incurring agency costs. A recent joint recruitment process proved very successful, drawing a stronger field than would have been the case as individual schools.

Governors from each school have visited the other, developing their expertise as governors and also informing different perspectives on each school's unique strengths and improvement priorities. The schools now share a maths lead, music teacher and a business manager, helping to retain and share expertise while maximising efficiency. Joint activities for the pupils in the first year included shared music trips and sports events. More are planned for the current year to strengthen the community presence of the partnership and to bring the two school communities closer together.

## Federations

A federation is one type of structural partnership. It is defined in law as two or more maintained schools operating under the governance of a single governing board. In a federation the governors and school leaders commit to improving the outcomes and life chances for all children across the federation, as opposed to just a single school.

In other contexts the term "soft federation" is used to describe many different types of partnership, from semi-formal collaborations to groups of schools which share an Executive Headteacher (EHT) but do not share a governing board.

**In both cases each federated school is treated as an individual school, meaning it:**

- Keeps its existing DfE category and does not gain, lose or change its religious character through being part of a federation.
- Continues to have its admissions determined by the appropriate admission authority.
- Will receive individual budgets, noting that the local authority can allocate this as a single budget share to the federated governing board. Additionally, the federated governing board, upon receiving the delegated budget for all the schools in the federation, can allocate the budget to each individual school or pool all or part of the budget with the agreement of governors.
- Is inspected individually by OFSTED.
- Can still be subject to a **Direct Academy Order**. If it is judged "requires significant improvement" or placed in "special measures" by Ofsted.

Community, voluntary aided and voluntary controlled schools can all federate with each other, but academies cannot federate with a school that is not an academy.

Many federations choose to have an executive head that works across all the schools within the federation, but this is not a legal requirement. The legal definition of a federation is that there is a **single governing board** across multiple schools. This may operate with multiple school leaders.

Hard federations involve two or more maintained schools operating under a single governing board. The original governing boards are dissolved, and a new federated governing board is formed. A single EHT may oversee multiple schools within the federation with individual headteachers or heads of school for each school. Schools within the federation may adopt shared policies and practices. A single federated governing board is responsible for all schools within the federation.



References:

[Federations: guidance on the governance processes – GOV.UK](#)  
[The School Governance \(Federations\) \(England\) Regulations 2012 \(legislation.gov.uk\)](#) (section 24)

## Rhyl/ Carlton School Amalgamation

**The merger between Rhyl and Carlton Primary Schools in 2021 was precipitated by the closure of Carlton to address falling pupil numbers. The two schools had a history of collaboration through the 135 Partnership, a longstanding informal partnership of five Camden Primary schools. There was already a common approach to policy and curriculum, half-termly Chairs of Governors meetings, some degree of staff sharing, and their regular participation in Collaborative Inquiry had helped build trust and mutual challenge.**

There was some early opposition and significant media attention, particularly some families at Carlton who were understandably worried about losing their school. The pre-existing trusting relationship between the two headteachers and Chairs of Governors was critical in managing these concerns. The Heads provided a united presence throughout, with the Rhyl headteacher spending a lot of time on the Carlton site, attending staff meetings and meeting regularly with parents. Opportunities for parents to express their concerns were achieved not just through formal meetings but also through informal events like coffee mornings. Parent Governors provided an important role as a communication conduit. They played an active role in listening to parents concerns and feeding back to the whole Governing Body enabling space and time to address issues ahead of the merger date. Two Governors from Carlton joined the Rhyl Governing Body for continuity.

A key message was that the process should be seen as a merger, not a takeover, as an opportunity, not a loss. Importantly, it was made clear that all 124 Carlton pupils would be guaranteed a place at the post-merger school and, to help mitigate parental anxieties, free new school uniforms were provided, along with a 'soft' start and walking bus to resolve starting times across a split site. All but two families moved across. All Carlton teaching staff were guaranteed shortlisting for posts in the merged school, although none took these up. However, six Carlton Teaching Assistants did. This was important because they were rooted in the local community and knew families well.

The opportunities offered by the two sites for extended community provision were seen as integral to the merger process, and these were developed through a community working group including parents and governors. As a result, the Carlton site is now used not only as a base for Early Years and Year 1 provision, but also for family learning, adult learning, children's centre, and family health services, while the Rhyl site provides a base for other community provision, such as baby provision, as well as the other year groups.

Perhaps inevitably, so many pupils starting on the same day at a new school with unfamiliar routines brought some behaviour management challenges. These were short-lived, however thanks to a well-established school culture with strong leadership and support from governors. Additional time was requested and provided by the Camden outreach team and the Educational Psychology service. Indeed, the overall support provided by the LA and Camden Learning throughout was an important factor in the merger's success. A restructured leadership team ensured a leadership presence on both sites. Staff work across both sites, the location of staff meetings is rotated, and there are shared staff lunches. Staff satisfaction is high, which means retention has not been an issue.

The impact of the merger on children, parents and community has been enormously positive. It has brought two separate school communities together into a cohesive whole, evolving into a genuine community school – now reflected in the school's name – offering comprehensive family hub services with real benefits for children and families. Parents say they feel part of a network that was never available to them before, through which they can access support on issues ranging from housing to food and clothing, and adult learning. And, in a school judged by Ofsted as outstanding in all areas, the benefits for the pupils speak for themselves.

## Amalgamations

Amalgamations involve two or more schools joining together to become a single institution with one governing board, one leadership team and a single budget. Schools merge to form a single school, which may operate on multiple sites. A single headteacher and leadership team oversee the amalgamated school and a single governing board is responsible for the entire institution. Amalgamations are irreversible.



# The experience of a 'hard' federation

Torriano Primary School,  
Brecknock Primary School

**Executive Headteacher:**  
Helen Bruckdorfer

Torriano and Brecknock became formally federated in September 2022, although their journey to federation began some two years earlier when Helen Bruckdorfer, then Head of Torriano, was asked by the local authority and Chair of Governors to additionally step in temporarily as Head of Brecknock where there was a leadership gap. The potential of developing a more formal partnership was immediately apparent and a partnership committee was quickly established to explore federation and to provide strategic oversight and direction. The governing board for the federation was duly finalised after consultation, with support from the local authority.

The pathway to federation for the schools is summarised below.

## Federation Journey 22-27

Collective quest to ensure **all children** have choice and opportunity.

2022	2023	2024	2025-27
<b>The Federation Curriculum</b>	<b>EEF Research School</b>	<b>Federation Teaching and Learning Principles</b>	<b>Developing our inclusive federation approach</b>
<ul style="list-style-type: none"> <li>Powerful knowledge</li> <li>Aligned curriculum</li> <li>Shared expertise</li> </ul>	Developing an evidence informed approach	Shared understanding and language for great teaching and support	Belief that all children can succeed Empowering staff Inclusive community

From the outset, the federation brought together complementary strengths. Torriano was well placed to share leadership capacity and expertise, while Brecknock contributed strong inclusive practice and emerging school leaders. This combination enabled rapid progress towards agreed goals. The first step was to ensure an aligned curriculum with a focus on evidence-based teaching and learning, alongside a determination to improve the opportunities and outcomes for all pupils.

Each school has a head of school. None has a deputy head, but each has a team of "leaders of learning" focused on the curriculum – two in Torriano and one in the slightly smaller Brecknock. A director of inclusion works across both schools, as does a director of business operations, and there is a shared family support worker.

While Torriano has a waiting list, a falling roll at Brecknock has led to a successful, planned reduction from two-form to one-form entry – a process made much easier by the joined-up processes, unitary governance and flexible staffing of the federation. Staffing at the schools is stable, and recruitment and retention has not been a major challenge to date. Three collective meetings each year provide a 360° impact assessment to inform planning, as well as an inclusive forum for reviewing and improving workload management and staff development.

The structure and systems of the federation enable and support financial flexibility as well as making professional development and succession planning more straightforward. Administration and back-office functions are shared, as is policy formation, CPD planning and the expertise of middle leaders. Staff movement across schools is relatively easy and bureaucracy is reduced. The inclusion teams work and learn in partnership, strengthening the federation approach to SEND and pastoral support. Together, the schools are also able to offer joined-up extended family provision, which is welcomed by the community.

The federation also benefits from a broader, "soft" partnership as a leading member of the North London Alliance Research School – also involving Parliament Hill and Eleanor Palmer schools – which aims to use evidence-informed practice to develop skilled and knowledgeable teachers across North London and further afield, including most recently Havering.



## Multi Academy Trusts (MATs)

MATs could be seen as another type of structural partnership, but for schools that are academies. Unlike maintained schools, academies are not the responsibility of local authorities and instead are accountable to the Secretary of State for Education. Legally a MAT is a charitable company limited by guarantee. The legal form of a MAT dictates how a MAT is governed.

**The expectation is that there are three levels of governance:**

- **Members**, who agree the Articles of Association for the trust and are responsible for appointment and removing trustees.

- **The Board of Trustees**, which is the accountable body of the trust and is responsible for the conduct and standards of all the schools within it. The key responsibilities of MAT trustees are like those of a maintained school governing board but they exercise these responsibilities across multiple schools, not just one. As the legal employer and accountable body, the Board of Trustees is responsible for agreeing the structure of the central team and for appointing the trust's chief executive officer (CEO) as its most senior officer. The CEO is also normally a trustee and it is a legal requirement that all MATs have a CEO.
- **The Local Governing Board**, which is attached to an individual school. In practice MATs have very different policies on the powers and responsibilities that are delegated to Local Governing Boards and these will be set out in the Scheme of Delegation.

Reference: [Academies \(gov.uk\)](https://www.gov.uk/guidance/academies)

# Comparative overview of three common school collaboration models

Below is a comparative overview of three common school collaboration models – partnerships, federations and MATs – highlighting their legal status, governance structures, budgetary arrangements, policy alignment, back-office functions, accountability mechanisms, autonomy levels, ease of establishment and typical benefits. This framework is designed to help schools and governing boards assess which model best aligns with their strategic objectives, resource capabilities and desired level of operational integration.

Feature	Partnerships	Hard Federations	MATs
<b>Legal Status</b>	Independent schools + MoU	Two or more maintained schools + one Governing Board (GB)	Charitable company (trust) + academies
<b>Governing Board</b>	Remains separate	One shared GB	One central trust board
<b>Budget</b>	Separate (no pooling, unless agreed)	Separate budgets (GB may pool funds)	Direct DfE funding; trust sets budgets
<b>Shared Policies</b>	Informal alignment via MoU	Unified policies (statutory/legal backing)	Trust wide policies (bespoke to trust)
<b>Back-Office Functions</b>	Minimal sharing	Centralised Finance, HR, MIS etc.	Centralised Services: Finance, HR, MIS etc.
<b>Accountability</b>	Local LA (each school)	LA oversight + GB governance Dioceses (Church Schools)	ESFA, DfE, Charity Commission, Ofsted
<b>Autonomy</b>	High (own GB, budget)	Moderate (GB sets direction; heads run sites)	High, though there can be strong trust level control that academies follow
<b>Ease of Set-Up</b>	Quick (sign MoU)	Moderate (consultation, reconstitution)	Complex (company registration, DfE approval)
<b>Typical Benefits</b>	Fast collaboration, low cost	Shared leadership, policy consistency, savings Economies of scale, strategic autonomy, financial resilience	

# Why do schools choose different partnership models?

Several circumstances may lead a governing board to explore formal collaboration, these include:

## Proactive Growth and Leadership Development

A thriving school with an experienced and successful headteacher may benefit from a collaborative structure. Offering the headteacher the opportunity to become an Executive Headteacher can enhance staff retention, facilitate career progression and ensure long-term sustainability through shared curriculum development and cost efficiencies.

## Succession Planning

When a headteacher plans to leave, the governing board should consider all collaborative options, including partnerships and federations before initiating a traditional headship recruitment process.

## Financial Sustainability

Anticipating potential budgetary challenges, the governing board seeks to explore collaborative models to ensure financial stability and avoid future crisis-driven cuts.

## Risk Mitigation and Quality Assurance

The governing board identifies several risk factors that necessitate a proactive review of collaborative options. These may include but are not limited to:

- Low Reception intake, with less than 80% of places filled with first-choice preferences.
- A significant vacancy rate, exceeding 20% of total school places.
- An adverse Ofsted outcome or a perceived risk of such an outcome.
- Challenges recruiting to, or retaining, senior positions.
- Budgetary challenges.
- Concerns regarding the overall quality of education provided.

## Effective Evaluation

Before embarking on a federation, governing boards must first verify strategic alignment by undertaking due diligence:

- Ensuring each school's mission, values and improvement objectives are compatible.
- Conduct a thorough financial audit to assess the feasibility of pooled budgets, staffing harmonisation and potential economies of scale.

Simultaneously, leaders should evaluate curricular coherence and performance data to determine whether a shared pedagogical framework will genuinely benefit student outcomes.

Cultural compatibility can be tested via staff surveys or working groups, joint leadership workshops or staff training and small-scale pilot projects to identify any operational or ethos-based conflicts.

Stakeholder consultation (including parents, local authorities and external partners) can support community engagement and uncover hidden challenges. For a "hard federation" there is a statutory requirement to consult, but not with other forms of soft partnership. However, it is important to seek to understand and evaluate the perceptions of different stakeholders.

A concise risk register covering legal, financial and reputational contingencies, with an exit strategy and clearly defined Key Performance Indicators with review schedules, will provide the evidence governors need to make an informed decision.

**See Appendix A: Governor considerations checklist/process chart**

# What do federated governance models look like?

With a partnership or “soft” federation, each school retains its own governing board, however a joint strategic committee to oversee the effectiveness of the impact is often formed between the two boards.

**For example:**

School A	School B
Single governing board e.g.	Single governing board e.g.
<ul style="list-style-type: none"> <li>8 co-opted governors</li> <li>2 parent governors (elected)</li> <li>2 staff governors (elected)</li> <li>1 LA governor</li> <li>1 headteacher governor</li> </ul>	<ul style="list-style-type: none"> <li>8 co-opted governors</li> <li>2 parent governors (elected)</li> <li>2 staff governors (elected)</li> <li>1 LA governor</li> <li>1 headteacher governor</li> </ul>

## Joint Strategic Committee

A joint strategic committee with the following membership:

- The chairs of both governing boards
- A further member from each governing board
- Executive headteacher
- Both heads of schools
- Co-opted members as agreed, from time to time, by the governing boards all governors other than those employed at the school

**Quorum** – any 3 governors who are members of the committee terms of reference

When a hard federation is formed, one governing board needs to be formed, but there is often a local advisory board, or subcommittee that is associated with each school. **For example:**

## Single Governing Board with 13 Members, an equal distribution from each school

- 8 co-opted governors
- 2 parent governors (elected)
- 1 staff governor (elected)
- 1 LA governor
- 1 executive headteacher governor

## School Committees

School A	School B	School C
Up to 7 members, 4 voting who are part of the full governing board, focus on local standards and performance. Local board chair feeds back to main governing board.		
<ul style="list-style-type: none"> <li>4 voting members</li> <li>associate Governors including headteacher/head of school</li> </ul>	<ul style="list-style-type: none"> <li>4 voting members</li> <li>associate Governors including headteacher/head of school</li> </ul>	<ul style="list-style-type: none"> <li>4 voting members</li> <li>associate Governors including headteacher/head of school</li> </ul>

## Resources Committee

4 Governors including Chair of Governors

**The composition of federation governing boards is as follows:**

- at least 7 governors in total
- two parent governors from across the schools in the federation
- the designated headteacher of each school in the federation unless they stand down in accordance with regulation 19 of the School Governance (Constitution) Regulations 2012 (or executive headteacher for schools where they are the designated headteacher)
- one staff governor from across the schools in the federation
- one local authority governor

The federated governing board may also co-opt as many governors to the board as they see fit, although the number of governors who are employed at the schools must not constitute more than a third of the governing board.

**There are additional requirements for foundation and voluntary schools:**

Type of school	Requirements
<ul style="list-style-type: none"> <li>Voluntary controlled</li> <li>Voluntary aided</li> </ul>	<ul style="list-style-type: none"> <li>at least two foundation governors but no more than one quarter of the governing board</li> </ul>
<ul style="list-style-type: none"> <li>Foundation or foundation special schools which do not have a foundation</li> <li>Foundation or foundation special schools with a non-qualifying foundation</li> <li>Qualifying foundation schools</li> </ul>	<ul style="list-style-type: none"> <li>such number of foundation governors to outnumber all the other governors by up to two</li> <li>at least two foundation governors, but no more than one-quarter, partnership governors</li> <li>at least two, but not more than 45%, foundation governors</li> <li>such number of foundation governors so as to outnumber all the other governors by up to two</li> </ul>

Reference: [Federations: guidance on the governance processes – GOV.UK](#)

# Governance structures and local stakeholder voice in soft and hard federations

**Go Shine Anglican Partnership:** St. Mary's CE Primary School, St. Luke's CE Primary School, St. George the Martyr CE Primary School, St. James and St. John CE Primary School, St. George's Hanover Square CE Primary School

**Executive Headteacher:** Harvey Webb

The Go Shine Anglican Partnership, comprising two schools in Camden and three in Westminster, was formally federated with a single governing board in June 2025. Its roots however are in a long-standing informal partnership, originating in Camden and involving a wider group of faith schools – including those that now make up the Camden Catholic Schools Partnership. A Memoranda of Understanding provided the framework for the collaborative work of this partnership.

The decision of the Anglican schools to move to federation was prompted by several factors, including:

- the proven effectiveness of the informal partnership
- the government drive towards formal
- school groupings
- London Diocese guidance on formalising
- school partnerships
- a common faith culture
- the need to plan effectively across schools
- for falling rolls
- the succession planning of school leadership changes
- the inefficiency and repetition of supporting separate governing boards and the need for strategic and
- efficient governance across the schools

The first step was the establishment of a joint working party to explore the benefits and implications of federation for the schools. This built on an existing Chairs' Committee but also included vice chairs and clergy governors and it was supported by independent expertise from an external consultant. A proposal paper was subsequently presented to the individual governing boards, with full consultation agreed for the autumn of 2024. Notwithstanding some inevitable initial nervousness about change and potential "loss of local voice", the overall response to the proposal from all stakeholders was strongly positive.

The federation has a single governing board, but each school has a local advisory board (LAB), with members appointed by the Parochial Church Council, two parents, a staff member, head of school, and a diocese appointed member. Each school also has a linked governor who also attends the LAB. School information and plans are presented to the LAB which meets at the beginning of each term and minutes from these meetings go to the governing board which meets twice termly.

After years of close collaboration, the schools were already aligned in many areas of work, including curriculum and policy development, leadership working, moderation and training. There is also a strong cultural alignment in terms of school ethos and systems as well as faith. The federation benefits from some shared staff across the schools e.g. a music teacher, Spanish teacher, PE teacher and finance director. Importantly, retention and succession planning are supported by the flexible staffing arrangements and the professional development opportunities provided by the partnership for example, all senior leadership posts have been developed from within.

Budgets are currently retained within individual schools, not shared, with the main aim being to ensure balanced budgets in a difficult financial environment for schools generally. There have been undoubted financial benefits from federation, however, such as joint SLAs, additional leadership capacity, procurement savings and equipment centralisation, alongside the staff flexibility to minimise recourse to agency staffing.

## What does effective delegation look like?

Memoranda of Understanding (MoUs) and Schemes of Delegation (SoDs) are foundational governance documents that clarify how schools collaborate and make decisions:

### Memorandum of Understanding:

A non-statutory agreements used when two or more schools (or a school and a trust) agree to work together on specific activities such as joint professional development, shared specialist staff or joint resource procurement, without forming a new legal entity. An MoU spells out each party's objectives, the scope of shared activities, who leads and oversees the partnership, how long it will run and how either side can amend or withdraw. In essence, it provides a lightweight "partnership roadmap", ensuring everyone understands what they've committed to and how progress will be monitored.

**See Appendix C: Memorandum of Understanding example**

### Schemes of Delegation:

Formal frameworks – often required in federations or multi-academy trusts that set out exactly which governing board or leader holds which powers. They list decision areas (e.g. approving the budget, appointing staff or ratifying policies) and show whether authority rests with the full governing board (or trust board), a specific committee (e.g. Finance, Teaching & Learning or Pay & Personnel), the EHT/CEO or site-level heads of school.

By clearly mapping out who can act in each area, and under what thresholds, the SoD ensures accountability, transparency and timely decision-making across all member schools.

Together, MoUs and SoDs ensure that collaborative work proceeds smoothly (MoUs) and that governance remains effective (SoDs), whether in short-term partnerships, federated governing boards or larger academy trusts.

## Scheme of Delegation explained

To ensure clear lines of responsibility and accountability, a Scheme of Delegation should define decision-making authority across the multi-school organisation's governance and management. This document is essential for cohesive leadership and operations as it clarifies roles and powers. By precisely outlining responsibilities it aligns decisions with partnership goals, promotes effective governance and ensures accountability. The resulting transparency streamlines communication, fosters collaboration, and empowers leaders with clarity and confidence. Within a school partnership this scheme is critical for establishing an operational framework that ensures everyone understands their roles and that decisions are made efficiently in a clear and accountable manner.

### Clarity of roles and responsibilities:

Partnerships and federations bring together multiple schools and often share leadership at headship or senior leadership level. Depending on the context, there may also be a shared governance structure. This can create complexity. A scheme of delegation clearly defines who is responsible for what, preventing confusion and overlap.

It outlines the lines of accountability for all involved in the leadership of the partnership and the schools within it.

### Accountability:

By establishing clear lines of authority, the scheme of delegation makes it easier to hold individuals and groups accountable for their decisions and actions.

This is crucial for maintaining transparency and ensuring that all parties are working towards the agreed criteria or goals of the working agreement.

### Efficient Decision-Making:

Organisations may need to make decisions quickly and always efficiently. A well-defined scheme of delegation empowers school leaders and governors/committees to make decisions within their areas of responsibility.

This streamlines processes and allows the governing board to focus on strategic matters.

### Consistency and Standardisation:

A scheme of delegation helps to ensure consistency in policies and practices as agreed and adopted by the schools within the partnership/federation.

### Legal and Regulatory Compliance:

Schools are subject to various legal and regulatory requirements. A scheme of delegation helps to ensure that these requirements are met.

### Effective Governance:

Ultimately, the scheme of delegation is a fundamental tool for effective leadership and governance. It enables the federation to operate smoothly, efficiently and in the best interests of its pupils.

See Appendix D: Scheme of Delegation



## A secondary school federation with special provision

**The H3 Federation:** Haverstock School, Harmood School, Heath School in collaboration with Acland Burghley School

**Executive Headteacher:** Nicholas John

**H3 Federation is a new partnership between secondary mainstream and special settings: Haverstock is a comprehensive community school; Harmood is a special school for students with complex social, emotional and mental health needs; and Heath is Camden's PRU. The special school and PRU had both formerly operated as a single unit called Camden Centre for Learning (CCfL). In January 2022 CCfL entered an informal collaboration with Haverstock. After an initial successful trial governors decided to rename Harmood and Heath and to establish the H3 Federation formally.**

Following the departure of the founding executive headteacher H3 worked with Camden Learning to bring Nicholas John, headteacher for 10 years at nearby Acland Burghley School, to take up the role in a part time interim capacity. Nicholas shares his time between the four schools in particular developing the heads of school and key senior staff. He builds capacity in the system by making links and connections, making use of local knowledge and connections across the borough, for example, the head of Heath School has now also been appointed to act additionally as Executive Director of Resources across the federation. Seconded Acland Burghley staff also directly support Nicholas in his H3 work.

The role of executive headteacher in this setting has been about spotting opportunities for freeing up local decision making, through coaching of senior staff, specialist problem solving and vision shaping. It is very much leadership by influence rather than hands on management of school improvement projects, which must be delegated to others.

One of the early roles for Nicholas has been to unpick some decisions made at the federation's start, so as to set it up for a sustainable long-term future. For example, the need to amend governance arrangements quickly became apparent. The original sub-committees of the governing board were established to address cross-federation matters, but this often seemed to leave individual school matters under-represented. The committees were therefore re-purposed to focus more on the individual schools. Cross-federation matters are now dealt with by the federation governing board itself and one finance sub-committee. Appropriately, support for H3's process of change was given by another Camden federation, saving time and effort.

Federation is already bringing benefits to staff development, including a growing understanding of SEND and the development of an inclusive curriculum. There has been an early and positive impact on recruitment and retention. Acland Burghley has never had such strong fields of applicants when positions (increasingly rarely) fall vacant. While the financial position remains challenging for H3, the issues to be addressed and actions needed are now more clearly understood. Financial benefits, limited to date, are expected to grow over the next year.

There are countless other examples of strong partnership working. Haverstock played a leading role in a group which developed a borough-wide approach to the delivery of T Levels. It has now set up a School-Centred Initial Teacher Training (SCITT) programme, and other schools are joining up as partner deliverers of that project. Heath is piloting an outreach service and, again, its close links and connections with other schools, enabled through the capacity generated by its federated partnership model, will help to facilitate this.

## What should the executive headteacher role, responsibilities and salary structure look like?

### Leadership roles in partnerships and federations

#### Executive Headteacher

**Partnerships:** In a partnership, when a governing board agrees for their headteacher to also serve as the Executive Headteacher (EHT) for another school a Memorandum of Understanding (MoU) is created and signed by both governing boards. This MoU details the collaborative arrangement and mutual benefits. Additionally, a secondment agreement is established, functioning as an employment contract for the EHT during the partnership. This agreement covers salary, performance management and specific arrangements like additional travel expenses. The EHT's original employing school invoices the partner school for the proportion of time spent at the partner school, including associated costs. Upon conclusion of the partnership, the EHT returns full-time to their original school, resuming their headteacher role and substantive salary.

**Federations:** In a federation the EHT is employed by the federation's governing board to lead all schools within the federation. The governing board acts as the sole employer, allowing for a permanent contract. If schools plan to jointly advertise for an EHT one school initially serves as the employer for pay and pension purposes. However, if the EHT role is permanent the governing boards are expected to formalise the federation within two years.

Reference: [Academies \(gov.uk\)](https://www.gov.uk/government/organisations/academies)

## Executive headteacher and head of school arrangements in partnerships and federations

### Executive headteacher in a partnership:

When a governing board agrees to a headteacher becoming an EHT across multiple schools in a partnership, the following processes are implemented:

- **Memorandum of Understanding:** Both governing boards sign an MoU outlining the partnership's operational framework and mutual benefits.
- **Secondment Agreement:** A secondment agreement, functioning as a temporary employment contract for the EHT, is created. This agreement specifies salary, performance management procedures and any bespoke arrangements, such as travel expense reimbursement.
- **Financial Reimbursement:** The employing school invoices the partner school monthly for the proportionate time the EHT spends at the partner school, including associated on-costs.
- **Return to Employing School:** Upon partnership termination, the EHT resumes their full-time headteacher role at their original employing school, reverting to their substantive salary.

### Head of school in a partnership:

- A head of school (HoS) may be recruited for the partnership.
- More frequently, the deputy headteacher assumes the HoS responsibilities for the partnership's duration, receiving appropriate compensation for the additional duties.

### Executive headteacher in a federation:

- The federation's governing board is the sole employer of the EHT, who leads all schools within the federation. A permanent employment contract can be issued.
- If multiple schools jointly advertise for an EHT, one school acts as the employer for pay and pension purposes. Governing boards should aim to federate within two years for permanent EHT positions.

### Head of school in a federation:

The EHT, as part of their strategic leadership, establishes the staffing structure for each federation school, which often includes a permanent HoS.

## The executive headteacher role: Strategic leadership and collaborative vision

The EHT role, while not legally defined, is a strategic leadership position that varies significantly based on the specific needs, context and number of schools within a partnership or federation.

**Key Distinction from Headteacher:** The EHT's primary focus shifts from operational management to strategic direction, encompassing the long-term vision and development of all schools in the collaborative structure.

### Core responsibilities:

- **Strategic leadership and equity:** The EHT is responsible for establishing and implementing a unified strategic direction across all schools, ensuring equitable treatment and fostering a collaborative environment. This requires a thorough understanding of each school's unique characteristics, context, strengths and weaknesses, particularly when integrating new schools into the partnership.
- **Sustainability and growth:** Securing the long-term sustainability of all schools within the partnership or federation.
- **Leadership development:** Coaching and supporting the professional growth of school leaders.
- **Systemic development and monitoring:** Establishing and monitoring effective systems across all schools.
- **Knowledge sharing and best practice:** Identifying and facilitating the sharing of best practices, curriculum resources, and expertise among schools for mutual benefit.
- **Rapid intervention:** Addressing weaknesses promptly and decisively.
- **Financial stewardship:** Ensuring value-for-money, effective financial planning and balanced budgets, including shared procurement strategies.
- **Stakeholder engagement:** Building and maintaining strong relationships with parents and governors, particularly when introducing new leadership models.
- **Governance and reporting:** Providing regular and comprehensive reports to the governing board.

### Governance and Support:

**Policy Alignment:** Governing boards and trustees must ensure their Human Resources (HR) policies reflect the EHT's role and delegated decision-making authority.

**Appointment Authority:** The appointment of EHTs and headteachers ultimately rests with the governing board, who should consider guidance provided by Camden Learning.



# Executive Headteachers as Agents of Change

## Regent High School/UCL Academy

Gary Moore, Headteacher, Regent High School & Executive Headteacher (Seconded) The UCL Academy

**Gary Moore was seconded to the post of executive headteacher of The UCL Academy in April 2024 following its critical 2022 Ofsted inspection and subsequent period of uncertainty. His secondment from Regent High, commissioned by Camden Learning, was driven by the need to stop drift and accelerate improvement. As executive headteacher, his role was essentially a strategic one, intended to bring about system change rather than take over daily operational leadership duties, although there was some inevitable overlap.**

The first step was a rapid appraisal of culture, standards, structures and capacity, focused on systemic issues and the development of a stabilisation plan. Winning hearts and minds was critical. This began with whole staff meetings at both the start and the end of the very first day, where conversation centred on relationships and listening. Anxious about increased workload, staff were seeking both support and clarity of purpose. The turbulence the school had experienced was acknowledged, as was the quality of the staff, but it was also important to be clear and transparent about what needed to change. Three principles were set out to underline the message that the leadership was there to build, not to criticise: Clarity; Consistency; Collective Responsibility.

A renewed clarity of purpose centred on student outcomes helped reinvigorate the senior team and empower it to lead. Line management protocols were reviewed and recalibrated and – with an Ofsted reinspection imminent – school priorities were reshaped into a short-term delivery plan in which everyone could understand their role. Staff morale was helped considerably by the fact that, at the end of the first day, the executive head was able to announce that he had earlier in the day secured an Ofsted deferral!

The second week was marked by 25 lesson observations by the executive head accompanied by a member of the senior team. This led to a report to staff and governors outlining a plan for a new quality assurance cycle, re-established behaviour routines and improved corridor and lesson transition culture. The data gathered also fed into an analysis of curriculum intent and impact to help steer improvement in teaching and learning.

An important ‘quick win’ was achieved through the introduction of daily SLT meetings, morning staff briefings twice weekly, and a weekly “staff cup” to celebrate staff successes. These helped increase the visibility of the SLT and strengthen its empowerment to lead. They also reinforced staff unity through consistent messaging on expectations and direction. It took a little longer to strengthen middle leadership so that it contributed more effectively to collective problem-solving and sharing of best practice across departments. Regular structured meetings of middle leaders, chaired by a SLT member, were introduced to address this and ensure alignment with the school’s overall objectives.

The impact of these changes was quickly evident. A positive Ofsted inspection after just six weeks was a major boost. Having been graded as “Requires Improvement” for two years, the school was now judged “Good” on every element. The report explicitly referenced improved leadership capacity and the energy and clarity of the new direction. It was clear, too, that the mood around the school had changed, with a renewed sense of optimism, focus and pride among staff, students, parents and the wider community.

The experience brought benefits to Regent High as well as to the UCL Academy. It underlined the quality of the leadership, systems and classroom education operating in the school, and it provided an opportunity for its deputy headteachers to act up and develop their leadership skills. It also enhanced Regent’s reputation as a school that not only provides an excellent education for its own pupils but also contributes to system-wide improvement through partnership working.

## Executive Headteacher Appointment Process in Informal Partnerships/Soft Federations: Principles and Approaches for Governing Boards

The appointment of an EHT in an informal partnership or “soft federation” within the maintained school sector requires careful consideration by the governing board. While the specific process may vary depending on the unique circumstances of the schools involved, certain principles and approaches should guide the decision-making and recruitment.

See also: [NGA executive recruitment toolkit](#)

### Understanding the Context: Informal Partnership vs. Formal Federation

It is crucial to differentiate between an informal partnership (or soft federation) and a formal (or “hard”) federation.

- **Informal Partnership/Soft Federation:** This involves collaborative arrangements where schools agree to work together, sharing knowledge, experience and resources for mutual benefit. These are often formalised through a memorandum of understanding (MoU). In this model, the EHT may be seconded from one school to another or appointed to work across multiple schools without a single, unified governing board for all schools.
- **Formal Federation:** This involves a more integrated structure where two or more schools are governed collectively under a single governing board. In a formal federation, the EHT is employed by the federation’s governing board to lead all schools within the federation, typically on a permanent contract.

This guidance focuses on the appointment process within the informal partnership/soft federation context, where separate governing boards typically remain, and the EHT’s role may be a secondment or a new appointment working across existing structures on a fixed term contract or subcontracted via an agency.

## Key Principles for Governing Boards

### Clarity of Purpose and Vision:

- Before commencing any recruitment, each governing board must have a clear understanding of why an EHT is needed for the partnership. This understanding should be shared and agreed by both boards.
- To define the strategic vision for the partnership and how the EHT will drive this vision across the collaborating schools it may be helpful to consider these questions – What are the shared objectives? And What challenges will the EHT address? (e.g. declining enrolment, curriculum leadership and financial sustainability).

### Defining the EHT Role and Responsibilities:

- While the EHT role is not legally defined, it is fundamentally more strategic and less operational than a traditional Headteacher role.
- Clearly articulate the specific responsibilities of the EHT within the partnership. This includes:
  - › Strategic leadership and direction across all schools.
  - › Ensuring the long-term viability and success of all schools.
  - › Promoting and nurturing the unique ethos and values of each school.
  - › Leadership development within each school.
  - › Developing and monitoring consistent and effective systems.
  - › Facilitating knowledge sharing and best practices.
  - › Addressing weaknesses and areas of concern swiftly.
  - › Financial stewardship, including exploring shared procurement.
  - › Engaging collaboratively with parents and governors.
  - › Accountability and reporting to the respective governing boards.

### Defining the EHT’s delegated decision-making authority within the context of separate governing boards:

- If the person acting up into the EHT role is currently employed as a HT in one of the partnership schools, careful consideration should be given to how their current responsibilities will be deployed during the period of acting up. A review of internal schemes of delegation and decision-making authority should be undertaken.



#### Legal and HR Considerations:

- For informal partnerships, an EHT may be appointed either via a secondment agreement if an existing headteacher is taking on the role for another school or with a new contract if it's a new appointment.
  - › A memorandum of understanding (MoU) should be created and signed by both governing boards, detailing the collaborative arrangement.
  - › A secondment agreement should function as an employment contract for the EHT during the partnership, covering salary, performance management and specific arrangements (e.g. travel expenses).
  - › The EHT's original employing school will typically invoice the partner school for the proportion of time spent at the partner school. The process and expectations of this should be set out in the memorandum of understanding.
- The School Teachers' Pay and Conditions Document (STPCD) and the school pay policy will determine the pay structure. The EHT's salary group size is determined by a "unit score" calculated from the total number of pupils on roll across all their schools. The governing board establishes a seven-point salary range within the group, considering internal differentials, role complexity and candidate experience. Justification is required if exceeding the standard salary range (e.g. for recruitment/retention). See the Camden schools pay policy and the [School teachers' pay and conditions guidance 2025](#).
- Consideration may also need to be made for other roles taking up new responsibilities to allow a seconded headteacher to assume the role of EHT.
- If the appointment involves reorganisation or requires existing headteachers/deputy headteachers to compete for positions, the School's Organisational Change Policy may need to be followed. "Ringfencing" arrangements may be applied to headteachers of directly affected schools in consultation with the local authority to minimise redundancies.
- If other staff (e.g. deputy headteachers) are taking up new or additional responsibilities for a fixed period due to the secondment of the headteacher to an EHT role, this may be recognised in the form of fixed term honoraria, temporary movement through or changes to the salary scale. In an informal fixed term partnership such changes should be for less than 2 years and carefully documented as only being for the period of the partnership arrangement.
- It is strongly recommended to seek early HR advice throughout the process to ensure compliance with employment law, school policies and to navigate complex staffing arrangements.

#### Recruitment Approaches:

- The EHT role should be advertised using appropriate methods aligned with school procedures, similar to headteacher and deputy headteacher posts.
- Internal vs. External: Governing boards should consider whether to recruit internally (e.g. seconding an existing headteacher from one of the partner schools) or externally.
  - › If an existing headteacher is seconded, ensure clarity on salaries reverting to the original scale on their return to their substantive post at their original school upon conclusion of the partnership.
  - › If recruiting externally, the process should be robust and competitive to attract the best candidates.
  - › It is highly recommended that an external advisor supports the recruitment process. Camden Learning offer all Camden schools this advice and support.
  - › For a true partnership approach, a joint recruitment panel comprising governors from all involved schools is highly advisable. This ensures collective ownership and a shared understanding of the ideal candidate.
  - › Develop clear and comprehensive selection criteria based on the defined EHT role and responsibilities within the partnership. These should go beyond standard headteacher criteria to include leadership across multiple settings, strategic thinking, collaboration and stakeholder engagement.
  - › All arrangements should be documented and carefully communicated in writing to affected parties, with a record kept on their school file.

#### Transition and Induction:

- Plan a thorough induction for the appointed EHT, ensuring they have time to understand the unique characteristics, context, strengths and weaknesses of each school within the partnership. Camden Learning and the school's CPP can support this process.
- Establish clear lines of communication and accountability with each governing board.

#### Appointing a head of school

If appointing a HoS, a similar transparent process should be followed by the governing board of the school where the post would be based. This post would typically be managed and appraised by the EHT, who would also be part of the recruitment panel.

Interim or "acting up" posts would not necessarily require external recruitment processes, but a similar robust approach should be taken to ensure that terms and conditions and suitability are established prior to any appointment.

# Succession planning and career pathways provided by partnership working

Holy Trinity CofE Primary School, Emmanuel CofE Primary School, Hampstead Parochial CofE Primary School

**Executive Headteacher:** Laura Hall

The partnership between these three primary schools followed an evolutionary process over several years. In 2016, Laura Hall was appointed headteacher at Holy Trinity where – partly because of small size and intake – the potential for partnership had already been under discussion. Some four years later, following the departure of its then headteacher, Hampstead Parochial appointed Laura and her senior leader as executive head and head of school, with Emmanuel following suit two years ago.

The schools all having CofE status was a natural foundation for the development of the partnership. Each school has retained its own governing board, with oversight of the partnership overseen through a joint committee made up of governors from each school.

Staff across the three schools benefit from observing and experiencing teaching and learning in different contexts and witnessing supportive and constructive challenge. This provides an environment for learning and development for staff that enables them to feel confident about pursuing career development opportunities both within and outside of the partnership schools.

While nowhere has escaped the national challenge of recruiting and retaining teaching staff, it has been less of a problem to date for the three schools in this partnership. The number of applicants for teaching jobs to the schools has fallen significantly, but the schools have still been able to recruit excellent staff when needed. Retention rates are high too. As Laura Hall said: “Teachers generally want to work in successful, supportive schools with career development opportunities.” One example of the partnership’s success in keeping good people is that of one teacher moving from Holy Trinity to Hampstead Parochial to cover a leadership maternity leave and then going on to be head of school at Emmanuel.

The benefits for the pupils and their families are well evidenced by the excellent educational outcomes highlighted in their Ofsted reports, but these are not the only benefits. The partnership also organises many well-attended joint events for the pupils and their local communities, one example being that of combined local sports events.

Budgetary concerns and falling rolls are often among the key drivers for the formation of school partnerships. While this has not been the case here, there have been productivity and financial benefits for the partnership schools. Savings on teaching costs are not seen as feasible, but administrative savings have been significant. For example, there is shared business management across the three schools and not only has this saved on staffing costs but it has also enabled savings on procurement, subscription rates, and the cost of external curriculum and development courses for staff.

## Practical steps for the governing board

- Governors from all schools in the potential partnership should meet to discuss the rationale, vision and scope of the EHT role.
- Work collaboratively to draft a Memorandum of Understanding outlining the partnership’s objectives, the EHT’s responsibilities and the terms of collaboration.
- Engage with Camden Learning and HR professionals early to discuss employment models (secondment vs. new contract), pay implications, potential partner schools, appraisal arrangements and any necessary organisational change processes.
- Develop a detailed job description and person specification for the EHT role, reflecting the strategic nature and multi-school responsibilities.
- Decide on the recruitment approach (internal/ external, ringfencing if applicable) and establish a joint recruitment panel.
- Consider other posts within the partnership schools where roles and responsibilities may be affected, including whether a HoS, overseen by the EHT is needed.
- Advertise the post widely (if external), conduct interviews and assess candidates against the agreed criteria. Engage external advisory support to the panel.
- Formalise the offer with a comprehensive secondment agreement or employment contract, ensuring all terms (including salary, performance management and arrangements for partnership termination) are clearly documented.
- Communicate transparently with staff, parents and the wider school community about the new leadership structure and the EHT’s role.

## Executive headteacher pay determination

Executive headteacher and headteacher salaries must adhere to the School Teachers’ Pay and Conditions Document (STPCD), which provides statutory guidance for maintained schools, including VA and VC schools. Any deviation from the STPCD should be undertaken only after consulting with HR to ensure compliance and best practice. Governing boards are required to consult their respective school pay policies.

## Calculating group size for salary determination

The “unit score”, based on the total pupil roll, determines the salary group size. For an EHT overseeing multiple schools the combined pupil roll across all schools is used to calculate the overall group size.

- **Example 1 (headteacher):** A headteacher of a single-form entry (1fe) primary school with 210 pupils would fall within Group 2 salary range.
- **Example 2 (executive headteacher):** An EHT overseeing two 1fe primary schools with a combined pupil roll of 420 pupils would fall within Group 3 salary range.

The governing board establishes a seven-point salary range within the determined group, considering factors such as:

- Salary differentials with other school staff.
- The complexity and scope of the EHT’s responsibilities.
- The experience and qualifications of the appointed individual.

Where permitted by the school’s pay policy, the governing board may exceed the established group salary range. This decision requires a clear and documented rationale, such as recruitment and retention challenges. The rationale must also address the long-term financial sustainability of the increased salary.

**See Appendix E: Executive headteacher and head of school model job descriptions**

# What is an effective appraisal structure for executive headteachers?

## Headteacher appraisal in multi-school organisations

Maintained schools are governed by the Education (School Teachers' Appraisal) (England) Regulations 2012 (regulation 7), which mandate headteacher appraisal. While these regulations do not explicitly address EHTs they apply to all teachers, including those in executive roles. Consequently, governing boards bear the responsibility for appraising their EHTs, as outlined in section 3.1.1 of the maintained schools governance guide.

Statutory guidance specific to EHT appraisal across multiple schools is limited. Therefore, schools must define their appraisal procedures within their own appraisal policies, tailored to their governance structures.

## Governance Structures and Appraisal Responsibility:

### Hard Federations:

A single governing board oversees all schools and assumes full responsibility for the executive headteacher's appraisal. This includes:

- Appointing an appraisal panel.
- Selecting an external advisor (a requirement for maintained schools and a best practice for trusts).
- Setting clear and relevant objectives.

### Partnerships with joint executive governing boards:

A joint executive governing board, or an appraisal committee composed of governors from each school, manages the EHT's appraisal. Responsibilities are similar to those in hard federations:

- Appointing a panel.
- Selecting an external advisor.
- Setting objectives.

### Partnerships with multiple governing boards:

Despite multiple boards the EHT's role is singular, necessitating a unified appraisal process to avoid undue workload.

### Appointing a panel:

- Boards should collaboratively agree on the panel's composition.
- If one school is the employer, the panel should primarily consist of its governors.
- If all schools are employers, the chairs should form a three-person panel with representation from each board.
- Consider including local school improvement partners for broader school context.
- Panel members should possess experience and ensure fair, relevant objectives.

### Selecting an external advisor:

If one school is the employer, that board typically selects the advisor, with optional consultation. If all schools are employers, boards should jointly select the advisor.

### Setting objectives:

Objectives must reflect the development plans of all schools, requiring strategic information sharing and collaborative decision-making. Objectives should account for varying school contexts and the monitoring of senior leadership across each school. Consider including an objective focusing on the benefits of the EHT role to each school, such as shared training and staff secondments.

### Executive headteacher appraisal report:

The EHT should prepare a report for the appraisal addressing:

- The benefits and challenges experienced by each school.
- Personal and professional reflections on the role.

**See Appendix F: Sample EHT Performance Management Checklist**



## A governor's experience of forming a partnership

Edith Neville Primary School,  
Richard Cobden Primary School

**Executive Headteacher:** Ruby Nasser

**As is common in the formation of school partnerships, the relationship between Edith Neville and Richard Cobden grew over time. In this case, the two schools had a shared chair of governors for many years, who played a significant role in promoting collaborative working between the schools and the development of a more formal partnership.**

A period of uncertainty following the retirement of the longstanding and well-regarded headteacher at Richard Cobden led to the governors considering closer professional links between the two schools, which are very near to each other geographically and serve similar communities. The successful oversight of a major new build over several years by the headteacher of Edith Neville while maintaining the school's outstanding rating was clearly a factor in this.

The chair, Deborah Isaacs, set up a sub-committee to steer the development of the partnership and to guide consultation with the two governing boards, with a view to formal federation over time. A service level agreement (SLA) proved a simple but important tool for setting out the initial partnership arrangements between the schools and the appointment of the executive headteacher. The whole procedure inevitably took up a considerable amount of governor time in the earlier stages, but the chair maintains that there were undoubted advantages to her membership of both governing boards, in terms of knowledge, trust and personal relationships. The boards meet regularly and standing items on the governing board meetings ensure that common issues are routinely discussed, while joint tasks are overseen by sub-committees drawn from both schools.

The headteacher of Edith Neville was formally appointed as EHT of Richard Cobden in September 2024, with a second member of staff appointed head of school. There have been significant educational benefits from the growing partnership, particularly for curriculum development, staff support, training and mentoring across the two schools. For example, two highly regarded special educational needs and disabilities coordinators (SENCo) at Richard Cobden are able to offer mentoring support to a newly appointed SENCo at Edith Neville. These benefits are still growing, but the latest Ofsted reports for the schools confirm that the outstanding education provided by both schools has been maintained.

There have been financial benefits too, such as cost savings from shared business and accounts management. As is the case throughout education, further savings in future are likely to be necessary in the face of increasing budgetary pressures. These include the need to manage a falling roll at Richard Cobden, as well as growing demands for SEND support. However, the chair sees the partnership structure as making this more manageable – perhaps even more readily so if formal federation is carried through.

## What are effective economies of scale?

"Economies of scale" refers to the cost savings or efficiency gains that arise when resources or activities are combined across multiple schools, rather than duplicated in each individual institution. In a federation of schools this typically happens because:

- 1. Fixed Costs Spread Over More Pupils/Staff:** Certain overheads – such as central leadership, recruitment costs, ICT infrastructure or finance teams can be spread across all member schools rather than born by each school in isolation.
- 2. Bulk Purchasing & Unified Contracts:** Buying goods or commissioning services (e.g. photocopier leases, cleaning contracts and software licenses) in one large block generally reduces the unit price because suppliers are willing to offer volume discounts.
- 3. Shared Expertise & Reduced Duplication:** Rather than every school having its own specialist (e.g. a dedicated HR officer or SENCo), a federation can deploy a small team whose time is apportioned across sites. This frees up budget lines and reduces duplication of admin roles.
- 4. Administrative Efficiency:** Consolidating back-office functions (e.g. payroll, management information system (MIS) administration and finance processing) into a single central team avoids each school subscribing to separate support agreements and can reduce overall staffing requirements.

### Shared Staff and Administration:

Shared Senior Leadership Team (SLT) or Executive Leadership Team (ELT) Instead of each small school having a full-time headteacher, the federation has an EHT/chief executive officer (CEO) overseeing several schools, with head of schools managing the day-to-day operations of individual sites. This can lead to cost savings on higher-level salaries which are shared between a number of schools. This also provides each school with access to highly skilled staff to help lead and develop the school strategies.

- **Shared School Business Manager (SBM)/CEO:** One highly skilled employee can manage the high level finances (including payroll, budgets and procurement), HR, GDPR, Health and Safety and premises for multiple schools, reducing the need for a full-time manager at each school.
- **Central Finance Team:** A central finance team handling invoicing, purchase orders for all its schools, creating efficiencies and potentially employing fewer, more specialised staff.
- **Central HR Team:** A central HR officer can manage recruitment, training and employee relations across multiple schools, leading to cost savings and consistent practices. Recruitment costs can be reduced through advertising for vacant posts as a group, rather than as a single, school.
- **Shared Administration:** Shared administration practices, for example booking trips, leads to efficiencies and cost savings through joint purchasing. Having a shared administration team also allows staff to work across schools and cover absence and high volumes of work where needed.
- **Shared IT Support/Head of Information and Communications (HOIC):** Instead of each school having its own IT support/IT management, a central IT team can provide support remotely and through scheduled visits to multiple schools, reducing overall IT costs. Schools will also benefit from shared initiatives and implementation of new technologies.
- **Shared Premises Staff (Caretakers):** A team of premises staff employed across several nearby schools, optimising their time, sharing different skill sets and potentially reducing the total number of staff needed or providing increased hours of cover throughout the school day.

### Service Level Agreements (SLAs) and Procurement:

- **Joint Procurement of Resources:** Multiple schools can pool their resources to buy stationery, textbooks, furniture and other educational materials in bulk, securing discounts due to the larger order volume.
- **Shared Specialist Services (e.g., Educational Psychology, Speech Therapy, Recruitment):** Collaborations between schools can lead to cost savings through joint procurement.

### Curriculum and Teaching Resources:

- **Shared Curriculum Development:** Teachers collaborate to develop curriculum materials, lesson plans and assessment tools, reducing the workload for individual teachers and promoting consistency.
- **Shared Training and Professional Development:** Delivering training sessions for staff from multiple schools together can be more cost-effective than running separate sessions for each school. It also allows for networking and sharing of best practices. (e.g. MDA training/first aid/GDPR/safeguarding etc).

### Key considerations for finding economies of scale:

- **School Size and Structure:** Our smaller schools often have an increased benefit from economies of scale through collaboration.
- **Geographical Proximity:** Sharing resources and staff is more practical when schools are located close to each other. It is considered that most schools within Camden are close enough to each other for partnership to be practical.



## Economies of Scale and using staff flexibly

Our Lady's Catholic Primary School,  
St Eugene de Mazonod Catholic Primary  
School, St Joseph's Catholic Primary School,  
St Patrick's Catholic Primary School

**Executive Headteacher:** Moya Richardson

The Camden Catholic Schools Partnership, comprising four schools, has its roots in a wider group of faith schools – including a group of local Anglican schools – which have worked closely together for many years and, indeed, continue to do so. Although not federated, three schools formed a more formal partnership in 2022 with the fourth joining in 2023, working to a memorandum of understanding, with a common executive head and separate governing boards. The present executive head was appointed in April 2023 and each school has a head of school and an assistant head/SENCo.

The executive head spends one leadership day a week in each school and holds weekly zoom meetings with the whole group of heads and assistant heads. There are subject leads (e.g. maths and science) who work across the four schools – and also across the wider, more informal partnership with the Anglican schools group. These leads work with the individual school subject leads to establish an agreed curriculum and pedagogical approach. The scale of the partnership means that it has the capacity to respond quickly and effectively when leadership and development support is needed – mentoring support for a recently appointed SENCo, for example. Many teachers from the partnership have moved into senior leader positions within and beyond the Catholic partnership, including three head of school appointees to Anglican partnership schools. One member of staff has moved from teaching assistant to head of school, and one head of school worked previously as head of school in two of the four schools.

Budgetary challenges are an issue for schools everywhere and will continue to be so. However, the partnership has brought financial benefits during a time of these increasing pressures. Leadership costs are split, professional development costs are lower, school business management and premises management costs are shared and procurement costs are lowered through bulk buying.

While each school has a clear individual identity, the collaborative nature of the partnership brings many benefits to all, including economies of scale and a common approach to the curriculum, to staff development and to school values and ethos. There is ready access to expertise across the schools and workload is better managed because of the reduced demands of curriculum development on individuals, for instance.

Teachers can – and do – work in different schools, gaining confidence and wider experience. For example, internal secondments are currently being used to cover the maternity leave of two SENCos in the partnership schools. Staffing across the schools has remained stable, retention rates are high and recruitment has been less of a challenge than has been the case for many schools.

Good educational outcomes are the ultimate goal of course and Ofsted reports are testimony to the success of all the partnership schools in this respect. Between them, the four schools received 16 ratings of “Outstanding” and 4 of “Good” in their latest inspections.

## How can we streamline policy approaches?

Federated schools adopt shared policies to ensure consistency, fairness and legal compliance across all sites. By having one unified framework for areas such as safeguarding, behaviour, SEND and finance, pupils and parents know exactly what to expect, staff benefit from equitable terms and streamlined induction, and governors can more effectively monitor and review a single document rather than multiple versions. Shared policies also reduce duplicated effort and costs including centralising updates, training and administration, while strengthening governance by embedding common values, simplifying benchmarking and enhancing stakeholder confidence that every school in the federation operates to the same high standards.

### Safeguarding & Child Protection

- **Federated Rationale:** One comprehensive flowchart (from concern → DSL → LADO → social services) avoids confusion when cases cross site boundaries. All designated safeguarding leads (DSL) follow the same reporting and record-keeping templates.

### SEND (Special Educational Needs & Disabilities)

- **Federated Rationale:** A unified approach to identification, assessment and intervention means all schools pool specialist staff (e.g. the same SENCo, speech therapist). Consistency of provision prevents duplication and supports smoother Education, Health and Care Plan (EHCP) reviews.

### Health & Safety

- **Federated Rationale:** One risk-assessment regime (with site-specific appendices) satisfies insurers, reduces implementation variance and makes H&S audits more reliable – sites can be compared using identical checklists.

### Data Protection & GDPR

- **Federated Rationale:** Appointing one data protection officer (DPO) for the federation underpins a single retention schedule, breach-response pathway and subject access request (SAR) process, making compliance easier to demonstrate.

### Finance & Scheme of Delegation

- **Federated Rationale:** Common procurement thresholds, identical purchase-order processes and a single audit regime (where one external auditor covers all schools) lowers costs and reduces the chance of financial irregularities.

### Personnel & HR

- **Federated Rationale:** Shared recruitment templates, standardised interview panels and a unified pay policy promotes fairness. Staff mobility within the federation (e.g. applying for a Year 5 role in another site) is frictionless.

### Admissions & Attendance

- **Federated Rationale:** Even if each school remains its own admissions authority, a joint Coordinated Admissions Scheme prevents over-subscription confusion. A single attendance escalation process ensures persistent absence is tackled consistently.

### Equalities & Accessibility

- **Federated Rationale:** One action plan across all sites means resources (ramps, signage, accessible facilities) are prioritised equitably. Equality objectives (e.g. closing attainment gaps) can be measured across the whole federation.

### Complaints

- **Federated Rationale:** A federation-wide complaints policy ensures that parents, pupils, staff or other stakeholders have a clear, consistent route for raising and resolving concerns across all member schools.



# What are effective communication strategies?

## Craft a clear, consistent “federation story”

### Define a shared vision and values

- **Articulate what federation means for the schools:** A stronger leadership structure, shared expertise, enhanced opportunities for pupils, economies of scale and a robust support network.
- **Express the “federation mission” in one or two sentences:** E.g. “By working together under one governing board, [School A] and [School B] will deliver a richer curriculum, wider extracurricular experiences and outstanding pastoral support for every pupil.”
- **Identify 3-5 core values that underpin the federation:** E.g. “collaboration, innovation, community, excellence”. Display these visibly on both school websites and in common areas (halls, staff rooms, reception).

### Use a simple, recognisable brand

- Create a **logo or “badge”** that incorporates each school’s identity (e.g. two crests side-by-side or an emblem showing joined hands).
- Develop a **“federation tagline”** – a short phrase that families and staff can repeat (e.g. “Achieving Together” or “Stronger as One”).

### Tell “federation success” stories

- Choose 2-3 exemplars of federation-driven benefits (e.g. “Year 6 from School A visited School B’s science labs”, “Joint sports day attracted 150 pupils across both sites”, “Shared music teacher introduced Year-5 ensemble”).
- Turn each into a **brief case study** (150-200 words).

### Engage governors and senior leaders

- Hold regular **“federation leadership forums”**: Updates on joint initiatives (e.g. staff CPD, cross-school projects), governance news (policy alignment, budget monitoring), celebration of achievements (exam results, Ofsted feedback), identification of next “quick wins” (e.g. joint procurement opportunities, shared site maintenance).
- Publish a federated governors’ newsletter.
- When new governors join either school invite them to an induction session that explains the federation model.

### Build a strong, visible staff “federation culture”

- **Shared professional development (CPD) calendar/ joint CPD timetable** for the year, highlighting teacher-led peer-observation sessions across sites, cluster moderation meetings (Key Stage 1 and Key Stage 2) that bring together teachers from both schools.
- **“Twinned” subject departments/Key Stage teams.** Form **subject “twins”** (e.g. English leads at both schools jointly plan writing moderation).
- **Set up cross-site “Key Stage huddles”** (e.g. Key Stage 2 coordinators from both schools meet monthly).
- Federation-wide staff briefings and socials.
- Create an online “federation hub” for staff.
- Agreed shared policies.
- Contact lists: “Who’s who in the federation” (with email addresses, key responsibilities).

### Involve pupils and parents directly

- Establish a “federation pupil voice” group which meets once per half-term to discuss ideas (e.g. joint clubs, shared projects). Have them plan one federation-wide event (e.g. literacy week challenge or charity day) and produce a short newsletter item or poster to promote it. Share their meeting notes on both school noticeboards and websites. Expose pupils to leadership, responsibility and cross-site teamwork.
- Combine extra-curricular and enrichment activities (e.g. sporting and musical events).
- Parent information evenings & workshops (e.g. host bi-annual “federation family evenings”).
- Offer a short presentation on federation progress and invite parents to submit questions.
- Send out a “federation newsletter for families” termly.

### Use digital channels to amplify federation messages

- A federated website landing page.
- Social-media takeovers and “cross-posting”.

### Setting goals and evaluating impact

- Over the first 12 months aim to systematically align 3-5 core policies (e.g. behaviour, attendance or SEND).
- Create a “federation leadership development programme”.
- Cross-site mentoring and buddy systems for new staff.
- Establish Key Performance Indicators (KPIs) for governance benchmarking.
- Create an annual “federation impact report”.

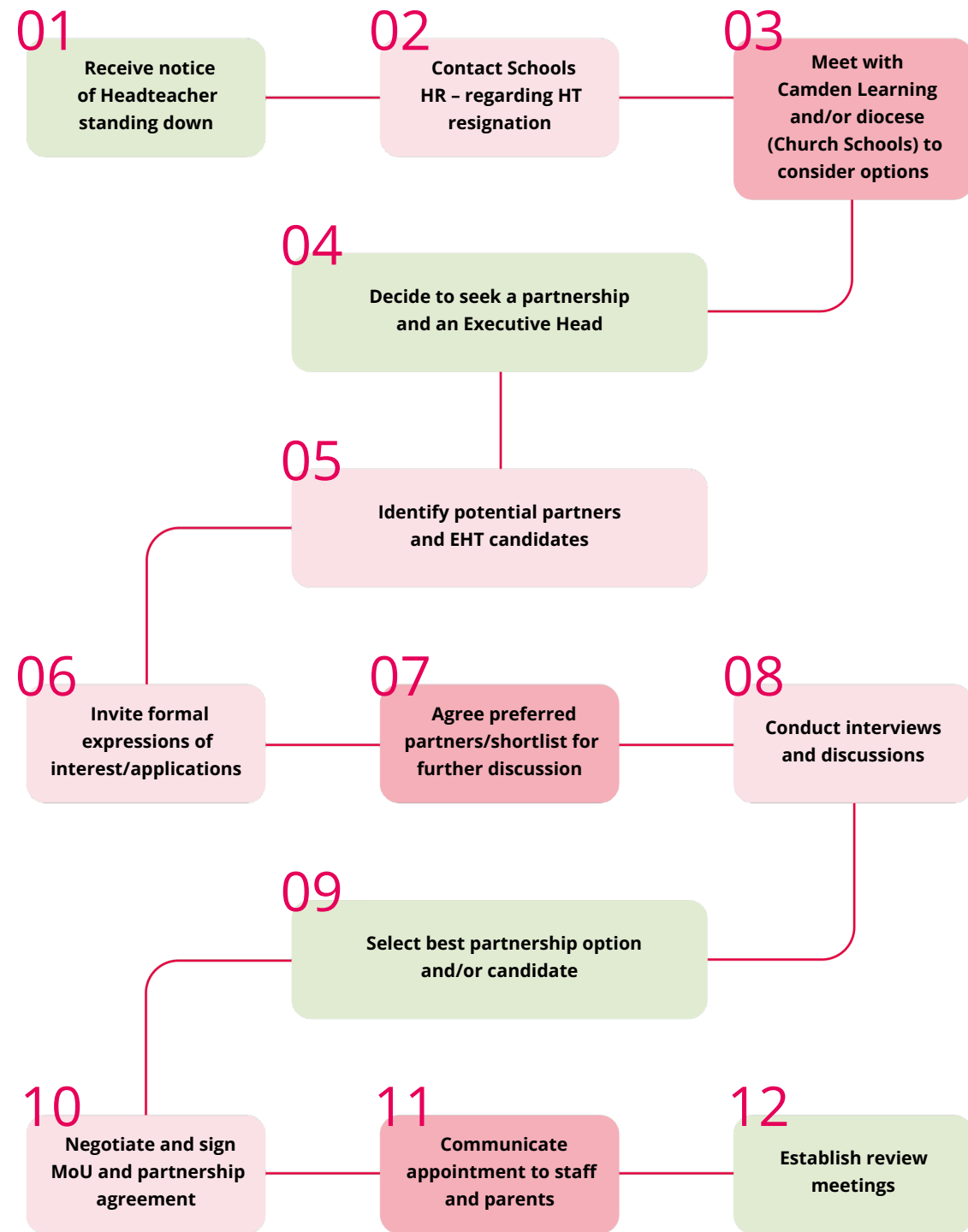
**Appendix A: Checklist governors and flowchart linked with template letters (re. forming a partnership)**

## Appendix A: Checklist governors and flowchart linked with template letters (re. forming a partnership)

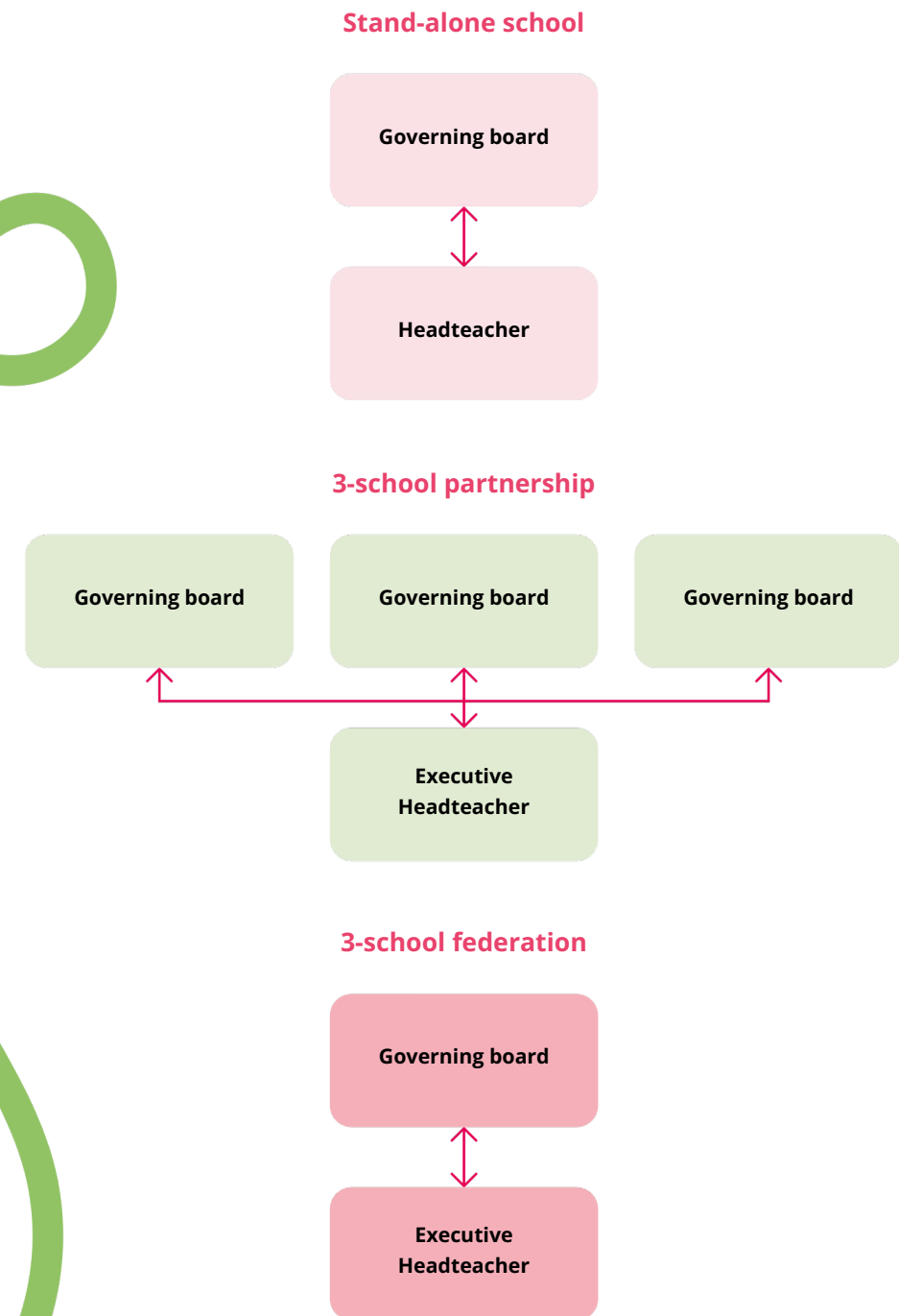
No.	Steps	Checklist
<b>Receive notice that headteacher or executive headteacher will be standing down</b>		
01	Acknowledge the resignation/intention to resign. Inform the governing board and relevant stakeholders (e.g. Camden Learning, foundation, Diocesan Education Service for VA schools, HR).	
<b>Contact Camden Professional Partner</b>		
02	Reach out to the designated Camden Professional Partner (CPP) for guidance and support, and to discuss next steps and available resources.	
<b>Meet with Camden Learning to consider options</b>		
Arrange a meeting with Camden Learning and the CPP to explore potential options for the school's future. Camden Learning will offer support with each subsequent step.		
03	Diocesan schools should meet with their respective education services.  Discuss the benefits and challenges of forming or joining a partnership and assess preferred models. As part of this, governors should consider what type of partnership would suit the school and its vision and culture. A governing board meeting should be held to discuss options.	
<b>Decide to seek a partnership and an executive head</b>		
Establish a working party to explore options and report back, with advice available from the CPP and Camden Learning.		
04	Evaluate the feasibility and desirability of joining a partnership, including the nature and type of partnerships available.  Make a formal decision to explore pursuing a partnership and appointing an EHT.	
<b>Identify potential partners and EHT candidates</b>		
05	Make a formal decision to explore pursuing a partnership and appointing an EHT.  Using advice from the CPP and Camden Learning shortlist potential partner schools, federations and executive leaders that align with the school's values and goals.	
<b>Invite formal expressions of interest/applications</b>		
Agree the application process and outline the deadlines for participation  Draft and agree a job description and person specification* for the EHT.		
06	The individual's employing school or federation has final responsibility for pay and conditions. Camden community schools should set the pay scale using the Camden Schools Pay Policy and Teachers Pay and Conditions Guidance.  Ensure the documents reflect the skills, experience and attributes required for the position.  Supported by Camden Learning (and Diocese where appropriate), publicise the opportunity and invite formal expressions of interest from potential partner schools and EHT candidates.	

No.	Steps	Checklist
<b>Interview and dialogue process</b>		
07	Prepare interview questions* and/or evaluation criteria*.  Use a structured interview and/or dialogue process* to assess candidates and partnership proposals.	
<b>Conduct interviews and discussions</b>		
08	Working party to arrange interviews with shortlisted EHT candidates and/or have discussions with potential partner schools and federations.  Evaluate each candidate and proposal based on the established criteria.	
<b>Select best partnership option and/or candidate</b>		
09	Review the outcomes of the interviews and discussions.  Select the most suitable partnership option and/or EHT candidate.  Governing board should approve the decision to make an offer	
<b>Negotiate and sign Memorandum of Understanding and Partnership Agreement</b>		
Nominate governors to meet with governors of the other school (may be carried out by the working party)  Negotiate the detailed terms of the partnership and the secondment of the EHT, including duration and notice, and include these in a Memorandum of Understanding* and Partnership Agreement* The terms should be broadly in place prior to the governing board's agreement		
10	Employing school or federation to agree EHT's salary and both schools to agree payment structures.  Draft and sign a Memorandum of Understanding (MoU) and Partnership Agreement* to formalise the arrangement.  If one does not exist, establish a joint committee with the other school(s) and appoint governors to sit on it.  Governing board ratifies agreement following agreement	
<b>Communicate appointment to staff and parents</b>		
11	Announce the appointment of the EHT and the partnership to staff and parents.  Provide details on the expected benefits and next steps.	
<b>Establish review meetings</b>		
12	Set up regular review meetings to monitor the progress of the partnership.  Evaluate the effectiveness of the partnership and make any necessary adjustments, including any further formalisation of arrangements, including federation.	

# The Partnership Process



# Appendix B: Federation Model



# Appendix C: Memorandum of Understanding example

### Aims:

- To maintain and improve upon the quality of education at each school, so that overall effectiveness is judged by Ofsted as good or better
- To build high quality, sustainable staffing structures for the future so that the school is able to maintain and improve.
- To provide value for money.

### The organisation of the work of the governing board

The governing board of School A agrees to follow the same partnership governor annual meeting structure, committee structure and meeting structure as the other schools in the partnership. The governing board of School A agrees to use the same policies and school systems as the other schools in the partnership, which are reviewed annually.

### The role of the executive headteacher

The role of the EHT is defined in the job description. The EHT will attend most full governing board meetings and any committee meetings as appropriate. The EHT will lead and manage the schools in line with their contract from add dates with the option to extend the arrangement. The EHT will report to the governing board of each school and to the partnership committee.

If there is a significant change in the senior leadership of any of the schools, the chairs of governors of each school will meet to review the situation and plan a way forward. The arrangement can be terminated with a term's notice.

### In summary, the EHT has lead responsibility for:

- Advising the governing board on the school's aims, objectives, policies, targets, priorities, plans, monitoring and evaluation of progress and impact.
- Leading on strategic thinking, planning and development and resource management, with the aim of improving educational provision and pupil outcomes.
- Reporting to the governing board.
- Deploying the HoS and exercising direct line management of the HoS.

### The role of the head of school

The HoS is appointed by the EHT in consultation with the chair of governors. The local authority will be invited to the interview in an advisory capacity, the chair of governors or their delegate will also attend the interview. The HoS is contracted to the school that they lead. Under the delegated authority of the EHT, the HoS will have responsibility for the day-to-day organisation and operation of the school. The role of the HoS is defined in the job description. The HoS is performance managed by the EHT.

### Financial arrangements

The other schools in the school partnership will pay a proportion of the EHT's salary to *add name* on a termly basis. The EHT is performance managed by the partnership committee. The partnership committee consists of all chairs of governors. The partnership committee meet on a termly basis and report back to the governing board in each school.

Each school will also pay a proportion of *add name* salary (partnership business manager).



# Appendix D: Scheme of Delegation example

## Federation Scheme of Delegation

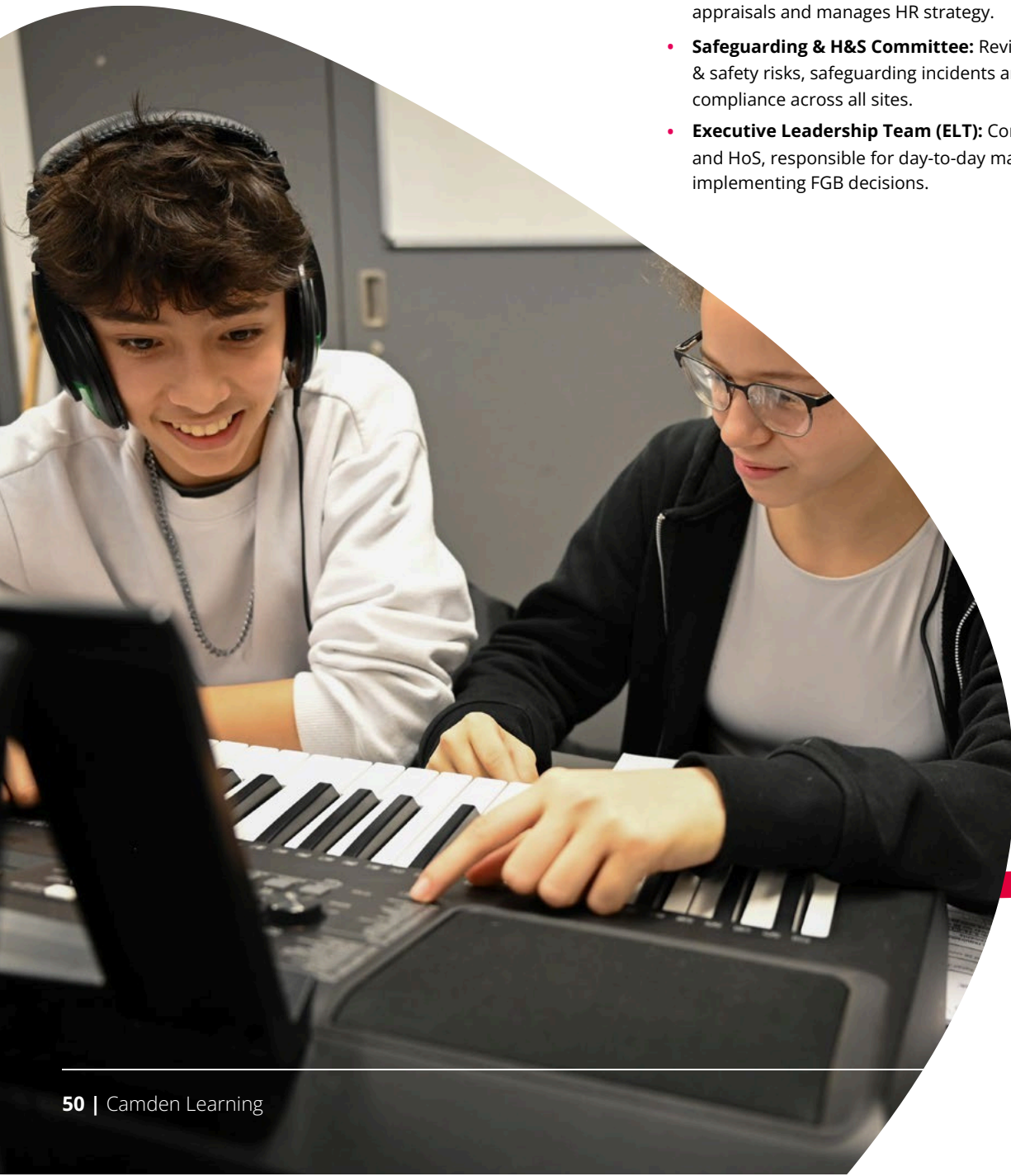
### Introduction

**Purpose:** This Scheme of Delegation (SoD) clarifies which decisions are reserved for the federated governing board (FGB) and which are delegated to sub-committees, EHT, or individual heads of school (HoS). It ensures transparency, accountability and timely operational decisions.

**Scope:** Applies to all schools within the federation. Review annually (e.g. July each year) and update version numbers accordingly.

## Governance structure & committees

- **Federated Governing Board (FGB):** Ultimate authority on strategic matters, statutory policies and large financial commitments.
- **Finance & Resources Committee (F&R):** Advises on budgets, monitors expenditure, recommends virements and oversees audit responses.
- **Teaching & Learning Committee (T&L):** Monitors curriculum implementation, pupil outcomes and staff performance data.
- **Pay & Personnel Committee (P&P):** Reviews and approves staff pay awards, oversees senior-leader appraisals and manages HR strategy.
- **Safeguarding & H&S Committee:** Reviews health & safety risks, safeguarding incidents and statutory compliance across all sites.
- **Executive Leadership Team (ELT):** Comprises the EHT and HoS, responsible for day-to-day management and implementing FGB decisions.



Decision Area	FGB	Committee	EHT	HoS
Strategic Planning	Approve development plan		Draft & implement	Local implementation
Budget Ratification	Ratify budget	Review & recommend	Draft budget	Submit forecasts
Budget Virements	>£50k	£10k-£50k	≤£10k	-
Capital Expenditure	>£100k	£50k-£100k	≤£50k	≤£5k propose
Staff Appointments	Appoint EHT	Appoint senior leaders	Appoint middle leaders	Appoint site staff
Pay & Reviews	Approve pay policy & EHT awards	Recommend senior awards	Recommend staff awards	Appraise staff
Statutory Policies	Approve policies	Review & recommend	Draft & update	Implement & feedback
Curriculum	Approve intent	Monitor outcomes	Coordinate moderation	Local delivery
Disciplinary & Grievance	Appeal EHT/ HoS cases	Hear SLT appeals	Investigate staff ≤HoS	Handle site-level cases
Complaints	Stage 3 for EHT/GB	Stage 3 for SLT	Lead Stage 2	Handle Stage 1 & 2
H&S Compliance	Approve policy	Review audits	Ensure procedures	Site checks
Audit & Controls	Approve accounts	Review reports	Prepare for audit	Assist audits
Risk Management	Approve framework	Review register	Monitor risks	Report site risks
Premises & Maintenance	>£200k	£50k-£200k	≤£50k	Raise requests
Admissions	Approve policy	Monitor outcomes	Coordinate appeals	Manage applications
Staff Leave	Ratify policy	Recommend changes	Monitor absence	Manage site leave
Governor Training	Approve programme	Oversee needs	Organise sessions	Invite site governors

# Appendix E: Job description examples

## TITLE OF POST:

### Executive Headteacher

#### Salary Scale:

Dependent on combined group size of the partnership schools

#### Spinal Points:

LXX – LXX

#### Job Purpose:

To provide effective leadership for xxxxx and xxxxx schools, securing success and continuous improvement across both/all schools, ensuring high quality education for all pupils and the highest standards of learning and achievement in accordance with statutory requirements. The EHT will be required to uphold the schools' vision, ethos and values within day-to-day working practices.

#### Responsible To:

The governors of xxx Primary School and xxx Primary School

#### Accountabilities:

To be met in accordance with the provisions of the School Teacher's Pay and Conditions Document and within the range of headteachers' duties set out in that document and the National Standards for Headteachers. The postholder will be expected to liaise with representatives such as the Director of Children's Services as required.

#### The executive headteacher will:

**Shape the future** by establishing and implementing a strategic plan that inspires and motivates all stakeholders, which ensures pupils achieve high standards and develop in all aspects of their education and reflects the needs of both schools and their communities.

#### Lead learning and teaching

- Set high expectations and challenging targets, monitoring effectiveness and evaluating outcomes.
- Ensure both/all schools focus on pupils' achievement, using data and benchmarks to monitor progress in every child's learning.
- Monitor, evaluate and review classroom practice and promote improvement strategies, challenging underperformance and ensuring corrective action.

- Establish creative, effective approaches to learning and teaching, responsive to the needs of the pupil community.
- Ensure that all staff are equipped to implement strategies to secure high standards of behaviour and attendance.

#### Manage the organisation

- Work with governors and senior colleagues to recruit, induct and develop high quality staff within safer recruitment guidelines.
  - Manage, deploy and develop staff to secure the quality of education and pupils' achievement.
  - Review and manage all financial and human resources identifying how to make best use of sharing resources across schools in the partnership.
  - Review all relevant policies to ensure that they enable effective change to take place.
  - Set appropriate priorities for expenditure, allocating funds and ensuring financial control, in accordance with governing board policies.
- Regularly evaluate the allocation of roles, responsibilities, finance and resources to ensure these underpin the best possible learning environment and highest standards.

#### Safeguarding

- Ensure that there are effective, robust safeguarding procedures in place, which cover all statutory requirements, including effective reporting systems.
- Take responsibility for ensuring that all staff understand and follow safeguarding policies and procedures.
- Ensure that all teaching and support staff are fully inducted in, and made aware of, the school safeguarding procedures including knowing the names of the designated safeguarding leader and the deputy safeguarding leader.
- Be responsible for monitoring that all policies and procedures are followed by all teaching and support staff.
- Ensure that the designated safeguarding lead in each school is given the appropriate resources to carry out the duties of that role effectively and is sufficiently supported by deputy designated leaders.

#### Developing self and others

- Build a collaborative learning culture within and across the schools and actively engage with other local schools in order to build effective learning communities.
- Ensure effective planning, co-ordination, support and evaluation, ensuring clear delegation of tasks and devolution of responsibilities.
- Develop and maintain effective strategies and procedures for the induction, professional development and performance review for all staff.
- Set high expectations for all and address underperformance using the relevant process and procedures to do so.
- To act as a role model for the highest professional standards.
- Regularly self-evaluate, set personal targets and take responsibility for own personal professional development so as to be well equipped to deal with the increasingly complex role of leadership of the school community.
- Ensure both self and others achieve an appropriate work/life balance.
- Build effective professional working relationships with all staff so as to motivate them and enable them to carry out their respective roles effectively.

#### Securing accountability

- Be legally and contractually accountable to the governing boards of both/all schools, their environments and all their work and work with both sets of governors to meet their responsibilities.
- Ensure individual staff accountabilities are clearly defined, understood and agreed and are subject to rigorous review and evaluation through performance management.
- Develop and present an accurate account of both/all schools' performances to a range of audiences including governors, parents and carers, local authority, the London Diocesan Board for Schools and Ofsted.

#### Strengthening community

- Establish strong working relationships between the schools in the partnership.
- Share expertise and bring mutual benefits to all in the two partnership schools through close collaboration.
- Ensure learning experiences for pupils are linked and integrated with the wider community, local, national and global.
- Build a school culture and curriculum that takes account of the richness and diversity of the schools' communities.

- Create and promote positive strategies for challenging all forms of prejudice and harassment.
- Promote the concept of lifelong learning and family engagement with learning through partnership.
- Manage effective relationships with all stakeholders and partners.

#### In addition to the above responsibilities the executive headteacher is:

- The school self-evaluation leader – this should be up near the top...
- The assessment leader.
- Responsible for the performance management of all teaching staff, including the heads of school.

#### Person specification

##### Knowledge and experience

- QTS and xxx years' experience as an effective Headteacher.
- In depth understanding of Ofsted, curriculum etc.
- Experience of managing a team of staff within a unionised setting.
- Experience of building strong relationships with parents.
- Experience of building effective working relationships with school governors, outside agencies and key stakeholders.

##### Understanding

- Understanding of the STPCD and other terms and conditions of employment.
- Understanding of relevant legislation in relation to safeguarding.

##### Commitment and personal attributes

- A commitment to providing a high standard of education.
- Excellent communicator.
- A commitment to promoting racial justice and ensuring that the partnership pays the London Living Wage.
- The ability to work under pressure.
- The ability to be well organised and adaptable to unforeseen change.
- The ability to ask for guidance and to recognise own CPD.
- The ability to define appropriate professional boundaries and to operate at a strategic level.

## JOB DESCRIPTION: Head of School

### Introduction

The HoS works in partnership with the EHT and is line managed by the EHT.

The HoS is an employee of the governing board and is required to carry out his/her professional duties in accordance with the school, the Instrument of Government and within the terms and conditions of the current School Teachers' Pay and Conditions Document and relevant employment legislation.

The contract of employment between the governing board and the HoS will be the current contract of employment for a headteacher.

The job description can be amended at any time, following consultation between the HoS, the EHT and the governing board and will be reviewed annually.

### Core purpose

The core purpose of the HoS is to provide professional leadership and day to day management for the school, carrying out the functions of a headteacher under the direction of the EHT.

The head of school ensures that:

- He/she deputises for the EHT in their absence. the school is conducted as an Anglican school in accordance with the trust deed and instrument of government. the school sets high expectations, provides quality
- teaching and learning which brings high standards of academic achievement, pupil behaviour, moral growth and personal development.
- the school promotes and safeguards the welfare of all children.
- the school meets all statutory requirements.
- the work of the school is effectively monitored, evaluated and reviewed.

### Areas of responsibility

**Shaping the future** In partnership with the governing board and EHT, the HoS:

- Articulates a clear vision for the school, which reflects the school's vision and values.
- Establishes and implements a strategic plan which ensures pupils achieve high standards and develop in all aspects of their education, the spiritual and the moral as well as the academic.
- Shares the strategic vision with pupils, staff and parents and enables them to participate fully in the school's mission.
- Maintains and develops a distinctive ethos which permeates all aspects of school life.
- Monitors and evaluates the effectiveness of the school.

### Leading learning and teaching

In partnership with the EHT, the HoS leads in achieving high quality teaching and learning by:

- Establishing a learning community within which each individual pupil is enabled to achieve his/her potential.
- Establishing a school environment and a behaviour code which supports effective teaching and learning.
- Developing partnerships with parents to support pupils' learning and achievement.
- Determining, organising and implementing a broad and balanced curriculum with equality of access, within the context of the national curriculum.
- Ensuring that personal, social and health education and citizenship education are in accordance with statutory guidance.
- Establishing appropriate schemes of assessment to track pupil progress.
- Establishing effective systems for monitoring and evaluating the curriculum and its assessment.
- Establishing effective systems for monitoring and evaluating teaching and learning.

### Developing self and working with others

In partnership with the EHT, the HoS enables staff to develop their potential and achieve high standards by:

- Actively continuing his/her own professional development so as to be well equipped to deal with the increasingly complex role of leadership of the school community.
- Ensuring all new staff are successfully inducted into the school and are able to develop sound understanding of the nature and purpose of the school as a community.
- Building effective professional relationships with all staff so as to motivate and enable them to carry out their respective roles effectively.
- Providing staff with a role model for continuing professional development.
- Implementing effective systems of performance management which support staff development.

### Leading and managing the organisation

In partnership with the EHT, the HoS provides effective organisation and management of the school in the best interests of the school community and implementation of its mission by:

- Setting appropriate priorities for expenditure, allocating funds and ensuring financial control, in accordance with governing board policies.
- Working with governors and senior colleagues to recruit, induct and develop high quality staff.
- Managing, deploying and developing staff to secure the quality of education and pupils' achievement.
- Managing and monitoring use of resources in order to secure the quality of education and pupils' achievement.
- Ensuring best value in deployment and use of human, financial and material resources.
- Managing accommodation to ensure that it meets the needs of pupils, the curriculum and health and safety regulations.
- Regularly evaluating the allocation of roles, responsibilities, finance and resources to ensure these underpin the best possible learning environment and highest standards.

### Securing accountability

In partnership with the EHT, the HoS is accountable for the school and its work to a range of stakeholders, particularly pupils, parents, carers, the diocese and the local authority and is accountable legally and contractually to the governing board. He/she exercises this accountability by:

- Using school self-evaluation processes, those of Ofsted, to report on the school's performance and development to those bodies, and to a variety of audiences, and to inform future school improvement planning.
- Providing information, advice and support to the governing board in meeting its responsibilities for the character of the school, effective teaching and learning, standards of achievement, efficiency and value for money.
- Keeping parents and pupils informed about the curriculum, attainment and progress and school improvement plans.
- Liaising, in the best interests of pupils, with support services and other agencies.

### Strengthening community

In partnership with the EHT, the HoS ensures that the school engages with the school community and the wider local community by:

- Establishing strong working relationship between the partnership schools.
- Developing an effective partnership with parents and carers, to support pupils' development in all aspects of their school life.
- Celebrating the richness and diversity of the various communities which make up the schools.
- Collaborating with other schools and other agencies and organisations to share expertise and bring mutual benefits to all.

In addition to the above responsibilities the head of school is;

- Designated safeguarding lead.

## Appendix F: Sample EHT Performance Management Checklist



### By End of August (Pre-Cycle):

- Draft SMART objectives agreed between EHT and panel.
- Resources (budget, FTE releases) confirmed.
- Evidence requirements, deadlines, and process flow documented and circulated.
- External adviser briefed on objectives and statutory requirements.

### September (Objective-Setting):

- Formal panel meeting to ratify objectives, timelines and resources.
- EHT begins evidence portfolio and leadership journal.

### December/January (Mid-Year):

- EHT submits interim report (data, actions, well-being reflections).
- Panel meets to review progress, provide formative feedback and agree adjustments.
- Updated action plan documented and shared.

### March/April (Ongoing Monitoring):

- Panel chairs or designated governors maintain brief check-ins – e.g. review updated data from data clinics or moderation summaries.
- Confirm that evidence portfolio is updated with any new reports or minutes.

### Mid-July (Final Submission):

- EHT submits complete portfolio, including final data, consultant reports, governor training evidence, moderation documentation and leadership journal.
- External adviser reviews portfolio for compliance.

### Late July (Final Appraisal Meeting):

- Panel reviews each objective and well-being log, rates performance and deliberates pay outcomes.
- External adviser validates any pay uplift.
- Final decisions recorded in minutes.

## EHT Performance Management: Frequently Asked Questions (FAQs)

### 1. How many objectives should an EHT have?

Limit to three to four. This allows genuine focus, ensures governors can monitor effectively and reduces risk of overloading the EHT.

### 2. What role does the external adviser play in pay decisions?

If a pay uplift (lump-sum or permanent range increase) **exceeds 25%** of the EHT's basic salary, the external adviser must provide a **written validation** of the business case's accuracy.

For awards **below 25%** a succinct confirmation that the evidence supports "exceptional performance" is sufficient and no formal business case is required.

### 3. Can objectives change mid-year?

Yes — if external factors (e.g. unexpected staffing changes, delays in policy guidance) make original objectives unachievable. Any mid-cycle adjustments must be agreed by the panel, documented and communicated in writing.

### 4. How should well-being be integrated into the cycle?

- Include a leadership journal requirement for monthly reflections.
- Ask well-being questions explicitly at both mid-year and final reviews.
- Offer professional development or mentoring to address stress management.
- Adjust workload (e.g. protect strategic planning time) if needed.

### 5. What happens if an objective is only partly met?

- Panel must document the degree to which each success criterion was achieved, noting mitigating factors.
- Performance rating may be adjusted (e.g. "Partially Meets Expectations").
- Pay outcomes should reflect partial fulfilment, per the federation/trust pay policy and STPCD guidance.

## Appendix G: Example Letter Templates

### Formation of a Partnership

Dear Parents/Carers,  
We are writing to share an important development regarding the future leadership of our school and [Partner School Name]. After careful consideration and discussion between both governing boards, we are pleased to announce that our schools will be entering into a formal partnership, with a shared Headteacher – known as an Executive Headteacher – leading both schools from [insert date].

This is the first step in a collaborative journey that we believe will bring lasting benefits to our pupils, staff, and families. While each school will retain its unique identity and character, working together in this way allows us to strengthen leadership, share expertise, and make the most of our resources.

Some of the key benefits of this partnership include:

- Improved learning opportunities through shared curriculum planning and teaching strategies
- Enhanced professional development for staff across both schools.
- Greater continuity for families, especially those with children attending both schools
- Efficient use of resources, helping us invest more directly in pupil outcomes

We understand that this may be new and unexpected news, and we want to reassure you that the wellbeing and success of every child remains our top priority. The Executive Headteacher will be supported by strong leadership teams in each school, ensuring that day-to-day operations continue smoothly and that each school's values and community spirit are upheld.

We are committed to keeping you informed throughout this process. In the meantime, we've attached a set of Frequently Asked Questions to help explain what this means and how it will work in practice.

Thank you for your continued support. We look forward to building a partnership that strengthens both schools and supports every child to thrive.

Yours sincerely,

### Formation of a Hard Federation

Dear Parents/Carers,

We are writing to inform you of our intentions for the future of our two schools. As you may be aware, on ??, we entered into a soft federation/partnership <delete as appropriate>. <Name> has been Headteacher of both schools since <Date> and with the success of this arrangement, we are confident that it will continue to be beneficial to pupils and staff. We are now planning our next steps, with the aim of entering into a hard federation, from <Date>. In practice, this means sharing resources between schools, and creating a new single governing board across both schools. We believe this will further strengthen the relationship between our schools, providing more continuity for pupils and their families, and more opportunities for leadership and development for our staff. Please find attached some Frequently Asked Questions. A formal consultation period will take place in the <WHEN>, after the publication of the full proposal.

Yours sincerely,



# Example Frequently Asked Questions

## General Questions

### What is a federation?

A federation is a legal partnership between two (or more) maintained schools (or academies) operating under one single governing board. Each school remains distinct in name, location and admissions, but governance and strategic leadership are combined.

### Why federate rather than merge?

In a merger, one school closes and pupils move to the other site. In a federation, both schools stay open under their own name and ethos. A federation allows both to retain identity while benefiting from a shared strategy.

### How do we know if federation is right for us?

Governing boards initially carry out a feasibility study (academically, financially and culturally). If the evidence shows improved outcomes, cost savings and stronger leadership, they proceed to consultation. This is a statutory requirement for the formation of a “hard federation” or MAT with a single governing board, not for other forms of partnership.

### What if the consultation reveals strong opposition?

Governors must sincerely consider all feedback. If the feedback suggests that a federation is not in the best interests of either community, governors can choose to withdraw the proposal. A vote against federation would mean the status quo remains.

## Questions for parents & carers

### Will my child's daily routine or timetable change?

No. Initially there will be no change to routines, timetables or staffing that affect daily life. If minor adjustments are needed (e.g. for joint training days) these will be communicated well in advance.

### Will the school ever become an academy?

The federation itself does not automatically convert schools to academies. If the governors later decided to explore academy status a separate consultation and process would be required.

### What if I have children at both schools?

You may see some benefits, such as joint events (e.g. combined sports day and choirs) or a single point of contact for strategic matters. Day-to-day schooling remains on each child's current site.

### Will there be changes to admissions policies?

Each school will continue using its existing admissions policy (subject to LA approval). If a joint policy is proposed in the future we would hold a separate consultation.

### How will safeguarding and behaviour policies be handled?

Both schools will continue to operate under their current policies initially. Over time we may harmonise key policies (e.g. behaviour and safeguarding) so that there is consistency, but this will only happen after full stakeholder consultation.

## Questions for staff

### Who will manage performance appraisals?

Appraisals will be managed by the executive headteacher however heads of school may conduct appraisals for teachers based at their own site. We aim for consistent standards and your objectives will be aligned to federation goals.

### Will there be redundancies?

Redundancies are most often not needed and certainly not inevitable when partnerships form. If there are any voluntary redundancies or restructuring they would follow statutory procedures, including full consultation with trade unions.

### What about supply or toolkit teachers?

Supply or toolkit staff will continue to be engaged by their current school on existing terms. Any change to contracting or deployment will be subject to consultation.

### Will job descriptions and job titles change?

Current roles (e.g. class teacher or site administrator) remain unchanged. Over time we may review some titles, but no changes will be implemented without prior consultation.

### How will sickness absence and cover work?

Each site will continue to manage absence and cover locally. We may develop a shared approach to supply teacher bookings (e.g. a joint pool) to streamline costs and ensure familiar faces cover classes.

## Questions for governors

### How many governors will the federation have?

The new federation governing board (GB) will have [X] members. The exact makeup (e.g. number of parent, staff, LA, co-opted and foundation governors) must comply with the School Governance (Federations) (England) Regulations 2012.

### Will the chair remain the same?

At first, one of the existing chairs (e.g. chair of [School A]) may chair the federation GB temporarily, until elections/appointments are held at the first meeting.

### How do we reconcile different Instrument of Government clauses?

We draft a new Instrument of Government (Schedule of the Scheme) that sets out the composition, terms and procedures for the federation GB. Any conflicting clauses in the old instruments are superseded.

### What about committees?

The federation GB may set up committees (e.g. Finance, Curriculum, Pay or Staffing) that include members from both schools. Terms of reference will reflect federation responsibilities.

### How often will the federation GB meet?

Typically, once per term (minimum three times per year), plus committee meetings as needed. Working groups on policies or site-specific issues may meet more frequently.

## Questions for the local authority/diocese/DfE

### What formal approvals are needed?

- **Maintained schools:** The LA must issue a “Scheme for Federation” after statutory consultation.
- **Voluntary aided/controlled:** The Diocese (if applicable) must approve the Scheme and appoint foundation governors accordingly.
- **Academies:** If either (or both) school is an academy (or becoming one), the Academy Trust(s) or DfE must approve a new funding agreement or a multi-academy trust (MAT) structure.

### What happens to each school's budget share?

Each school retains its Individual Schools Budget (ISB). The federation GB may agree to pool part of the budgets (e.g. for joint procurement). Final approval lies with the LA's Schools Finance Team.

### What if one school is failing or in an Ofsted category?

Federation can be used as a school improvement measure. In such cases the LA or DfE may require an approved “milestones” plan for improvement as part of the Scheme.

### How is employer liability managed?

Maintained schools' employees remain employed by the LA. The federation does not change employer but may consolidate payroll processes. For academies, employees transfer under TUPE to the academy trust.

## Appendix H: Useful Links

### Legislation.gov.uk:

#### "The School Governance (Federations) (England) Regulations 2012"

Full text of the primary statutory instrument governing how maintained schools form, join or dissolve federations.

[Legislation.gov.uk](https://www.legislation.gov.uk)

### National Governance Association (NGA):

"Federations: a guide for governing boards" NGA's up-to-date guidance (December 2024) on why schools federate, how the legal process works and model documents to support governance.

[National Governance Association](https://www.nga.org.uk)

### GOV.UK:

#### "Federations: guidance on the governance processes"

A comprehensive DfE guide covering the statutory steps, governance structures and legal context for maintained-school federations. [GOV.UK](https://www.gov.uk)

### GOV.UK:

#### "Get Information about Schools - Federation Guidance"

Explains how to create, edit and manage federation records in the DfE's school database (Get Information About Schools). [Get Information about Schools](https://www.gov.uk)

### GOV.UK:

#### "Federated schools receiving a single budget share"

Details how local authorities should budget and report for federated schools that share a single budget share under ESFA/DfE requirements. [GOV.UK](https://www.gov.uk)

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