Ealing headteacher handover guidance and checklist

Primary schools 2018/19

Ealing headteacher handover guidance and checklist good practice

It is the responsibility of the governing board to ensure the appropriate procedures are in place to facilitate a smooth transition from one headteacher to the next. This guidance is to support this process.

It is important when a headteacher leaves a school there should be formal handover procedures in place. This will ensure all key documents including financial accounts are carefully documented with up to date information. This document is to support the governing board to facilitate an effective handover procedure.

Suggested procedures

The outgoing headteacher must ensure all elements contained in these handover procedures are completed, before the leaving date.

It is good practice if this document is kept and regularly updated in any case, so that senior leaders have access to information in the absence of the headteacher.

The outgoing headteacher and the incoming headteacher must discuss this handover checklist at a mutually agreed time before the departure of the outgoing headteacher.

The incoming headteacher must check that the handover checklist is completed and documents identified. If there are any discrepancies, incomplete or missing documents, this should be addressed as soon as possible and rectified before the outgoing headteacher leaves. The chair/vice chair of the governing board should ensure that this is done.

If there is the possibility that the incoming headteacher is not known then the outgoing headteacher who is leaving should go through the handover checklist with a senior member of staff for example the deputy headteacher and the chair/vice chair of governors.

The chair/vice chair must ensure that the checklist is signed by the outgoing headteacher.

A copy of this 'handover checklist' to be signed by the outgoing headteacher and chair/vice chair of governors to say to the best of my knowledge this is a true record'

A copy of this 'handover checklist' must be retained by the school and a copy given to the chair of governors.

Name	Signature

Outgoing headteacher _____

Incoming headteacher _____

Chair/vice chair of Governors _____

Date _____

School information

School name	
School DfE number	
Senior management team	
Senior administrator Email address and telephone number	
School business manager (if applicable) Email address and telephone number	
Chair of governors Email address and telephone number	
Vice chair of governors Email address and telephone number	
Clerk to governors Email address and telephone number	
Site manager/address Email address and telephone number	

School information

Director learning standards and school partnerships Email address and telephone number	
HR Email address and telephone number	
Link partner Email address and telephone number	
Child protection officer Email address and telephone number	
(SENCO) inclusion manager	
Speech and language therapist (if applicable)	
Behaviour support LA	
Key first aider	
School budget plan and financial audit Including pupil premium funding and sports funding. 3-year budget forecast including deficit or surplus and any known future commitments eg boiler replacements	

School information

Schools with Additionally Resourced Provision (ARP) funding Needs of pupils Staffing	
Upcoming urgent meetings and dates eg LA monitoring meeting; headteacher briefings; quadrant meetings as well as any projects the school is involved in eg counselling project, Ealing innovative fund.	
School website and maintenance contact	
Ongoing concerns regarding parents	
Parental complaints received over the past year and any still in progress	
List of longstanding contractual obligations	

Staffing structure with pay grades,
roles and responsibilities

School documents

Documents	Where located - e-copies	Where located - paper copies	Staff responsible
Mission/vision statement			
School development plan			
School self-evaluation summary			
Latest Ofsted report			
School prospectus			
School initiatives with the LA eg securing good network, outstanding schools etc.			
School initiatives with other schools e.g. partnerships, school to school support, moderation clusters, cluster lead			
List of all staff CPD – internal and external			

School documents

Documents	Where located - e-copies	Where located - paper copies	Staff responsible
Minutes of staff and senior leadership team meetings			
Minutes of all governing board meetings including committees			
Copies of headteacher reports to governors			
Copies of presentations to governors			
Pay committee recommendations			
Governor training			
Copy of single central record			
Risk assessments			
Parent teacher Association - contact details - minutes activities			

School documents

Documents	Where located - e-copies	Where located - paper copies	Staff responsible
Class list/names of teachers etc. number of pupils EHCP, number of pupils in need etc.			
Safeguarding information eg allegations against staff and volunteers (ASV)			

Teaching and learning/curriculum and standards

Documents	Where located – e-copies	Where located – paper copies	Staff responsible
Analyse school performance (ASP)			
Schools own data analysis report			
Results information-EYFS KS1 Phonics KS2 – Reading Writing (TA) Maths EGPS GAPS Disadvantaged/most able			
Termly/half termly pupil progress meetings and tracking information			
School quality of teaching profile			

Teaching and learning/curriculum and standards

Documents	Where located – e-copies	Where located – paper copies	Staff responsible
Pupil files/statements/ Provision Map Annual review timetable			
Intervention groups and pupil names			
Work with external partners e.g. high schools to support transition at year 6, links with universities, teacher training colleges, banks etc.			
Curriculum map			
Visits and visitors			
Assessment timeline			
School Improvement calendar and timeline			

Teaching and learning/curriculum and standards

Documents	Where located – e-copies	Where located – paper copies	Staff responsible
External consultants reports and notes of visits/external reviews/peer reviews Cluster peer reviews/meetings/ information			
KS2 transition arrangements for y6			
Transition arrangements for EYFS to y1, y2 to y3, y6 to y7			
Parent workshops			
Parent/staff and pupil questionnaires and analysis			
Provision for able pupils and gifted and talented			
Guidance on use and access of schools tracking systems			

Teaching and learning/curriculum and standards

Documents	Where located – e-copies	Where located – paper copies	Staff responsible
Details of SEN support			
Provision for pupils in receipt of pupil premium and pupil premium plus			
Sports provision funded through the grant			

School policies

Documents	Where located – e-copies	Where located – paper copies	Staff responsible
Appraisal and capability policy			
Charging and remissions policies			
School behaviour policy			
Sex education policy (not nursery)			
Special educational needs policy			
Teacher appraisal policy			
Teachers' pay policy			
Data protection policy			
Health & safety policy			

School policies

Documents	Where located – e-copies	Where located – paper copies	Staff responsible
Accessibility plan			
Admissions arrangements (where LA delegates)			
Behaviour principles - written statement/policy			
Central record of recruitment and vetting checks			
Complaints procedure statement			
Contract/statement of main terms and particulars for each staff member			
Equality information/objectives			
Freedom of information and data protection			

School policies

Documents	Where located – e-copies	Where located – paper copies	Staff responsible
Governors' allowances (schemes for paying)			
Instrument of governance			
Minutes/paper of GB/ committee meetings			
Governor training records			
Premises management documents			
Register of business interests of headteacher and governors			

School policies

Documents	Where located – e-copies	Where located – paper copies	Staff responsible
Access to attendance data			
School financial value standard (SFVS) (Whistle blowing policy required as part of SFVS)			
Staff grievance (LA) and whistle blowing			
Staff disciplinary policy/ Any known staffing issues, absence, capability, disciplinary			
Child protection policy and procedures			
EYFS statutory Framework policies and procedures			
Statement of procedures for dealing with allegations of abuse against staff			

Website

Documents	Where located – e-copies	Where located – paper copies	Staff responsible
Information on pupil premium funding and sports funding			
Information on spent funds (sports, pupil premium and pupil premium plus)			

Passwords and access codes

Documents	Where located – e-copies	Where located – paper copies	Staff responsible
Analyse school performance (ASP) NCA tools			
EGFL password Contact: EGFLwebteam@ealing.gov.uk			
Fischer Family Trust			
Door codes/alarms etc.			
NQT manager password			
Keys to success password			
School to school (S2S) password (transfer of data information)			

Staff information

	Pay point	Date of last review and outcome
Temporary staff – days and hours of work E.g. PE (PPA) MFL, music etc		
Catering provider and contact information		
Details of personnel/HR files including • Personal details • Qualifications • CRB/DBS • Job Descriptions • Pay rates • Contract • Hours of work • Appraisal • Recruitment information		
Names contact detail of governors and committee membership		
Staffing structure		

Staff information

	Pay point	Date of last review and outcome
Designated safeguarding lead/s		
SENCO		
Staff list with responsibilities pay, hours, length of service		
Designated teacher LAC		
Summer staff roles and responsibilities		
Staff list with contact details; Emails, phone numbers		
Key holder		
Any known staffing issues, absence, capability, disciplinary		

Certificates

	Where located	Staff responsible
Health and safety certificate		
Paediatric first aid certificate		
First aid certificate		
Records of fire drills, alarm testing and health and safety inspections		

Ealing Learning Partnership
Perceval House
14-16 Uxbridge Road
Ealing W5 2HL

www.egfl.org.uk/ELP