# The Education Update Action Checklist Spring/Summer Term 2021

Use our action checklist to easily identify the actions and key priorities that you should consider during the remainder of the spring and summer term 2021.

This action checklist compliments the **‘Education Update’** webinars and covers HR, wellbeing, safer recruitment, payroll, finance, governance and health & safety.

This checklist is intended as a helpful guide for senior employees to help you prepare across the spring and summer terms. This is not intended to replace specific advice, therefore, please contact us if you have any queries about implementing any of these action points.

Please note that not all action points will be applicable to your School or Trust.

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| **Topic** | **Actions** | **Person Responsible** | **Completion Date** |
| **HR & Wellbeing** | | | |
| **Organisational Change/Ending Contracts** | Review genuine fixed term contracts and consider non-renewal, where appropriate. Employees with over 2 years’ service may be entitled to a redundancy payment, therefore, it is advisable to seek HR advice. |  |  |
| End any fixed term contracts not continuing into the autumn term. If you are an EPM customer, please end these on the portal. |  |  |
| Seek early advice about organisational change plans. |  |  |
| Review the [DfE School Workforce Planning Guidance (August 2018)](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/737168/Workforce_planning_guidance_August_2018.pdf). |  |  |
| **Gender Pay Gap** | Where applicable, your next Gender Pay Gap report should be published on your School website and the Government website by 5 October 2021.  You can find more guidance [here](https://www.gov.uk/guidance/the-gender-pay-gap-information-employers-must-report).  For EPM customers, the Gender Pay Gap report is available to download from the portal. |  |  |
| **Brexit** | Consider becoming a licenced sponsor if you are not already, to enable you to employ EU workers from January 2021. |  |  |
| View our ‘The Immigration & Social Security Co-ordination (EU Withdrawal) Bill 2020’ advice note [here](https://schools.epm.co.uk/wp-content/uploads/2020/08/Advice-Note-The-Immigration-Social-Security-Co-ordination-EU-Withdrawal-Bill-2020.pdf). |  |  |
| Ensure you have issued reminders to employees to apply for the Settlement Scheme. You can use the official template letter found [here](https://www.gov.uk/government/publications/eu-settlement-scheme-template-letter-to-eu-citizen-staff/eu-settlement-scheme-template-letter-to-eu-citizen-staff). |  |  |
| **Exit Payments** | Review any exit cap restrictions applied to leavers from 4 November 2020 as per [guidance](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/961147/Guidance_to_Public_Sector_Exit_Payments.pdf). |  |  |

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| **Schools Re-opening** | Continue to review and update individual employee and school risk assessments. |  |  |
| Share risk assessment with employees. |  |  |
| Contact those who have been shielding or fall into the clinically extremely vulnerable group. |  |  |
| Seek advice if an employee is refusing to return to work. |  |  |
| **Safer Recruitment** | | | |
| **Updated Policy and Guidance Documents** | We have amended the documents listed below following updates to legislation or best practice recommendations.  We advise you review your model documents in light of these changes:   * Application forms * Invite to interview letter and attached forms. * Criminal self-declaration form |  |  |
| **Barred List Process** | From 1 April 2021, Schools, Academies and FE colleges should access the TRA website if a standalone barred list check is required. |  |  |
| View our ‘Processing Barred List Checks’ advice note [here](https://schools.epm.co.uk/wp-content/uploads/2021/03/Advice-Note-Processing-Barred-List-Checks-changes-from-1-April-2021.pdf). |  |  |
| **Payroll** | | | |
| **Extension to the Coronavirus Job Retention Scheme (CRJS)** | Review affected employees as employers will gradually pay more from July 2021.  Claims for April must be made by 14th of May 2021.  View guidance on how to claim for wages through CJRS [here](https://www.gov.uk/guidance/claim-for-wages-through-the-coronavirus-job-retention-scheme). |  |  |
| **Off-payroll Working Rules** | You must continue to check employment status but from 6 April 2021, there are additional responsibilities for public sector clients:   * Issue a Status Determination Status to notify a worker of the outcome * If a worker disagrees, consider reasons, and respond within 45 days of receipt |  |  |
| View our ‘Off-payroll Working’ advice note [here](C://Users/Natalie.Northall/Downloads/Advice-Note-Off-payroll-working-IR35.pdf). |  |  |
| **Rates and Threshold Changes** | Review rates and thresholds to ensure correct values are being used from the start of the new tax year. |  |  |
| **McCloud Deferred Choice Underpin** | Review impact on school budgets once valuation exercise is complete. |  |  |
| Review and submit LGPS information where required to support data collection exercise. |  |  |
| **Finance** | | | |
| **21/22 Funding Allocations** | Check for accuracy by mapping back to October 2020 census return. |  |  |
| **Medium Term Financial Planning** | Watch for DfE consultation on transitioning to the hard National Funding Formula and submit a response. |  |  |
| Maintained Schools to ensure a three-year plan is produced. |  |  |
| Academies to ensure the combined online Budget Forecast Return is submitted by the deadline of 27 July 2021. |  |  |
| Ensure the modelling of future years’ funding allocations takes into account pupil profiles, Minimum Funding Guarantees and local formula decisions. |  |  |
| Consider submitting a response to DfE’s sparsity consultation. |  |  |
| **Future Pay Awards** | Liaise with Boards of Directors and Local Authorities around decisions for the modelling of future pay awards. |  |  |
| **Pupil Premium** | Ascertain the financial impact of the DfE’s decision to calculate the funding based on October 2020 census data. |  |  |
| **Pupil Number Projections** | Ensure the pupil number projections underpinning the Medium-Term Financial Plan are refreshed regularly and reported to Directors/Governors. |  |  |
| **Integrated Curriculum and Financial Planning** | Consider introducing an ICFP approach to financial planning. |  |  |
| **Narrative Report** | Produce a narrative report detailing budget assumptions, opportunities and risks. |  |  |
| **Covid-19** | Agree transitional arrangements for the move away from supplier relief. |  |  |
| **Business Rates Consultation** | Consider submitting a response to DfE’s Business Rates consultation. |  |  |
| **Liaison with HR Professional** | Ensure discussions between Finance and HR professionals take place at key points during the financial year. |  |  |
| **Governance** | | | |
| **Clear Process** | Ensure you have a clear process for updating the Trust Board or Governing Body on the key priority areas for the summer term – including recording their decision-making process and evidencing an appropriate level of support and challenge. |  |  |
| **Developments and Updates** | Keep Governors informed of developments taking place in the School as well as relevant updates to government guidance. |  |  |
| Ensure Governors have access to high quality advice and online training to keep them abreast of educational policy and updates. |  |  |
| **Governor Monitoring** | Review your School’s governor monitoring protocols and consider safe ways in which governor monitoring can resume. |  |  |
| Ensure Governors are aware of and in agreement with the priority areas for governor monitoring in the summer term. |  |  |
| **Review** | Undertake a review in conjunction with the Governing Body to consider lessons learnt from the last 12 months and how arrangements can be strengthened for the coming academic year. |  |  |
| **Assurance Checks** | Complete assurance checks for the key aspects of governance, including registers of interest, terms of office, website information, get information about Schools and Companies House (if an Academy). |  |  |
| **Health & Safety** | | | |
| **Play Equipment** | Ensure equipment brought back into use is checked before use. |  |  |
| Ensure that regular checks are completed on equipment such as trim trails and gym equipment. |  |  |
| Ensure you have records of these checks easily available, should they be needed as part of an accident investigation or if requested by an Enforcement Officer. |  |  |
| **Legionella** | Ensure you have a legionella risk assessment in place for your water system. |  |  |
| Ensure you are completing regular checks as specified in the scheme of control. |  |  |
| Ensure you are following any specified procedures for recommissioning the water system before returning after the summer holidays. |  |  |
| Ensure you have records of these checks easily available, should they be needed as part of an accident investigation or if requested by an Enforcement Officer. |  |  |
| **Manual Handling** | Identity manual handling tasks on site that would be considered high risk. |  |  |
| Review existing manual handling risk assessments for identified high risk tasks, or complete new assessments where required. |  |  |
| Ensure all employees who are likely to perform this manual handling operation are trained in the outcomes of the manual handling risk assessment.  [HSE guidance on Manual Handling Assessments](https://www.hse.gov.uk/pubns/indg143.pdf), including links to handy resources. |  |  |
| **Hazardous Substances** | Compile a register of all hazardous substances on site. |  |  |
| Review existing COSHH assessments or complete new COSHH assessments where required. |  |  |
| Ensure all employees who are likely to use the hazardous substance are trained using the COSHH assessment. |  |  |
| Review the [HSE website](https://www.hse.gov.uk/coshh/) which has a range of resources, tools and guides. |  |  |
| Review the [CLEAPSS website](http://www.cleapss.org.uk/) which provides excellent advice for the education sector. |  |  |

If you need any further support, please get in touch with us on [services@epm.co.uk](mailto:services@epm.co.uk), call us on 01480 431993, or contact your dedicated team.

