

DRAFT v0.1 FOR PRACTITIONER TESTING — NOT FOR CIRCULATION

School and trust customisation worksheet

Complete once to supply the details needed across the five implementation resources. Record agreed choices or write “undecided”. Do not enter individual pupil information.

This worksheet is **GOOD PRACTICE**. Administrative details and policy choices are separate from case decisions. Completing this worksheet does not adopt a policy. Use the Policy framework’s **YOUR SCHOOL DECIDES** boxes and Appendix B.

1 Setting, people and contacts

Record	Complete or give a secure record reference
Setting	[School name; trust name if applicable; England setting; primary/secondary/all-through/special; pupil age range]
Safeguarding roles	[DSL name/contact; deputy name/contact; route for passing a request]
Decision and oversight roles	[Decision-maker; governor/trustee oversight; trust lead; local reporting body; who briefs supply and temporary staff]
Communication	[Named sender/role; school address; parent contact details for the school; policy location/link; how outcomes are communicated]
Policy and approval	[Policy title/version; local authority/trust/legal review; approving governing body/proprietor and date; next policy review date]

2 Local timescales and reviews

Record	Complete or give a secure record reference
Request timescale	[Local target in school days; who provides progress updates and when. KCSIE sets no decision timescale.]
Review and disagreement	[Regular review interval; contact for earlier review; complaints procedure location; direct complaints route or review meeting first]
Trust assurance cycle	[Reporting date; school return deadline; escalation role/body; next trust review; school list supplied separately]

3 Confirm school choices within the guidance limits

Do not select an option simply to fill a box. Copy the school's agreed wording or mark it undecided. The original Policy framework gives the options and qualifications.

Choice to confirm	Agreed wording or undecided
Confiding without a request Policy framework section 4: whether a brief confidential note is made. Its option B calls for data protection advice. Limits [271, 74, 104, 105].	[Choice; advice/reasoning reference]
Private conversation before a decision Policy framework section 4: whether different words are used privately. Its option B calls for advice because KCSIE does not say whether it counts as adopting a change. Limits [260, 271].	[Choice; advice reference]
Alternative facilities Available alternatives; responsible role; recording and review interval. Limits [111, 112, 113, 117, 118, 202].	[Arrangements; role; interval]
Uniform, PE kit and pronouns Agreed uniform/kit options and exception process; names/pronouns approach within bullying and religion/belief considerations. Limits [258, 259, 277, 279].	[Policy wording; relevant section]
Records and access Secure location; authorised roles; who informs relevant staff and how. Limits [74, 261, 263, 282, 104, 105].	[Location; roles; method]
Moving school Case-by-case sharing and review of incoming arrangements. Policy framework section 8; limits [150, 151, 280, 283].	[Agreed process and responsibility]

4 Confirm what can be populated

Record	Complete or give a secure record reference
Confirmed by	[Name/role/date; choices authorised for use; unresolved items and owner]
Documents to customise	[All five / list exceptions. Include the Excel tracker if trust details and school names are supplied.]

Numeric brackets above identify KCSIE paragraphs cited in the Policy framework; they are not fields to replace. Source: Policy framework, YOUR SCHOOL DECIDES boxes and Appendix B, v0.1 draft.