



## Healthcheck Review and Consultation Process, June 2021

The following document applies only to the ***four Ofsted category Healthchecks, plus the Ethos Healthcheck***.

The Finance Healthcheck will be reviewed once the new Academies Financial Handbook is issued and will be brought in line with those regulatory areas, the HR and Premises Healthchecks will not be changed at this stage except in as much as standardisation is needed across all the Healthchecks following this consultation.

### **Context:**

The Trust's system of Healthchecks has been reviewed and updated on a number of occasions since its inception in 2017.

- In the spring of 2018 the original Healthcheck documents were given a thorough overhaul, following a review with LGB members.
- In the summer of 2019, they underwent significant renaming and rewriting, which was primarily to align them to the radically new Ofsted Inspection Framework, which came into place in September of the that year; however, the review process also allowed for some tweaking and stream-lining of the process which was being used in the growing number of schools in the Trust.
- In the summer of 2020, in the midst of the global pandemic and partial school closures, minor changes were made to facilitate the documents becoming updated, cumulative reports.

As we approach a new academic year, which we all hope will be more “normal” than the previous two years, the Trust has grown further still so it would appear to be an opportune moment to reflect upon the documents themselves, their use, and the process by which they are completed and scrutinised.

### **Commentary:**

1. The Healthcheck system is a pivotal process within the Trust, as the documents:
  - replace what used to be the termly Headteacher's written report to governors, allowing governors to be informed and up-to-date and to hold the school to account
  - encourage governor participation in, and oversight of, a specific area of the school's work
  - provide a framework for schools to monitor and evaluate the work they are doing, including the impact of their work
  - inform the School Development Plan, as a result of the self-evaluation that they represent
  - help ensure that the school is Ofsted-ready, by using Ofsted criteria in their guiding questions
  - are presented to Ofsted inspectors as evidence of school-self-evaluation, which Ofsted requires of all schools (and which have been well-received in inspections of LIFE schools)
  - allow the Trust Board to maintain an oversight of all aspects of all schools in the Trust

2. The cover page is the same for all Healthchecks. The 6-step guidance for completing the document is very clear, but in many schools some of these steps have fallen into misuse over time.
3. The guiding questions in each section of every Healthcheck are based on the lines of enquiry that Ofsted are required to consider; however, in their current form, there are a small number of areas that are repeated in some Healthcheck documents.
4. There is variation in the way that the final concluding text boxes in each section of every Healthcheck are completed (see the 6-step guidance on the cover page).
5. Completing five “Ofsted” Healthchecks is burdensome; and from the point of view of Ofsted, the areas covered in the Trust’s “Ethos” Healthcheck are addressed in one or other of their four judgement areas (mostly in their Leadership and Management judgement).

**Recommendations, arising from the commentary:**

1. For the reasons outlined above, the Trust should remain fully committed to the Healthcheck system and only make changes where necessary, to improve the process.
2. The guidance for completing the Healthchecks is clear. There are some minor tweaks in the attached consultation but, more importantly, refresher training should be provided for all schools.
3. The guiding questions for each section should be reviewed and amended, where there is unnecessary overlap and repetition, in order to streamline the process, both of writing and scrutiny.
4. The wording for the final box in each section (“Summary of key points of LGB discussion”) should be amended for clarity, but otherwise refresher training should be provided to ensure consistent use and completion
5. The Ethos Healthcheck should be subsumed into the Leadership and Management Healthcheck to reduce the overall workload associated with the process without diluting its impact.
6. The HR and Premises Healthchecks are not changed materially at this stage
7. The Finance Healthcheck is changed in line with any alterations to the AFH



	Completion Date:	Sept 2021	Jan 2022	May 2022

**XXX Healthcheck report for Standards Committee**

**School Name: XXX School**

**Term to which this Healthcheck applies:** Summer 2021      Autumn 2021      Spring 2022

**Completing the Healthcheck:**

1. For each of the 3 sections that follow, the school should complete a draft response, to include brief detail, data and explanation and a proposed rating. This should be sent to the link Governor and the **Director of Standards a week** in advance of their meeting. Additional data and examples may be made available for **scrutiny at** the meeting. **Relevant** information from the previous Healthcheck should be retained; **out-of-date information should be deleted**; changes or new information should be highlighted in **YELLOW**.
2. The link governor and/or **Director of Standards** will meet with the school representative to interrogate **the document, scrutinise** evidence, agree the proposed rating and agree how much and which evidence should be presented to the LGB (Local Governing Body). **These meetings may be held in person or virtually and may be preceded by email exchanges regarding the draft content.**
3. Where any category is not rated Green, a brief outline of actions being taken should be included; if any category is rated Red, a separate exception report should be provided.
4. The final Healthcheck draft, **as agreed with the link governor** must be completed in time to be sent out to governors with other paperwork **one week** in advance of the LGB meeting. Having read this, governors should try to send any questions arising to the clerk for circulation in advance of the meeting. When possible, the link governor should present the Healthcheck to the LGB meeting, with the member of school SLT supporting.
5. At the LGB meeting, governors should scrutinise the Healthcheck and any evidence presented to satisfy themselves that they can confidently agree the proposed rating (or, when appropriate, to amend it). A brief summary of any discussion or questions asked at the LGB will be added to the Healthcheck commentary by the clerk, from the minutes of the meeting, and returned to the school ready for the next update.
6. Once agreed, the final Healthcheck should be sent to the Clerk of the Trust Board; ready to be forwarded to the next relevant Committee.

**Rating:**

Green suggests the school is highly effective in this measure (A strength of the school; Ofsted Good or better)  
 Red suggests the school is not yet effective in this measure (An area for development for the school; Ofsted RI or worse)  
 White suggests the school is effective in this measure but is working to improve it (Broadly average; not yet confidently Ofsted Good)

**Draft Healthcheck completed by: XXX** (School Representative)

**Meeting to confirm the Healthcheck with: XXX** (on dd/mm/yy)

**Healthcheck presented to and agreed by the LGB on: dd/mm/yy**

## Appendix 2 (Q3&5 – changes to guiding questions)

### Quality of Education Healthcheck report for Standards Committee

QoE1	Curriculum Intent	RAG Rating:	RED	WHITE	GREEN
<p><b>Guiding questions:</b></p> <p><b>1.1</b> What planning has taken place for the design of the current curriculum? Who was involved in the planning? What training has been provided for staff?</p> <p><b>1.2</b> How does the curriculum address the needs of <b>all</b> learners, particularly the most disadvantaged and pupils with high prior attainment or SEND?</p> <p><b>1.3</b> Outline how the curriculum is broad and rich for all learners in all year groups/key stages? How is it sequenced to ensure progression of knowledge/skills?</p> <p><b>1.4</b> How is curriculum coverage monitored and how are potential gaps in pupils' knowledge and skills identified and addressed?</p> <p><b>1.5</b> How is "cultural capital" developed in pupils, both in lessons and extra-curricular? <b>How is full extra-curricular coverage addressed for all pupils?</b></p> <p><b>1.6</b> How does the curriculum address personal development, health, citizenship, appreciation of human creativity? If not taught in lessons, how do you ensure coverage for all pupils?</p> <p><b>1.7</b> Does the school have a Curriculum Policy? How is this reviewed? What curriculum developments are currently being planned?</p>					

QoE2	Implementation of the Curriculum	RAG Rating:	RED	WHITE	GREEN
<p><b>Guiding questions:</b></p> <p><b>2.1</b> What systems does the school have in place to evaluate the quality of teaching and learning? What is the current evaluation? Are there any subjects or areas of the school which are particular strengths or areas for development? How are these being addressed?</p> <p><b>2.2</b> How well do teachers use assessment, both in and out of lessons, to inform teaching, check understanding and provide feedback? Does the school have a marking, feedback and assessment policy? Is the school assessment system efficient in terms of teacher workload?</p> <p><b>2.3</b> How does the school ensure that lessons are challenging in terms of matching the aims of the curriculum and stretching all pupils, including the more able?</p> <p><b>2.4</b> How is the development of pupils' fluency, confidence and enjoyment of reading addressed in lessons?</p> <p><b>2.5</b> What training has been provided to teachers to support their teaching, especially in those areas in need of improvement?</p> <p><b>2.6</b> Do children attend a broad and rich ranges of extra-curricular activities? How is its coverage and impact for <b>all</b> pupils monitored and evaluated?</p>					

QoE3	Impact of the Curriculum	RAG Rating:	RED	WHITE	GREEN
<p><b>Guiding questions:</b></p> <p><b>3.1</b> How have standards in national tests/exams (both progress and attainment) compared to national standards and what has been the trend in recent years?</p> <p><b>3.2</b> How are standards <b>in the school currently</b> compared to past outcomes? How do you know? How are these assessed/moderated?</p> <p><b>3.3</b> Are there any groups of pupils (eg. boys, girls, PPG, HPA, SEND) who are achieving less well? If so, what actions are being taken?</p> <p><b>3.4</b> Is there significant variation in standards of pupils' work across the different subjects of the curriculum? If so, what actions are being taken?</p> <p><b>3.5</b> How is pupils' fluency in reading being improved and their cultural capital developed?</p>					

## Behaviour and Attitudes Healthcheck report for Standards Committee

B1 – Behaviour Systems	RAG Rating:	RED	WHITE	GREEN
<p><b>Guiding questions:</b></p> <p><b>1.1</b> How is behaviour tracked and monitored in the school (including incidents of racism or bullying)? What does the monitoring show? Is any group (eg PP or SEND) disproportionately represented? And what actions are being taken to improve the situation?</p> <p><b>1.2</b> What are the exclusion rates (internal, fixed term, permanent) and how do they compare to last year? Is any group disproportionately represented?</p> <p><b>1.3</b> What other data exists to help evaluate behaviour (eg rewards, sanctions, pupil voice, parental views) and what do they show?</p> <p><b>1.4</b> Is the behaviour tracking system robust and fit for purpose? Has it been reviewed?</p> <p><b>1.5</b> How effective and widely understood is the school’s behaviour policy? How do you know?</p>				

B2 – Behaviour and Attitudes	RAG Rating:	RED	WHITE	GREEN
<p><b>Guiding questions:</b></p> <p><b>2.1</b> What does the evidence of lesson visits show about behaviour in lessons, including pupils’ behaviour for learning?</p> <p><b>2.2</b> What is behaviour like around the school out of lessons? Is there a calm, orderly and positive environment?</p> <p><b>2.3</b> Is there variability in behaviour in the school? By time? Area? Year group? Pupil groups? With particular staff (eg cover, MDAs)?</p> <p><b>2.4</b> Do pupils feel safe in school? How do you know? What do pupils, parents and teachers say about behaviour?</p> <p><b>2.5</b> What methods does the school use to promote high expectations of pupils’ behaviour and attitudes?</p>				

B3 – Attendance and Punctuality	RAG Rating:	RED	WHITE	GREEN
<p><b>Guiding questions:</b></p> <p><b>3.1</b> What is the current attendance rate for the school? How does this compare to the LA and national averages and to the school’s figures for the last 3 years?</p> <p><b>3.2</b> What is the current persistent absence rate for the school? How does this compare to the LA, national and the school’s figures for the last 3 years?</p> <p><b>3.3</b> What are the above rates for disadvantaged pupils? Are there any other groups which are disproportionately represented?</p> <p><b>3.4</b> What actions are being taken to improve the above rates? And what is the impact? How do these figures compare to the school-set targets?</p> <p><b>3.5</b> What is punctuality like? To school and to lessons? How is this monitored to evaluate any disproportional representation of pupil groups?</p>				

## Personal Development Healthcheck report for Standards Committee

PD1 Spiritual, Moral, Social & Cultural Development	RAG Rating:	RED	WHITE	GREEN
<p><b>Guiding questions:</b></p> <p><b>1.1</b> How does the school provide for pupils' spiritual development? What opportunities exist for pupils to reflect upon their own beliefs &amp; perspectives on life (religious or otherwise)? How is a sense of creativity and fascination fostered? How successful is this currently and what future actions are being taken?</p> <p><b>1.2</b> How does the school provide for pupils' moral development? How do you know if pupils understand the difference between right and wrong? How is this developed? And how are pupils encouraged to see the consequences of their actions and behaviours? Where are moral and ethical issues explored in the curriculum? How successful is this currently and what future actions are being taken?</p> <p><b>1.3</b> How does the school provide for pupils' social development? How are pupils encouraged to work/socialise with others from different backgrounds (ethnic, religious, economic)? How does the school teach cooperation &amp; conflict resolution? How successful is this currently &amp; what future actions are being taken?</p> <p><b>1.4</b> How does the school provide for pupils' cultural development? How are pupils helped to understand &amp; appreciate the cultural influences that shape one's own heritage and exist in modern Britain? How is participation encouraged and monitored in artistic, musical, sporting and cultural activities? (See QoE 2.6). How successful is this currently for all groups of pupils and what future actions are being taken?</p> <p><b>1.5</b> (For church schools only): How well prepared is the school for SIAMS and what evidence exists to support this judgement?</p>				
PD2 Preparation for Adult Life in Modern Britain	RAG Rating:	RED	WHITE	GREEN
<p><b>Guiding questions:</b></p> <p><b>2.1</b> In what ways, and how successfully, has the school established an inclusive environment and promoted equality of opportunity?</p> <p><b>2.2</b> How well do pupils understand the fundamental British Values? How do you know? How is this being developed and deepened?</p> <p><b>2.3</b> How do pupils learn about such issues as protected characteristics, FGM, Prevent, gangs, criminal and sexual exploitation?</p> <p><b>2.4</b> How well prepared are pupils for their next steps (education or employment)? What information, advice and guidance is provided?</p>				
PD3 Physical & Mental Health	RAG Rating:	RED	WHITE	GREEN
<p><b>Guiding questions:</b> (see also PD1above)</p> <p><b>3.1</b> In what ways, and how successfully, does the school develop pupils' character?</p> <p><b>3.2</b> In what ways, and how successfully, does the school develop pupils' confidence and resilience thereby strengthening their mental health?</p> <p><b>3.3</b> What support and training has been provided for pupils for issues of health, online safety, risks to their wellbeing, bullying and social media?</p> <p><b>3.4</b> How does the school develop the pupils' age-appropriate understanding of sex and healthy relationships?</p> <p><b>3.5</b> How does the school develop pupils' understanding of and participation in healthy lifestyles, including through extra-curricular activities?</p>				

## Leadership and Management Healthcheck report for Standards Committee

LM1 – Strategic Leadership	RAG Rating:	RED	WHITE	GREEN
<p><b>Guiding questions:</b></p> <p><b>1.1</b> Pupil Premium: does the school have a PP policy and a clear rationale for expenditure? Is it reviewed regularly? What is the evidence of impact?</p> <p><b>1.2</b> How many pupils does the school have in off-site or alternative provision? How is this quality assured?</p> <p><b>1.3</b> How many pupils have left the school since the start of the year? Could any of these be considered as artificially “off-rolling”?</p> <p><b>1.4</b> Is governance effective? How well does the governing body fulfil all of its statutory duties? Are there any vacancies on the LGB?</p> <p><b>1.5</b> What training has been provided for governors? How strong and consistent is governor attendance to meetings, events and training?</p> <p><b>1.6</b> What evidence exists to show that governors, staff and pupils support Trust events and activities?</p>				

LM2 – Educational Focus	RAG Rating:	RED	WHITE	GREEN
<p><b>Guiding questions:</b></p> <p><b>2.1</b> What is the school vision and how does this translate into a strong ambition for high standards and a high-quality education for all?</p> <p><b>2.2</b> In what ways are the school’s vision and values aligned to and supportive of those of the Trust? How are these communicated to all stakeholders?</p> <p><b>2.3</b> How does the HT/SLT ensure they remain focused on improving curriculum, pedagogy and staff development (and not other school organisational matters)?</p> <p><b>2.4</b> How does the school develop effective middle leaders to ensure consistency of high standards?</p> <p><b>2.5</b> What training has been given to staff so far this year on matters of curriculum and pedagogy? What has been the impact? How do you know?</p> <p><b>2.6</b> How does performance management, target setting and school development planning work, and how do they drive the raising of standards?</p> <p><b>2.7</b> How does the school ensure robust monitoring and evaluation, including from external sources?</p>				

LM3 – Safeguarding and Wellbeing	RAG Rating:	RED	WHITE	GREEN
<p><b>Guiding questions:</b></p> <p><b>3.1</b> How does the school ensure there are robust systems to assure that safeguarding is effective <i>and that a culture</i> of safeguarding is established? (How and when was this last audited?)</p> <p><b>3.2</b> What training has been provided to all staff and to individuals for Levels 1 and 3 safeguarding training and Safer Recruitment?</p> <p><b>3.3</b> How does the school gather evidence of the views of pupils, staff and parents? What does this show? How are views of “hard to reach” parents sought?</p> <p><b>3.4</b> How does the school support the wellbeing of staff, including managing their workloads?</p> <p><b>3.5</b> How does the school ensure a culture of professionalism and high expectations in oneself and of colleagues in the school, in line with Trust expectations?</p>				



	Completion Date	Sep 2019	Jan 2020	May 2020
E1	Trust Culture & Values			
E2	School Culture & Values			
E3	Professionalism & Presentation			

### Ethos Healthcheck report for Board

<b>E1 – Trust Culture and Values</b>	<b>Rating:</b>	<b>RED</b>	<b>WHITE</b>	<b>GREEN</b>
<b>Guiding Questions:</b> <b>E1.1</b> How does the school identify itself as part of the Trust in its buildings, through social media and in communications with stakeholders? <b>E1.2</b> What concrete examples are there of how the school supports the Trust vision (Dare To Achieve) and beliefs (Courageous Optimism; Boundless Creativity and Heartfelt Compassion)? <b>E1.3</b> What evidence is there that the school supports the Trust’s broadly Christian ethos? <b>E1.4</b> What evidence exists to show that the school staff and pupils support Trust events and activities?				
<b>E2 – School Culture and Values</b>	<b>Rating:</b>	<b>RED</b>	<b>WHITE</b>	<b>GREEN</b>
<b>Guiding Questions</b> <b>E2.1</b> Does the school have clear prominently displayed values? How do these relate to the Trust’s beliefs/values? <b>E2.2</b> Is there evidence that all stakeholders including pupils know their school values? <b>E2.3</b> What structures exist to support the delivery of school values? <b>E2.4</b> How does a clear programme of well publicised events and activities support school values? <b>E2.5</b> What evidence is there of a culture of praise with effective rewards, for staff as well as pupils?				
<b>E3 – Professionalism &amp; Presentation</b>	<b>Rating:</b>	<b>RED</b>	<b>WHITE</b>	<b>GREEN</b>
<b>Guiding Questions</b> <b>E3.1</b> What evidence is there that the school communicates effectively in a variety of ways with its stakeholders? <b>E3.2</b> Is there evidence that the behaviour, attitude and presentation of staff is good, in line with Trust expectations? <b>E3.3</b> How does the school ensure a culture of high expectations, in oneself and of colleagues, in the school? <b>E3.4</b> What has the school done to ensure its facilities are of a high standard and well maintained?				

**Appendix 3 (Q4: summary boxes at the end of each section)**

**We consider ourselves to be R/W/G for this section because ...**

*(where this involves a **change** of RAG rating, please be explicit on what has changed to bring the new rating)*

**The main actions required to improve/maintain this rating are ...**

**Additional evidence seen at the Healthcheck meeting:** *(This should be made available for the link governor to scrutinise, and to the LGB if requested)*

**Summary of key points of **the previous** LGB discussion:**