

# Monitoring inspections of schools whose overall effectiveness is satisfactory

Guidance for inspecting schools whose overall effectiveness is satisfactory under section 8 of the Education Act 2005

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This guidance sets out the judgements that inspectors make and report on during monitoring inspections of satisfactory schools. Schools can use the guidance to see how inspections will be conducted and judgements made. They may find it helpful when evaluating their own performance.

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## Background

1. This guidance relates to monitoring inspections of schools whose overall effectiveness was judged satisfactory at their last section 5 inspection and which may not be demonstrating a good capacity to sustain improvement. Up to 40% of satisfactory schools receive monitoring inspections under section 8 of the Education Act 2005.
2. Schools are selected for these monitoring inspections in line with the *Protocol for the selection of schools whose overall effectiveness is graded satisfactory for a monitoring inspection*.<sup>1</sup> Monitoring inspections usually take place 12 to 24 months after the date of the section 5 inspection that judged the school's overall effectiveness to be satisfactory.
3. Satisfactory schools receive their next section 5 inspection in accordance with the normal inspection scheduling arrangements, taking into account Ofsted's most recent annual risk assessment. Monitoring inspections cannot change the grade for overall effectiveness, but if the monitoring inspection raises very serious concerns about the standard of education provided this may influence the timing of the next inspection.
4. This guidance sets out the judgements that inspectors make and report on during monitoring inspections of satisfactory schools. Schools can use the guidance to see how inspections will be conducted and judgements made. They may find it helpful when evaluating their own performance.
5. Further general guidance, briefing papers on school inspections and other materials are available on Ofsted's website: [www.ofsted.gov.uk](http://www.ofsted.gov.uk)
6. All monitoring inspections are carried out in accordance with the principles and code of conduct for inspectors set out in *The framework for school inspection*.<sup>2</sup>
7. Monitoring inspections are normally led by an inspector who was not a member of the previous section 5 inspection team. Between one and three inspectors will carry out the inspection depending on the size of the school and whether it is a pupil referral unit or special school. The monitoring inspection lasts for one day and the school is notified of the inspection the day before. The lead inspector should decide whether to arrive at the school during the afternoon before the inspection to complete preparation and planning or to do this through telephone conversations. Paragraphs 23 to 35 set out the arrangements for conducting monitoring inspections with on-site preparation. Arrangements for inspections without on-site preparation are described in paragraphs 36 to 42.

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<sup>1</sup> [www.ofsted.gov.uk/resources/protocol-for-selection-of-schools-whose-overall-effectiveness-graded-satisfactory-for-monitoring-ins](http://www.ofsted.gov.uk/resources/protocol-for-selection-of-schools-whose-overall-effectiveness-graded-satisfactory-for-monitoring-ins)

<sup>2</sup> [www.ofsted.gov.uk/resources/framework-for-inspection-of-maintained-schools-england-september-2009](http://www.ofsted.gov.uk/resources/framework-for-inspection-of-maintained-schools-england-september-2009)

## Evaluating the school's progress

### Introduction

8. Inspectors are required to evaluate the school's progress in:

- making improvements

and

- demonstrating a better capacity for sustained improvement.

Judgements are made on the four-point scale: 1 is outstanding; 2 is good; 3 is satisfactory; 4 is inadequate. Where the areas for improvement from the previous full inspection include specific timescales, inspectors should use professional judgement when evaluating the school's overall rate of progress. Progress should not necessarily be judged inadequate simply because a challenging deadline has not been met.

9. **On a monitoring inspection inspectors will not make a judgement on the school's overall effectiveness. Neither can a monitoring inspection place the school in a category of concern.** However, the judgements made during the monitoring inspection may influence the timing of the school's subsequent section 5 inspection.
10. Inspectors should make the two key judgements about the school's progress by considering carefully the evidence gathered and by using their professional judgement.
11. The outline guidance is not exhaustive but is intended to guide inspectors to the range and type of evidence they might collect.

### Outline guidance

12. The inspection covers aspects of *The framework for school inspection*, but is selective and focused sharply on the **improvements made by the school** since the last section 5 inspection and the extent to which it is demonstrating a **better capacity for sustained improvement**.
13. **The focus for the monitoring inspection is the areas for improvement identified by the last section 5 inspection. however inspectors must use their judgement in the light of the particular circumstances of the school**
14. Inspectors should focus on gathering evidence to support a convincing judgement about the school's progress in building a better capacity to sustain improvement. If a satisfactory school has not built a better capacity to improve since the previous inspection, for example as reflected in insufficient progress in dealing with key areas for improvement, it is not well placed to become a good

school by the time of its next inspection. It is unlikely to be able to cross a grade boundary in key areas. This is an important indication of whether a school is demonstrating good capacity to improve.

15. Inspectors must take account of the following.

- **Contextual matters** including any significant changes to staffing, pupils and the school's status, for example if the school is an academy.
- **Pupils' achievement:** taking account of their attainment and the quality of learning and progress for all pupils and for pupils with special educational needs and/or disabilities, in line with *The evaluation schedule for schools*.<sup>3</sup> Inspectors should consider first-hand evidence, **which must include a sample of lesson observations**, and school data for different groups of pupils and, where appropriate, recent test and examination results. Reference should be made to the challenge and impact of the school's targets.
- **Safeguarding arrangements:** inspectors must always check the single central register and may need to review other procedures if they have any concerns.

**Specialist status:** this need only be referred to when it is having a significant impact on the overall effectiveness of the school in either a positive or negative way.

16. Where relevant, inspectors should also consider the most significant of the school's areas for improvement from among the following.

- **Other pupil outcomes** with particular emphasis on behaviour and attendance.
- **The quality of provision:** teaching and learning, and the use of assessment are likely to be key issues, although inspectors should also consider the curriculum and the care, guidance and support provided for pupils if there are any concerns about these aspects of the school's work.
- **The effectiveness of leaders and managers** with particular emphasis on:
  - how well senior leaders and governors are driving improvement
  - the impact of the school's planning for improving the standard of education and tackling the areas for improvement identified by the section 5 inspection
  - the quality of the school's monitoring, analysis and self-evaluation and its capacity to improve.

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<sup>3</sup> [www.ofsted.gov.uk/resources/evaluation-schedule-of-judgements-for-schools-inspected-under-section-five-of-education-act-2005-sep](http://www.ofsted.gov.uk/resources/evaluation-schedule-of-judgements-for-schools-inspected-under-section-five-of-education-act-2005-sep)

17. If the school has sixth form or Early Years Foundation Stage provision, this will not usually be inspected unless it was identified as an area for improvement in the last section 5 inspection.
18. If inspectors consider that safeguarding arrangements are **inadequate** this may affect the judgements made during the monitoring inspection. For example, inadequate safeguarding arrangements may be indicative of more general weaknesses in leadership and governance. In these circumstances inspectors need to exercise professional judgement in reaching a view about the extent to which the school is demonstrating a better capacity for sustained improvement. When safeguarding is inadequate the lead inspector must call the SCC helpdesk to log their concern and email the appropriate Managing Inspector for SCC.
  - The Managing Inspector may recommend one of the following options
    - an early unannounced monitoring inspection to check safeguarding requirements
    - bringing forward the next section 5 inspection of the school
    - scheduling an immediate inspection of the school under section 8 of the Education Act 2005.
  - In making the decision the Managing Inspector for SCC will liaise with the Regional Director and take account of:
    - the nature and seriousness of the weaknesses in safeguarding
    - the wider performance of the school in terms of the progress it has made in dealing with areas for improvement and building a capacity for sustained improvement
    - the likely impact of any further inspection.

## Conducting the monitoring inspection

### Before the inspection

#### Off-site preparation

19. **Inspectors should consider all the relevant guidance before planning their inspection.** This includes *The evaluation schedule for schools*, *Conducting school inspections*<sup>4</sup> and *The framework for school inspection*, as well as the specific guidance on monitoring inspections.
20. Inspectors should use their off-site preparation time to begin to plan the inspection. Planning should be informed by:

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<sup>4</sup> [www.ofsted.gov.uk/resources/conducting-school-inspections-guidance-for-inspectors-of-schools-september-2009](http://www.ofsted.gov.uk/resources/conducting-school-inspections-guidance-for-inspectors-of-schools-september-2009)

- the previous section 5 inspection report
  - up-to-date self-evaluation, where this is available
  - the most recent RAISEonline report and, where relevant, the sixth form performance and assessment report (PANDA)
  - letters from any previous monitoring or survey inspections
  - any qualifying complaints about the school that have been retained by Ofsted.
21. The purpose of the off-site preparation is to enable the lead inspector to gain a broad overview of the school's recent performance and areas for improvement identified by the last section 5 inspection.
22. Where applicable, the lead inspector should prepare and distribute brief joining instructions to the inspection team. These should include:
- essential information about the school and the timings for the inspection
  - details of the main focus of the monitoring inspection and the key issues that the team will explore
  - provisional allocation of areas of the school's work for team inspectors to observe and investigate.

### **Planning for inspections with on-site preparation**

23. When the off-site preparation is complete the lead inspector should travel to the school and arrive during the afternoon of the day before the inspection. Exact timings will depend on travel arrangements and the location of the school, but the lead inspector should ensure that there is sufficient time to complete the on-site preparation as set out in paragraphs 30 to 35. The lead inspector should telephone the school in the morning before they are due to arrive to inform the headteacher of the inspection. If the headteacher is unavailable the lead inspector should ask to speak to the most senior member of staff present. If it is not possible to contact the school the lead inspector should complete their journey and inform the school of the inspection on arrival as set out in paragraphs 24 and 25.

### **Arrival at the school**

24. On arrival at the school the lead inspector must show their identity badge and ask to see the headteacher. If it was not possible to contact the school beforehand, care should be taken not to inform the secretary or others in the school about the inspection before speaking to the headteacher. The headteacher should be told that they may phone the National Business Unit (telephone: 0300 123 4234) to confirm the identity of the lead inspector.
25. If the lead inspector is unable to speak to the headteacher, they should ask to speak to the next most senior member of staff. It is important that preparation

for the inspection is not held up by waiting for the headteacher to arrive at the school.

26. **Requests for a deferral should be referred to the appropriate Regional Director.** Decisions will be made in accordance with Ofsted's policy on the *Deferral of inspections*.<sup>5</sup> This makes clear that the absence of the headteacher is not normally a reason for deferring an inspection.
27. As soon as it is certain that the inspection can take place the lead inspector will notify the inspection service provider, who will send formal confirmation to the school by email. The email will also include contact details for the inspection service provider and an outline of the arrangements for publication of the monitoring letter after the monitoring inspection. Where necessary the inspection service provider will ensure that any team inspectors are informed that the inspection will take place.
28. The lead inspector should ensure that the headteacher has time to notify school staff of the inspection. After this, there should be a brief introductory meeting with the headteacher and/or senior leadership team to:
  - explain that the inspection is carried out under section 8 of the Education Act 2005
  - confirm that the school is able to inform the governing body that the monitoring inspection is taking place
  - make sure that the headteacher understands the purpose and focus of the inspection and the judgements that will be made
  - remind the school that the monitoring letter will be published on Ofsted's website.
29. In explaining the inspection arrangements, the lead inspector should:
  - indicate the likely format of the inspection
  - explain that the principles for engagement with senior staff set out in *Conducting school inspections* will be applied where possible, but that the lead inspector has the discretion to manage this in the way they feel is most appropriate
  - discuss the arrangements for giving feedback to teachers
  - request to see evidence of up-to-date self-evaluation, but **should not** expect an evaluation specifically prepared for the inspection team's use
  - indicate that they will need to see the single central register and may need to review other safeguarding arrangements if any concerns emerge during the inspection

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<sup>5</sup> [www.ofsted.gov.uk/resources/deferral-of-inspections-information-for-schools](http://www.ofsted.gov.uk/resources/deferral-of-inspections-information-for-schools)

- make domestic arrangements (room, parking, meals, refreshments)
- indicate the team's intended arrival and departure times noting that it is recommended that inspectors arrive at the school no earlier than 8am and that they depart no later than 6pm, but explaining that these times are advisory and that the lead inspector might arrive later and leave earlier.

### **On-site preparation**

30. The lead inspector should provide the headteacher and/or senior leadership team with an early opportunity to contribute to the pre-inspection preparation and planning by clarifying the progress that the school has made since the previous section 5 inspection and explaining the ways in which the school has built a better capacity for sustained improvement. Any significant changes to the context of the school should be discussed.
31. The lead inspector should scrutinise briefly the key documents provided by the school including, for example, any self-evaluation the school may have, the school improvement plan and information about pupils' current attainment and progress. Any emerging issues should be discussed with senior leaders whenever possible.
32. In setting up inspection activities the lead inspector should indicate to the school what needs to be tested and ask the school to suggest the best ways of finding the necessary evidence to substantiate its views about the progress it has made. However, the focus of the inspection may shift as new evidence becomes available or other issues emerge.
33. The on-site preparation time may be used flexibly at the discretion of the lead inspector and, where appropriate, with the agreement of the headteacher. However, the lead inspector should not start the inspection early by, for example, conducting lesson observations or scrutinising the single central register during the preparation afternoon.
34. The lead inspector is not expected to compile a pre-inspection briefing. However, before leaving the school when the on-site preparation is complete, they should ensure that senior leaders have a clear understanding of the key inspection issues and have been given an opportunity to contribute to the planning of the inspection.
35. The lead inspector should also use the on-site preparation time to:
  - agree with the school how senior leaders may engage in the inspection
  - receive an update on staff absence and other practical issues
  - ascertain whether there are particular reasons why any teachers should not be observed, for example if they are subject to informal or formal capability procedures where the use of observations by Ofsted may compromise those procedures

- ensure that the headteacher is aware that Ofsted's evidence from lesson observations, whether joint or otherwise, should not be used as evidence in competency/disciplinary proceedings or for the purposes of performance management.

## Planning for inspections without on-site preparation

36. Subject to the availability of the headteacher, or in the headteacher's absence the most senior member of staff, the lead inspector should make initial contact to inform the school of the inspection during the morning of the day before it is due to start. It is important that planning for the inspection is not held up by waiting for a headteacher who might be delayed or not due to be at school. If the school is using a telephone answering machine, the lead inspector should leave a message and state the time at which the message was left. Where the telephone remains unanswered, the lead inspector should persevere, keeping a note of the times at which they tried to make contact with the school.
37. **Requests for a deferral should be referred to the appropriate Regional Director.** Decisions will be made in accordance with Ofsted's policy on the *Deferral of inspections*. This makes clear that the absence of the headteacher is not normally a reason for deferring an inspection.
38. As soon as it is certain that the inspection can take place the lead inspector will notify the inspection service provider, who will send formal confirmation to the school by email. The email will also include contact details for the inspection service provider and an outline of the arrangements for publication of the monitoring letter after the monitoring inspection. Where necessary the inspection service provider will ensure that any team inspectors are informed that the inspection will take place.
39. Planning for the inspection should include similar activities to those described in paragraphs 23 to 35 for inspections with on-site preparation. The lead inspector should arrange an extended telephone call to provide the headteacher with an early opportunity to contribute to the pre-inspection preparation and planning by clarifying the progress that the school has made since the previous monitoring inspection. Any significant changes to the context of the school should be discussed.
40. The lead inspector should scrutinise, briefly, electronic copies of the key documents provided by the school including, for example any self evaluation, undertaken by the school, the updated school improvement plan and the most recent information about pupils' current attainment and progress. Any emerging issues should be discussed with the headteacher through a follow-up telephone call whenever possible.
41. In setting up inspection activities the lead inspector should indicate to the school what needs to be tested and ask the school to suggest the best ways of finding the necessary evidence to substantiate its views about the progress it

has made. However, the focus of the inspection may shift as new evidence becomes available or other issues emerge.

42. The lead inspector should also use the pre-inspection telephone discussions to:
- agree with the school how senior leaders may engage in the inspection
  - receive an update on staff absence and other practical issues
  - ascertain whether there are particular reasons why any teachers should not be observed, for example if they are subject to informal or formal capability procedures where the use of observations by Ofsted may compromise those procedures
  - ensure that the headteacher is aware that Ofsted's evidence from lesson observations, whether joint or otherwise, should not be used as evidence in competency/disciplinary proceedings or for the purposes of performance management.

## **During the inspection**

### **The start of the inspection**

43. The lead inspector should meet briefly with the headteacher and/or senior leadership team at the start of the day to introduce any team inspectors and discuss any changes to previously planned inspection activities.
44. Where there is more than one inspector there should be a short team meeting to clarify the areas to be explored, inspection activities and individual roles and responsibilities.
45. The lead inspector may provide a short briefing for school staff.

### **Inspection activities**

46. The activities carried out during monitoring inspections are similar to those in section 5 inspections. They may involve: lesson observations; analysis of pupils' work; scrutiny of school records and documentation; discussions with staff, pupils, governors and, where appropriate, the school's partners. While staff interviews are important, the main focus should be on gathering other first-hand evidence, including lesson observations.
47. Inspection activities should be tightly focused on issues which:
- relate directly to the areas for improvement identified during the previous section 5 inspection
  - appear to be of greatest concern from the pre-inspection analysis.
48. Inspection activities are likely to cover some or all of the areas set out in paragraphs 15 to 17, although the emphasis will depend on the circumstances of the school and its improvement priorities.

49. In the monitoring letter written after the inspection, inspectors are required to comment on pupils' achievement, even when this was not a key area for improvement in the previous section 5 inspection. When reaching a view about achievement they should follow the outline guidance in *The evaluation schedule for schools* and the supplementary guidance on judging attainment and achievement available at [www.ofsted.gov.uk](http://www.ofsted.gov.uk)
50. Inspectors **must always** examine the single central register and follow up any safeguarding concerns. If it becomes clear that there are inadequacies in care, child protection or health and safety, they **must** be reported and may influence the timing of the reinspection of the school and have an impact on the judgements made during the monitoring inspection (see paragraph 18).
51. School circumstances will require inspectors to exercise flexibility about how the inspection proceeds but the general shape should have been determined during the on-site preparation or, for inspections without on-site preparation, during the pre-inspection telephone call. Inspectors may wish to:
- conduct telephone interviews with governors and parents if face-to-face meetings are not feasible
  - examine additional documentation, including, for example:
    - further data on attainment and progress that the school may have gathered
    - reports or action plans from the local authority and/or other key partners
    - governing body minutes – particularly when, for example, a separate committee has been established to oversee progress on the areas for improvement
    - analysis of aspects of pupils' work that are closely related to the areas for improvement – for example, to evaluate improvements in writing or use of targets for pupils.

### Recording evidence

52. Inspectors should follow the section 5 guidance on completing evidence forms. Inspectors are reminded of the following points.
- Evidence forms should be clear and legible. They are the main source of evidence for the inspection and may be scrutinised for retrieval, for quality assurance monitoring and used as a source of evidence in the event of a complaint. Inspectors should highlight or identify any information that was provided in confidence.
  - Evidence forms can be used for discrete events, such as lesson observations. They can also be 'open' or 'running', where, for example, a particular theme is pursued across a number of lessons and/or discussions.

- Although numerical grades are not always required, the text on the evidence form must make clear the overall judgement of progress on the issue being evaluated.
- Evidence forms should be used for recording the main points of discussion when feeding back to senior leaders and for summarising evidence that underpins key judgements about the school's progress.
- The evidence base must contain sufficient evaluative information to sustain, under external scrutiny, the judgements reached about the progress made by the school.

### **Engaging with the headteacher and senior staff**

53. The principles for engaging with the headteacher and senior staff set out in *Conducting school inspections* should be applied during monitoring inspections. The lead inspector should exercise discretion in adapting and extending the approach according to the school's circumstances.
54. It is important that an ongoing professional dialogue is maintained throughout the inspection. Emerging issues should be discussed and the feedback at the end of the inspection should not be a surprise to the school.
55. Throughout the inspection inspectors should strike a careful balance between probing the areas of concern and acknowledging where the school has been successful in tackling areas for improvement. However, inspectors should remember that pupils are unlikely to be well served by a school that has dealt with a range of peripheral matters while shying away from tougher and more fundamental actions needed to improve its performance.
56. In order to promote further improvement, inspectors may refer to effective practices, for example, that they have observed in other schools or that have been highlighted in Ofsted survey reports. However, they should not recommend a particular or specific kind of methodology that the school should adopt.

### **Feedback on lesson observations**

57. Feedback on the quality of teaching and learning is an integral and essential part of the inspection. Feedback is valued by schools and is a valuable means of furthering improvement. For any observation of 20 minutes or more, inspectors should offer feedback to the teacher concerned.
58. In addition, inspectors may feed back their general findings to:
  - small groups of staff following a series of short visits
  - key senior staff, for example the head of a key stage and/or senior staff with responsibility for professional development

- subject leaders, for example specialist subject leaders in secondary schools and foundation subject leaders and/or core subject leaders in primary schools.

## After the inspection

### Oral feedback at the end of the inspection

59. Inspectors must provide brief oral feedback at the end of the monitoring inspection. The headteacher may ask a representative of the local authority, of the governing body, interim executive board, or proprietor or significant external partners in the school's improvement as appropriate, to attend. It is the responsibility of the lead inspector to manage the meeting.
60. The inspector and headteacher should discuss which members, if any, of the senior leadership team will attend the feedback, especially where the feedback is challenging or raises sensitive issues.
61. The feedback must:
  - report the range of evidence gathered
  - explain the inspection judgements
  - where relevant, comment on the impact of the school's specialist status
  - make clear that the text of the monitoring letter which will be written after the inspection may differ slightly from the oral feedback, but that the judgements will not change
  - indicate any further significant concerns about the school's performance which were not identified at the previous section 5 inspection including, for example, any safeguarding issues.
62. If the monitoring inspection has raised **serious concerns** this may affect the timing of the next inspection. The lead inspector should make sure that the school is aware of this and must inform the appropriate Managing Inspector for SCC. However, the likely timing of any further inspection should not be indicated to the school.

### The monitoring letter

63. Before writing the letter, the lead inspector should note the guidance in paragraphs 65 and 66 and also take account of the specific guidance provided in the letter template and the Ofsted style guide. The letter should be published on Ofsted's website within 15 days of the end of the inspection.
64. The arrangements for publishing the letter are as follows.
  - The lead inspector completes the letter on the day after the inspection and sends it to the appropriate inspection service provider by 9am on the second working day after the inspection.

- The inspection service provider edits and sends the letter to the school within 5 working days of the end of the inspection. Twenty per cent of letters are further quality assured by HMI in the QA SCC team
- The school has 24 hours to check the letter and report any factual inaccuracies to the inspection service provider.
- The inspection service provider prepares a final version of the letter, which is sent to:
  - the headteacher
  - the Chair of the Governing Body or interim executive board or proprietor as appropriate
  - the local authority (unless the school is an academy)
  - the person or body responsible for appointing foundation governors, if the school has them (including diocesan or other appropriate authorities in the case of schools with a religious character)
  - the lead inspector
  - the Young People’s Learning Agency (for secondary schools with a sixth form).

65. In general, monitoring letters should be between **700 and 1000 words**. Inspectors should make appropriate professional judgements about the extent of the detail needed to explain clearly the progress made by the school depending on the complexity of circumstances. The letter must include:

- any significant contextual changes since the last inspection
- a summary of the issues for improvement from the previous section 5 inspection
- the judgement made (using the four-point scale set out in paragraph 8) **on the overall progress made by the school**
- the judgement made (using the four-point scale set out in paragraph 8) **on the progress made by the school in demonstrating an improved capacity for sustained improvement**
- a brief commentary on pupils’ achievement and any other relevant outcomes
- an outline of the progress made in making improvements to teaching and learning, and other elements of the school’s provision where relevant and in building a stronger capacity for sustained improvement
- where the school has specialist status, a brief evaluation of its impact
- a judgement on the quality and impact of any external support provided to the school.

66. The letter must be written on the template provided by the inspection service provider.