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Education & Skills
Funding Agency

Guidance

Understanding your data: a guide for school governors and academy trustees

Updated 30 September 2019

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Foreword



Access to high quality data is the hallmark of any successful organisation. We believe that your school or academy trust is no different. This resource sets out what is reasonable to expect to see from your executive leaders and local governing boards when looking at the performance of your school or academy trust.

5. Quality assurance
6. Safeguarding and well-being
7. The school community – staff, pupils and parents

This is not about collecting more information, but about collecting the right information, understanding it, discussing it and using it to inform your actions. You can use this resource to refine your board reporting and to actually reduce the amount of data collection and associated work – remember, when collecting any information, it is important to be aware of the potential burden this may place on executive leaders and teachers.

This resource is intended to support your own professional judgement; and it is in this spirit that we hope you will find it a useful check for your existing processes. There is no need for any additional reporting mechanism here. This resource can be used alongside your existing approaches such as your school improvement/development plan or help to create a new one.

We asked a number of experienced governors and trustees who serve on boards and local authorities across the country to share best practices and learning. These have been summarised into this document to help you to have productive conversations with your executive team and analyse the educational performance and financial sustainability of your school or academy trust. We have signposted to resources, which, we think you will find useful to support with constructive conversations with your executive leaders.

Eileen Milner

Chief Executive of the Education and Skills Funding Agency

Introduction

All governance boards, no matter what type of school or how many schools they govern, have 3 core functions:

1. ensuring clarity of vision, ethos and strategic direction
2. holding executive leaders to account for the educational performance of the organisation and its pupils, and the effective and efficient performance management of staff
3. overseeing the financial performance of the organisation and making sure its money is well spent

([Governance Handbook](#) 2019 1.1)

You should already be challenging and evaluating what your data is telling you about your school or academy trust. You should know who is responsible for providing this data (eg Chief Executive Officer (CEO) or headteacher and/or school business professional (SBP)). Having sight of your data will enable you to establish the 'root causes' behind problems and the reasons for success.

To facilitate further improvement in your school or academy trust's performance, we have developed 7 themes for you to use as an evidence base when

discussing the performance of your school or trust and the academies within it with your board.

Further information on the knowledge, skills and effective behaviours which are required by the board can be found in the [competency framework for governance](#).

Your evidence base

The 7 themes bring together a broader range of information to help guide discussions and provide a basis for challenge to ensure value for money is achieved, whilst focusing on educational outcomes. They should be used in conjunction with each other, and in the context of your organisation and its wider operational strategy.

It is important that you take into consideration the:

- size of your organisation
- type of school(s) within your organisation (eg primary/ secondary/alternative provision/special school) and whether a school has a specialist Special Educational Needs (SEN) unit or resourced provision
- key stage
- curriculum offer
- pupil wellbeing and resilience
- pupil behaviour
- quality of career guidance
- [implications of the Public Sector Equality Duty under the Equality Act 2010](#)

In all cases, you should consider what the data is telling you:

- what is going well?
- what learning can you apply from one area to another?
- what are the concerns?
- what changes need to be made?
- what can be done about it?
- how will this affect productivity for your school or academy trust?
- what is the impact on educational and financial outcomes?

Your evidence base will support you to develop, monitor and deliver your organisation's strategy for robust decisions about teaching, improvement and the deployment of resources in your school or academy trust.

It should be used to identify underlying reasons where you might expect performance to be better, and challenge any mitigating actions, analysing the risks/ benefits of each, clearly documenting the changes/progress made since the

last discussion.

As board and executive leaders, you should be benchmarking against comparators and analysing trends that bring together quality of leadership, financial health, resource management and pupil educational outcomes into one place.

Remember: it is important the data obtained is the **most recent available**. The data required for your evidence base should be easily accessible and should be used in the format in which it is routinely available.

Boards and executive leaders should understand the precision and limitations of data, and what can be inferred from it - the collection of data and its analysis must be proportionate. Time spent collecting and analysing data can be burdensome, placing additional workloads on individuals. You should consider what is the minimum information the board requires to hold leaders to account.

Further information on removing unnecessary workload associated with data management is available in the [making data work](#) report, which sets out the principles for data use.

Frequency of reporting

The board and its committees **must** meet regularly enough to discharge their responsibilities. Board meetings **must** take place at least 3 times a year (and business conducted only when quorate). ([Governance Handbook](#) 2019 3.2).

We recommend the chair, together with the headteacher/CEO and clerk agree the frequency of reporting at board meetings.

Reporting by exception

An exception report should be used to identify and prioritise instances which require immediate attention when reviewing the performance of your school, or academy trust. It allows the board to easily understand issues of concern, or where the performance at your school or trust has significantly deteriorated from that which you would expect, and to question and challenge executive leaders to understand and contribute towards the improvement actions.

The exception report should form the basis for structured discussions, and boards should take a critical look at future risk and future planning. To help you do this we have provided an [exception report template](#), with guidance notes, and example case studies ([example A](#) and [example B](#)).

The 7 themes

1. Pupil numbers/attendance and exclusions

Pupil numbers

Pupil numbers account for the vast bulk of your income. Understanding the growth or decline in numbers is vital to safeguard the financial health of your organisation.

Look at recent trends, current numbers and pupil number projections. This should include a breakdown to show first, second and third choices, and in-year churn in all year groups.

You should consider:

- engaging with feeder schools
- transition from primary to secondary schools
- pupil projections/future financial planning including considering those with additional needs that will require additional funding
- differences between pupil projections and actual pupil numbers
- number of service pupils/pupils from traveller families/seasonal employment trends
- liaising with local authorities where required on pupil places

Pupil absence levels (including persistent absence)

Comparative data is often a spur to improvement, including for high-performing organisations.

Benchmark your school's authorised, unauthorised and persistent absence rates against comparators and national averages. Also, look at absence levels over time to spot trends and improvements, and compare against other schools within your local authority area or Multi-academy trust (MAT) and the national average.

You should also consider:

- absence levels by pupil characteristics including:
 - gender
 - different ethnicities and first language

- different year groups
- free school meal (FSM) eligibility
- those with special educational needs or long-term medical conditions
- those who have needed a social worker (looked after children (LAC) and children in need (CIN))

For academy trusts and local authority (LA) maintained schools:

- the [pupil absence statistics: guide](#) provides information on authorised and unauthorised pupil absences by school type, including persistent absentees and pupil characteristics. Statistics are published 3 times per year
- [analyse school performance \(ASP\)](#) also applies. Boards can request a 'governor' account from their DfE Sign-in approver which allows access to the ASP

Pupil moves (including exclusion levels)

Boards should consider carefully the level of pupil moves and the characteristics of pupils who are moving and deploy maximum challenge to school and academy trust management teams on any permanent exclusions to ensure it is a choice of last resort.

Look at exclusions, those taken off roll and those on roll but attending education off site. It is important to consider both the cost implications of directing children to be educated off site in alternative provision (AP) and whether there are any patterns to the reasons or timing of moves. For example, if high numbers of children with special educational needs or disabilities (SEND) are moving, your school, academy or trust may wish to consider reviewing its SEN support.

Multi-academy trusts (MATs) may also choose to work with their academies to consider this information, and whether or not there are patterns across academies within a MAT, recognising that numbers in any one academy are often low.

You should consider:

- effectiveness and consistency in implementing the school's behaviour policy
- the school register and absence codes
- instances where pupils receive repeat fixed period exclusions
- interventions in place to support pupils at risk of exclusion or in receipt of fixed period exclusions
- rolling average of permanent exclusions to ensure they are used very sparingly
- timing of moves and exclusions, and whether there are any patterns including any indications which may highlight where policies or support are not working
- the characteristics of children who are excluded, removed from roll or educated off site, such as the proportion who have SEN, whether they are supported by

social care and have needed social workers, and their ethnic background. This should include considering whether any groups are excluded or moving out of school at a higher rate than others, discussing why this is and whether any changes to practise are required to address disparities

- whether the placements of pupils directed off site into AP are being reviewed at sufficient intervals to provide assurance that the education is achieving its objectives and that the pupil is benefiting from it

For academy trusts and LA maintained schools:

- the [school attendance guidance](#) provides information on using pupil registers and attendance codes
- the [school exclusion](#) statutory guidance provides information on the exclusion of pupils from local-authority-maintained schools, academies and pupil referral units
- the [alternative provision](#) statutory guidance provides information for local authorities, as well as headteachers and governing bodies of settings providing alternative provision
- [analyse school performance \(ASP\)](#) also applies. Boards can request a 'governor' account from their DfE Sign-in approver which allows access to the ASP

2. Attainment and progress

Pupil education outcomes

The measure will reflect the type and phase of the school, for example key stage 2, key stage 4 progress and attainment.

Look at the breakdown of current numbers, for example, by boys/girls, free school meals, pupil premium, English as an additional language, special educational needs (those with an education, health and care (EHC) plan and those on SEND support), looked after children, and previously looked after children.

Monitor the actions taken to close the attainment gap and to improve year on year. Boards should avoid over-interpreting analysis of small subgroups of pupils, in line with the advice in the [making data work](#) report.

You should consider:

- progress of pupils in receipt of pupil premium and year 7 literacy and numeracy catch-up premium funding, tracked with pupil premium spend
- progress of disadvantaged pupils by key stage/year group against that of their

non-disadvantaged peers nationally

- use of pupil premium plus and how it is being used to raise the educational attainment of previously looked after children
- progress of pupils with an EHC plan or on SEND support and an evaluation of the effectiveness of the provision made for them. [The SEND Governance Review Guide](#) sets out a framework for how to ensure that learners with SEND access high-quality provision
- progress 8/ attainment 8 scores/ English Baccalaureate (EBacc) measures
- destination/career data including for pupils with SEND

For academy trusts and LA maintained schools:

- [school performance measures: about the data](#) provides guidance and information to help you analyse the data that we report in the school and college performance tables and in the [analyse school performance \(ASP\)](#) service. Boards can request a 'governor' account from their DfE Sign-in approver which allows access to the ASP
- the Teaching Schools Council (TSC) '[Guide to Effective Pupil Premium Reviews](#)' has useful material about school self-evaluation and includes a template that schools may choose to use to publish their pupil premium strategy

Remember: it is important that board and executive leaders consider whether data is proportionate, and the frequency and time costs of data collection. For example, they should not routinely request teacher-generated tracking data.

3. Curriculum planning – staff and class sizes

Curriculum planning (integrated with financial planning)

It is vital that curriculum planning is coordinated as a joint exercise with your budget planning to produce a curriculum that meets the needs of **all** pupils (including those with additional needs) and is affordable.

A curriculum-led and data-informed approach to financial planning will help establish a staffing structure that can deliver the greatest impact. Boards should challenge leadership teams on the effective organisation of the curriculum and deployment of staff.

Look at factors including:

- pupil to teacher ratio

- average class size
- teacher contact ratio (at secondary)
- average teacher cost
- % of total spend on teaching/non-teaching staff
- % of total spend on senior leadership team
- spend per pupil for non-pay expenditure lines (eg catering, ICT, estates management, business administration, energy and curriculum supplies)
- data on the deployment of teaching assistants (TAs) and higher-level teaching assistants (HLTAs) is helpful at primary level
- the amount of non-teaching time the special educational needs co-ordinator (SENCo) has available in relation to the number of pupils with SEN

You should consider:

- whether the current staff deployment strategy supports the school's educational vision and pupil outcomes
- current and future pupil forecasts to identify any changes in staffing requirements, including consideration of any special educational needs and disabilities of current and future pupils
- progress over the school's published accessibility plan, that must include plans to increase access for disabled pupils to the curriculum
- where actual pupil numbers diverge from forecasts
- succession planning/staff turnover
- teaching and learning responsibility (TLR) and on costs (eg National Insurance)

Schools can then use this data to model alternative scenarios and plan strategically to implement new structures if necessary.

For academy trusts and LA maintained schools:

- further information can be found in the [school resource management: top 10 planning checks for governors](#). School and academy governors can explore these questions to help manage their resources and money efficiently
- the [integrated curriculum and financial planning](#) (ICFP) guidance provides information on how schools can use ICFP to create the best curriculum for pupils with available funding
- the [school workforce planning](#) guidance provides information for all schools and will help school leaders to review their staff structures regularly, as part of annual school improvement, curriculum and financial planning
- to help schools achieve excellent school resource management, ESFA is deploying [school resource management advisers \(SRMAs\)](#). Academy trusts should contact ESFA if they think they may benefit from the support of a SRMA. Maintained schools should speak to their local authority

4. Financial management and governance

Financial management

All schools and academy trusts should have robust systems and processes in place to manage their finances securely and effectively and provide assurance of this. It is important that board members understand the financial data that is presented to them to ensure there is sufficient challenge – if you are unsure, ask!

As a minimum we recommend you should:

- highlight any material divergence from initial budgets set and ongoing forecasts
- identify and challenge trends and inefficiencies to understand what is happening in your school or academy trust
- track income versus planned and actual expenditure against budget forecasts, revenue expenditure and non-staff costs as a percentage of total expenditure (and of income)
- analyse cash flow
- ensure pupil number projections have been accurate and if not, immediately re-budget accordingly

For academy trusts:

- 'the trust **must** prepare management accounts every month' which **must** include an income and expenditure account, variation to budget report, cash flows and balance sheet. The trust **must** select key financial performance indicators and measure its performance against them regularly, including analysis in its annual trustees' report as explained in the [Accounts Direction' \(Academies Financial Handbook 2019 2.21-2.22\)](#)
- the management accounts must also be shared with the chair of trustees every month irrespective of the size of the trust, and with the other trustees six times a year
- multi-academy trusts (MATs) should ensure there is clarity around the services that are provided centrally to its academies (eg through service level agreements). There should also be robust processes in place for assessing the quality of these services and their value for money
- the [academy trust financial management good practice guides](#) provide information outlining good practice in academy trust financial management and assurance

For LA maintained schools:

- 'provide the authority with details of anticipated and actual expenditure and income, in a form and at times determined by the authority' ([Schemes for financing local authority maintained schools 4.1](#))

For academy trusts and LA maintained schools:

- complete the [school resource management self-assessment tool](#) return (for academies and trusts) or the [schools financial value standard \(SFVS\)](#) (for maintained schools) to see how your school's expenditure and characteristics compares to thresholds and identify possible areas for change
- use the [school's financial benchmarking](#) service to compare your school's income and expenditure annually against that of similar schools and investigate further
- the [school resource management: checklist](#) provides help with planning school finances and resources
- use the [get financial advice for schools guidance](#) if you would like to find an external financial adviser

School and academy trust improvement activities

The budgetary process should be embedded within the strategic leadership function. It is an integral part of the planning cycle, not an isolated activity that is the sole responsibility of the finance manager.

You should consider:

- are school or academy trust improvement initiatives prioritised, costed, and linked to the budget?
- are all new initiatives fully costed before the school or academy trust is committed to the proposal?
- any additional workload burden to staff as a result of new initiatives
- do outcomes for pupils with SEND suggest you require a specific focus on SEND in terms of school improvement? The SEND Index available here on the [SEND Gateway](#) enables governors to compare outcomes against the regional and national picture

Long and short-term financial/budget planning

Ensure there is a 3-5 year financial/ budget plan, including balance sheet and for academy trusts cash flow projections. (Academy trusts are required to submit a 3-year budget forecast to ESFA in their annual [budget forecast return \(BFR\)](#), and an annual budget forecast return outturn (BFRO). Trustees **must** approve both the BFR and BFRO before submission to ESFA).

The board should challenge the assumptions about future funding, pupil numbers and pressures to ensure they are realistic.

You should consider:

- the school's formula funding for additional needs and the available data on the pupils it will support (for example those with special educational needs or English as an additional language) and the funding provided for the pupil premium
- consult the school's published pupil premium strategy and check with the senior team the rationale for the spending decisions
- planning for expenditure on your estate, including in implementing your published accessibility plan (the content of which must include plans to increase access for disabled pupils to the physical environment)

Schedule of contracts

Your school or academy trust should have a contracts log to identify which contracts are due for renewal. It is important that contract renewal is planned for in advance of expiration. You should allow time to review all the commercial options, which are available and align with your school or academy trust's requirements.

All schools and academy trusts should ensure they are getting the best deals on all goods or services (eg energy and water supplies and devices such as printers, scanners and copiers).

For academy trusts and LA maintained schools:

- the [buying for schools](#) guide provides advice on buying goods and services for your school.
- the [find a DfE approved framework for your school guidance](#) helps you to find quality checked suppliers of goods and services for your school

Estate management

The school estate should be managed strategically to reflect both short and longer-term needs and priorities, including disability access.

We recommend you:

- produce an estate vision, strategy and asset management plan to support your education vision, aligning this with your published accessibility plan
- ensure you have the right data to support and enable short/ longer term planning and help strategic decision-making about your estate
- analyse what you spend on your estate now, and what you need to spend to keep it safe, watertight and to provide for the future
- prioritise expenditure and investment accordingly

For academy trusts and LA maintained schools:

- you can find further information about managing your estate strategically including performance measures and data needs in [good estate management for schools](#)
- the [find a DfE approved framework for your school](#) guidance helps you to find quality checked suppliers of goods and services for your school

Financial governance

To ensure effective financial governance we recommend boards should have:

- appropriate financial skills and the ability to understand and interpret data
- clear and concise monitoring reports of the school's budget position
- access to an adequate level of financial expertise from either the school business professional or finance specialist, including when those staff are absent, e.g. on sick leave
- robust plans/policies/procedures in place to set, monitor and authorise spend and manage the risks of overspend
- adequate arrangements for audit of voluntary funds
- adequate arrangements in place to guard against fraud and theft by staff, contractors and suppliers
- business interests of boards and staff properly registered and taken into account to avoid conflicts of interest

For academy trusts:

- there **must** be an audit committee to direct 'the trust's programme of internal scrutiny and reporting to the board on the adequacy of the trust's financial and other controls, and management of risks' ([Academies Financial Handbook 2019 3.8](#))
- include a report to the board on non-compliance with the [Academies Financial Handbook \(AFH\)](#), which should also cover the trusts' publications requirements.
- the [school resource management self-assessment tool](#) provides assurance that good financial management is in place and can be used to identify where they may be able to make changes to improve their management of resources
- [establishing and developing your trust](#) provides guidance and resources for academy trusts, including those establishing new trusts and existing trusts planning to grow
- the Academies Financial Handbook describes the financial requirements for academy trusts.

For LA maintained schools:

- the [schools financial value standard \(SFVS\)](#) provides assurance that good

financial management is in place and can be used to identify where they may be able to make changes to improve their management of resources

- the [schemes for financing schools](#) provides statutory guidance for local authorities on producing and amending school financing schemes

For academy trusts and LA maintained schools:

- the [Governance Handbook](#) provides guidance on the roles and duties of governing boards, and advice on the skills, knowledge and behaviours they need to be effective

Remuneration

Boards should exercise strong governance around CEO pay or other highly paid staff. Remuneration committees should evidence and validate the decision-making processes used when setting and increasing pay and associated packages. There should be strong challenge to ensure it is appropriate, high pay can only be justified by delivering exceptional education and balancing the books.

You should consider:

- assessing the roles and responsibilities of the individual
- level of challenge to the role: educational, financial, and geographical challenges locally
- reviewing performance activity against objectives
- other benefits paid in addition to the salary base
- how pay decisions are documented
- how value for money is achieved

For academy trusts:

- 'The board of trustees **must** ensure its decisions about levels of executive pay (including salary and any other benefits) follow a robust evidence-based process and are a reasonable and defensible reflection of the individual's role and responsibilities' [Academies Financial Handbook 2019 2.30](#)
- The [setting executive salaries guidance](#) sets out key factors to support trust in making decisions about salaries and enables boards to be both confident and accountable in their decisions

For LA maintained schools:

- The [school teachers' pay and conditions](#) guidance applies

Gender pay gap

The gender pay gap is the difference in the average hourly wage of all men and women across a workforce.

Schools and trusts with 250 or more employees are legally required to publish their gender pay gap figures annually, on the Government's [reporting portal](#) and on their own websites. The statutory deadline for public bodies to publish their data is 30 March each year. More information on the reporting requirements is available on the [ACAS website](#).

We recommend that boards challenge leadership teams to identify potential causes of the gender pay gap in their school or trust and develop an effective action plan to tackle it. The Government Equalities Office has published guidance to help employers understand their gender pay gap figures and take the right actions to address any gender pay differences, including advice on using evidence-based [actions to close the gap](#), [eight ways to understand your gender pay gap](#) and a [four-step guide](#) to developing an action plan.

5. Quality assurance

Ofsted judgements

Review the last Ofsted assessment and future expectations.

For academy trusts and LA maintained schools:

- Ofsted's new [education inspection framework](#) for 2019. This framework sets out Ofsted's inspection principles and the main judgements that inspectors make

Audit ratings

Boards should review internal and external audit ratings and identify areas for improvement, ensuring there is clear ownership of actions and timescales for completion.

For academy trusts:

- 'The audit process can support trusts by identifying areas that may require improvement. The board of trustees taking advice from the audit committee, **must** ensure there is an appropriate, reasonable and timely response by the trust's management team to any findings by external auditors, taking opportunities to strengthen systems of financial management and control'.

(Academies Financial Handbook 2019 (4.16).

- trustees should also consider the comments and findings in their external auditor's management letter, **and** the formal opinion on the accounts and regularity.
- the [academy trust financial management good practice guides](#):
 - '[academy trust management letters](#)' provides further information about management letters
 - '[choosing an external auditor for an academy trust](#)' provides further information about the appointment of an external auditor
 - '[internal scrutiny in academy trusts](#)' provides further information about internal scrutiny
- boards should conduct a review of the academy trust's annual internal summary report consisting of the auditor's key findings, recommendations and conclusions, including any other internal scrutiny reports produced and identify areas for improvement.

For LA maintained schools:

- local authorities (LAs) are responsible for the financial monitoring and audit of maintained schools. LAs are required to publish [schemes for financing schools](#) setting out the financial relationship between them and the schools they maintain. This guidance is required to include information about auditing.

Risk register

Boards should regularly review the procedures, processes and controls which are in place, to effectively manage risk and any actions to mitigate them.

For academy trusts:

- the risk register sets out the challenges and threats that the trust is facing, together with the action that the trust's management team should be taking to mitigate negative outcomes
- the [academy trust risk management good practice guide](#) provides further information on risk management

Equality

Review data relevant to your published equality objectives and the material you have published to demonstrate how you are complying with the public sector Equality Duty.

Other reviews

For example, look at outcomes of annual reviews including but not limited to school improvement reviews, pupil premium reviews, safeguarding reviews, and denominational inspections (for organisations designated with a religious denomination).

Consider whether data highlights a need to commission a [SEND review](#), which looks at how education settings provide for pupils with special educational needs and disabilities.

The Preparing for Adulthood tool available on the [SEND Gateway](#) helps you consider if your establishment is sufficiently preparing pupils with SEND for adulthood/ employment.

6. Safeguarding and well-being

Safeguarding

All schools, academies and academy trusts **must** comply with the [keeping children safe in education](#) statutory guidance.

'Boards should ensure they read and have regard to this guidance.

Boards should ensure their schools have effective safeguarding policies and procedures in place. This includes an effective child protection policy, which should describe procedures in accordance with government guidance and reference any locally agreed multi-agency safeguarding arrangements put in place by the three safeguarding partners. It should be available publicly either via the organisation's website or by other means. It should also be updated annually (as a minimum).' ([Governance Handbook 2019 6.7](#))

Academy trusts **must** comply with the [Education \(Independent School Standards\) Regulations 2014](#).

You should consider:

- the types of concern raised to identify emerging trends
- actions taken to mitigate the risk of re-occurrence
- the effect of the concern on pupil(s) and impact of intervention taken as a result of the concern
- ensuring regular audit checks are being carried out effectively on pre-employment checks

Regularly challenge data around the percentage of staff who are DBS cleared, in particular any outstanding vetting in new employees and the intervention put in place to mitigate risks to pupils until clearance is received.

Health and safety

Boards should analyse health and safety/ accident reports and review areas of non-compliance and audit concerns.

Contingency plans should be in place which cover a range of potential incidents that could occur.

You should consider:

- number of notifiable accidents/dangerous occurrences
- near misses and assess what can be learned/what improvements can be made

For academy trusts and LA maintained schools:

- the [emergency planning and response](#) guidance provides information on how schools and other educational settings should plan for and deal with emergencies [the health and safety: responsibilities for schools](#) guidance summarises the health and safety law relevant to all schools.

7. The school community – staff, pupils and parents

Staff views

You should consider:

- staff feedback to measure levels of satisfaction, staff surveys, and exit interview summary reports.

You can find examples of staff workload surveys in the [reducing teacher workload toolkit](#).

The toolkit provides practical advice and tools to help school leaders and teachers review and reduce workload, including in relation to data management.

The [reducing teacher workload: data management review group report](#) provides information about eliminating unnecessary workload for teachers when managing

data. The [making data work report](#) sets out recommendations and principles to reduce unnecessary workload associated with data and evidence collection.

Human resources

You should consider:

- reasons for high staff absence/turn over
- staff performance/ objective setting and appraisals
- succession planning
- skills shortages for teaching/non-teaching staff and at board level

The [professional development for school leaders](#) provides information on professional development for school leaders and governors.

Pupil views

Academy trusts are charities and must operate in the public interest. They are accountable to the pupils they teach and the communities they serve.

Establish a mechanism to measure pupil satisfaction.

Parent views

As the strategic leaders of their organisations it is vital that boards are connected with, and answerable to, the communities they serve, particularly parents/carers... The board should be able to demonstrate the methods used to seek the views of parents, carers and the local community and be able to show how those views have influenced their decision making' ([Governance Handbook](#) 2019 2.4).

A feedback mechanism should be established to measure the levels of parent engagement and satisfaction. Schools should use indicators such as the trend in numbers of first choice applicants for school places or an annual parental questionnaire to provide such data.

You should consider:

- attendance rates at open days or parents' evenings
- number of complaints received - what are these about/is there a common theme, what action is being taken to address these?

Ofsted [Parent View](#) is a mechanism available to parents/ carers to provide

feedback regarding their child's school. Schools can sign up for regular feedback alerts.

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