



External Review of Governance – Framework for review with indicative time-lines

Phase	Step	Detail
Phase 1: Planning and Preparation (4 – 6 weeks) (Reviewer time: 0.5 – 1 day)	Step 1 Appointing reviewer and initial process	<p>In the case of a review being recommended following an Ofsted inspection, it is important that the review is commissioned soon after the inspection and certainly within 2 – 4 weeks of the report being published. Consideration should always be given to matching the skills and experience of the reviewer with the individual school context. Once appointed, the reviewer should have a preliminary conversation with the chair and headteacher to:</p> <ul style="list-style-type: none"> • discuss the context and needs of the school • explain the principles and process of the review • identify the key focus areas for the review • discuss the self-review process • agree dates for receiving information from the school and for the face-to-face meetings • understand the vision and culture of the school • agree the fee for the review <p>Where the school has a foundation/trust it may be appropriate to involve trustees in this conversation.</p>
	Step 2 Collate data and review documentation	<p>During the initial conversation the reviewer and chair/headteacher may identify additional elements to help address the issues and priorities for the board. The reviewer will have access to relevant documentation provided by the school to prepare for the review meetings and self-review session. This is likely to include but is not limited to:</p> <ul style="list-style-type: none"> • Instrument of Government (maintained schools), Memorandum and Articles of Association (academies) or Instruments and Articles of Government (sixth form colleges) • Scheme of delegation (MATs) • board and committee agendas, reports and minutes for last 3 - 4 terms • most recent annual report and accounts

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		<ul style="list-style-type: none"> • committee terms of reference / scheme of delegation and membership • headteacher's reports • the school improvement plan and self-evaluation report • RAISEonline • Ofsted reports and section 48 reports¹ in denominational schools • School improvement adviser reports and diocesan adviser reports in denominational schools • the relevant trust documents supplied by the school's Foundation, in the case of voluntary schools and academies <p>The reviewer will also want to look at the information available on Ofsted's Parent View and the school website.</p>
Phase 2: Engagement	Step 3 Key meetings and evidence gathering	<p>The reviewer will meet individually with the chair and headteacher and as many other governors as possible, the clerk and other member(s) of the leadership team if appropriate, to:</p> <ul style="list-style-type: none"> • assess the capacity of the board, its strengths and areas for development • discuss the self-review process • agree how to run the self-review meeting with the governing board <p>In a voluntary school or academy, it may be appropriate to involve an officer of the school's foundation in this conversation.</p>
	Step 4 Self-review session	<p>The reviewer will conduct a self-review session with the governing board. This should take place within 8 weeks of the Ofsted inspection (where the review is the result of an Ofsted recommendation) and may often follow step 3 on the same day. The logistics for this meeting and the extent to which the reviewer supports, facilitates or leads will be agreed with the chair.</p> <p>During the self-review process the reviewer will confirm with the board the key areas for development and the action required.</p>

¹ 'Section 48' refers to Section 48 of the Education Act 2005 which places a requirement on governing bodies of denominational schools to arrange for inspection of the denominational education and collective worship arrangements in the school. In Anglican and Methodist schools this is called the SIAMS inspection (the Statutory Inspection of Anglican and Methodist Schools)

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<p>(Reviewer time: 1 – 1.5 days)</p>	<p>Step 5 Agree areas for improvement and action plan</p>	<p>Once the self-review process is complete, the reviewer will confirm the key areas for improvement and draft an action plan for discussion and approval by the governing board, as well as a date for the progress and impact review. The proposed action plan will be forwarded to the chair.</p> <p>The board may amend the plan. The reviewer should be informed of any changes made.</p> <p>At the end of the review, the reviewer will have produced:</p> <ul style="list-style-type: none"> • a concise, sharply focused report outlining the governing board's strengths and areas for development, with clear recommendations/key areas for action; • a proposed action plan identifying the key priorities for improvement and the recommended actions required to address these, including timescales and success criteria (in agreement with the reviewer this may be produced by the school in line with the recommendations in the report). <p>By the end of phase 2 the agreed action plan will have been ratified by the governing board.</p>
<p>Phase 3: Follow up</p>	<p>Step 6 Implementation (within 3 – 4 weeks of the self-review)</p>	<p>Once the review is concluded, it will be up to the governing board to implement the agreed action plan, drawing on external support as appropriate.</p> <p>It is important that the governing board takes ownership of the agreed outcomes and ratifies the plan through due governance process i.e. formally adopts the action plan at a board meeting. Governing boards must share this plan with others who share legal responsibility in terms of governance, such as a MAT board, or the foundation of a voluntary school or academy. It will also often be appropriate to share it with other education professionals who work alongside the school such as the local authority, external adviser, diocesan adviser or HMI.</p>
<p>(3 – 4 months after the ERG is completed)</p> <p>(Reviewer time: 0.5 – 1 day)</p> <p>(Total reviewer</p>	<p>Step 7 Progress and impact review (within 3 – 4 months of the self-review)</p>	<p>A suitable time frame will be agreed for a follow up visit to enable the reviewer to evaluate progress and impact against the agreed actions. This will help determine whether the governing board is on track to deliver against these targets and what further support might be needed. The reviewer will record the outcome of this follow up visit on the action plan.</p> <p>The timing of this follow up visit may vary significantly between schools depending upon context but the expectation is that it will take place within 12 – 16 weeks of the self-review.</p> <p>Where the reviewer has concerns about the capacity within the board to make improvements this phase may include discussions between the reviewer and other bodies responsible for the school.</p>

Phase	Step	Detail
time to complete review: 2.5 – 3 days)		<p>For schools judged to be 'requiring improvement' or 'inadequate', HMI monitoring visits will include:</p> <ul style="list-style-type: none"> • discussions about the action plans from the review • evidence of progress in improving governance • evidence of progress in improving the leadership and management of the school. <p>Reports of monitoring visits will comment on the evidence of impact of the review on the quality of governance.</p>