



KNOWING YOUR SCHOOL

Making School Self-Evaluation Work

*It is not enough to understand what we ought to be, unless we know what we are;
and we do not understand what we are, unless we know what we ought to be.*
T.S. Eliot

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Introduction

Schools have long been concerned to take stock of how well they are doing and how they might do better. Over recent years, however, school self-evaluation has developed as a more formal and extensive process. This can be seen as a response to two key trends which have affected all schools, though to differing degrees in the maintained and independent sector: the growth of external accountability and the expectation of continuous improvement. Through self-evaluation, the school keeps itself in the driving seat and sets its own direction.

Self-evaluation draws on a range of activities which may be variously described as assessing, appraising, monitoring, auditing or reviewing. Terms such as school self-review and school self-evaluation are often used interchangeably, but the process involves looking inwards and looking outwards, reviewing the past, taking stock of the present and planning for the future.

The term 'school self-evaluation' has come to describe an organised process of reflectiveness in pursuit of effectiveness. The process is internally driven, though the impulse for undertaking it may come from outside, notably from inspection. Objectivity comes from the criteria against which the school evaluates itself. The school controls the yardstick for measurement by agreeing its aims and intentions. Although inspection criteria and national measures of performance increasingly shape these aims, the process of self-evaluation can test and nurture distinctiveness.

External frameworks may be of use in setting the process off, embedding it in the system, and securing objectivity and comparisons over time. They are also of use in streamlining the workload, by putting the experience of others to use without reinventing the wheel.

This report provides an overview of how school self-evaluation has developed in the UK and beyond, tracing the influences that are shaping current practice in the maintained sector, and are having an impact on the independent sector. The report draws on the results of a survey conducted by HMC in January 2007, analysis of recent ISI inspection reports, and case studies that show how self-evaluation is being practised on the ground in HMC schools.

Many schools helped to shape this report, in responding to the HMC survey and in volunteering further information. The case studies were drawn from the following schools, whose contribution is most gratefully acknowledged:

Ampleforth College
Bloxham School
Dulwich College
Rendcomb College
Rugby School
St Columba's College
St Edward's School
Silcoates School
Tettenhall College
Uppingham School

School self-evaluation: the national context

External and internal evaluation

Across the maintained sector, school self-evaluation has grown and been shaped by the inspection system since the creation of Ofsted in 1992. Initially, alongside factual information in preparation for an inspection, headteachers were invited to make a personal statement giving their view of the school. The process became gradually more formalised, as feedback from inspection showed how effective, or otherwise, schools were in evaluating the job they were doing.

In 1997-98 one in three of all schools was judged to be good, or very good, at monitoring and evaluating the quality of its work, and a further one in three was judged to be satisfactory. The remaining one-third were unsatisfactory. Primary schools were generally slightly better at this than secondary schools. Although these proportions show an improvement since the beginning of the Ofsted inspection cycle, there is still much work to be done.

The Ofsted Handbook for Inspecting Schools from 2000

From 2000, schools were required to fill in forms before the inspection that included a 'Governors' audit of statutory requirements' and a 'Self-evaluation report'. This report asked the school to make an evaluation of its work under each heading of the inspection framework, grading itself for each aspect on a 7 point scale and addressing the question 'How do you know?'

The process involved collecting and interpreting evidence about how well the school was doing. Effective monitoring and evaluation were highlighted as a key indicator of the quality of leadership and management.

The school that knows and understands itself is well on the way to solving any problems it has. The school that is ignorant of its weaknesses, or will not, or cannot, face up to them is not well-managed. Self-evaluation provides the key to improvement.

As the headteacher, you are strongly influential in providing a culture in which the cycle of self-evaluation and development is valued, understood, published and communicated.

The Ofsted Handbook for Inspecting Schools from 2000

Inspection became an important driver for self-evaluation, while also articulating the criteria against which the school should measure itself. At the same time it was recognised that self-evaluation should be a continuing process, serving but also served by inspection.

Inspection, well-used, complements good self-evaluation....(providing) additional valuable information to add to your own evaluation of the school.

The Ofsted Handbook for Inspecting Schools from 2000

Internal and external evaluation should serve the same purpose in promoting school improvement. The pre-inspection self-evaluation form was therefore suggested for use by headteachers and governors 'for the regular evaluation of the progress their school is making, across all its work, whether or not it is being inspected'.

The new Ofsted framework for inspection from 2005 ¹ shifted the balance between internal and external evaluation, with the latter now being a test of the effectiveness of the former. Inspection, twice as frequent, but lighter touch and at shorter notice is shaped by the school's own self-evaluation and checks out the judgements the school makes about itself. The self-evaluation form (SEF), to be updated at least annually as part of the school's normal cycle of review and planning, is the key inspection document.

The SEF is intended to record the outcomes of your self-evaluation. As such, it should be an accurate diagnostic document with all conclusions fully supported by evidence. It should indicate key strengths and weaknesses, and what needs to be tackled to effect improvement. Inspectors will make considerable use of the SEF when discussing their arrangements for inspection. The impact of self-evaluation in helping to bring about improvement will be a major factor in their judgements about the effectiveness of your leadership and management and your capacity to improve in the future.

Ofsted guidance on completing the SEF 2005

The new self-evaluation format places less emphasis on the process of gathering evidence, which is now well established. The question 'how do you know?' is no longer appended to each section. However, there is a strong requirement to be evaluative rather than descriptive, and to focus on the 'so what?' of impact rather than the simple 'what?' of input. Under each aspect, schools are asked to identify key priorities for development, derived from their self-evaluation. Schools are expected under each heading to grade themselves on a four-point scale, with reference to Ofsted's inspection criteria and descriptors for each grade. Inspection probes and confirms or challenges the school's judgements about itself.

As schools move on from their first inspection under the new framework, they are working to embed self-evaluation as a continuing process. The challenge lies in maintaining 'inspection readiness' while pulling together all the threads of monitoring, planning and review in ways that are coherent and manageable.

¹ This framework is for 'Section 5' inspections, of all maintained schools in England

Evaluating performance

Inspection guidance suggests two starting places for self-evaluation: standards and teaching.

Two of the most systematic spurs to self-evaluation are the appraisal of teachers, and the monitoring and analysis of performance.

The Ofsted Handbook for Inspecting Schools from 2000

'Are all the pupils in my school learning as much as they are capable of learning?' Schools are expected to analyse and interpret data rigorously in pursuit of answers to this question. They draw on national data to identify trends over time, differences in performance between groups of pupils or subjects and comparisons with national benchmarks or similar schools. They are also expected to track the 'value added' by the school as pupils progress from one key stage to the next.² This analysis feeds into the setting of targets, and the planning of action to raise standards.

In Scotland, an explicit link was made from the start between self-evaluation and the introduction of targets.

By setting targets, we have something to aim for and some way of measuring whether we have got there.... Setting targets would not work if self-evaluation was not already accepted as the way we do things in Scotland. We have known for some time that the most effective way of improving the quality of education for individual pupils is for teachers in schools to evaluate what they, themselves, are doing and to make the necessary changes. Targets are the next logical step.

The Scottish Office HMI Audit Unit (1998) Raising Standards – Setting Targets

To bring about improvement, analysis must be turned into action and here the focus is on the quality of teaching.

School self-evaluation is about diagnosis and change in the way people work, and this is particularly so for teaching and its impact...The monitoring, evaluation and support of teaching are central to school effectiveness and improvement.

The Ofsted Handbook for Inspecting Schools from 2000

With regard to teaching, school self-evaluation is closely linked to performance management. There is a legal requirement for maintained schools to manage and review the performance of teachers on an annual basis.³ In new regulations the links with school improvement planning and school self-evaluation are made explicit.

² RAISEonline, an interactive web-based system introduced in 2007, provides each maintained school with comparative analysis of its key stage performance data and of 'contextual value added'.

³ The Education (School Teacher Performance Management) (England) Regulations 2006, in force from 1st September 2007, replace regulations for appraisal that were first introduced in 1991.

The performance management policy shall –

- a) state what results the policy is intended to achieve and how these will be measured
- b) show how the school's arrangements for school teacher performance management link with those for school improvement, school self-evaluation and school development planning.

School Teacher Performance Management Regulations 2006

Classroom observation is central to the new performance management arrangements, requiring a clear statement of the primary purpose of observations. While schools can devise their own pro forma for observations, inspection criteria for judging the quality of teaching are frequently used.

In all maintained schools, the performance of the headteacher, as well as each teacher, is reviewed annually. Objectives are set that relate to priorities in the school's development plan and these priorities are also reflected in teachers' objectives for the year. The performance management of headteachers is carried out by two or three 'appointed governors' with guidance from an external adviser. These advisers are now being replaced by 'school improvement partners' who work with the school on a regular basis. The government's intention is to bring about a 'single conversation' with schools to reduce bureaucracy and multiple accountabilities. The drawing together of school self-evaluation and preparation for inspection, performance management and school development planning is central to this.

Development planning

Useful self-evaluation draws on, and feeds into, planning for school development and improvement, creating a cycle of action and review. While inspection has concentrated minds on the analysis required for school self-evaluation, the value of this analysis depends ultimately on whether it makes a difference.

In the maintained sector, expectations about school development planning have grown steadily since the introduction of the National Curriculum and Key Stage testing. The process has focused increasingly on measurable outcomes as local and national targets and initiatives have been filtered into schools. At the same time, development planning fosters self-awareness as schools seek to define their vision. The development plan is the governing body's main mechanism for reviewing how well the school is doing, determining priorities and aligning these with the budget and the school's aims.

An annual cycle of school development planning, linked to a longer term, usually three year, plan is now the norm⁴. As the process has matured, the emphasis has shifted from 'development' to 'improvement', reflecting the expectation that schools can and

⁴ School development plans became a legal requirement in Scotland in 2000. Though not statutory in England, annual development plans are expected in maintained schools.

should go on getting better. While 'development' indicates an organism with a natural pattern of growth, 'improvement' speaks of active intervention to bring about change.

The cycle of development planning requires regular review of progress to date, and it is this taking stock that leads to the pinpointing of priorities for the future and the mapping out of required action. Planning, action and evaluation interlock to propel a school forward. At best, the process generates a shared sense of direction, and agreed accountability, combining a 'top down' and a 'bottom up' approach. This is evident when the head and senior management team set the pace but ensure that action plans from departments and other areas of the school fit within the whole and help in reaching shared goals.

Schools have been expected to draw up an action plan following inspection, to address the key issues highlighted as areas for improvement. This process, too, is now expected to be incorporated into the school's ongoing development planning, and not to stand as a separate agenda. If self-evaluation has been effective, it is likely that issues highlighted by the inspection will, in some form, already have been flagged up by the school as areas for improvement, and can be readily integrated into subsequent planning.

Schools are expected to consult widely in the process of school development planning and to find ways of taking into account the views of parents and pupils. Increasingly, plans are shared with stakeholders. School profiles, published online and updated annually, are intended to keep parents informed.⁵ They include school information, inspection findings, and sections that cover 'What have been our successes this year?' and 'What are we trying to improve?' Admission of weakness becomes reassurance that the school knows where it is going.

After the urgency of completing the SEF and keeping it up to date in readiness for inspection at two days' notice⁶, many maintained schools are now refining the process into a regular cycle of self-evaluation and planning. They are developing their own ways of involving staff, governors, pupils and parents in a rolling review of all aspects of the school's work.

Self-evaluation has become, and is becoming, more of a distributed, collaborative, ongoing process.

NFER 2006 Impact of Section 5 Inspections

Procedures for self-evaluation

School self-evaluation, as a formal process, has been jump-started by inspection. However, procedures are continuing to be refined through application in the UK and

⁵ The school profile became a requirement for maintained schools (but not for independent schools) in 2005, replacing the governors' annual report to parents.

⁶ The SEF is completed and updated online through the Ofsted website

beyond, to provide a set of tools for schools to use for their own purposes. Internal and external evaluation are increasingly seen as complementary and mutually informative.

Guidance about self-evaluation has been developed by Ofsted, but also, within different legal frameworks, by the education inspectorates in Scotland, Wales and Northern Ireland. Beyond the UK, too, there is a growing interest in linking internal and external school evaluation, as in the Republic of Ireland's approach to 'whole school evaluation'.

Ireland, along with other European countries, is adopting a model of quality assurance that emphasises school development planning through internal school review and self-evaluation, with the support of external evaluation carried out by the Inspectorate.
DES Ireland 2003 Looking at our School: an aid to self-evaluation

Similarly, a model of complementary school self-evaluation and external school review has been developed and implemented in Hong Kong schools since 2003. After two years, a study of its impact on schools, by Cambridge researchers, concluded that the process had 'put self-evaluation centre stage and lent a sense of urgency to improvement and accountability'. However, the study also recognised the danger of self-evaluation, as a new requirement linked to inspection, becoming an end in itself and thus a dead end.

[Self-evaluation] tended not to be seen as an extension or refinement of what went before but rather as another new initiative. This is a perception likely to prevail as long as self-evaluation is viewed as an event rather than a process integral to ongoing professional practice
Hong Kong Impact Study 2005

The challenge lies in making self-evaluation part of normal practice and thinking, whether or not inspection is looming. To this end, the Education and Training Inspectorate in Northern Ireland (ETINI) has developed materials under the title 'Together Towards Improvement'. The aim is to encourage rigorous and systematic self-evaluation which can be applied, as required, to any aspect of the school or to individual subjects.

Self-evaluation is a process through which an individual teacher, groups of staff, the staff as a whole and senior management:

- reflect on their current practice;
- identify and celebrate the strengths of the school;
- identify and address areas for improvement in their work;
- engage in personal and professional development; and
- focus on improving the quality of learning and teaching, and the standards of achievement in the school.

ETINI 2003 Together Towards Improvement

The guidance suggests 'characteristics of good practice', aligned with inspection criteria, to provide a yardstick for self-measurement. As well as requiring objectivity, the process can only work where there is a culture of openness and a shared commitment to improvement. Self-evaluation must be made manageable by linking it to existing processes, and fashioning it to become 'an intrinsic part of the school's way of working'.

HM Inspectorate of Education in Scotland has also produced a framework for school self-evaluation under the title 'How good is our school?' This sets out 'quality indicators' in seven key areas of the school's work, with a six-point grading scale for evaluation.

How good is our school? has been a success story for Scottish education...it provides a common set of reference points for judging the quality of performance and provision, shared by inspectors, teachers, headteachers and local authority staff, and it aims to do so in a practical user-friendly format.

How good is our school? Foreword to updated 2002 edition

How good is our school? fits in with inspection, but also provides a methodology for schools to use in taking a broad view of their performance, or a closer look at one aspect of their work. A series of self-evaluation guides under the same title directs attention to current concerns, as in the recent *Hungry for Success (2006)* which guides evaluation of health education and school food.

Self-evaluation can be used to drill down into any aspect of the school's work, as seen, for example, in the DfES guidance 'Improve your Library'. This provides a methodology for self-evaluation 'to support the development of the school library and to demonstrate its contribution to, and impact on, teaching and learning in the school'.

In all parts of the UK, the main impulse towards self-evaluation has come from the inspectorates. The inspection regime has established criteria that describe good practice and inspection has modelled the process of weighing evidence to identify strengths and areas for improvement. Self-evaluation offers the means for schools to become actively involved in the process, and to develop the self-knowledge necessary for bringing about change. Schools have largely welcomed the new emphasis on self-evaluation.

Providers, inspectors and stakeholder across all sectors identified the value of the self-evaluation in focusing and driving improvement. They also recognised that the self-evaluation process was still relatively new for certain sectors, and that confidence... should continue to improve over time. There was a clear enthusiasm among providers for using self-evaluation processes more widely to help drive and support improvement.

Estyn (Wales) 2006 Evaluation of Inspection Arrangements

The virtuous circle of planning and review, supported by school self-evaluation and inspection, is widely seen as providing leverage for improvement while leaving schools in control of the process.

Implications for independent schools

The use of self-evaluation in the maintained sector is now well established. It seems only natural that schools that pride themselves on their independence should want their own views to be taken into account in inspection. At the same time, the exercise of independence fits well with the development of internal evaluation that recognises the school's individual circumstances and distinctive vision, and serves a purpose well beyond inspection.

Inspection requirements

Since 2005, all Ofsted's inspections of maintained schools have been built around the self-evaluation form (SEF) that schools are required to complete, and keep up to date. From 2007, this is being extended to independent schools inspected by Ofsted.

In England, half of all independent schools (though a far smaller proportion by number of pupils) are outside the associations covered by the Independent Schools Inspectorate (ISI). They are therefore subject to short-notice inspection by Ofsted as 'non-association independent schools'.⁷ Before these inspections, school information, and the school's own evaluation of its performance and regulatory compliance are pulled together in the school information and self-evaluation form (SIEF). Ofsted's guidance reminds these independent schools that self-evaluation requires more than filling in a form.

Open, honest and robust self-evaluation helps schools to carry out their responsibilities more effectively. Completing the SIEF is not in itself self-evaluation. The SIEF is a summary of findings, providing a record of the outcomes of routine self-evaluation. It encourages schools to make well-evidenced judgements which link the quality of provision to the regulatory requirements and the outcomes for pupils.

Ofsted Independent school inspection: guidance for schools

All independent schools in Scotland, Wales and Northern Ireland, whatever their association membership, are subject to inspection by their national inspectorate. In many cases, this has brought to the fore an expectation of school self-evaluation that exceeds current practice.

Certain differences between the independent and maintained sectors were made explicit to the school by the inspection process. It is clear that self-evaluation...needs to become more developed and to become embedded in the school...This is seen in a positive light and self-evaluation will form a greater part of planning in the future.

School response in Estyn inspection report 2006 – HMC school in Wales

⁷ Ofsted's 'Section 162A' inspections of non-association independent schools follow a three-year cycle and are managed by Cambridge Education.

Under ISI's arrangements for inspection of independent schools in England in membership of the Independent Schools Council (ISC), pre-inspection self-evaluation is not a compulsory requirement. An optional self-evaluation form was introduced for the first time in January 2006 as part of the pre-inspection documentation for the second cycle of ISI inspections. The form follows the inspection schedule. Under each heading, five questions are posed; about developments since the previous inspection, the strongest features of provision, areas needing development or improvement, how the need was identified and actions being taken.

The attached guidance treads carefully, aware that the form could be seen as another burden on schools. The fact that the form is optional is stressed, brevity is advised and the layout encourages conciseness. The guidance also recognises that schools may fear giving hostages to fortune in confessing to areas of weakness; assurance is given that the inspection will not 'take advantage of your candour'. The guidance makes clear that the purpose of the form is to focus thinking by the school, and to focus the inspection on 'the most relevant and important issues'.

As in Ofsted inspections, the inclusion of self-evaluation is part of a process of shifting inspections from being 'done to' to being 'done with' the school. This requires tapping into the school's thinking about its own direction of travel, and is reflected in ISI's second cycle emphasis on judging schools against their own declared aims. This is a distinctive characteristic of ISI inspections, honouring the individuality of schools in pursuing their own vision, within an objective framework for inspection against agreed criteria.

By nature of their independence, schools inspected by ISI have not been subject to external expectations with regard to development planning and performance management. The ISI guidance recognises that a school's knowledge of itself can be derived in many different ways.

The school may have a variety of methods for performance review and management:

- a) through a formal self-evaluation or monitoring programme;
- b) as part of the appraisal arrangements;
- c) built into the cycle of development planning.

The school or head may operate informally, by key managers being 'in touch' with what is going on and with its quality. ISI has no requirements about the methods the school uses, but only expects a critical and active grasp at all levels of the main strengths and weaknesses.

ISI Self-evaluation form introduction

Many different information streams may flow into a school's self-evaluation, from parental surveys and student feedback to audits of resources and departmental reviews. Public examination results and associated league tables have fostered a culture of asking why results are as they are, and considering how they could be improved.

This data analysis and interpretation is part of the self-evaluation process in independent schools as in maintained schools.

Completion of the self-evaluation form before an inspection requires the marshalling and sifting of evidence to provide a considered overview of what is really important. The usefulness of the form-filling exercise depends in large measure on the quality of thinking that precedes or is generated by it.

The form does not constitute the process of self-evaluation but is a summary of your considered views about the school, its strengths and weaknesses.

ISI Self-evaluation form introduction

However, inspection may usefully concentrate the mind. The completion of this form can in itself raise questions about who 'owns' its conclusions, how they have been arrived at, and how the process could be extended to strengthen the school's understanding of itself at all levels.

A criticism levelled at self-evaluation is that good schools do not need their knowledge confirmed by inspection, while inspection does not help a school's perceptiveness about itself. In other words, good schools hand inspectors a watch from which to tell them the time, though they already know it, while weak schools remain unable to read the time for themselves. Or have long since lost the watch.

Yet there is clear evidence from the maintained sector that inspection has contributed to the clarity and impact of schools' own self-evaluation. As this has grown more effective, it has in turn shaped the style of inspection so that internal and external evaluation come to be recognised as complementary. The high take-up of optional self-evaluation in preparation for ISI inspection indicates a similar trend in the independent sector.

The view from HMC schools

The heads of 161 schools responded to an HMC survey about school self-evaluation, in January 2007. The survey asked about schools' experience of ISI second cycle inspection, how the self-evaluation form was completed and the evidence on which it drew. It also asked about established processes or plans to extend the use of self-evaluation, for the school's own purposes.

Preparing for inspection

Twenty-five of the responding schools had already been inspected since the start of ISI's second cycle, and a similar number had an inspection in prospect within a year. All but one of those that had been inspected had completed the optional self-evaluation form, and all those with an impending inspection intended to do so. This exceeds the 80% take up reported by ISI across all schools in the first year. It appears that self-evaluation is becoming an established part of the inspection process, and that HMC schools readily put themselves in the driving seat in preparation for an inspection.

Views varied on the format of the ISI form as an aid to self-evaluation. Some found it repetitive, difficult to use or too narrowly focused on inspection. Others commented that the questions were a useful prompt, whether for inspection or as a regular review tool. The varying length and detail of the completed forms indicates that schools have chosen their own approach to the process.

The responses indicated that the head played a major role in the completion of the self-evaluation form, with varying degrees of consultation and delegation. In around a third of cases, the head was named as the writer, while in a further third the head and the senior management team worked together on the form. Some heads mentioned consulting widely with staff and governors and, in one case, with students, in preparation for writing. One head indicated a 'bottom up' process with input from staff being passed to the senior management team, and through them to the deputy before reaching the head. In a few cases, the task was delegated, to the deputy head or the director of studies.

In many, but not all, schools, the self-evaluation form was shared beyond the inspection team and those who had written it. Although the main school readership was the senior management team, in around a quarter of schools it became an open document for all staff to read. In a similar proportion of schools it was shared with all governors.

Of the schools where inspection had been completed, all but one believed that their self-evaluation had helped to shape the inspection, while one was uncertain.

Inspection outcomes

From the inspectors' perspective, the self-evaluation form maps the school's current position, the ground covered since the previous inspection and the direction of development into the future. This provides the starting point for a conversation that is carried through the pre-inspection visits and into the inspection itself.

Ofsted inspections include a specific judgement about the effectiveness of the school's self-evaluation. Although this is less explicit in ISI inspections, inspectors are encouraged to comment on the school's self-awareness, particularly with regard to areas for improvement. The ISI inspection criteria include judgements about how far those with management responsibilities, at all levels, are effective in analysing needs, planning and prioritising, putting decisions into practice and reviewing effectiveness. All this requires a robust process of self-evaluation, however it is shaped or described by the school. Where this is strong, it underpins planning and ensures that goals are achievable.

Effective development planning is seen in the outcomes the school achieves. A thorough analysis of needs precedes synthesis of ideas into the main thrusts for development. Planning is not static but dynamic, evolving over time as contexts and priorities change. The current ten statements of intents, including ensuring fitness for purpose of the school management structure, are an indication of the strength of the school's self-evaluation.

Inspection report – HMC school 2006

ISI's second cycle inspection reports conclude with the section 'Next Steps', where key areas for improvement are summarised. In 20 reports on HMC schools inspected in 2006, around half of all the listed 'Next Steps' refer, in some form, to school self-evaluation. Analysis of the 'next steps' that fall within this broad category shows that six themes recur, as summarised below:

'Next steps' from inspection reports

SMT ROLES

Defining management responsibilities for monitoring and evaluation across the school as a whole

APPRAISAL

Linking performance review to school development planning, staff development and improvement of teaching quality

DEPARTMENTS

Developing the contribution of heads of department to departmental review and school development planning

TEACHING

Monitoring the quality of teaching and learning through observation and sharing of good practice

ASSESSMENT

Using assessment information consistently to track progress and evaluate the effectiveness of teaching

CURRICULUM

Auditing and reviewing the curriculum to ensure fitness for purpose

Beyond inspection

The 2007 survey asked heads about current practice and plans to extend the use of self-evaluation for the school's own purposes. This elicited a very wide-ranging response from schools, whether or not they had been, or were soon to be, inspected.

Interestingly, all the schools that had completed a pre-inspection self-evaluation form felt that this had been of value beyond its inspection purpose. Schools frequently mentioned that it helped to shape their development planning. Others found it of value in informing a new head about the school's strengths and weaknesses, or in lending weight to the head's judgement and vision for the school. One said that it generated a sense of pride in the school.

Many of the responses recognised self-evaluation as a way of thinking, a means of developing shared purpose in effecting change, rather than a one-off form-filling activity.

A useful tool for management irrespective of ISI requirements.

A way of encouraging staff to see what needs to be done to move the school forward.

It needs to be an annual (though not all at once) procedure as part of ongoing improvement – I see it as a principle rather than a system – right down to pupil self-assessment.

Many schools recognise themselves as being at an early stage, but are beginning to think about future possibilities.

We haven't begun formal self-evaluation as yet, although each academic department currently files an annual report which covers many self-evaluation elements.

By maintained school standards we do not do much self-evaluation.

Not yet discussed but I should like the process of self-evaluation to be embedded in the thinking of all departments and teams so that we are constantly being self aware. The process of creating a School Development Plan will then be easier every 5 years.

No plans at present but it could be a useful annual check.

Other schools are developing formal processes, and thinking about how these can be extended. In implementing self-evaluation, schools are concerned to strike a balance, drawing on existing formats to save time and tap into others' experience, while customising the approach to their own needs.

The self-evaluation element of inspection has prompted us to undertake the process with staff and pupils. We may extend further to governors and parents.

We are about to begin a process of semi-formal internal departmental inspections (peer to peer). This is an outcome of a sub-committee looking at self-review.

We are introducing self-evaluation for departments and indeed most areas of school life.

We have been steadily doing more self-evaluation over the last year or two – in all areas of school life, notably classroom observation, work scrutiny, library use, spirituality, parents surveys, and pupil surveys.

We have brought How Good is Our School? from Scotland and adapted it for use in our school (in England).

A significant minority of schools speak of established processes that they consider to be working well.

Self-evaluation is already the core part of our performance management processes.

We are constantly evaluating. Each term we have a special review meeting to discuss what needs attention.

Self-evaluation is coming to be seen less as a one-off activity than as a continuing and recurrent process. In some cases, it is being articulated as a way of working that runs through the whole of school life.

Using self-evaluation to make a difference: case studies of practice in HMC schools

Many of the schools responding to the HMC survey outlined ways in which they are developing the use of self-evaluation for purposes including, but also extending well beyond, inspection. For most schools, self-evaluation is work in progress. Many expressed a willingness to share experience of how it is working on the ground. The resulting case studies explore some of the practical ways in which schools are using self-evaluation to help themselves in doing a better job.

Preparing for inspection

Having decided to complete the pre-inspection self-evaluation form, the school has to decide how to go about doing this. Schools that plan ahead and invest time and thought in the process have found it to be a valuable exercise, not only in preparing for inspection, but in focusing everyone's thinking about how the school is doing.

The school set out to complete the self-evaluation form in preparation for inspection within the year. A joint staff and governors' brainstorming session took place in which it was open season for throwing bouquets or rotten tomatoes at all aspects of the school. Detailed findings from this session were collected, arranged under headings and variously discussed.

The head and a deputy head went on an excellent one-day course entitled 'Let's Keep it Simple' which they felt did just that, whittling down Ofsted's suggested self-evaluation form (SEF) procedures to what was manageable and useful.⁸ (All the others on the course were from the maintained sector.)

The senior management team spent a weekend away turning it all into a SEF. They used the overall format and headings of the ISI self-evaluation form, ensuring the stipulations of 'Every Child Matters' were covered. They also incorporated information about what we had done in response to suggestions in the 2000 report, with direct reference to that report. The SEF was given in draft to the staff for their contributions. It was presented to governors, with the latest model of the School Development Plan which had emerged 'organically' from the SEF. It was thus available, with minimal updating, for the RI's first pre-inspection visit.

⁸ Run by Chris Pickup chrispickupltd@aol.com

The process began a year before the inspection, and putting the SEF together took two terms. It was felt to be a very valuable exercise for a number of reasons. The school took the opportunity to analyse everything it could and produced a very thorough document (15 sides of A4 as it turned out). Everyone had more than one chance to contribute. A new School Development Plan came out of it and many points led to animated discussion and action during the year. Finally, the school's self-evaluation gave the Inspectors the wherewithal to judge the school on the basis of how well it lived up to its stated ethos and aspirations.

The pre-inspection self-evaluation can be of particular use for a new head in 'drilling down' into the school's workings, exploring how the school is perceived internally and externally, and setting minds on the future.

With an inspection due barely a term after the head's arrival, the pre-inspection self-evaluation became a useful tool for getting to know the school. In particular, it set an agenda for early discussions with the senior management team and gave an opportunity to explore their responsibilities and how they worked together. It helped to build a close working relationship between the head and the deputy head who was mandated to lead the preparation for inspection.

The deputy head did a first very rough draft of the self-evaluation form. This was then broken down into sections by the senior management team and passed out to different groups for discussion, verbally and by e-mail. It was found difficult to separate out the different sections of the form, but this in itself generated discussion about how aspects interlocked.

It became an iterative process, with the senior management team going through the whole form twice, before the head and deputy finalised the wording of the final version. Preparation for inspection accelerated a necessary process, forcing the pace for the head in gaining an overview of the school and working with the senior management team to this end. Stocktaking by a new head was made less threatening by the sense of a 'common enemy' in the form of external inspection.

Developing shared vision

Views from schools vary on the suitability and manageability of the pre-inspection self-evaluation form. However, it has frequently provided a starting point for a process that has continued beyond inspection, fashioned by the school for its own purposes. In particular, self-evaluation has been built upon to strengthen awareness of what the school is about and to clarify its vision for the future.

The school has an inspection in prospect. The head wanted to involve all staff in the process of school self-evaluation. He felt that the inspection form would be off-putting and difficult for staff to use, so he put together the school's own tick box questionnaire. This had six sections: academic; extra-curricular; boarding and pastoral care; spiritual, moral, social and cultural development; links with parents and community; and governance and management. These related to inspection aspects, but contained questions that reflected current issues for the school, such as 'Is the new library enhancing academic provision?' 'Do gifted and talented pupils need to be stretched more?' 'Do teachers know individual pupils well?' 'Do we observe each other's lessons enough?' Responses were given on a four point scale plus a 'don't know' option. There was a 100% return from staff who found the form took about 15 minutes to complete.

Outcomes were collated and shared with all staff, and the head used the conclusions to fill in the self-evaluation form. The inspection team found the form useful, and the report commented on the school's 'positive and honest approach to self-evaluation'.

The pre-inspection exercise, and the recommendations from the inspection, began an ongoing internal process of self-evaluation called 'Vision 2010 and beyond', an innovative internal marketing exercise.

The school engaged two consultants to work as facilitators with groups of pupils, teachers, non-teaching staff and a representative 'vision group' including governors and senior management. They also talked with parents and alumni. Each session explored likes and dislikes about the school, and perceptions of what others thought of it. The final outcome was a 'Vision and Values' document, with 15 key statements against which the school can judge its development. These have been presented to all employees, to all students, and to governors and parents. They are becoming a yardstick against which corporate and individual behaviour is measured. Students are learning to take ownership, for example, in relating their own actions to the school's environmental principles.

The process has helped the school to arrive at the kernel of what it stands for and where it is going. The intention is to ensure that the school has a vision with associated values upon which all its development planning can be based, and that these should be taken on board by everyone and projected consistently to the outside world.

Creating a school development plan

There is a close and often circular relationship between self-evaluation and development planning. As this relationship becomes established, schools note increasing integration of 'top-down' and 'bottom-up' processes.

The school has not yet been inspected under the second cycle. Its increasing use of self-evaluation is seen as growing out of, and feeding into, its cycle of development planning.

The head sets the strategic vision and, with the senior management team, develops key 'strategic intents'. The school development plan is then discussed with all staff at the start of the school year. Everyone is involved in working out their contribution towards implementing the strategic intents, for example, in promoting independent learning, or the use of target setting. This is worked on within departments, and tracked through into performance management and the piloting of projects in parts of the school, under the direction of the deputy head. Progress is audited each term.

The school also makes use of annual parent and student questionnaires to guide its development planning. Questionnaires are completed by parents at the end of Year 9, and by students and parents at the end of Year 13. This is a longstanding process and is being extended to all year groups. The questionnaires are quite specific in asking for ratings of the overall quality of subject teaching, marking and tutoring. Parents are informed of the findings from questionnaires and these are incorporated into the school's self-evaluation and development planning.

The Director of Studies is trialling the use of the Independent School Self Review software⁹ that can be used for evaluating any aspect of the school. The framework provides numerical scales as well as descriptive comment, and allows analysis and comparison from year to year. It poses the basic questions of what are we doing well, how do we know and how can we improve. The school believes that it is developing a model that can be applied in many areas, from the teacher or the student in the classroom to the tutor or the housemaster in the boarding house.

The school has now taken the step of publishing the annual development plan on its website. This shares with a wider audience the school's view of itself, its recent development and its plans for the future. The school believes that this helps to show the school's essential character, demonstrating that it is evaluating itself, that it wants to improve and that it knows how to do this. Although parents rarely comment on the development plan, the school finds that it now receives many fewer questions about its direction and vision. Parents feel they are 'in the know' and that the school knows where it is going.

⁹ ADA Assessment Solutions set up Independent School Review in 2006. Software for school and departmental self-evaluation is being trialled by a number of HMC schools. ADA also offers Observe, software for lesson observation.

Maintaining a rolling process

Many schools are intent on streamlining processes so that they interlock with each other, and on avoiding paperwork exercises that lead nowhere. Schools are concerned that self-evaluation, whether or not precipitated by inspection, should become an habitual way of working that keeps the school focused on what it is about.

Having been through an inspection, the school wanted a simple process to help it in continuing to measure itself against the key inspection criteria. The governing body has two committees: finance and general purposes, and strategy and policy. The work of the latter committee has now been reorganised in line with the main inspection headings. These focus attention on the quality of education, including teaching, learning and achievement, the quality of care, and the effectiveness of governance and management.

The inspection headings set the termly agenda and feed into the development plan and the school's training strategy. Policies are reviewed with the key criteria in mind. Although the process 'clunks and clicks a bit' because information does not always fit easily under the given headings, it gives an agreed baseline for measuring progress over time.

This way of working prepares the way for any future inspection and fits well with SORP reporting requirements. It also gives a framework for considering public benefit. Conclusions are linked to the budgeting process, as when considering a new post with responsibility for teaching and learning and the sharing of good practice across departments. It has added a dimension in looking at issues across the school as a whole.

Evaluating departments

Inspection in the second cycle, and preparatory self-evaluation, focuses on the school as a whole and the way that all the aspects of its work fit together. Schools are concerned that self-evaluation should reach the level of departments and that heads of departments, as middle managers, should develop their skills in the process.

In the absence of subject reports from inspection, some schools are seeking external evaluation by other means. One school spoke of recruiting specially chosen individuals from other schools to inspect departments, in order to provide the headmaster with a frank appraisal.

Other schools are keeping the process in-house, establishing cyclical internal departmental reviews. These incorporate self-evaluation by departments that then roll forward into action planning.

Departmental self-review is being introduced with departments making a report at the start of the year that draws on lesson observations, comparisons of performance within and between departments, and the use of benchmarking data to quantify value added. This raises questions about why outcomes are as they are, and what needs to be done. In some subjects, performance management includes self review that highlights strengths and weaknesses and implications for management. Increasingly, the student voice is also being heard. In some subjects, students are being encouraged to assess their own learning at the end of units of work. This provides feedback on the quality of teaching and is helping students to be more aware of their own learning.

The process may be formalised further, with the school's senior management undertaking what equates to a mini inspection, starting with self-evaluation and feeding into appraisal and target-setting. 'Internal' evaluation by the department and 'external' evaluation by senior management complement each other.

Each department is audited every other year by the head and director of professional development, both trained inspectors, during a designated 'audit week'. In preparation, the department, led by the head of department, fills in a questionnaire. This prompts self-evaluation and consideration of whether job descriptions are being fulfilled and whether issues, for example from the school development plan or the last inspection, are being kept in sight. Questions provide a checklist against expectations, for example about the regular reviewing of syllabuses, effective library use, or observation of colleagues' teaching.

Each member of the department is then observed teaching by the head or by the director of professional development. The audit team also considers exam results and internal assessments and produces a report that is discussed at a meeting with the whole department. This triggers appraisal in the next week, by the director of professional development, of the HoD who in turn appraises the other members of the department, before each teacher meets briefly with the head for a final 'wash up'. The targets set by appraisal link back to the audit findings. In the intervening year between audits, departments complete the questionnaire again, and evaluate progress against targets.

The model works well in what is a relatively small school. The school considers that the quality of middle management, which is often highly variable, has improved as a result, and that the school has developed a more corporate approach. The pattern of audit has also served to identify training needs across the school, for example in providing for pupils who are gifted and talented, have specific learning difficulties, or are learning English as an additional language. The next inspection is not due for a number of years, but the systems in place are expected to prevent the 'terror of inspection' from looming too large.

Using information from assessment

Much external evaluation, within inspection or through league tables, focuses on the results achieved in public examinations. Self-evaluation digs beneath the figures, questioning why patterns of progress and performance are as they are. The proactive use of assessment, to raise sights or to improve achievement, requires open discussion of the data to draw out implications for teaching and learning. Inspection reports have often noted inconsistency in the use of assessment. Schools are seeking ways to ensure that the collection of data is the beginning rather than the end of the story, and that evaluative use of assessment has an impact on learning.

The school was concerned that it did not have the means to evaluate performance or to gauge pupils' progress accurately enough, as 80% were exceeding the grades predicted nationally from baseline measures. Two of the staff analysed the algorithms being used and reworked the predictions taking account of the normal performance of the school's pupils. This gives a clearer and more challenging view of what pupils are capable of achieving.

Such data and information from each assessment period are now regularly discussed by the tutor with each pupil. The system has been introduced with students in the first year of the sixth form and will be extended schoolwide, from Years 7 and 8 onwards. Tutors are alert in picking up any trends and talking with teachers and heads of subjects about them. The head and academic deputy head interview all subject heads about their results during the autumn term. A new post for learning assessment, working with the academic deputy head, is being established to help the process of using data to improve performance.

Teaching, learning and appraisal

Teaching and learning lie at the heart of the school's work and self-evaluation explores how well the former brings about the latter. Lesson observation, observing and being observed, stimulates shared reflection on what works and what could be better. Analysis of pupils' progress and, increasingly, self-assessment by pupils, fill out the picture. Appraisal focuses on the individual's execution of the school's essential business, in and out of the classroom. At best, it relates input to outcome, it connects the individual to the school's wider intents and it maps the way forward. The challenge lies in forging a sustainable process that draws on the power of self-evaluation to strengthen both the individual and the school.

A meeting about the new ISI framework, and the inclusion of self-evaluation, triggered the conviction that self-review should be pursued as a good in itself, without regard to inspection. With this in mind, the deputy head set about designing and implementing a schoolwide appraisal system with self-evaluation at its core.

Each member of the teaching staff completes an online form, considering their performance against a list of indicators. These explore aspects of teaching in detail, such as whether lessons start on time, the use of different teaching methods, the use made of ICT resources and awareness of pupils' learning difficulties. Responses are made using a three point scale, with the opportunity for additional comments. These are then collated electronically and a report returned to the appraisee, as an agenda for discussion with the appraiser. This meeting distils key issues and future targets to be included in an appraisal report that is written up by the person being appraised.

There is a parallel appraisal process for boarding staff, which includes self-evaluation against a set of questions, as well as collecting the views of all pupils on the quality of pastoral care. Members of the senior management team are also appraised following a similar format. They start by completing a self-evaluation form that guides reflection on performance against a set of standards. Generic questions about leadership and management are included,¹⁰ alongside questions tailored to the individual role.

The school has found the use of checklists for individual self-evaluation to be very productive. Staff have been reminded about what is important. Questions about lesson observations have underlined the value of these. Schoolwide concerns, for example about independent learning, have been brought into sharper focus.

Early concerns about the system being too soft-edged if appraisees led the process have proved unfounded. Instead, the school has found that teachers look harder and more critically at themselves than any appraiser would. Because they write the report, focusing on what they want to achieve, teachers are less likely to bristle at perceived criticism. Career development and training needs are considered in all appraisals and this feeds into the school's planning.

All staff are appraised and many are also appraisers. The head reviews all appraisal reports, focusing on key issues and targets, picking up points requiring attention by the school and passing these on for action by the relevant person. The deputy head puts together the self-evaluation schedules and collates information. The staff have recently reviewed the process after the first one-year cycle. The main concern now is to reduce the paperwork and the number of questions, while continuing to highlight key aspects of teaching and learning in ways that prompt real reflection.

¹⁰ These draw on the National Standards for Headteachers (DfES 2004)

Surveying stakeholders

Independent schools depend on satisfied customers and schools are becoming more proactive in finding out how satisfied they really are. In taking on-board perspectives that may be critical or challenging, as well as those that are celebratory and confirmatory, schools begin to see themselves more clearly as others see them. Open self-evaluation paves the way for constructive change.

The school regularly seeks the views of pupils, staff and parents as an integral part of its strategic planning. In recent years, four such exercises have contributed to the school's knowledge of itself, and its planning for improvement.

An annual survey is conducted around Easter among all pupils and staff on the quality of the school's in-house catering. This has led to many visible (and edible) changes, including reducing the time between cooking and eating, dispensing with long refectory tables in favour of round tables, and bringing staff out of their own dining room to eat with the pupils.

Half way between the last inspection and the anticipated next one, the school used the ISI inspection questionnaire to test parental opinion. Fifty volunteer parents, representing all shades of opinion, were then invited to a follow-up discussion. This helped to explore parental perceptions of the school's character and its strengths and weaknesses. It gave the school food for thought in developing its own self-evaluation.

The school worked with one parent, an international consultant in the field, on a values questionnaire for staff, pupils and parents, including some who had looked at the school but gone elsewhere. The outcomes helped to define the school's core values and to sharpen their articulation, so that actions could be measured against them.

Each year, pupils complete a questionnaire, as used in boarding welfare inspections. This shows changes over the years, for example, in perceived equality for boys and girls as co-education has taken root. The results also show up patterns in different houses that are followed up by senior management. Where names are given, housemasters and housemistresses promise that issues will be tackled. The school finds that the questionnaire provides a useful, regular evaluation of the quality of boarding care that helps it to deal with any problems.

All questionnaires are used for a purpose, and the school acts on the outcomes. The information gained is often summarised on the website, and routinely feeds into the school's strategic planning.

Governors' self-evaluation

Good self-evaluation feeds effective governance. The more open, honest and accurate the school's self-evaluation, the better informed the governors will be about the school's strengths and areas for development. It follows logically that the governing body should also review its own effectiveness and this expectation is now embedded in national codes of governance.¹¹ Some schools have brought in external reviewers to give objectivity and breadth of perspective in evaluating governance. Others have opted for an internal exercise with governors asking questions of themselves. Either approach can serve to shine a light into cobwebbed corners of custom and practice and lead to some useful springcleaning.

The school felt that most aspects of its work were being audited annually, but that governance was the one area not subject to regular review. The head was an experienced ISI inspector. He and several of his governors had also governed state schools. All this helped to identify that the school's governance was not keeping up with the times, and that there was no ready mechanism for dealing with this. There was also a sense of 'two tier' governance with some governors making little input.

In consultation with the head, the chair of governors designed a questionnaire to be completed by each governor. Eight questions, rated on a five point scale with opportunity for comment, explored views and ideas for improvement. The questions focused on the governing body's make-up and effectiveness, the adequacy of induction and training, and the efficiency of its workings.

Governors took advantage of the opportunity to write freely. Responses were confidential, but were drawn together by the chair of governors, leading to an extended discussion at a governors' strategy day, with the head and bursar in attendance. Those who were most widely experienced as governors tended to be the most critical of the status quo, but the process of reflection opened the way for everyone to contemplate change.

The self-evaluation exercise led to a new committee structure and a rescheduling of meetings. Gaps in expertise were identified and induction arrangements were revised. All this brought greater transparency about governors' roles and gave every governor a voice. The process was successful in confirming what governors were doing well, while generating a collective view of what could be improved.

¹¹ Good Governance 2005: 'The Board should periodically review its own and the organisation's effectiveness, and take any necessary steps to ensure that both continue to work well'.

Conclusion

The practice of school self-evaluation is developing fast. Pre-inspection self-evaluation has been broadly welcomed and has proved a useful catalyst for reflection. With increasing familiarity, school self-evaluation is coming to be seen less as a single activity or series of events than as a permeating principle.

From experience in schools, as exemplified in the case studies, a number of key points emerge about making self-evaluation work to maximum effect.

- School self-evaluation requires commitment from the top. This needs to be mirrored at all levels so that it becomes part of the culture.
- The process must be recognised as worth the effort; its value is undermined if it is seen as an external imposition.
- The questions or criteria used, whether internally or externally devised, should reflect the school's view of what is important.
- The process should be challenging as well as confirming; it is an opportunity for venturing beyond the comfort zone.
- Good management is required to avoid overload, and to align scrutiny of the parts with planning for the whole.
- Self-evaluation flourishes in an atmosphere of openness and trust; areas for development are ambitions for the future not admissions of failure.
- School self-evaluation is not an end in itself; the school should know what it stands to gain from it and be prepared to act on the outcomes.

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