

Audit tool for School Leaders and Governors when considering collaboration



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The audit tool is designed to enable the school to explore the current opportunities and possible challenges to future collaboration with other schools. It has been developed for use by School Leaders and Governors as part of their “pre-collaboration” audit. Local Authority experience indicates that this background exploration of the key areas is a vital part of any consideration and will support the planning processes.

It is recommended that the audit is completed prior to any formal discussions taking place with the Local Authority. The audit tool draws together information that is already held by the school, but enables them to begin to look at it from a collaboration perspective. The Local Authority may be able to provide support in some areas if additional information is needed that the school does not hold.

It is suggested that the audit tool is completed by staff and governors in a working party, or it might be possible to use current committee structures to undertake the work. The working party will need to set aside sufficient time to explore all the key issues and to complete the document and take the follow-up actions required. It is important to stress that collaboration is not a quick and easy process but does have the potential to bring many positive outcomes for children.

The key aim of any collaboration is to provide benefit for children, so please try to keep outcomes for children at the heart of your thinking.

SCHOOL FACTS AND FIGURES	NOTES	NEXT STEPS	OUTCOMES SECTION / IMPROVEMENTS
What is the school status (Community / VC / VA/Trust)			
What are our pupil numbers currently and projected for the next 3 years? Can we cope with additional pupils expected? Can we continue to be sustainable if pupil numbers fall?			
Who are our geographical neighbours? Do we have any 'natural' partners – e.g. similar schools, schools we already have a particularly strong relationship with?			
What are travel links to nearest neighbours/natural partners? How far away is the school? Is travel difficult at certain times of year? How long does the journey take?			

A Word version of this Audit Tool document is available for download at <http://cyps.northyorks.gov.uk>

COLLABORATION	NOTES	NEXT STEPS	OUTCOMES SECTION / IMPROVEMENTS
What current collaborations are in place with others school(s) and / or organisations / settings?			
For example – informal collaboration, teaching school alliance			
Which area(s) of provision e.g. Sports partnerships, challenge partnerships, moderation?			
What is the impact of collaborations on outcomes for children so far?			
Which area(s) of provision could be improved by collaboration?			
Which staff are involved, what is their role and frequency?			

COLLABORATION (continued)	NOTES	NEXT STEPS	OUTCOMES SECTION / IMPROVEMENTS
What is the impact of collaborations on staff?			
How has the school made parents aware of current collaborations?			
What opportunities exist to obtain parental views on current collaborations?			
Are there any negative impacts of current collaborations?			
How has the school developed its aims and vision in line with collaborative working practice?			
How does the school currently meet its aims through collaborative working?			

COLLABORATION (continued)	NOTES	NEXT STEPS	OUTCOMES SECTION / IMPROVEMENTS
What collaborations are in planning for the near future?			
What benefits for children might emerge from further collaboration?			
What disadvantages might emerge from further collaboration?			

GOVERNANCE	NOTES	NEXT STEPS	OUTCOMES SECTION / IMPROVEMENTS
Which Governors are due to finish their terms of office in the next 3 years?			
Are there current vacancies on the Governing Body?			
Are there particular skills and/or experience which could help the Governing Body to do its work more effectively?			
Could reconstitution help the Governing Body to do its work more effectively? E.g. a smaller Body, with co-opted governors holding certain skills and experience?			
What links are there between Governors or Governing Bodies of other schools?			
How does the current Governing Body secure the unique ethos of the school, including religious character where appropriate?			

FINANCE	NOTES	NEXT STEPS	OUTCOMES SECTION / IMPROVEMENTS
What is our financial projection for the next 3 years? Is the school viable if no changes are made to its' organisation?			
Is the school currently receiving MFG protection? Would the school be viable without this protection?			
Do Governors have a good level of understanding of financial issues?			
Are there any potential additional factors where the full details are not yet clear – i.e. proposed new housing, changes in the funding system, primary pupil numbers profiles going forward?			

STAFFING	NOTES	NEXT STEPS	OUTCOMES SECTION / IMPROVEMENTS
Headteacher			
What are the current Headteacher's career plans for the next 3 years?			
What are we doing with regard to succession planning? Is there anything further that we can do?			
What are the benefits to us and others of extending the responsibility of the Headteacher beyond our school?			
How do we support the Headteacher's professional development?			
When looking at our school do we know what the current challenges for our Headteacher are - how have we addressed these to date?			
Do we know how our Headteacher views their work – life balance and what support they might like in this area?			

STAFFING (continued)	NOTES	NEXT STEPS	OUTCOMES SECTION / IMPROVEMENTS
Headteacher (continued)			
Do we support the Headteacher to work beyond the school and with other schools e.g. collaborative working?			
What networks does the Headteacher work with?			
Teachers			
What is the current teaching structure, including responsibilities held and how are individuals held to account? Is this structure sustainable for the next 3 years?			
Are any staff due to retire over the next 3 years?			
Are any staff expected to move on / promotions in the next 3 years?			
Are any staff expected to ask to reduce hours over the next 3 years?			

STAFFING (continued)	NOTES	NEXT STEPS	OUTCOMES SECTION / IMPROVEMENTS
Teachers (continued)			
Are any staff interested in leadership and promotion opportunities internally? Are any staff aspiring leaders?			
Which staff have taught successfully across FS1/KS1/ KS2/KS3/KS4/KS5 and which staff are able to take on leadership responsibilities and / or other teaching areas?			
Are any staff specialists who could apply their expertise in other schools as well as ours?			
Is there specialist expertise missing from the school? Could it be provided by specialist staff from other schools?			
Support staff (Admin, Teaching Assistants, Clerk to Governors, Site staff (Caretaking Cleaning), MSA and Catering)			
What is the current support staff structure? Is this structure sustainable for the next 3 years?			

STAFFING (continued)	NOTES	NEXT STEPS	OUTCOMES SECTION / IMPROVEMENTS
Support staff (continued)			
Are any staff due to retire over the next 3 years?			
Are any staff expected to move on / promotions in the next 3 years?			
Are any staff expected to ask to reduce hours over the next 3 years?			
How much of the finance / budget management is undertaken by an admin officer / the Headteacher / FMS support officers/ School Business Manager and are there plans to change this over the next 3 years?			
Does the admin post have a strategic management role – i.e. managing other support staff? Could it be developed with current post holder?			
Is current clerk to GB a school appointment or part of the Clerking Service? Do they currently work across more than one school?			