



DIOCESE OF  
LICHFIELD

# STATUTORY INSPECTION OF ANGLICAN AND METHODIST SCHOOLS

Protocol, Information and Guidance for the Diocese of Lichfield for  
Head Teachers  
Academy Principals  
Executive Head Teachers  
Heads of Schools  
Foundation Governors  
Trust Board members  
SIAMS Inspectors  
DBE Board Members  
Diocesan Advisers and Officers

*SIAMS Protocol  
for Church of  
England Schools  
in the Diocese of  
Lichfield –  
September 2019*

## 1. Introduction

This handbook sets out the expectation of The Lichfield Diocesan Board of Education for the process of the Statutory Inspection of Anglican and Methodist Schools (SIAMS) inspections under section 48 of the Education Act 2005.

## 2. The Purpose of SIAMS Inspection

The Purpose of SIAMS Inspection is

- To provide an evaluation of the distinctiveness and effectiveness of the church school for the governing body and/or the multi-academy Trusts, the school, the parents, the diocese and the wider public.
- To meet the requirements of section 48 of the Education Act 2005, for schools which have a religious character
- To make a significant contribution to improvement in church schools.

The SIAMS inspection seeks to answer one overarching question:

**How effective is the school's distinctive vision, established and promoted by leadership at all levels, in enabling pupils and adults to flourish?**

This question is explored through seven strands:

1. Vision and leadership
2. Wisdom, knowledge and skills
3. Character development: Hope, aspiration and courageous advocacy
4. Community and living well together
5. Dignity and respect
6. The impact of Collective worship
7. The effectiveness of religious education (RE)

Full details of content and expectations of inspections can be found in the Evaluation Schedule for Schools and Inspectors.

The SIAMS inspection focuses on the impact that the Christian vision of the church school has on pupils and adults. This will involve looking at the school's Christian vision, the provision the school makes because of this vision and how effective this provision is in enabling all pupils to flourish. Schools become effective by means of a variety of strategies, approaches and styles which reflect their local context or church tradition. Inspectors should carefully diagnose how each church school has a positive impact on pupils and adults. They should not apply a preconceived template of what an effective church school should be like.

### **3. Contractual Arrangements for SIAMS under the Education Act 2005**

It is the responsibility of the governing body of all voluntary and foundation schools to ensure that a denominational inspection is carried out and Ofsted inspectors are required to ensure that this duty has been met. In the case of an academy, the inspection of denominational education and collective worship is required by its Funding Agreement with the Department for Education (DfE).

Funding for SIAMS inspectors is provided by the DfE and administered by the Church of England Education Office. The school/academy will be liable for the expenses of the local Diocesan Board of Education; these include the administration of the section 48 process, including the quality assurance procedures and a visit to the school by the Christian Distinctiveness Adviser prior to the inspection. In Lichfield these expenses are covered in the Diocesan Christian Distinctiveness Service Agreement. Those schools who do not subscribe to this service agreement will be invoiced by the LD BE for £650.00.

### **4. The Scheduling of Inspections**

The Education (School Inspection) (England) Regulations 2009 (S11564) sets out the interval within which the inspections are required to take place. All section 48 inspections are scheduled independently from Ofsted's section 5 inspection. All schools must be scheduled for their next section 48 inspection within 3 to 5 years from the end of the academic school year within which they were last inspected depending on the outcome of their previous inspection. In the Diocese of Lichfield the decision has been taken that all schools should receive their section 48 inspections within 5 years of their previous inspection.

Where a school has become an academy, including becoming part of a multi-academy Trust, the date and the outcome of the last section 48 inspection for the predecessor school will be used to determine the timing of the section 48 inspection of the new academy, as above. It should be noted that although for Ofsted scheduling purposes such schools are considered new because they have a new URN, for section 48 scheduling purposes they are not considered new schools. (This change was made by the DfE in requirements in January 2014 and replaced guidance issued the previous year).

When a new academy or a free school opens, a section 48 inspection should be scheduled no earlier than 2 years and no later than 3 years from the date of opening. Thereafter the timing of inspections should be in line with the general guidance above.

Where a new school has been created by the amalgamation of two or more predecessor schools and the school now has one URN the new school can be scheduled according to the outcome and timing of the inspection of any of the predecessor schools, ideally when this would allow for an inspection within 5 years.

The delivery of the section 48 process is the responsibility of the Diocese. The date of the inspection within each term for each identified school is decided by the Diocese, and an inspector is allocated for each inspection.

Schools will be notified of their pending inspection approximately one week prior to the scheduled date. In Lichfield this will usually be via a phone call from the Diocesan office on a Thursday, and the inspection should take place the following Thursday or Friday.

SIAMS inspections are scheduled by the Church of England Education Office independently from Ofsted's section 5 and section 8 inspections, but in the event of a no-notice Ofsted inspection where a SIAMS inspection is scheduled to go ahead on that day it has been agreed with Ofsted that the two may be conducted simultaneously. Feedback from both inspections may take place at the same meeting.

The relationship between section 5 and section 48 inspections is governed by a protocol between Ofsted and signatory faith group inspectorates. SIAMS inspectors should make sure they are familiar with this protocol.

The scheduling of a joint Anglican/Catholic school should alternate between the Anglican and Catholic dioceses. (Request separate guidance available from the School Character and SIAMS Development Manager at the Education Office) Joint Anglican and Methodist schools share the same schedule and will be managed alternately between the Anglican Diocese and the Methodist. The Methodist appendix to the schedule will form part of the inspection programme.

All inspectors abide by the Church of England Education Office's Code of Practice for SIAMS Inspectors. It is the school's responsibility to report alleged contraventions of this Code of Practice to the Diocesan SIAMS Manager.

SIAMS inspectors expect to be treated with dignity and respect by representatives of the school at all times during the inspection process. It is the inspector's responsibility to report any alleged concerns to the Diocesan SIAMS Manager.

## 5. Before the Inspection

Following notification to the school by the Diocesan office of their scheduled inspection, the inspector will make contact with the school. It is the school's responsibility to ensure that the appropriate senior leader is made available to take this call.

Before telephoning the school, the inspector will have visited the school website and collected some initial findings about the way the school leaders promote its distinctive Christian vision, and uses it to help its pupils flourish. They will also begin to explore the unique context of the school, which will be considered throughout the inspection. These topics will also be discussed in the initial telephone call with the headteacher/senior leader. During this call the inspector will gather additional information about the school and may request that the following documents be emailed:

- The School's self-evaluation documents. These may take the form of the 2018 SIAMS self-evaluation form (SEF), the new self-evaluation audit tool (SEAT) summary reflection or another format chosen by the school.
- Relevant policies not available on the website.
- The schools development plan for the current and previous year.
- Any action plans related to SIAMS.
- The school's IDSR (Inspection Data Summary Report).

In the case of an academy the inspector may request any scheme of delegation that sets out the levels of delegation to the local governing body.

During this conversation the inspector will also discuss the details of timetabling the inspection day, and suggest which personnel should be involved in the process. If key individuals are not going to be available arrangements may be made to speak to them by telephone.

Following receipt of the self evaluation the inspector will complete the Pre-Inspection Plan (PIP), which will then be sent to the school at least 24 hours prior to the inspection. This will identify the key focus for the inspection. The timetable will also be confirmed in light of these. The inspector will also email the SIAMS contract to the school. This needs to be signed by the Chair of Governors and the inspector before the inspection day begins.

The Inspector will also speak to the Diocesan SIAMS Manager or relevant Christian Distinctiveness Adviser to discuss how well school leaders work with the local diocese and churches.

## 6. During the Inspection

The following may be requested as evidence on the day of inspection, if not already shared:

- Any SIAMS action plan and the school development plan.
- Any policies not available on the school's website
- Logs and analysis of records of exclusions, pupils taken off roll, incidents of poor behaviour, records of bullying, including racist, disability and homophobic bullying and attendance figures should be requested to be available on the day of inspection. Inspectors must not request electronically or remove from the school any documents that contain pupil names.
- Work samples. The PIP should offer guidance about the nature and size of the sample, and the purpose of the scrutiny. This ensures school leaders only spend time collecting work that is directly relevant to the inspection issues.
- Evidence of planning, content and monitoring of collective worship and religious education by pupils, staff and governors.
- An analysis of responses from parent and pupil surveys.
- Relevant minutes from governor meetings.
- Records of visit from external consultants and advisers relevant to SIAMS.

Inspectors should:

- Take account of the views of learners and pupil voice evidence.
- Discuss with staff, governors, clergy, parents and others, to verify the self-evaluation findings on the effectiveness of the school's distinctive Christian vision and how this enables pupils and adults to flourish.
- Complete learning walks, share in acts of worship and visit classrooms.
- Scrutiny of pupils' work will be undertaken where relevant and may be carried out in conjunction with members of the school leadership.
- Lessons may be observed in part, but inspectors are unlikely to visit a whole lesson or to give detailed individual feedback to staff on what they have seen.

Feedback is an ongoing process throughout the inspection day and will involve continued dialogue with the school's headteacher or nominated senior leader. The purpose of observations is to verify the school's own monitoring, not to assess the

quality of teaching. The final feedback takes place at the end of the day and is an opportunity for the inspector to share the findings and provisional judgements with senior leaders. The school should be informed of the grades that the inspector is recommending, but should be made aware that they are subject to a critical reading process, and so are to be treated as confidential until the final report is received.

One overall grade is awarded. In addition, a stand-alone grade is awarded in all schools for collective worship and in voluntary aided (VA) schools and former VA schools for religious education. This grade is based on teaching and learning alone, and RE is inspected and commented upon in all schools.

If an inspector thinks that the school is going to be judged 'ineffective' they must contact the Diocesan SIAMS manager or the Director of Education before the final grading.

## **7. Processing the Report**

The inspector must send the first draft of the report and the PIP to the critical reader within 5 working days of the inspection.

Within 3 working days of receiving the first draft report the critical reader should conduct the first critical read and respond to the inspector with detailed comments. The critical reader has the responsibility to ensure the report is compliant with the evaluation schedule, is coherent and has sufficient clarity for the reader. Judgements should also be internally consistent and supported by the evidence. If the critical reader is not satisfied that the evidence presented in the report fully supports the grades given they can request a change to the grades.

When the critical reader has signed off the report the inspector should send this version to the school for checking for factual accuracy. The report is still confidential at this stage. The school should return the report with any amendments to the factual accuracy to the inspector within 2 working days.

Any disagreement between the inspector and the school over judgements of the inspection will initially be dealt with by the inspector and the school. If the school wishes to raise an appeal or complaint the Church of England Education Office's Appeals and Complaints Policy applies. However, this policy does not apply to inspectors who are not accredited by the Education Office or to inspectors appointed by a governing body of a school without the explicit support of the Diocese concerned.

Once the school has accepted the report a final version will be sent to the school. It will also be sent to the Diocese for publication, and it becomes a public document.

## **8. Following the Inspection**

The headteacher and governors work with staff to draw up an action plan. This will be incorporated into the school Improvement/Development Plan.

The Diocesan Christian Distinctiveness Adviser to the school may be approached to provide support in the implementation of the Action Plan. This will closely follow the issues raised in the 'focus for development' section of the report.

In the event of an 'ineffective' finding, there is a Diocesan 'Notice to Improve' (see appendix 1) followed by an action plan created in conjunction with the Diocese, with appropriate monitoring procedures and advisory support to enable the school to improve as soon as possible. This will be clarified by monitoring visits from the SIAMS manager and Diocesan Director of Education.

If an academy that is part of a multi academy trust has an 'ineffective' finding, the DDE can request that the academy is rebrokered.

The school will be asked to complete an evaluation form as part of the review process of the DBE about the inspection process and the inspector.

If the school thinks the inspection outcome is unfair or does not accurately reflect the school, it should follow the appeals policy. An appeal is a request from the school that the inspection outcome should be reviewed because it is believed that an injustice has occurred.

If the school is unhappy with the inspection experience because of the conduct of the inspector the school should follow the complaints policy. A complaint is a concern raised by the school regarding their dissatisfaction with the conduct or behaviour of the inspector.



## Diocesan Notice to Improve

In the event of an 'ineffective' finding during a SIAMS inspection the following procedures apply;

The Diocesan Director of Education will write to the school confirming the inspection findings

- The SIAMS Manager and Diocesan Director of Education will visit the school to discuss the report and identify causes of the ineffective judgement, and possible strategies to improve. A written report clarifying these will be issued by the SIAMS manager.
- The SIAMS manager will support the school in producing an action plan and a copy will be shared with the Director, This action plan should include time scale and budget, and be prioritised on the school development plan.
- The Diocesan Christian Distinctiveness Adviser will support the school in implementation.
- The SIAMS manager will visit the school after 3 and 6 months to monitor progress and a written report will be shared with the Diocesan Director.
- A final visit to the school by the SIAMS manager and Director to formally take the school out of this category and confirm the school now 'RI' or 'good'. Written confirmation will be sent from the Diocesan Director. +

## SIAMS Inspectors working in the Diocese of Lichfield

The SIAMS manager will allocate an inspector to each school. However, the schools have certain rights as regards who they deem suitable. In VA schools the whole governing body are responsible for overseeing the section 48 inspection and the appointment of a person to undertake the inspection, while in controlled and foundation schools it is the responsibility of the foundation governors. However, the governing body or foundation governors are required to consult with the Lichfield Diocesan Board of Education on the appointment of an inspector. In practice the LDBE will forward a list and pen portrait of all its accredited inspectors to schools in September (see below) with the instruction that this list should be discussed at the next meeting of the governing body. The Diocese should then be immediately informed of any inspector deemed inappropriate to inspect in their school by the governing body. The LDBE will then allocate an appropriate inspector. The inspector will be documented in a contract.

In exceptional circumstances the governing body of a school has the right to employ an inspector without the approval of the Lichfield Diocesan Board of Education (for example, from another diocese). That inspector will be required by Government regulation to submit a written claim, including bank details, and a SIAMS report to the diocese or to the Methodist Church. The diocese will forward the claim to the DfE for payment provided it is satisfied that the inspection has taken place and it has been carried out to what the diocesan critical reader and SIAMS manager consider to be an acceptable standard by a fit and proper person. Payment may be withheld if the report and conduct of the inspection fall short of that required of an accredited inspector. The report must satisfy the statutory requirements for section 48 inspections and comply with the Education Office standards in terms of quality, format and house style. All SIAMS inspectors hold a current full and enhanced certificate provided by the Disclosure and Barring Services (DBS), and professional insurance, for their work within the diocese. All inspectors carry a Church of England Education Office photo ID badge which confirms their DBS status. An inspector must display his/her ID badge throughout an inspection. If a school has any concern about the DBS of an inspector, the school leader must immediately contact the Diocesan SIAMS Manager so that they can swiftly address the matter.

**Angela Daniel**

I was headteacher of a VA Primary school in Herefordshire for 12 years, and became head of a VA Primary in Wolverhampton from September 2017. I have a music degree, studied RE to Masters Level and have been a National Leader of Education.

**Mary Gale**

As a retired headteacher I am currently working as an independent consultant, carrying out inspections and advising schools in all phases of education. This involves working as a school improvement partner, external adviser and facilitating training in schools and at the local authority.

**Sara Goddard**

Currently Executive Principal of a large Church of England Academy, Which is judged as SIAMS Outstanding. I have held leadership roles in Church of England primary schools for twenty years. I hold a joint English, Religious Education and teaching degree and have a Master's Degree in Education Studies.

**Tom Hutchinson**

Currently a Principal of a formerly VA Stand Alone Academy and have led in Catholic and Church of England 11-18 schools for over a decade. I hold a geography degree and have a passion for teaching and learning and providing education that meets the needs of all pupils.

**Lizzie McWhirter**

Working a part time role as RE Adviser for the Diocese of Coventry. A SIAMS inspector, trainer and critical reader I am also a QA Assessor for new inspectors. A previous lecturer in RE, I have written materials for Collective Worship and RE.

**Revd Alison Morris**

I have been a SIAMS inspector since 2012. I am an Anglican Ordained Priest (NSM) in the diocese of Lichfield serving on the Diocesan Board of Education and St Chad's Academy Trust. I have extensive experience of educational leadership, including governance in a range of settings including academies.

**Revd Jason Phillips**

I was a pilot inspector for the 2018 framework on behalf of The National Society. Currently an Anglican Priest serving 3 villages and diocesan vocations team having previously served both urban and rural parishes. I have taught in 4 schools - 2 urban deprived schools and two small village schools and have been a Head of 2 schools and a teaching head in one. I have been RE subject leader in all 4 and have 3 Religious studies degrees.

**Marianne Phillips**

I have been a headteacher of 3 schools, the latter judged outstanding by Ofsted and SIAMS. A confident and persuasive manager, I lead by example working to implement rigorous, structures that drive forward teaching and learning within a caring and supportive team environment.

**Allyson Taylor**

Previously Deputy Director of Hereford Diocese now working as the SIAMS Adviser for Oxford Diocese. I have had experience as Headteacher in two church schools, I inspect across the West Midlands and serve as a trainer and quality assurance assessor for the National SIAMS Training Team. I am also Ofsted trained.

### **Rosemary Woodward**

A SIAMS inspector since 2008. I have recently retired from the Lichfield Diocese's team of Christian Distinctiveness Advisers. Before joining the team, I was a primary school teacher in both Staffordshire and Surrey; I was also involved in the wider world of RE following my study for an MA in the subject. I have led the LDBE's partnership with Western Kenya for ten years and am now an assessor for the Global Neighbours initiative.

### **SIAMS Manager**

This position is currently vacant but Claire Shaw is the acting SIAMS Manager, please see below for further details.

### **Diocesan Director of Education**

#### **Claire Shaw**

Previously a Headteacher in a CofE Primary School Claire joined the Diocesan Team in Lichfield in 2016 as Deputy Director of Education, managing the Christian Distinctiveness Team in Lichfield. In 2018/2019 Claire has completed the training to become both a SIAMS inspector and Critical Reader. Claire does not inspect in the Diocese of Lichfield, but inspects for many of the surrounding Dioceses.

## Deferral Policy

There are two ways of moving an inspection:

### 1. Adjustments

An adjustment is moving an inspection from one term to another term in the same academic year. This can be achieved with limited financial complication and should be the first consideration when a diocese has identified a need to move an inspection.

**School A** is seeking an adjustment because there are concerns about the effectiveness of the Vicar. This is related to Parish issues rather than the school but it means that the Vicar is in dispute with some of the foundation governors. The school is open and the situation is not impacting the pupils in any significant way.

In this situation, there are no grounds for an adjustment or a deferral. The SIAMS inspection should take place as planned.

### 2. Deferrals

A deferral means moving an inspection from one academic year to another. This is far more complicated and should be avoided where possible.

If the diocese does feel there is a case for an adjustment or a deferral, diocesan staff should first conduct a review to establish whether the concerns/issues identified are having such a profound impact that a SIAMS inspection would be unable to evaluate the SIAMS inspection question: How effective is the school's distinctive Christian vision, established and promoted at all levels, in enabling pupils and adults to flourish? If the inspection is scheduled within the first or second terms of an academic year consideration should be given to making an adjustment instead of a deferral.

Listed below are some examples of the type of things that might warrant an adjustment or a deferral:

1. The school has experienced a major incident, such as a fatal accident involving a member of staff or pupil.
2. The headteacher or a member of the school's senior leadership team is the subject of a current police investigation which would be compromised by an inspection of the school.
3. The school is closed to all pupils – for example, owing to adverse weather conditions – for at least half of the period for which the inspection has been scheduled.
4. At least three quarters of the pupils will not be at school – for example, owing to a school trip or a religious festival – for at least half of the period for which the inspection has been scheduled.
5. Other exceptional circumstances which, in the judgement of the Education Office, justify deferral or cancellation of the inspection as the named religious authority in the Section 48 Agreement with the DfE.

Once the diocese is satisfied that they need to request an adjustment or a deferral they will need to make a request to the Education Office School Character and SIAMS Development Manager. It cannot be a unilateral decision by the diocese or any of its officers. This request should be in the form of an email, so there is an evidence trail, from the SIAMS manager or the diocesan director of education with an

explanation of the reasons relevant to the individual circumstances of the school which is the subject of the request.

The School Character and SIAMS Development Manager will then make a decision on whether an individual school can have its inspection adjusted or deferred or not.

Applications to adjust or defer a planned inspection on the following grounds will not be accepted as pupils at the school are still receiving education:

- The headteacher is out of school
- The school has been judged to require improvement by Ofsted
- Difficult relations between the governing body and the senior leadership team
- The school wants more time to improve in order to secure the best judgement
- An imminent change of leadership
- The diocese hasn't been able to secure enough inspectors

On occasion it may happen that a SIAMS inspection is scheduled and an Ofsted team contact the school to inform them they will be inspecting on the same day or turn up to do a no notice inspection on the day of the SIAMS inspection. In such a situation it is possible for both inspections to take place concurrently, indeed there may be advantages to this. However, if the headteacher feels that the two inspections running concurrently will place too much pressure on the school staff, governors or pupils the SIAMS inspector must stand down. The diocese, in conjunction with the inspector, will then arrange for the inspection to take place at the earliest date possible.

**School B.** A member of the senior leadership team with two young children in the school was diagnosed with terminal cancer earlier this year. She is deteriorating fast and is now in a hospice with only a few weeks to live. The pupils are aware of the situation and have recently said their goodbyes when the teacher visited the school last week. The school and clergy are working hard to support the staff and pupils but many are emotionally exhausted.

Whilst in many ways this may show the school as a Christian community at its best, the extra strain and stress caused by a SIAMS inspection would not be helpful and so the inspection can be deferred or adjusted.

On occasion the situation may occur that a school has had an Ofsted judgement that has resulted in the school being re-brokered by the Regional Schools Commissioner into a Multi Academy Trust (MAT). In such circumstances it is recognised that to conduct an inspection of a school which will report to school leaders and governors who are about to stand down is of limited value and may add a significant burden to the school community. It is therefore possible to defer the inspection until the first term in which the new MAT school leadership is in place.

If there is no immediate likelihood of the re-brokering process going ahead then the SIAMS inspection should take place.

## SIAMS Appeals and Complaints Procedure

The procedure for appeals by schools and academies against SIAMS findings and/or complaints about the conduct of inspections/inspectors is as follows:

### Step One

The School must raise the issue directly with the SIAMS inspector. This may involve re-consideration of evidence or consideration of evidence not already taken into account.

### Step Two

If Step One fails to resolve the issue to the satisfaction of the school the governing body may ask the diocese to review the report and/or the inspection. The diocese will seek to determine whether the report is fair and judgements are supported by secure evidence. The diocese may also review the performance or conduct of the inspector. The inspector may, in consultation with the diocese, amend the report (not necessarily in the school's favour).

### Step Three

If the school remains dissatisfied with the findings the diocese may refer the case to the National Society. The Society will review the inspection and will either support the inspector's findings and/or conduct of the inspection or, after consultation with the diocese, render the inspection void and arrange for a re-inspection to take place. The Society's decision will be final.

The National Society appeals process does not apply to inspectors who are not accredited to the Society or inspectors appointed by a governing body against the expressed advice of the diocese concerned.

Please note: an appeal that is not submitted by the end of the school term following the term in which the Section 48 inspection took place will no longer be considered.

## Appeals Against SIAMS Outcomes

There are three possible outcomes to an appeal

1. The original findings of the inspection are upheld.
2. The original findings of the inspection are over-ruled and changed.
3. The National Society deems that the school needs to be re-inspected.

The main issues emerging over inspection appeals are:

- Writing, which is not evaluative and does not make it clear why the particular grade has been given.
- Over reliance on the Evaluation Schedule at the expense of sensible judgements based on evidence.
- Inclusion of terms such as 'with excellent features' in headline judgements, which are good and grading-related terms (e.g. good or satisfactory) being liberally included in judgements which state otherwise.
- Most cases of appeal have been the result of inspectors grading schools as Good when the school considered themselves to be Excellent. A common link is unrealistic self-evaluation by the school.

