



# Self Assessing Brilliantly

Lou Doyle

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An SDN-Mesma event



# Introductions



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# Today's agenda

- Polls!
- Is self assessment the engine room of organisational improvement?
- What do we do about the revised Ofsted framework?
- Summary
- Close

# Poll

## Have you developed a SAR and QIP before?

1. Yes, my organisation has but I wasn't involved
2. Yes, my organisation has and I was involved
3. Yes, my organisation has and I led writing it
4. Yes, a SAR and QIP by another name
5. No, it is new to us

# Poll

**If you already have a SAR and QIP, how would you rate its value in driving quality in your organisation?**

- 1 – no value
- 2 – low value
- 3 – some value but could be better
- 4 – high value

# Poll

If you didn't have a regulatory requirement to develop a SAR and QIP, would you do it?

- 1 – Yes
- 2 – No
- 3 – Not sure

# Is self-assessment the engine of organisational improvement?

Unlocking the Value of Honest,  
Actionable Reflection

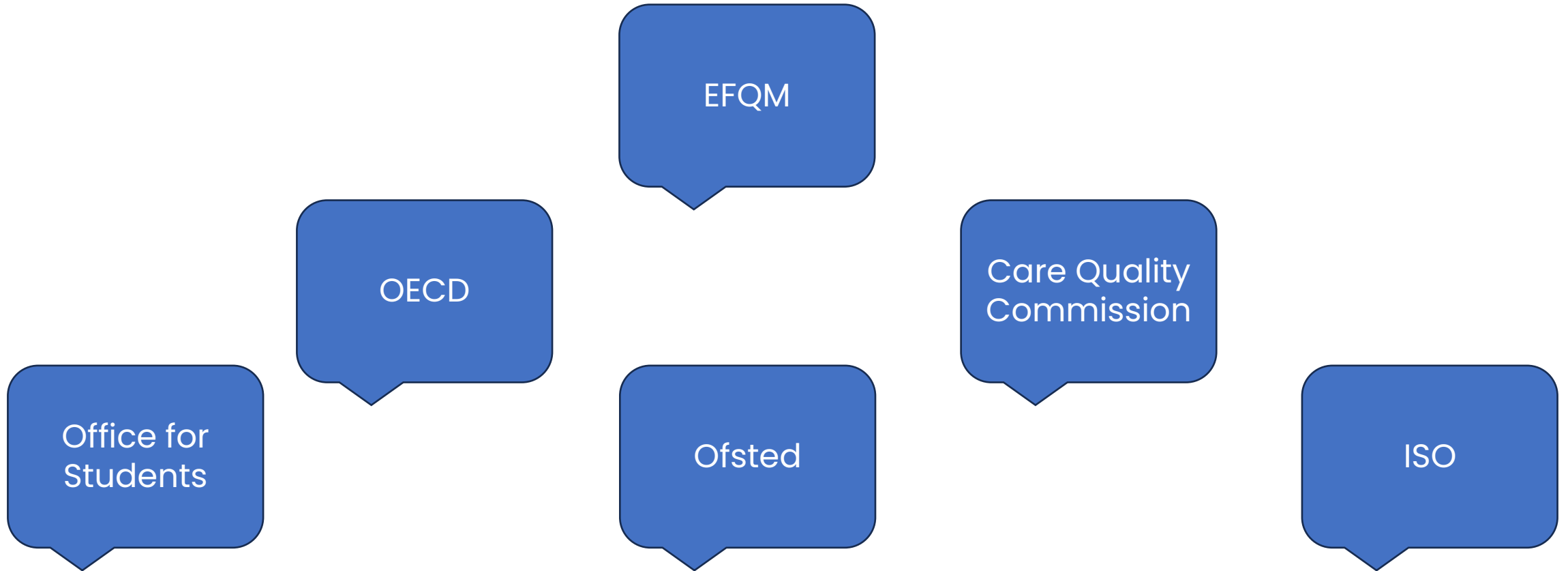
# Why are we talking about self-assessment?

“Know thy impact.”

John Hattie



# Self assessment isn't an Ofsted 'thing'



# What makes self-assessment valuable?

- Encourages internal accountability
- Improves organisational self-awareness
- Supports targeted investment in improvement
- Enhances readiness for inspection/accreditation
- Identifies risks in quality and performance

# When self assessment adds less value

- Cosmetic Compliance: Doing it for the sake of ticking a box
- Over-optimism: Blind spots in underperforming areas
- Lack of Action: No follow-through on findings
- Disconnected from Day-to-Day Work

# Three pillars of self assessment

Reflective

Evidence-based

Action-focused

# Foundations for success

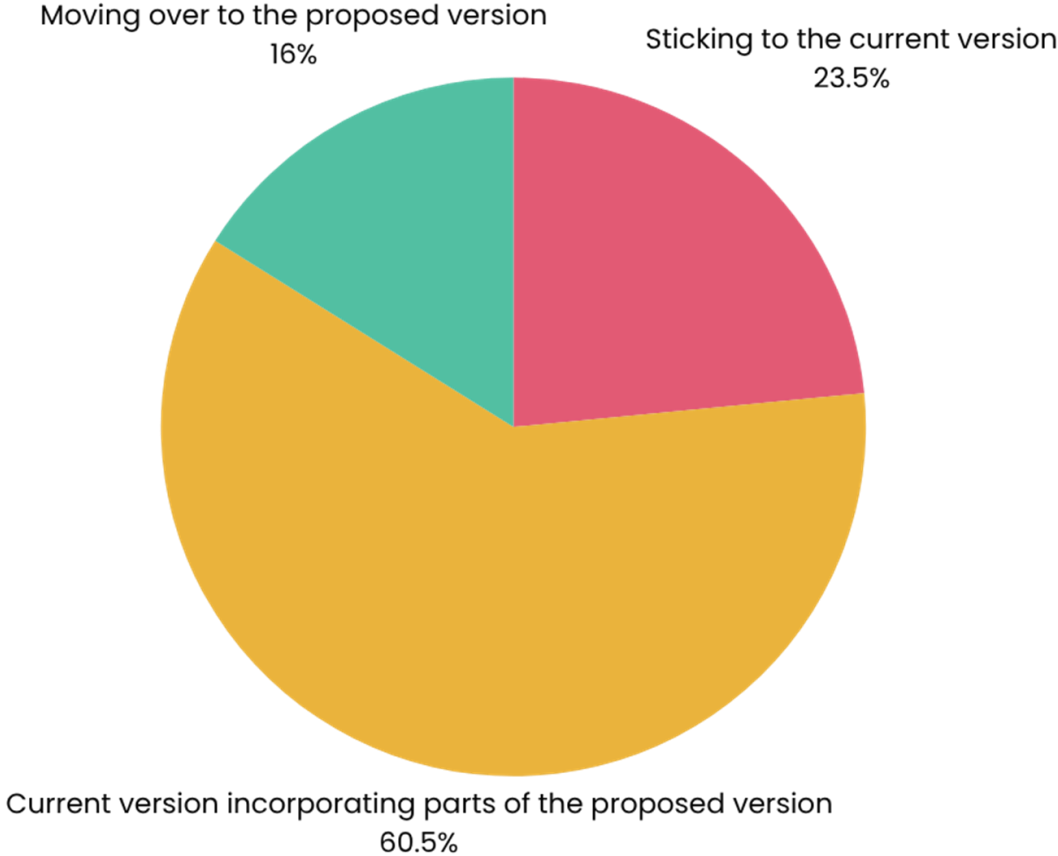
- Embed it in leadership culture: Senior ownership and visibility
- Use a clear framework: Helps avoid bias
- Combine with external challenge: peer review, mystery shopping, benchmarking
- Link to improvement planning: should inform and prioritise the QIP

“Leaders carry out suitable quality assurance and have a good sense of their strengths and weaknesses.”

“Leaders and the newly established body for oversight have recently introduced appropriate quality assurance processes. However, they do not use the information they gather effectively in order to improve provision.”

What do we do about the revised Ofsted inspection framework?

**Will you be aligning your 2024/25 SAR with the current version of the Education Inspection Framework or working with the proposed changes?**



# Regulatory Quality Indicators (apprenticeships)

## Current Ofsted EIF



## ESFA Accountability Headlines

### Apprenticeship achievement rates

- of less than 50% as 'at risk'
- greater than or equal to 50% and less than 60% as 'needs improvement'

### Apprenticeship retention rate

- of less than 52% as 'at risk'
- greater than or equal to 52% and less than 62% as 'needs improvement'

### Employer feedback

Organisations with average employer feedback of less than 2.5 will be assessed as 'needs improvement'.

### Apprentice feedback

Organisations with apprentice feedback of less than 2.5 will be assessed as 'needs improvement'.

### Ofsted grade(s)

# Draft Toolkit – Leadership

## Leadership (whole-provider level)

Causing concern	Attention needed	Secure	Strong	Exemplary
<p><b>Leadership is likely to be 'causing concern' if one or more of the following applies:</b></p> <p>Leaders do not identify and/or prioritise the right issues or take suitable or timely action to deal with them.</p> <p>Leaders do not have a track record of improvement or, since being appointed, have not done everything they could to reasonably secure improvements.</p> <p>Governors or those responsible for oversight, where relevant, do not carry out their statutory duties in relation to education and training effectively. Their contribution to the provider's aims is weak. Any breaches of legal responsibilities are serious and have a</p>	<p><b>Strategic leadership and capacity to improve (a track record of improvement or of sustaining high standards)</b></p>			<p>Where a provider is secure in all evaluation areas, and strong across all the themes in leadership, inspectors may consider a feature of leaders' work to be exemplary.</p> <p>All considerations of exemplary practice will be moderated and confirmed by the national quality and consistency panel. This will include whether the practice is:</p> <ul style="list-style-type: none"> <li>• embedded and sustained over time</li> <li>• making a tangible difference to learners' learning, development and well-being</li> <li>• being used and/or adapted internally to support and improve other areas of the provider's work</li> <li>• being (or will be) shared externally to</li> </ul>
	<p>Leaders' analysis of the provider's strengths or weaknesses lacks precision and/or does not consistently identify the root causes of weakness.</p> <p>Actions to bring about improvements, while focused on the right areas, are imprecise. This makes it difficult for leaders to know how successful their work has been and what further action is needed.</p>	<p>Leaders and those responsible for governance have an accurate understanding of the provider's context, strengths and weaknesses. This informs the actions they take.</p> <p>Leaders' actions are well judged and consistently effective. They improve or sustain standards over time.</p> <p>Leaders' decisions are, wherever possible, in learners' best interests.</p> <p>Leaders make sure that the provider's aims, priorities, vision and values are firmly established.</p> <p>Leaders create a culture of continuous improvement. They actively pursue their own professional development, acting as role models for staff.</p>	<p>Leaders' astute understanding of the provider's context, strengths and weaknesses informs and underpins their evolving response to priorities. They adjust and adapt actions as part of a responsive and continuous improvement culture.</p> <p>Highly effective leadership leads to consistently high standards, particularly for learners with special educational needs and/or disabilities (SEND) and those the provider identifies as disadvantaged. These standards are sustained over time.</p> <p>Improvements in any areas of weakness are rapid and sustained.</p>	
	<p><b>Governance, oversight and, where relevant, responsible bodies</b></p>			
	<p>Governors or those responsible for oversight do not understand key weaknesses or challenges.</p>	<p>Governors or those responsible for oversight carry out their roles effectively to support the provider's</p>	<p>The contribution to the provider's work of governors or those responsible for oversight is consistently strong. They are highly</p>	

# Draft Toolkit - Inclusion

## Inclusion (whole-provider level)

Causing concern	Attention needed	Secure	Strong
<p><b>How well leaders are developing inclusion is likely to be 'causing concern' if one or more of the following applies:</b></p> <p>Across the provider's work, leaders fail to meet learners' needs.</p> <p>Inclusive practices do not ensure an acceptable standard of education and/or care for disadvantaged learners, those with SEND and/or those who receive high-needs funding.</p> <p>The provider fails to identify learners who may have additional needs or face barriers, or to meet learners' needs and provide appropriate, targeted support.</p>	<b>Inclusive practices (across all toolkits)</b>		
	Aspects of the provider's inclusive practices need attention.	Across the provider's work, inclusive practices are secure so that all learners feel welcome and valued and have a sense of belonging to the provider.	Across the provider's work, inclusive practices are strong.
	<b>Identifying and meeting needs and removing barriers</b>		
	Leaders' support for learners who face barriers to their learning and/or well-being is not sufficiently precise, sustained or effective.	Leaders quickly and accurately identify learners who have additional needs, are disadvantaged or face barriers to their learning, participation or well-being that might make them vulnerable.	Leaders have established a culture in which all staff are highly vigilant in identifying those learners who may face barriers to their learning and/or well-being.
	Expectations of what learners can achieve are not high enough. Staff are not doing enough to make sure that all learners can participate fully in their learning programmes and make the progress of which they are capable.	Leaders make sure that these learners receive effective support, drawing on external specialists where necessary/available.	Leaders have a keen understanding of the barriers that individual learners face and tackle these swiftly and expertly. They systematically review adaptations, adjusting them as needed so that they make a sustained difference to learners' progress and/or well-being.
	Staff create an inclusive and welcoming culture for all learners. They have high expectations for what learners will achieve and enable all learners to participate fully in their studies and achieve well.		
<b>Supporting learners with SEND and/ or in receipt of high-needs funding</b>			
Assessment of learners' starting points does not identify all the learning and support needs of individuals accurately or in a timely way.	Leaders have a secure understanding of the needs of learners with SEND and/or those in receipt of high-needs funding. They use high-needs funding appropriately.	Leaders use a rich set of well-analysed quantitative and qualitative data to understand the needs of learners with SEND and/or those in receipt of high-needs funding.	
The provider seeks to meet the needs of learners, including learners with SEND and/or those receiving high-needs funding, but the support is not always precise, sustained or effective.	Leaders understand how supporting disadvantaged learners is central to, rather than separate from, their overarching strategic priorities.		

Inclusive curriculum culture and practices		
Weaknesses in curriculum design and/or poorly considered adaptations limit access to parts of the curriculum for some learners, including those with SEND and/or those in receipt of high-needs funding.	Leaders make sure that all learners have full access to the curriculum and are enabled to achieve well.  Any adaptations to the curriculum are made carefully to avoid limiting expectations for any learners.  Leaders take all reasonable steps to make sure that learners, including those who are disadvantaged, those with SEND and/or those in receipt of high-needs funding, can study an equally ambitious curriculum.	Leaders make sure that all learners gain the knowledge and skills to prepare them well to access the full curriculum and the next stage of learning.

# Ofsted Working Definition of Inclusion (draft)

- You are at the heart of your communities.
- You have high expectations and aspirations for every learner.
- You are alert to the needs of those who need the most support to achieve well.
- Your leaders set a clear and ambitious vision for inclusion.
- Your culture is one where every learner belongs, feels safe, welcomed, and valued.
- Your learners access high-quality education, taught by experts who strive to develop every learner's potential.
- Your leaders work in a close and effective partnership with parents/ carers and other agencies to secure the best possible outcomes.
- You are relentless in identifying and removing barriers to participation and learning.

# Voices in your SAR process?

# Poll – Problems to avoid

1. Purpose of self assessment is misunderstood/ misused
2. High on narrative, low on evaluation
3. Too much 'So what?'
4. Problems to solve are written in the future tense (SAR)
5. Disjoint between the self assessment and quality improvement plan
6. Improvement plan is an operational to-do list
7. QIP monitoring based on action implemented – not impact
8. Leadership team does not own the process or the outcome

# The Mesma mantra

No surprises.

# In summary

# Aim for:



- Purposeful
- Honest
- Action-oriented
- Embedded

# Self assessment is evidence-based storytelling

What is it like to be a learner with us?



98% Achievement  
Inconsistent  
8/10 Safe  
Excellent  
Not sure  
55% Progress  
25% Poor  
5/10

# Risks of *not* self-assessing well – 5 Cs

1. Lack of **clarity** from a shared understanding of provision
2. Lack of/ misplaced **confidence** going into inspection
3. Missed opportunity for **collaborative** capacity building
4. Weak prioritisation of resources to drive **continuous** improvement
5. Missed opportunity to **celebrate** successes

# Final thoughts


- Self-assessment is not a burden; it's a strategic asset.
- Done well, it fuels continuous improvement.
- Done poorly, it wastes time and creates false confidence.

What will you do differently next time you undertake self-assessment? .....



# Meet Mia: Mesma's Intelligent Assistant for Quality Assurance and improvement

"Mia is a game changer"  
User group feedback 2025



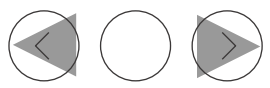
- Summarise and analyse large volumes of unstructured data
- Flag risks before they become issues and identify root causes
- Clear, consistent insights into what's working and what's not
- Reduce admin and encourage collaboration
- Spend more time embedding improvements

 Quality Assurance & Improvement Expertise Enhanced with AI

 Save Hours, Gain Insights Faster Quality Decisions



[mesma.co.uk/meet-mia](https://mesma.co.uk/meet-mia)



# Other SDN & Mesma events...

- [Observations of Practice in your Quality Cycle](#) – 2 July

## Other SDN events

- [2025-26 Apprenticeship Funding Rules](#) – starting 3 July
- [Apprenticeship financial management](#) – starting 18 August
- [Designated safeguarding officer training](#) – 10 September
- [Advanced progress review practice](#) – starting 16 September
- [Recognising and responding to harmful behaviours](#) – 24 September

**For full event details and to book, visit:**

[\*\*www.strategicdevelopmentnetwork.co.uk/sdnevents\*\*](http://www.strategicdevelopmentnetwork.co.uk/sdnevents)

# Quality & Compliance Professionals WhatsApp Community

## WhatsApp Community launched 19th June

Get weekly updates from the team of specialists at Mesma & SDN, including; current trends, policy changes, regulatory news, & quality & compliance strategies conveniently to your phone.



Scan the QR code to join, or visit:

<https://mesma.co.uk/quality-and-compliance-community/>

# Questions & Answers

Type your questions into the webinar panel

# After this session you will receive:

- **Survey**
- **Recording**

## An SDN–Mesma webinar

# Thank you for joining us

### Contact SDN

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# Ideas to involve others in SAR development

1. Be clear on who needs a voice in the process
2. Share the case for change
3. Create a small leading group
4. Explain why the process will make a difference for them
5. Set clear expectations about what is needed by when
6. Use less detailed questions to capture input
7. Scrutiny panels are invaluable
8. Provide clear guidance (or you'll have a bigger job at the other end!)
9. Make low volume/ high risk provision a limiting grade



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**In the chat:**  
**- Add one barrier that you've experienced to involving people in the SAR/QIP process**



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# No one best way to write a SAR but...

- 10–15 pages *maximum* for organisation level SAR
- Introduction and scope are important for scene setting
- ‘What we do’ and ‘what we do well’ are not the same thing
- Ask yourself who is benefitting from lots of tables and charts
- Using examples and quotes brings your SAR to life
- Treat it as a process of engaging people
- Primary purpose is for your organisation/ team. Except...



**In the chat:**  
**- Add a solution  
you've used to  
better involve  
people in the  
SAR/QIP process**

# SAR goals

- Build capacity from a position of strength
- Scrutinise the root cause of weaknesses
- Set the 'start point' for problem solving the priorities
- Test out 'the way we do things around here'

