

Promoting a culture of wellbeing in schools and trusts an evaluation tool for governing boards and school leaders

Introduction

School leaders and governing boards have significant responsibilities to support the wellbeing of those employed in their schools and trusts, including their work-life balance. These responsibilities are underpinned by health and safety law and statutory pay and conditions. The judgement of leadership and management in the current education inspection framework also considers how governing boards and school leaders review and address issues relating to staff workload and wellbeing, including the removal of unnecessary workload associated with data and evidence collection in schools.

Wellbeing culture and strategy

It is important for those governing and leading schools and trusts to understand the legal frameworks, and all of the requirements with which they must comply. However, it is much more important to look beyond this and to reflect on the culture of wellbeing that exists in the school or trust. We should not accept a culture that normalises overwork and excessive working hours, but instead create one that demonstrates an overriding concern for the wellbeing of the school community.

Effective wellbeing strategies:

- encourage school and trust leaders to lead by example by prioritising their own wellbeing and self-care
- provide mechanisms for highlighting and responding to specific pressure points and risks
- use effective communication to demonstrate the commitment to priorities (e.g. reducing working hours)
- allocate sufficient resource, including resource for providing confidential external support, for those who need it
- are monitored through executive reporting that is discussed by the board alongside other evidence and wider feedback received

The wellbeing of school leaders

This evaluation tool focuses on the wellbeing of school leaders, their self-care and how this is modelled throughout the school/trust. Governing boards have a clear statutory responsibility for the work-life balance of the senior executive leader. The senior executive leader has the responsibility for ensuring that their staff achieve the same.

Senior executive leaders work in an increasingly challenging environment with limited resources and higher levels of accountability. In this context, it is important for the senior executive leader to feel supported by a governing board that plays its part in limiting unnecessary stress, challenging excessive working hours and maintaining a healthy work-life balance. If the governing board models this approach with their senior executive leader, then they should expect their senior leader to embody and model this to their staff. The impact will be seen through:

- successful recruitment and retention of staff at all levels in the school or trust
- reduced absence due to stress or other mental health related issues
- improved outcomes for children and young people

We recommend that the evaluation tool is completed as a joint activity involving the senior executive leader (i.e. the headteacher of the school or CEO in the trust), the

chair of the governing board and/or a relevant governor/trustee as determined by the level of delegation in the school or trust.

Part one of the evaluation

Consider the approach taken towards staff wellbeing

Part one of the evaluation invites the participants to reflect on the approach taken towards staff wellbeing at board and operational level in the school or trust.

Decide which of the descriptors below best describes the approach taken towards staff wellbeing. Remember that collaboration is key and that collaboration between governing boards and senior executive leaders is underpinned by a fundamental understanding and recognition of their respective roles. This is explained further in the guidance [what governing boards and school leaders should expect from each other.](#)

Evaluation part one – consider the approach taken towards staff wellbeing

We consider the approach to be:	This means in practice:	Our approach would be even better if:
Strategic, organised and effective	<p>Sufficient time is allocated at board and operational level to assess wellbeing, develop the wellbeing strategy, implement wellbeing measures and evaluate the impact.</p> <p>This includes reports received at board meetings, evaluating and assessing the impact of resources allocated towards staff wellbeing.</p> <p>The chair of the governing board and senior executive leader model the approach by ensuring that their one-to-one meetings consider the wellbeing of the senior executive leader and their work-life balance including how much dedicated leadership time they take.</p> <p>Support is always being offered even if it isn't asked for.</p>	
Ad hoc	<p>The governing board and the senior executive leader recognise the importance of staff wellbeing to the school or trust. Wellbeing issues are discussed occasionally at governing board meetings.</p> <p>However, there is no routine assessment of wellbeing throughout the school or trust that is used to develop and inform a wellbeing strategy. This is reflected in the one-to-one conversations between chair of the governing board and the senior executive leader, in which neither party is likely to raise the issue of wellbeing and work-life balance unless there are obvious problems and concerns that need addressing.</p>	
It's not considered seriously, almost entirely reactive and issue driven.	<p>The governing board waits to be informed by the senior executive leader of staff wellbeing issues and how they are being addressed through day-to-day management.</p> <p>The senior executive leader's approach to wellbeing is mostly reactive to concerns or issues raised with them. This approach is reflected in the one-to-one meetings between the chair of the governing board and the senior executive leader, which focus on current events and issues more than the progress being made towards achieving strategic priorities.</p> <p>Little, if any, time is spent reflecting on the "climate" – how things feel in the school or trust.</p>	

Part two of the evaluation

Audit current practice in the school or trust

Use the following questionnaire alongside advice and feedback given by the senior executive leader to audit current practice in the school or trust.

A thorough audit of current practice will help to identify improvements that positively impact on the wellbeing of the senior executive leader, which the senior executive leader can extend and to model all staff.

The high-level priorities relating to staff wellbeing should be reflected in the governing board's strategy, which is monitored throughout the year and reviewed at the end of the strategic cycle, typically every three to five years.

The detailed activities, success criteria and timescales will form part of the senior executive leader's operational plan (school improvement/development plan) that is the basis of their reporting to the governing board.

Evaluation part two - questions to assess the current levels of support for the senior executive leader

No.	Questions	Y/N	How do we know?	Actions	Date for completion
1.	Does the senior executive leader feel valued and respected by the governing board?				
2.	Does the governing board regularly acknowledge the work and contribution of leaders and staff in the school or trust?				
3.	Is the governing board, and the chair in particular, generally aware of the wellbeing and work-life balance of the senior leader?				
4.	Is the senior executive leader encouraged by the governing board, and particularly by the chair, to be open and transparent about their wellbeing, work-life balance and how the governing board can support this?				
5.	Is the appraisal process used in a meaningful way to consider the wellbeing and development needs of the executive leader?				
6.	Is there resource available to provide the support required to maintain the senior executive leader's wellbeing and development – are they encouraged to use it?				
7.	Does the senior executive leader have (and take) dedicated release time and is it sufficient				

No.	Questions	Y/N	How do we know?	Actions	Date for completion
	time to allow the leadership thinking and planning needed for the role?				
8.	Is the senior executive leader actively encouraged to model a self-care approach towards work-life balance and wellbeing? (e.g. not working excessive hours, taking on excessive workload, time to exercise, relax, switch off)				
9.	Is there sufficient leadership capacity in the school or trust to prevent unreasonable and excessive demands being placed on the senior executive leader? (i.e. senior and middle leaders with skills, experience, ownership and accountability)				
10.	Does the senior executive leader recognise and make the best use of the leadership capacity in the school or trust to prevent unreasonable and excessive demands being placed on them? (i.e. through delegating appropriately, empowering and avoiding micro-management)				
11.	Does the senior executive leader feel that they have access to a range of professional support, peer support and pastoral support that they can access easily and on their own terms?				
12.	Does the governing board, and the chair in particular, ask the senior executive leader about the support that is available, or they				

No.	Questions	Y/N	How do we know?	Actions	Date for completion
	would like to have available – do these conversations result in change?				
13.	Are discussions between the governing board and the senior executive leader about wellbeing and work-life balance open to considering a range of options such as job share and flexible working?				

Questions relating to the governance demands placed on the senior executive leader

No.	Questions	Y/N	How do we know?	Actions	Date for completion
1.	Are the respective roles of governance and operational management clearly understood by all, including the senior executive leader, to avoid duplication of activity and inappropriate delegation.				
2.	Does the governing board's annual cycle of business take into account the demands and workload involved for the senior executive leader and other leaders in the school or trust? (e.g. number of meetings, meeting start times)				
3.	Are there robust, effective arrangements to clerk the governing board and provide support and governance advice to avoid this falling upon the senior executive leader.				
4.	<p>Are governing board meetings chaired and managed in such a way that considers the wellbeing of the senior executive leader and other leaders in the school or trust? For instance:</p> <ul style="list-style-type: none"> • meetings start on time • meetings have a time limit and do not overrun • agendas are well planned and kept to • discussion, questioning and challenge is candid but always constructive and respectful 				

5.	<p>Is the governing board's engagement with leaders and staff in the school or trust consistent with the culture of wellbeing it wishes to create? For instance:</p> <ul style="list-style-type: none"> • email communication • arranging visits • following correct procedures 				
6.	<p>Have the governing board and the senior executive leader worked constructively together over the quantity and format of information and reports provided to the board?</p>				
7.	<p>Does the reporting and information provided to the governing board balance the range and depth of information the board needs against other demands on leaders in the school or trust?</p>				
8.	<p>Is the reporting burden shared amongst leaders in the school or trust to take the pressure off the senior executive leader, support leadership development and provide the board with a wider perspective?</p>				
9.	<p>Is there an effective schedule and scheme of delegation that makes governance in the school or trust more manageable and avoids duplication of tasks?</p>				
10.	<p>Do the governing board, and in particular the chair and senior executive leader, make time to reflect on the quality, effectiveness and value of their working relationship?</p>				