

# Multiple Gains



**An independent evaluation of  
Challenge Partners' peer reviews of schools**

**PETER MATTHEWS and MARCIA HEADON**

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First published in 2015 by the UCL Institute of Education Press, University College London, 20 Bedford Way, London WC1H 0AL

[ioepress.co.uk](http://ioepress.co.uk)

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British Library Cataloguing in Publication Data:

A catalogue record for this publication is available from the British Library

ISBNs

978-1-78277-145-6 (paperback)

978-1-78277-146-3 (PDF eBook)

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Typeset by Quadrant Infotech (India) Pvt Ltd

Printed by CPI Group (UK) Ltd, Croydon, CR0 4YY

Cover image: ©iStock.com/SolStock

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# Acknowledgements

This research owes much to headteachers, hub managers and senior leaders from schools in eight Challenge Partner hubs who readily found time for extensive interviews. The authors also appreciate being invited to observe quality assurance reviews and training events for reviewers and having the opportunity to meet and talk to reviewers and lead reviewers. We are particularly grateful to the Chief Executive, Managing Director and staff of Challenge Partners, especially Henrietta Curtis, for their support and the provision of a wealth of data, and to Head Reviewer Joanna Toulson. We appreciate very useful initial discussions with senior partners Teresa Tunnadine CBE and Carolyn Robson CBE, and meetings with Sara Morrissey and David Horn of the Bradford Partnership, who with their colleagues provided helpful insights into their peer-review approach. We are grateful for research assistance from Dr Melanie Ehren of the UCL Institute of Education, and Caroline McLaughlin.

The draft paper benefited greatly from the comments and suggestions of Rita Bugler, Ed Chapman (DfE), Dame Sue John and John Malynn (Ofsted). And we thank Professor Chris Husbands for contributing the Foreword.

August 2015



## About the authors

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# Foreword

There is a key phrase in this report: an encapsulation of the executive summary with which the report opens. It's this: 'collective educational ambition and mutual trust', which Peter Matthews and Marcia Headon cite as the driving explanation for the success of the peer-evaluation model they describe here. In a world of social media, where the impulse is to summarize perceptions in 140 characters, those 48 characters go a long way.

Around the world, governments have become impatient with public education systems and with the often complex policy levers available to them to drive change. In its 2015 *Education Policy Outlook*, the OECD explored over 450 different reform initiatives and programmes across member nations. Across the world the OECD's account shows that governments have devolved powers or they have centralized control (sometimes, in a feat of policy athleticism, they appear to have tried both at once); they have, at different times and in different places, focused on students, on teachers, on institutions or on systems. They have, variously, reformed curriculum, accountability, standardized testing, teacher evaluation, governance and funding. They have legislated or exhorted or directed; they have used incentives or penalties; and they have frequently changed policies, borrowing from other countries whose performance in international tests impresses. The OECD was simultaneously optimistic about the power of governments to improve equity and quality, and pessimistic about the track record of governments: only 10 per cent of the reform programmes they studied had been evaluated for their impact. Moreover, the 'most effective policies are those that are designed around students and learning, build teachers' capacity, and engage all stakeholders' (OECD, 2015: ii).

Matthews and Headon explore the power of an innovation that genuinely builds capacity and engages stakeholders. Challenge Partners focuses on both the 'outside' and the 'inside': the model is rigorous in its analysis of performance, but understands that school performance is the result of internal processes that marshal and build professional expertise. It has grown and developed remarkably and the results are, as the authors show, 'highly credible'. This report is strongly focused on outcomes, but also shows just how much detailed planning and sheer logistics go into making it work.

All that makes this report important, not just for Challenge Partners or English education, but globally. It points the way to a model for school evaluation with genuine potential to restore faith in publicly funded education and to drive further quality and growth. In Matthews and Headon, Challenge Partners has found ideal evaluators: tough, thorough and – like their object of investigation – credible: Peter Matthews is one of the most distinguished thinkers about school improvement we have, and has, perhaps not coincidentally, extensive experience with the OECD.

I am delighted that IOE Press is able to publish this report. It is consistent with the mission of the Press and the UCL IOE: to support the development of quality in education and to build capacity among practitioners. It deserves the widest readership.

Chris Husbands  
Director, UCL Institute of Education

## **Reference**

OECD (2015) *Education Policy Outlook 2015: Making reforms happen*. Paris: OECD.

# Executive summary

This independent evaluation of quality assurance reviews was commissioned by Challenge Partners in April 2015. Challenge Partners is a growing cooperative partnership of more than 300 primary, secondary and special schools<sup>1</sup> clustered around one of 29 ‘hub’ schools whose headteachers are ‘senior partners’. More than 500 quality assurance reviews have been conducted in partnership schools since 2011. The reviews apply to all partner schools except those causing serious concern, for which there are more bespoke arrangements to provide challenge and support.

The findings of this study are rooted in extensive evidence from a range of sources that include: interviews with a range of senior partners, hub managers, reviewers and lead reviewers; observation of reviews and training events; analysis of wide-ranging data and evaluation evidence assembled by Challenge Partners staff, and discussions with those staff; and scrutiny of representative samples of review reports.

## The quality of reviews

Quality assurance (QA) reviews emerge from this scrutiny with a high degree of credibility owing to a number of key factors. Foremost among these are undoubtedly the collective educational ambition and mutual trust of partner schools. They recognize the benefits of independently led external scrutiny by peer senior leaders who work alongside their own staff, both in enhancing school effectiveness and in building and developing leadership capacity. Reviews are well designed and the process is efficient and effective when in the hands of skilled and experienced lead reviewers, all of whom currently have inspection expertise. The great majority of reviews are conducted with a high degree of consistency and lead to robust and well-evidenced findings. Ninety-three per cent of headteachers consider these judgements to be fair and based on evidence. Most peer reviewers have appropriate expertise and make a highly professional contribution, but there are exceptions, for example where a reviewer lacks sufficient experience, or professional or personal skills.

The organization of the reviews is excellent, being both very efficient and responsive to particular needs of schools. Management faces significant challenges when reviewers withdraw from teams at short notice, but usually finds a replacement. Reports are written to a common format under some time pressure. Their quality varies but is generally fit for purpose. Lead reviewers undergo annual training which updates them on approaches, reinforces the principles of the review model and shares solutions to challenges they commonly face. The training of reviewers is relevant, practical and well led, and is highly praised by participants. Reviewer training events, held in many parts of the country, cover many skills in an intensive day and include live (rather than videoed) lesson observation. Arrangements for the quality assurance of reviews and reports are well embedded and applied effectively.

One of the two head reviewers undertakes an annual quality assurance visit to each lead reviewer, giving priority to any about whom a concern has been raised. The head reviewers also edit and sign off reports.

### **Follow-up to reviews**

Review findings are followed up at different levels designed to support and meet the needs of the school. Lead reviewers always conclude the review by asking whether the school would like external support or advice. Requests for help are relayed to Challenge Partners, which matches requests with sources of expertise using its extensive network of schools and database of excellent practice. Typically, hub managers also make contact with schools after their reviews to see whether they need any support or expertise and whether this can be sourced from within the hub.

### **Multiple gains**

Much evidence points to multiple benefits of the reviews, both to the reviewed schools and to the reviewers and their 'home' schools. Eighty-four per cent of headteachers of reviewed schools indicated that reviews had been very useful<sup>2</sup> to the professional development of their senior leaders. The partnership approach to reviews, and the multiplicity of advantages that accrue from them, are distinguishing and possibly unique features of the Challenge Partners' method. Reviews are not practice or 'mock' inspections, nor do they attempt to replicate Ofsted inspections, which serve different purposes. But annual QA reviews are helpful in checking self-evaluation findings and judging the effectiveness of school-improvement strategies. Over 90 per cent of headteachers indicate that reviews 'have been very useful in planning school improvement'. Tangible links can often be made with improved provision and outcomes for pupils, particularly where the review has focused on an area of concern and been followed up with expert support. Reviews also provide a critical analysis of 'areas of excellence' that schools are invited to nominate as part of their review. This mechanism provides quality assurance of entries in the Challenge Partners' school support directory.

Just as significant are the professional development and reciprocal benefits that accrue from reviewer training and participation. The joint involvement of senior staff from the reviewed school with peer reviewers from other partner schools creates a *multiplier effect* that distinguishes Challenge Partner quality assurance reviews from external inspections and other peer-review approaches. Over time, the annual QA review process can give all appropriate senior leaders access to reviewer training and internal and external evaluation experience that is universally regarded by them as providing exceptional professional development.

Reviews also benefit the home schools of reviewers. On their return from reviews, the experience and professional learning of reviewers are invariably discussed at senior leaders' meetings in their home schools. This often leads to the adoption of improved practice and further communications

or visits between not only the reviewed and reviewers' schools but also between the schools of members of the review team. Our evidence shows that quality assurance reviews provide a potent mechanism for sharing issues and finding new solutions through disseminating knowledge of what works in other schools. They also confirm where there is excellent practice. This knowledge is captured and made accessible to all Challenge Partner schools.

We have found that the Challenge Partners' QA review model is exceptional in its conception, rigour, quality and developmental power. While partner schools value having an *annual* external appraisal of their quality and standards, quality assurance reviews need to continue to evolve so as to meet the needs of schools that from time to time want a different or more focused approach.

### This report

The report is set out in six parts, which can be conceived in process terms as shown in figure 1.

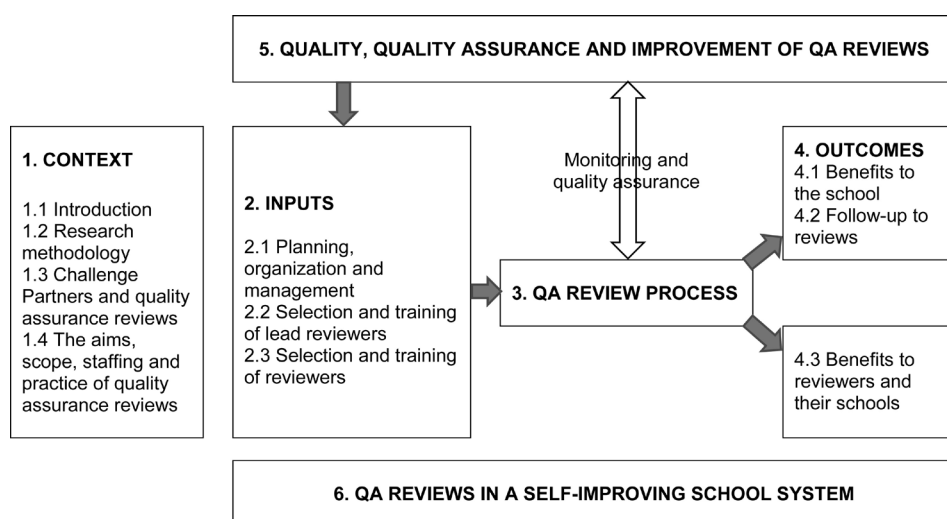


Figure 1. Evaluation themes for quality assurance reviews

*Part 1* introduces the context in which quality assurance reviews have been developed and discusses the place of independently led peer reviews within the spectrum of school evaluation approaches, which range from self-evaluation or internal review at one end of the spectrum to external inspection at the other.

*Part 2* is concerned with inputs: the planning, organization and management of reviews; and the selection and training of reviewers and lead reviewers.

*Part 3* describes and evaluates the review process.

*Part 4* evaluates evidence of outputs: benefits and follow-up for reviewed schools, and benefits to reviewers and their schools.

*Part 5* considers quality assurance, the rigour of reviews and how much variance is acceptable within the quality assurance review process. We identify conditions for success and define the non-negotiables.

*Part 6* looks forward to the contribution of QA reviews to a self-improving school system, and suggests how the reviews might usefully evolve.

We conclude that inspection, self-evaluation and robust peer review all have contributory parts to play in a cohesive approach to quality assurance. Such a model has much to offer a self-improving school system. We recommend that peer review should be encouraged across all national teaching school alliances in order that the important element of challenge is not excluded from their strands of work as system-leading schools. Peer reviews complement the new approach to inspection from September 2015. This deserves to be recognized and encouraged more explicitly through national policy. Our recommendations focus on aspects that would add further to the quality and undoubted value of QA reviews as practised by Challenge Partners.

# Main findings

- Challenge Partners' QA reviews are well conceived and succeed in providing authentic evaluation and challenge for partner schools, building evaluation capacity for school improvement and promoting peer learning across the partnership (1.1).
- Access to annual QA reviews is a key incentive for many of the schools that join Challenge Partners (1.3).
- The reviews maintain high integrity and a large measure of objectivity, despite being undertaken by external reviewers working in partnership with senior leaders in the reviewed school. The cooperative approach works well and contributes to greater acceptance of review outcomes by the school. Reviewers and schools regard the process engendered by the team approach as open and honest. Reviews do not cover the same ground as Ofsted inspections. They focus on school improvement strategies stemming from self-evaluation as well as on outcomes for students and teaching, learning and assessment (1.4).
- The planning, organization and management of the peer-review system involves multiple variables and is accomplished with great skill and efficiency (2.1).
- Lead reviewers are well-trained and experienced inspectors. They generally manage a complex evaluation process and an unfamiliar team with skill and professionalism. Most are rated highly by headteachers (2.2, 5.2).
- Peer reviewers are trained senior leaders from Challenge Partner schools, the great majority of whom fulfil their role well. Their training is excellent (2.3, 5.3).
- The review process works well. The experience is developmental, collaborative and challenging. A wide range of evidence is collected and school leaders are encouraged to play a full and active part (3.1).
- Reports are informative and fit for purpose, although some minor inconsistencies remain, despite the reports being checked before issue (3.2).
- Annual quality assurance reviews are regarded as very beneficial by headteachers, particularly in checking their self-evaluation and bringing a new perspective to the school's work (4.1).
- Reviews are followed up and lead to many avenues of support both by Challenge Partners nationally and from local hub partnerships (4.2).
- The involvement of internal and external reviewers, working together, brings multiple benefits to both groups in terms of the professional development of these leaders and the impact on their schools (4.3).
- The success of each review depends above all on three factors: the expertise of the lead reviewer, the quality of the reviewers on the team and the stance of the school (5.1).
- Considerable reliance can be placed on the outcomes of most reviews despite the school determining which lessons are observed. Reviews are no less objective or rooted in evidence than Ofsted inspections. Indeed



there is some evidence that review outcomes, on the aspects they consider, can be tougher and more candid than inspections, not least because schools feel they can be more open to reviewers than to Ofsted. There is little evidence that reviews are 'soft' (5.4).

- There is a significant investment in quality assurance and all lead reviewers are monitored annually. They appreciate the feedback they receive. All reviews are evaluated and survey returns show very high levels of satisfaction (5.5).
- The quality assurance review system can only work because of a high level of trust across partner schools reflected, not least, by their willingness to share their reports with others in the hub. Maintenance of this social capital is essential for continued success. It is desirable that reviews adapt to meet schools' needs, particularly in focusing on specific aspects (6.1).
- Peer reviews have an increasing role to play in a self-improving school system, complementing self-evaluation and the slimmed-down inspection arrangements (6.2).

# Recommendations for further development and improvement

## For Challenge Partners

- Consider increasing the flexibility and challenge of reviews by developing the capacity to undertake, for example: reviews that focus on a subject, theme, key stage or school transition; reviews that follow up an inspection; reviews focused on raising the attainment of underachieving pupils and reducing gaps, and reviews focused on management issues, in response to schools' specified needs and priorities. This would allow effective schools to intersperse the 'standard' review with one that looks in greater depth at a specific priority or concern.
- Continue to make sure that lead reviewers have undertaken Ofsted training or a validated equivalent, and are kept up to date with changes to Ofsted inspection criteria and priorities, and developments in QA review practice.
- Strengthen review teams further by ensuring as far as possible that:
  - all teams include one or more experienced reviewers and preferably a headteacher, and that teams do not normally include more than two new reviewers
  - prospective reviewers have previous knowledge of and engagement with the detailed DfE/Ofsted performance data for their own school, together with school evaluation and improvement planning before attending reviewer training
  - partner schools and hubs play their full part in facilitating the replacement of reviewers who withdraw at short notice.
- Further improve the quality of reporting by:
  - consolidating the use of the report template to ensure greater consistency in reporting
  - making sure that lead reviewers take full responsibility for writing the report, drawing from the evidence recorded during the review and findings agreed by the team
  - increasing proofreading capacity, feedback to lead reviewers on their drafting and the quality of evaluation.
- Obtain a better estimation of the impact of peer reviews and other initiatives by:
  - introducing data-tracking systems to assess trends in the performance of students in Challenge Partner schools, especially in relation to the aims of the partnership
  - following up the implementation and impact of specific 'even better if' recommendations from previous reviews.

### **For the system**

- > Peer reviews such as Challenge Partners' QA reviews are now part of the external evaluation landscape and should be factored more explicitly into national policy. They complement rather than attempt to replicate inspections. Their link with inspection should be more symbiotic, with Ofsted continuing to represent the gold standard in evaluation expertise and quality criteria.
- > Regular independently led peer reviews should become the main avenue of external whole-school evaluation for effective schools.
- > Quality assurance review should be considered an operational strand of teaching school alliances and encouraged in other school networks and partnerships.
- > Challenge Partners' QA reviews are very well designed and implemented so as to be as robust and thorough as possible. They also have multiple benefits to participants and their schools. They can be used to provide a benchmark against which other peer-review approaches can be gauged.

## Part 1

# The context for school quality assurance reviews

### 1.1 Challenge Partners and the peer review landscape

#### *Challenge Partners*

Challenge Partners is a cooperative organization and registered charity, owned and led by schools that work together to drive school improvement. The partner schools pay a modest subscription per pupil. They aim to provide excellent education for all their students and believe that this can best be done when the school engages with others in mutual challenge and support. Partner schools include primary, secondary and special schools, and alternative provision. Primary schools outnumber secondary. By August 2015 there were 311 partner schools clustered in groups coordinated by 29 ‘hub’ schools. Eighty-two per cent of partner schools were judged by Ofsted inspections to be ‘good’ (56 per cent) or ‘outstanding’ (26 per cent); 15 per cent ‘required improvement’ and 2 per cent were ‘inadequate’. The headteacher of each hub school is a ‘senior partner’. Each hub also has a ‘hub manager’ serving all partner schools in the hub from a base in the hub school. The hub schools, in most cases, are also designated ‘teaching schools’.<sup>3</sup> These are highly effective schools leading alliances of schools that make a notable contribution to system leadership.

As a group, Challenge Partners is committed to four aims that support an ambition for education – that is, to:

1. improve pupils’ examination results at a rate above the national average and accelerate progress of the disadvantaged
2. enable all schools to improve at a rate above the national average
3. create more national leaders and outstanding schools that fulfil the teaching schools designation criteria<sup>4</sup>
4. develop a world-class, self-improving and sustainable system that contributes to national research and policy making.<sup>5</sup>

The rationale for Challenge Partners balances *peer support* with *peer challenge*.

*Peer support* involves constructive collaboration on a wide range of school improvement programmes and initiatives, including the Improving Teacher and Outstanding Teacher programmes (ITP and OTP). Other elements include a school support directory (of excellent practice) and support for school improvement through: follow-up to reviews, as the ‘engine of improvement’; a ‘closing the gap’ project; and a range of national and local working groups on sectors, subjects and issues.

*Peer challenge* principally involves a commitment by every partner school to commission an annual Challenge Partners' quality assurance (QA) review. More than 500 such reviews have been completed since January 2011. The only exceptions are schools causing concern and those that judge that they would gain more value from a tailored review.

#### *Peer reviews in England*

Peer review has long been central to quality assurance in higher education in the UK,<sup>6</sup> but minimally in schools, where external evaluation through inspection has prevailed, complemented by school self-evaluation and the publication of school performance information. Before 2010 most peer review of schools in England was conducted on a one-to-one basis by: consultant headteachers (London Challenge) through evaluation, coaching and mentoring; headteachers who became school improvement partners (SIPs), and national leaders of education.<sup>7</sup> Interest in peer reviews in the school sector has intensified, particularly since 2010, influenced by the vision of a self-improving school system.<sup>8</sup> Early peer review initiatives included the Bradford Partnership of secondary headteachers, who initiated inspector-led peer reviews in 2010, using fellow headteachers as reviewers. In an attempt to improve all secondary schools to 'good' or better, Bradford schools currently undertake a second review in the summer term to follow up recommendations from earlier autumn reviews.<sup>9</sup> Other peer-review collaborations emerged from 2011, often prompted by the discontinuation of SIPs after 2010. Some crossed local authority boundaries, such as those instigated by a group of schools for children with behavioural, emotional and social difficulties that is centred on the Mulberry Bush School in Oxfordshire, which provides for traumatized children. Other peer-review approaches were associated with teaching school alliances, federations and chains, or promoted by national organizations such as NAHT.<sup>10</sup> At their simplest, peer reviews can involve two or three schools, characterized by review teams that consist of neighbouring headteachers, which must raise questions about rigour and objectivity. If evaluators are, or become, too close to the inspected, the capacity for independent judgement can be undermined or lost.<sup>11</sup>

The QA reviews of Challenge Partners have the distinctive advantages of ensuring that peer reviewers and their home schools normally have no connection with the reviewed school, and that reviewers are senior leaders and not exclusively headteachers. All QA reviews are led by experienced independent reviewers, a necessary condition for robust peer reviews. By 2012 Christine Gilbert was able to cite examples of 'professional collaboration and lateral accountability', including at middle leader level, in the well-established Harris Federation and ARK schools. She describes Challenge Partners as 'a collective of schools not only challenging each other to do better but also supporting weaker schools to improve. It uses peer "inspection", supported by experienced inspectors, as a way of raising aspirations and driving professional accountability.'<sup>12</sup>

Few evaluations of school peer-review approaches have yet been published. Examples include a pilot evaluation of reviews undertaken

by the Medway Teaching School Alliance<sup>13</sup> and an internal evaluation of peer reviews by Challenge Partners in 2014.<sup>14</sup> Our independent evaluation of Challenge Partners' QA reviews is consistent with the findings of that internal review.

*The international perspective*

Viewed internationally, peer reviews hardly feature in school evaluation. In a 2013 comprehensive survey of the evaluation of students, teachers, school leaders, schools and education systems in 28 countries (not including England) the OECD found a general pattern of growth in school evaluation, both external and internal, but barely any evidence of peer review.<sup>15</sup> The report identified 'developing school evaluation capacity' as a priority for school improvement and advocated the promotion of peer learning, especially in systems where there is a high degree of autonomy:

A starting point could be with school leadership teams working together to identify common challenges, devising common strategies and approaches to peer evaluation. The process would benefit from the appointment of an external facilitator or critical friend chosen and agreed by the school principals themselves. Within systems there are schools with more developed self-evaluation processes and there could be great benefits in finding ways to involve their staff in supporting and training colleagues in other schools.

(OECD, 2013: 468–70)

The QA reviews of Challenge Partners fully meet those joint OECD objectives of building evaluation capacity for school improvement and promoting peer learning. Delivery of reviews has been scaled up over four years and annual reviews now feature in more than 300 schools in England. The QA review approach has overcome the introspective and defensive culture engendered in some of these schools by inspection and has succeeded in 'stimulating collegial networking, peer exchange, sharing and critiquing of practice, and fostering a sense of common direction' as advocated by the OECD (*ibid.*, 470). This has required the development of trust, the glue that binds together the network of schools involved in peer review and a key characteristic of their leadership.

The annual QA reviews of Challenge Partners had few, if any, direct equivalents among other peer-review approaches for schools, in terms of the defining characteristics on which they were designed and implemented, although the process is now being emulated by other school organizations and partnerships in England and Wales. The Central South Consortium in Wales regards Challenge Partners peer reviews as 'providing an excellent insight into the possibilities'.<sup>16</sup> They needed (and continue) to be a key driver for school improvement, through:

- providing challenge and rigour – being led by an independent reviewer with training and experience in school inspection to assure the validity and reliability of the review findings

- being valid and unbiased – by drawing reviewers from outside the local hub or local authority area
- offering evaluation by peers – with all schools nominating reviewers from within their senior leadership teams to undergo training and undertake reviews elsewhere
- working with the reviewed school – through the equal involvement of senior leaders from within the school working in tandem with external reviewers, which develops evaluative capacity and gives the review findings greater acceptance
- being developmental, both for the reviewed school as the owner of the report, and for reviewers in terms of their professional growth and benefits to their home schools
- offering a range of mechanisms for following up and providing support to schools after their review.

We have found that QA reviews continue to reflect those principles on which they were designed in 2010–11. There is much to justify Challenge Partners' aspiration to 'serve as a benchmark for professionalism, underpinned by an ethos of open accountability and quality assurance systems'.<sup>17</sup>

## **1.2 Research methodology**

The project brief required the evaluation to answer the following questions:

- What is the quality of QA reviews?
- How do QA reviews benefit: i) the school being reviewed and ii) the reviewers undertaking the review? What are the subsequent benefits to their schools?
- How effective is the framework for delivering QA reviews, including planning, training, implementation and follow-up?
- What should be the non-negotiables, and how much variance is acceptable within the QA review process?
- How can the QA review process be developed and improved further?

First, we considered the nature of the well-documented QA review system. Key documents include handbooks for headteachers,<sup>18</sup> lead reviewers<sup>19</sup> and reviewers,<sup>20</sup> which are revised periodically. These set out clearly the review process and the roles of the different participants. The background picture was completed by a range of other documents including the Challenge Partners Annual Reports published in 2013<sup>21</sup> and 2014,<sup>22</sup> documents relating to other peer-review systems and a limited search of international literature.

A second strand of evidence was provided by the extensive database on QA reviews held by Challenge Partners. This includes evaluation data collected from headteachers of reviewed schools, lead reviewers and reviewers, as well as details of all the Challenge Partner hubs and their partner schools. We were also able to analyse a representative cross-section of recent QA review reports.

Third, we visited schools in eight Challenge Partner hubs and interviewed a cross-section of headteachers (partners and senior partners),

the trained reviewers on the staff of those schools, and hub managers. Most interviews were recorded and transcribed; some resulted in written notes. We also interviewed key staff at Challenge Partners.

The fourth element of the evaluation was direct observation of three reviews, two training events for reviewers and one conference for lead reviewers. These provided focus groups of various sizes and allowed us to observe and assess the processes in action. A useful comparative reference was provided by knowledge and experience of Ofsted inspection training and practice. We were also able to discuss the Bradford Partnership peer-review approach and observe one of its reviews. The evidence base is summarized in table 1.

| Source  | No. | Evidence   |
|---|-----|--|
| Challenge Partners publications                     | -   | Documentary  |
| QA review reports                                   | 25  | Form and content analysis  |
| Documents of other peer-review systems              | -   | Varied documentary evidence  |
| Ofsted handbook and inspector training              | -   | Ofsted documentation and first-hand evidence from those who had undertaken Ofsted training |
| <b>Evaluation data</b>                              |     |  |
| Partner headteachers                                | 70  | Online survey responses  |
| Lead reviewers                                      | 71  | Online survey responses  |
| Reviewers   | 200 | Online survey responses  |
| Trainee reviewers                                   | 43  | Online survey responses  |
| <b>Interviews</b>                                   |     |  |
| Headteachers and staff in hub and partner schools   | 25  | Semi-structured interview records  |
| Headteachers and staff in other peer review systems | 8   | Semi-structured interview records  |
| School staff and reviewers at three reviews         | 24  | Semi-structured interview records  |
| Trainee reviewers at two training events            | 21  | Focus groups   |
| Lead reviewers' training event                      | 12  | Focus group  |
| Head reviewers                                      | 2   | Semi-structured interview records  |
| Challenge Partners staff                            | 6   | Semi-structured interview records  |

**Table 1.** Research evidence base



### 1.3 The attraction of quality assurance reviews to partner schools

For many partner schools, access to an annual peer review is one of the biggest incentives for membership of Challenge Partners. It is understandably attractive to smaller schools for which the costs of such a review, if commissioned commercially, could be prohibitive. For larger schools, particularly secondary schools, the review is an important part of the menu of challenge and support programmes sponsored by Challenge Partners. A survey by Challenge Partners identifies the ‘top five’ reasons why schools decide to join or renew with Challenge Partners as:

1. the QA review
2. the philosophy of collaboration, moral purpose and values
3. professional development of senior leaders
4. access to a national network of high-performing heads and schools
5. networking opportunities.<sup>23</sup>

QA reviews are central to the ‘challenge’ element of Challenge Partners. New partners must commit to participating in QA reviews. This involves, first, having an annual review and second, providing reviewers to undertake reviews in other partner schools. Thus a school that requires a review team of four reviewers (plus a lead reviewer) will provide during the year the equivalent of four trained reviewers to undertake reviews of other schools. This balance sheet is honoured by the great majority of schools in Challenge Partners, although some occasionally encounter difficulties in supplying reviewers when needed.

Signing up to annual QA reviews is also a good test of the commitment of an applicant school to the collective principles (the four capitals)<sup>24</sup> on which Challenge Partners has been built: moral purpose, social capital, the creation and sharing of knowledge, and collaboration through effective organization. For schools that are looking for partnerships, the qualities, values and collegiality of Challenge Partners are enhanced by access to a robust QA system. As the headteacher of a partner school said:

We realized that as a stand-alone academy we needed to look outwards. We believe in peer-to-peer review; we believe in working in partnership; and it was really the synergy in working in partnership with [the hub school] and learning from schools in different contexts that was attractive. We were also interested in working with schools that were not our direct competitors. We were pleased to become part of a national organization, Challenge Partners, which has the assurance and right moral purpose to raise standards in all types of schools. I’ve a notion of high level professionals working together, challenging each other, challenging within a supportive ethos. ‘Challenge Partners’. The QA reviews completely change the dynamic of quality assurance. They give us a sense of how we are progressing on an annual basis.

Senior partners report that hardly any schools leave their hubs on account of being deterred by reviews. Where this happens, it is likely to be because the school does not share the ethos of Challenge Partners or recognize the value of peer reviews. A senior partner gives an example:

One of our partner schools has a new headteacher who doesn't 'get it'. She says she can get a review cheaper. She misses the whole concept of it being more than a QA Review, has not engaged, and says she has 'had enough development'! But the school has now lost a deputy and faces a turbulent time. They wanted to be an 'associate member', having access to parts of the Challenge Partners offer, but the steering group said 'no'. We tie everything into the four capitals and revisit those with our partner schools.

## 1.4 The aims, scope and nature of quality assurance reviews

### *Aims*

QA reviews aim to provide schools with:

- an initial audit when joining Challenge Partners
- a validation of their own self-evaluation
- key challenges for the next year
- the identification of areas of excellent practice
- development opportunities for senior staff.<sup>25</sup>

All these aspects are strongly supported by evidence from partner schools. The review process, which involves reviewers from distant partner schools working in partnership with senior staff from the reviewed school, makes a powerful contribution to the professional development of those involved. The validation of excellent practice identified by the school is a way of accrediting a school's excellence in a particular subject or aspect and bringing this to the attention of other Challenge Partner schools.

### *Scope*

QA reviews clearly do not set out to replicate Ofsted inspections. The scope of reviews differs in most respects from the inspection schedule, the only two common areas evaluated being 'outcomes for pupils' and the 'quality of learning, teaching and assessment' (see table 2).

|  | QA review | Ofsted |
|--|-----------|--------|
| Context of the school, and partnerships        | ✓         | ✓      |
| School improvement strategies                  | ✓         | ×      |
| Outcomes for pupils                            | ✓         | ✓      |
| Quality of teaching, learning and assessment   | ✓         | ✓      |
| Quality of area of excellent practice          | ✓         | ×*     |
| Personal development, behaviour and welfare    | ×         | ✓      |
| Effectiveness of leadership and management     | ×         | ✓      |
| Next steps: area in which support is requested | ✓         | ×      |

\*Unless it falls within the inspection framework

**Table 2.** Areas reviewed, compared with Ofsted inspections

QA reviews do not cover child protection and safety issues, which are largely related to compliance, although lead reviewers would report any concerns. Leadership is reviewed obliquely through examining school improvement strategies and partnerships, and reviews do not currently assess governance. Key common areas include achievement (or outcomes) and teaching (including learning and assessment), together with any focus – such as a key stage or subject of the curriculum – that the school requests. Other features of reviews and inspections are compared in Annex A.

*A cooperative team approach*

Reviews involve an independent lead reviewer and reviewers from beyond the school, together with senior leaders from within the school, all of whom comprise ‘the review team’. The review team embodies the concept of the review being a cooperative activity led and coordinated by the lead reviewer. Lead reviewers are instructed to regard both in-school and external participants as a single team. This was evident to a large extent in the reviews we observed. Variations of degree are due not only to the expertise of the lead reviewer but also the school’s previous experience, if any, of quality assurance reviews. A recently joined partner school will not have many – if any – trained reviewers among its staff and may not have learned how to participate in and use the review for maximum gain. But feedback from the great majority of schools, reviewers and senior leaders shows that the partnership ethos is recognized and valued.

The concept of ‘one team’ is evident in several tangible ways. The external reviewers have time apart on the first afternoon to undertake pre-review analysis and prepare questions for discussion, but thereafter they work closely with senior leaders in the school. Lesson observations are conducted and the evidence discussed jointly. Our observations, and reports from lead reviewers, suggest that most pairs of observers reach good levels of agreement on the four headline criteria (challenge, engagement, questioning

and learning) used as the basis for discussion, as well as perceptions of 'what went well' and 'even better if ...'. Reviewers and senior leaders also meet to probe evidence related to the main themes of the review, and both contribute to the feedback and shaping of review outcomes. Managing this relationship, while assuring the integrity of the review, is the responsibility of the lead reviewer.

Peer reviewers make very positive comments about the quality, openness and honesty of the review process, the quality of professional dialogue and the transparency of collaboration. Reviewers' comments on the collaborative process include examples such as:

It was honest and fair. I felt that the host school engaged really positively with the process, which made it all the more productive.

The review team and the school worked very collaboratively and the whole process was very open and transparent.

Schools invite you in to share expertise and experience. There is no complacency, and a genuine sharing of professional dialogue in order to raise standards of learning and teaching.

Strengths included the quality of relationships, a continual focus on learning, open minds as to what was going on, and real judgements based on data, lesson observations, learning walks and books.

School headteachers and senior leaders largely echo these views (see part 5). We have no evidence that the joint approach reduces the probity or objectivity of the review. Findings are well supported by evidence. The joint approach also means that challenging outcomes are likely to be more acceptable to the reviewed school, because it has been closely involved in the evaluation process.

## Part 2

# Inputs: The organization and staffing of quality assurance reviews

Membership of Challenge Partners commits as well as entitles the partner school to an annual QA review. The school decides the timing of the review and most are undertaken in the autumn or spring terms.

### 2.1 Planning, organization and management of reviews

The organization, staffing and deployment of review teams is carried out very efficiently by Challenge Partners. Schools specify the preferred timing of their annual review and any particular requirements or specialisms (such as a secondary school wishing to include a primary reviewer on the team). When the date is agreed, logistical organization and support come from the Challenge Partners headquarters in London (the 'CP office'). Challenge Partners will commission a lead reviewer, who is an Ofsted-trained inspector who has also been trained to lead quality assurance reviews. Challenge Partners has 32 lead reviewers on its books. The schools' preferred dates are matched with those on which contracted lead reviewers are available for work. Challenge Partners then allocates an available lead reviewer and approaches other schools to release reviewers to complete the team of external reviewers. Since all reviewers have full-time senior positions in their home schools, demands on their time are heavy despite the obligation of partner schools to release reviewers on a pro-rata basis.

The reviewers are senior leaders who have been identified by their schools as suitable to undertake reviews. Reviewers have all done one day's training in quality assurance reviews. They do not normally work in schools within the same hub or local authority area as the school to be reviewed, giving an added measure of independence.

A survey of 67 reviews found that not all the assigned reviewers were present for the duration of the review in one in five reviews. Illness, family illness and bereavement account for about half the shortfall, along with, in some cases, Ofsted inspection of the reviewer's school or unexplained withdrawal. Challenge Partners goes to considerable lengths to fill the gaps, and in some cases the contributing school supplies another reviewer. In one of the observed reviews, the headteacher (of a teaching school) had stepped in at very short notice to cover for a colleague who had to withdraw. Where the number cannot be made up, lead reviewers are expected to undertake the work of the missing member as well as lead and quality assure the review as best they can. Lead reviewers go to some lengths to sustain the

team's commitments to the school in these circumstances, and few schools feel short-changed.

Lead reviewers and headteachers are very complimentary about the helpful and speedy action taken by the Challenge Partners' review managers when there are difficulties in deployment, but securing stable staffing for reviews remains an ongoing challenge. In a small number of cases, a reviewer gives no warning and simply does not appear.

## **2.2 The selection and training of lead reviewers**

The quality of a QA review cannot exceed the quality of the review team and the leadership of the school with which it cooperates. The lead reviewer is key to quality. The great majority of schools reviewed are highly complimentary about the leadership of the review. The principal responsibilities of the lead reviewer are to manage and assure the quality of the review. These tasks include overseeing and guiding the work of team members and ensuring the parallel involvement of school senior leaders.

### *Selection of lead reviewers*

From the outset, the lead reviewers used by Challenge Partners were all trained by Ofsted either as former HM Inspectors (HMIs) or additional inspectors, and are experienced in leading inspections. Ofsted has introduced a new category of 'Ofsted inspector' from September 2015, replacing the designation 'additional inspector'. The criteria for new Challenge Partners lead reviewers are being reviewed. Most have been commissioned as a result of recommendations from partner schools or other lead reviewers based on personal knowledge of their work. To date, the number and availability of lead reviewers has kept pace with the growth in the number of hub and partner schools and hence the increasing number of reviews.

The QA review system is led by two head reviewers, one of whom has been involved from when QA reviews were first established. The head reviewers maintain and update the review process, prepare and facilitate all training, and provide quality assurance for the QA review system. They also lead reviews.

### *Training of lead reviewers*

Lead reviewers are obliged to attend an annual meeting, which incorporates any necessary training or updating. The event is designed to reinforce consistency in the main aspects of reviews, update lead reviewers on any changes to procedures and criteria – especially when Ofsted's inspection arrangements change – and reflect on and discuss issues raised by lead reviewers. One such event was observed, attended by 12 lead reviewers.

This one-day briefing provided a strong reminder of the processes and protocols of QA reviews, based on evaluations of reviews and feedback from lead reviewers, reviewers and schools over the previous year. Aspects that were stressed included reminders for lead reviewers to:

- type the pre-review analysis form and share it with the school on the morning of the review, with suggestions of key foci for the review
- lead one team – in two parts (external reviewers and linked leaders from the school)
- make sure the review is neither a practice (or ‘mock’) Ofsted inspection nor a ‘soft evaluation’, and that it does not duck issues
- make sure that the meeting at the end of the review day:
  - is focused on teaching, learning and achievement
  - is facilitated equally by the school and by the reviewers
  - agrees wording for the ‘what went well’ and ‘even better if’ points
  - is a dialogue, not feedback
- attend the achievement meeting and join lesson observations and discussions
- agree wording of the findings and *estimates* of the quality of the school
- find out whether the school wants post-review support
- make sure that reviewers’ self-evaluations are completed at the end of each review.

It was evident that the head reviewers who led the training were well informed about the inconsistencies that can affect the conduct of reviews. There was much discussion of such issues and sharing of challenges encountered and resolved. Lead reviewers also had inputs from key staff at Challenge Partners, notably one about new developments in arrangements to follow up the outcomes of reviews. A new, online school support directory was demonstrated to the lead reviewers. Participants were also encouraged to reflect on the Challenge Partners’ theory of action for school improvement, known as ‘upwards convergence’: the principle of ‘growing the top’ while ‘reducing disparity’ – or raising the floor – in terms of performance over time (see figure 2).<sup>26</sup> The implications for review are about awareness that raising achievement means growing the top as well as focusing on those that need great teaching, support and the reduction of barriers to learning.

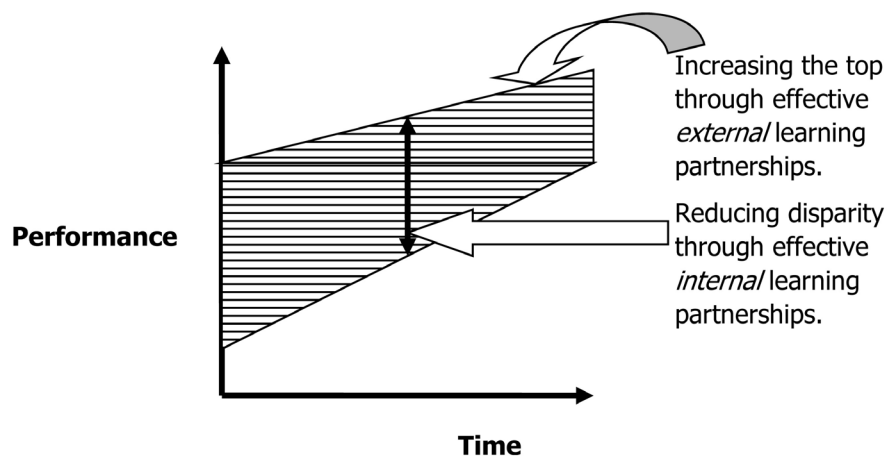


Figure 2. The principle of upwards convergence

The annual meetings for lead reviewers are also used to prepare newly appointed lead reviewers, who are already Ofsted trained inspectors. New



lead reviewers are quality assured by a head reviewer on an early review. Training for lead reviewers is highly rated by participants and has an important role in maintaining consistency of practice as well as introducing all lead reviewers to any changes in procedure.

## 2.3 The selection and training of reviewers

### *Becoming a reviewer*

It is important to the review system that reviewers have sufficient experience of leadership and line management, understanding of teaching, learning and assessment, and familiarity with working as one of a senior leadership team in order to relate knowledgeably and professionally to other reviewers and the senior leaders of the school being reviewed.

Challenge Partners has trained 1,156 reviewers at the time of publication. All reviewers accepted for training must be endorsed by their partner school headteachers as meeting all the following criteria, which are quite exacting. Prospective reviewers must:

- be available to attend reviews nationally
- have the capacity to attend a review (three days) at least once in the academic year
- be considered an outstanding practitioner
- be either a headteacher, senior leader or specialist leader in education
- have evidence of successfully using coaching and/or facilitation skills to bring about improvement
- be able to work sensitively and collaboratively with peers and colleagues
- understand what constitutes good and outstanding elements of school practice and have the ability to articulate this.<sup>27</sup>

Those nominated for training as reviewers are not necessarily conversant with RAISEonline data dashboard or the sixth form PANDA (school performance digests generated annually by Ofsted and the DfE for every school), where relevant. We consider this to be a significant disadvantage for which the training offers only partial compensation. The time available to assimilate school information and data at the beginning of the review is limited, since nothing is sent to reviewers in advance. Prior familiarity with complex school performance information therefore would be an advantage, although training continues during reviews.

The QA review system is sufficiently well established that becoming a reviewer and undertaking QA reviews is part of the leadership development strategy of many schools, large and small. One secondary school, for example, identifies and trains two new reviewers each year, each of whom then undertakes two external reviews. One all-age special school has six reviewers among its staff: the headteacher, deputy and four key stage leaders. This process means that for most reviewers, particularly in larger schools, the experience is confined to participation in a small number of reviews, often only one or two, before the baton passes to others in their schools. This may have advantages in building leadership capacity and spreading the workload, but means that many reviewers remain relatively inexperienced in the role.



### *Reviewer training*

One-day training events for reviewers are normally commissioned by hub managers and mounted in senior partners' schools. They are facilitated by one or both head reviewers. We attended two training events in different regions of the country. Both followed a well-prepared pattern and were designed to engage the trainees in the main aspects of the reviewer role, working together in pairs, threes or small teams. The main elements included:

- analysis of school data and key documents
- discussion of issues for review
- teamwork exercise on modelling teaching and learning and considering the indicators of outstanding practice
- dissection of Ofsted descriptors for 'outstanding', with a focus on distinguishing between teaching and learning
- introduction of the forms used by Challenge Partners to record evidence and judgements
- paired observation of lessons followed by comparing notes
- group analysis of features seen, including 'what went well' and 'even better if'
- discussion of protocols and codes of behaviour
- stress on the need for partnership with senior leaders in the school and the way this works in practice
- opportunities for reflection, questions and completion of evaluation forms.

Training is supported by a well-designed *Reviewer Handbook*. Expectations of training are high. Discussion with a group of 15 trainees revealed that:

The majority were there as their schools were soon to be reviewed and they needed to know more. Some expected the training to be valuable experience and good CPD, having heard how good the training was from other colleagues. A couple said that their school had sent them to refresh the trained pool of senior leaders as colleagues were moving on. Three participants were new to Challenge Partners entirely, as was their school. All gave the impression of previous training having been a highly positive experience.

### *What is the quality of reviewer training?*

Evaluation of training events showed that trainees rated them highly. Challenge Partners collects end-of-day evaluations, which are strongly positive. The comments of one experienced primary headteacher (in her second headship) gave a considered picture of what makes training so successful:

The training was excellent. We did it within our cluster of eight schools. The process of the training was very clear. We knew exactly what we were going to get out of the day. There was a good facilitator, a lot of sharing; it was very hands on, very analytical. We were deconstructing and reconstructing all of the time and imagining what that process would look like if we were in a different place. So considering that it

was a staged piece of training, we actually covered a huge amount. We observed real lessons. We had all brought along our improvement plans, RAISEonline and that sort of thing. That was another key point. We were all expected to take along our data to be shared with those who were there. So instantly there was a level of trust. You had to buy in and trust other colleagues, and that was helpful within our partnership because it got us sharing reports and reviews. The training prepared us well for the reviews. I have done many observations in many different schools, but I went into a Year 10 science lesson and felt unexpectedly comfortable there. It was clear that even if you are in a different environment, the essentials of good quality teaching and learning don't change.

(A headteacher)

As well as end-of-session evaluations, Challenge Partners requests reflective responses three days after training events. Forty-four trainee reviewer respondents from 12 training events in summer 2015 gave the following online ratings:<sup>28</sup>

| Scale (1 to 10): How do you rate the ... | quality of the venue? | quality of the facilitation? | quality of the resources? |
|--|-----------------------|------------------------------|---------------------------|
| Mean                                     | 9.2                   | 9.3                          | 8.7                       |
| Mode                                     | 10                    | 10                           | 9                         |

Excellent facilitation by each of the two head reviewers provides expertise, a discursive approach, clear explanations, challenge and time for reflection. In a well-structured day, participants particularly valued opportunities to:

- undertake an element of pre-inspection analysis of data and documents
- review an actual lesson (rather than a video)
- work and network with other colleagues
- reflect with other professionals on what constitutes good or outstanding teaching
- be taken through the parts of a review and understand how it works
- prepare 'what went well' and 'even better if' outcomes
- discuss, ask questions and seek clarification at any time.

As one participant wrote:

The pace of the training day was excellent and everything ran according to the outline for the day. The facilitator was very enthusiastic and knowledgeable – and was great at allowing us time to work together, share and question our thinking. The day was a good mix of instruction, discussion and practical activities. It was extremely useful to be able to take part in a lesson observation and to discuss this on our return. The facilitator was excellent at challenging our ideas and drawing more from us.

Another said:

It was most beneficial to conduct real observations (rather than critique filmed observations, as I have done during other training courses).

We learned that during the four-year life of Challenge Partners, schools have become increasingly confident in opening up their own practice for reviewer training days. This was not the case at the beginning and can present a challenge for new hub schools, which is normally overcome by asking for volunteers to have their lessons observed.

Training also reflects the ‘social capital’ characteristic of Challenge Partners. The views of many participants are reflected in such comments as:

I found using and sharing real documents and data of the participants’ schools and observing a live lesson was both excellent and symbolic of the openness of Challenge Partner schools. I know many partnerships that wouldn’t dream of sharing in this way.

The training provided a useful reminder of key ideas around coaching and the principles of observing within the Challenge Partners ethos. The opportunity to apply the quality assurance review principles in practice was very useful. Excellent facilitation coached us effectively through the key processes and thinking.

The ethos of Challenge Partners [was] explained well, so working ‘with’ the school rather than reviews being ‘done’ to the school.

Suggestions for improvement included:

- requests for more time on some activities, such as pre-review analysis
- experience of a learning walk
- more than one lesson observation
- a video demonstration of a review feedback meeting
- more practice on writing ‘what went well’ and ‘even better if’ findings.

Some trainees also voiced concern about whether some other participants among their number had the knowledge or experience to undertake reviews effectively, citing some who were unfamiliar with RAISEonline or had little knowledge of school self-evaluation. Others would like greater understanding of what schools do before or after reviews. One suggested that Challenge Partner hubs could offer training on interpreting performance data.

We observed two reviewer training days in different parts of the country and agree that the training events were very well designed and facilitated. The activities amounted to more than ‘tasters’ of different aspects of a review and there was a good balance of analysis, evaluation and reflection, together with paired and team working, clear instruction, coaching and dialogue. A training event with a mixture of primary and secondary trainees was at least as effective as one in which all trainees were from secondary schools.

The engagement of trainees with different aspects of the training related to some extent to their experience and leadership role in their ‘home’ school. Some, for example, found an exercise on the characteristics of outstanding teaching challenging, possibly because they were working in underachieving schools that required improvement or had not encountered professional development focused on outstanding teaching. Equally, some

participants were unfamiliar with the types of data set out in RAISEonline. Both facilitators handled the range of capabilities of their participants adroitly, coaching them while maintaining an appropriate level of challenge. Review documentation changes when inspection criteria are revised, and lead reviewers are expected to ensure that their teams are familiar with such revisions.

## Part 3

# The quality assurance review in practice

### 3.1 The review process

The evaluation included observation of three reviews, which allowed comparison of review practice with the well-defined QA review handbooks for headteachers, lead reviewers and reviewers. The lead reviewers contacted their schools two or three weeks before the review to discuss what would happen during the review but did not ask for data or documentation in advance. This is in line with Challenge Partners policy. The schools identified areas they wished the review to focus on – for example, Key Stage 3 in one case, aspects resulting from the recent reorganization of the school in another – although such a focus is not required. It is likely that schools will increasingly identify focus areas as annual reviews become routine. Schools can also identify an area of excellence for critical review, and the majority do. The lead reviewer also contacted review team members to find out their specialisms and areas of interest for the review.

Guidance for headteachers asks them to brief staff about the collaborative nature of the review and arrange for senior leaders to come off timetable in order to partner the reviewers. They also decide which lessons are to be observed, and may ask those teachers to provide lesson plans. Occasionally, the headteacher does not tell particular staff in advance that their lessons are to be observed, but this is exceptional. The suggested briefing for schools encourages headteachers to explain the following:

The tone of the review is developmental in approach, relying on a collaborative but challenging dialogue between the school being reviewed and the review team. This process acts as a channel for constructive and open discussions about how effective the school is and suggests areas where the school could be more effective. It is intended that the review is beneficial for the professional development of all the individuals involved as much as it is a useful audit for schools. The senior leaders that form the review team are all outstanding practitioners, and they are quality assured by the lead reviewer throughout the process. The findings of the review are compiled into a report that is written by an Ofsted-accredited inspector. It is up to the headteacher to use and/or publish the report as they see appropriate.<sup>29</sup>

The reviews we observed were largely conducted in the spirit of the above. The timetable prepared by the school spans the review day and the following morning and typically includes:

- paired lesson observations of 30 minutes followed by discussion time between the reviewer and a member of the school’s SLT
- meetings to discuss each area of the review, i.e.
  - school improvement
  - achievement/outcomes
  - teaching, learning and assessment
  - area of excellence (if one has been identified by the school)
  - partnerships
- work scrutiny
- meeting with students
- learning walks
- meetings between the review team and the school’s SLT to discuss the findings of each day and verbally agree the contents of the review report.

The lead reviewer remains free of timetable commitments apart from team meetings so as to be able to join each of the reviewers during some of their activities and quality assure the review. In the reviews we observed, the lead reviewer always joined one lesson observation and subsequent discussion session with each of the reviewers and their school counterparts.

The review takes place over three days (two equivalent days). This includes one afternoon (13.00–16.00) for the pre-review analysis, a whole day (08.00–17.00) for review activities and the morning of the third day (08.00–12.00) for further review activities and concluding discussions (see table 3).

|                  | Day 1  | Day 2  | Day 3   |
|------------------|--|--|---|
| <b>Morning</b>   |  | Review activities undertaken jointly with senior leaders in the school,                                | Review activities and feedback<br>08.00–12.00 |
| <b>Afternoon</b> | Pre-review analysis (PRA) by lead and external peer reviewers<br>13.00–16.00 | culminating in joint meeting to identify ‘what went well’ and ‘even better if’ findings<br>08.00–17.00 | <i>Report write-up time</i>                   |

**Table 3.** Outline of review timetable

In many cases the lead reviewer proceeds from one review finishing on Wednesday morning to start another on Wednesday afternoon, if necessary deferring completion of both reports until after the completion of the second review on the Friday. We understand logistically why many reviewers wish to optimize their use of time in this way but the arrangement runs the risk of detracting from the quality of reporting.

*Day 1: The afternoon session*

Each of the teams convened at the school for the first afternoon of the review to undertake the pre-review analysis (PRA) of documents and data provided by the school. No documents are circulated in advance, and all documents remain in the school unless the school permits otherwise. Review team members are advised to read the latest Ofsted report for the school. Some look at the Department for Education (DfE) school performance tables or the school's website. We consider that these items, together with Ofsted's data dashboard report for the school, should be specified as preparatory reading for all reviewers since they are readily available online.

The documents supplied by the school for the PRA meeting are as follows:

- Summary of current data
- Self-evaluation analysis
- School improvement plan
- RAISEonline
- Data relating to sixth form, if appropriate
- Previous Ofsted report and any survey visit reports
- Completed area of excellence form
- All previous Challenge Partners' QA review reports

All five review themes are analysed from data and documents provided by the school for the PRA deliberations of the external review team on the first afternoon of the review. The afternoon sessions we observed were all managed well by the lead reviewers, who made sure that all had sufficient time to read, then a discussion took place to explore the self-evaluation and improvement plan and identify any particular trails. Each member of the team was given responsibility for a trail related to one of the review themes in line with the meetings and timetable set by the school. The lead reviewers took the lead on the effectiveness of school improvement strategies. The teams worked in pairs to identify questions that would be asked during the meetings with senior leaders, and members of one team we observed provided good challenge to each other; in other cases the challenge came from lead reviewers. Reviewers vary in their ability to analyse data, particularly if they have had little previous contact with RAISEonline, but a benefit of undertaking the analysis collectively is the availability of expert help, when needed, from other members of the team.

Lead reviewers were very effective in quality-assuring the review process and coaching less experienced reviewers (all teams had one or more members taking part in their first review). Team members were also advised on how to frame open questions and how to allow the school to lead or contribute. The pre-review analysis is more focused when guided by issues provided by the school or identified by lead reviewers. One reviewer, for example, thought that having clear hypotheses was preferable to 'having a mass of documentation from which the team had to pick out things which

did not seem evidenced strongly enough'. Others were able to generate hypotheses from the material, with help from the lead reviewer:

The time on the Wednesday afternoon to discuss and go through the different documentation was very well spent. It was really brilliant to gain an overview of the whole school process; to see how RAISE drove the line of enquiry and then to follow this up with lesson observations, one-to-one meetings etc. The opportunity to share good practice and to have the experience of visiting another school. The whole process was very challenging and thought provoking, and thorough.

(Team reviewer)

The pre-review analysis session ended with the review team agreeing the key questions for the review in each of the main review aspects: school improvement strategies, quality of teaching, and quality of an area of excellent practice, together with an analysis of evidence of pupil achievement. The information was gathered on flip charts and entered into the pre-review analysis template form on lead reviewers' laptops to form the basis of a discussion with senior leaders.

### *Day 2: The full day*

After introductions, the review team and senior leaders met as a whole team to consider the pre-review analysis, which lead reviewers had printed out. This meeting was useful in setting the tone of the review – stressing its partnership nature – making sure that all understood the areas about which information was needed and confirmed again the school's understanding of the review trails.

One lead reviewer reminded the external reviewers of procedures for the lesson observations:

You will need 20 minutes to talk to the senior leader colleague about what you have both observed. This discussion is important. Base it on your observation form. Take a few minutes for reflection and fill in the continuum lines and the boxes for 'what went well' and 'even better if'. We are not grading lessons. The notes should be evaluative. Then I suggest you and the senior leader place your forms so that both can see them. Similarities and differences can launch the discussion. Normally there is a balance of strengths and areas for development.

The approach of Challenge Partners is a positive one: to boost morale, not to destroy it. If there are difficulties in this school, however, we can't go away and not tell the school, for if that was to happen, the whole virtue of QA reviews is lost. I had one school where the leadership team did not accept our findings. I try to be nice but it doesn't help the school to say they are getting much better when they were not. I've just read the last monitoring letter on the school which said that they had received very clear and reasonable advice from Challenge Partners. The report was couched in a positive way but had to reflect what we found.



Lesson observations were conducted jointly by reviewers and senior (or in some cases middle) leaders. In each lesson students were spoken to and books reviewed. All used the observation forms, although in some cases these were unfamiliar to school SLT members. The debriefing discussions between reviewers and their paired SLT members were at best genuine dialogue and sharing of views, although in a minority of cases review team members – perhaps through inexperience – were too quick to assert their own views from the beginning. A useful device was for the two observers independently to mark a point on a continuum between ‘major strength’ and ‘needs development’ for each of ‘challenge’, ‘engagement’, ‘questioning’ and ‘learning’ (see table 4). This provides a crude but effective indication of inter-rater reliability. Most reviewer/senior leader pairs reached a high degree of agreement on ‘what went well’ (WWW) and ‘even better if’ (EBI). Significant differences of view prompted constructive professional discussion leading to convergence. This was clearly a beneficial part of the process. The SLT members were expected subsequently to have feedback discussions with the teachers observed.

| <i>Enter X on the line to indicate judgement</i>                         |  |
|--|--|
| <b>Challenge</b>   | Needs development ●—————● Major strength                                 |
| <b>Engagement</b>  | Needs development ●—————● Major strength                                 |
| <b>Questioning</b>   | Needs development ●—————● Major strength                                 |
| <b>Learning</b>  | Needs development ●—————● Major strength                                 |
| <b>Free flow observation notes</b>                                       |  |
| <div style="border: 1px dashed black; height: 60px; width: 100%;"></div> |  |
| <b>What went well (WWW)</b>  | <b>Even better if (EBI)</b>  |
| <div style="border: 1px dashed black; height: 60px; width: 100%;"></div> | <div style="border: 1px dashed black; height: 60px; width: 100%;"></div> |

**Table 4.** Condensed layout of Challenge Partners’ lesson observation form

Meetings held with staff were normally conducted with very open questions and the school being allowed to set the agenda. Meetings with students

were not always as productive as such meetings can be, either because of too many closed questions or, in one case, because all twenty students had a minute each to explain their role and leadership function. While this showed they were highly articulate – and student leadership was the area of excellence being considered – it meant that time to explore this by the reviewers was constrained. In addition the school had only chosen the more able and articulate students, so the sample was not truly representative.

In each QA review, the day concluded with each member of the team including the SLT being asked to articulate WWW and EBI points from the lessons and meetings. Where this worked well, all took part. There was concurrence with the school on the quality of teaching, and all could see this. Advice was asked for and freely given by all reviewers. One offered to share a pro forma she had developed, and the school offered to share some leadership materials for Key Stage 3 that they had been developing. One meeting worked less well when the school leaders did not respond readily to the lead reviewer's invitation to contribute, and the reviewers were required to give more one-sided feedback.

### *Day 3: The final morning*

The initial discussion in all reviews took place first thing, without the school representatives being present. The teams had an effective discussion on the overall suggested areas for EBI and the grading for the school improvement section. All reviewers contributed to the EBI recommendations. The meetings were sharply focused by the lead reviewers, but team reviewers varied in their grasp of all the issues. Lead reviewers referred all to the Ofsted grade descriptors and teams reached agreement about where they felt the school stood in relation to these, with a strong steer from lead reviewers. During the morning, learning walks continued across subjects and there were further meetings with key staff.

In each of the reviews observed, there were minor departures from the specified procedures. In one, for example, the lead reviewer asked for the team to meet before the final meeting. The lead reviewer said the process was supposed to include the school at all events but sometimes things could be said among the team that either needed qualifying, modifying or even strengthening before the school representatives heard them. This was not quite in the spirit of Challenge Partners but it made sense and was very useful to clarify issues regarding data.

Where there were queries by schools about the emerging outcomes, lead reviewers were seen to stand firm but explain the reasons or evidence for the judgements. For example, one headteacher asked if the school improvement strategies would be graded as outstanding. The lead reviewer went through the evidence with the head who then understood why it was considered to be grade 2.

In all reviews observed, the final meetings were in some ways the weakest aspect, for one of a number of reasons. In one case, there was insufficient space for the school leaders to sit down with the review team, so they stood around the edges of a small room. In another, the lead reviewer

did nearly all the talking; it was not a dialogue and some of the senior leaders appeared to be disengaging. Where the final meetings went relatively well, each of the review team contributed, clearly and concisely, with linking commentary and explanation by the lead reviewer.

If the rest of the review has been conducted in partnership with the school there should be no surprises at the final meeting, but matters such as rephrasing the detailed wording of proposed EBI statements, or requests for mention of something that has not been covered, are not uncommon. In one case we witnessed, the lead reviewer asked the team to think about a specific request and email their evidence and views, after which the lead reviewer communicated further with the headteacher. We did not observe any significant disagreement with the main findings of reviews. One school, judged outstanding by Ofsted, later queried the undue number of EBI statements on their report and the matter was looked into carefully and resolved by a head reviewer.

Before the review team members depart, each completes a self-assessment pro forma for discussion with the headteachers of their home schools. The form asks them to assess different aspects of their own performance and includes entries for what they have learned and what they intend to do as a result. The lead reviewer adds a comment but, for a first-time reviewer, there is a case for considering whether this should be an assessment.

The school has sole ownership of the written report. All the schools visited shared these reports with their governing bodies and with the hub manager at the senior partner's school. Governors are reported to welcome the reports as a way of verifying the information provided to them by the school and providing an independent view of the school's quality and improvement.

### **3.2 The quality of reports**

Every QA review results in a report written by the lead reviewer to a standard format. This evaluation of the quality of reports is based on three samples: i) the latest review report on every school visited for interviews; ii) a cross-section of all the recent reports for schools in one Challenge Partners hub; and iii) reports resulting from the three schools whose reviews were observed.

The reports provide a summary of estimated judgements (outstanding, good, requires improvement or inadequate) on each of: school improvement strategies, achievement and quality of teaching. If an area of excellent practice has been identified by the school, the report either confirms its excellence or judges whether the aspect is developing or not yet identified. The report also gives an overall evaluation in relation to Ofsted's grade descriptors. The areas covered by the report are:

- Summary of estimates of school effectiveness and overall review evaluation.
- *Context of the school*: taken from the most recent Ofsted report.
- *School improvement strategies*: Summary of WWW and EBI about the effectiveness of school improvement strategies, using Challenge

Partners' grade descriptors, which draw elements from Ofsted criteria about leadership and management.

- *Achievement*: data analysis based on available information and indicators, and current progress data.
- *Quality of teaching*: summary of WWW and EBI about the quality of teaching.
- *Quality of area of excellent practice*: evaluation of strengths and aspects of practice nominated by the school.
- *Partnerships*: evaluation of the impact of partnership activities on school improvement and/or Challenge Partners.<sup>30</sup>

All reports in the sample followed this pattern, except that some schools had not chosen to identify an area of excellent practice for review. We conclude the following from analysis of the reports:

- i. There was in general a good match between the estimates for school improvement strategies and quality of teaching, on the one hand, and the WWW and EBI lists relating to these aspects on the other. The evidence explained the judgements.
- ii. The analysis of achievement was comprehensive in the great majority of reports, showing evidence of close attention to the available data and to Ofsted criteria.
- iii. Reports were more varied in the extent to which internal consistency was apparent in their evaluations of teaching, achievement and school improvement strategies, although most had adequate linkages.
- iv. Judgements on the 'quality of excellent practice' were fair and mainly well justified, although the supporting text was often more descriptive than evaluative and showed little evidence of impact.
- v. The evaluations of 'partnerships' were also predominantly descriptive and tended to lack evidence of impact on school improvement.

Overall, despite the bullet point format, there is a strong sense of narrative and connectedness in most QA review reports. The 'school improvement strategies' sections give a good flavour of the quality of leadership and management despite this not being a specific aspect of evaluation. When requested by the school, the review team also arrives at an *estimate* of the school's overall effectiveness, having regard for Ofsted's benchmark grade descriptors. A sample of ten reports written by different lead reviewers for different schools across a multi-phase hub partnership between December 2014 and April 2015 included the following estimates:

One school 'appears to be *firmly within the outstanding grade* as judged by Ofsted in the school's previous Ofsted report'.

One school 'appears to have *moved beyond a good grade* as judged by Ofsted in the school's recent inspection and is working within the outstanding grade'.

One school ‘appears to be *at the top of the good grade* as judged by the school’s most recent Ofsted report and is working towards being *outstanding*’.

Six of the schools ‘appear to be *working firmly within the good grade* as judged by the school’s most recent Ofsted report’.

One school’s report stated that ‘were Ofsted to inspect, it is likely that the school would be *judged to require special measures* because pupils are underachieving in mathematics. The quality of teaching, achievement, and leadership and management would be *judged as inadequate*’.

In all cases, the content of the reports was consistent with the overall estimate of where the school stood in terms of likely Ofsted judgements. In the case of the last school (above), the report also states that ‘the headteacher acknowledged the weaknesses in the school and had joined Challenge Partners in a move to get an external view on the school as well as to be able to access further support and guidance’.

All reports have been through a quality assurance check by one of the head reviewers before being returned to lead reviewers as a PDF file for onward issue to the school. Although not all reports are totally ‘publication ready’ in terms of minor differences in layout and typography, which investment in professional copy-editing, proofreading and design would eradicate, they are of sufficiently high quality to be useful and presentable working documents for the school, which is their main intention. Our evidence suggests that the quality assurance policy for QA reviews works well and is fit for purpose; overall findings are generally robust, and the process is cost effective.

## Part 4

# Review outcomes and follow-up

### 4.1 Benefits to the school

Post-review returns from headteachers show that the partner and senior partner headteachers interviewed are very positive about the benefits of having QA Reviews. Ninety per cent of headteachers rated the benefits to school improvement as 8/10 or better:

| How useful has the review been to your school improvement plans? Scale 1 least to 10 most useful. | Mean rating | Modal rating |
|---|-------------|--------------|
| Headteachers of reviewed schools (N=71)   | 8.83        | 10.0         |
| External team reviewers (N=200)   | 9.25        | 10.0         |

Asked to explain the usefulness of reviews, headteachers' first response was often related to an external validation of their self-evaluation, keeping them in tune with Ofsted criteria or strengthening confidence in their own observations and assessments for teaching and learning. Governing bodies were also reported to welcome the contribution of QA reviews to their understanding of the school's quality of teaching and performance. They feel that the review strengthens their position when inspected by Ofsted and contributes to the dialogue they have with the school. As one headteacher said: 'they like to have independent corroboration of what the school is telling them'.

These positive responses were borne out in interviews. One special school illustrated the 'Ofsted factor':

We are committed to the peer review. We have previously always bought in inspectors to come and review us, as often as once a term, to make sure we do the very best we can. Children are at the heart of that. We feel under a huge pressure to remain outstanding and need to keep up with what is going on in other schools. Moving from having inspectors coming in to review by our peers is much better for our staff.

Both schools that require improvement and those that are outstanding find them useful, and see them as complementing rather than completely replacing inspections. One head of a school that requires improvement told us:

... the more we have external scrutiny the stronger our evidence base becomes. I'd be happy to have them back next year and certainly the benefit of getting senior leaders out on reviews of other schools is very powerful. But if you are asking me is this an alternative to external inspections then I have to say no but as part of a jigsaw it is really valuable for us at this point.

It is notable that QA reviews not only depend on but contribute to the other matters listed above. Some schools want wider horizons than those found within their local authorities. The primary headteacher of a school on the edge of a small unitary authority explained as follows.

Our school pyramid cluster was looking for external challenge in a small authority, very much around school improvement: the primary reason. We wanted someone that you can commission to come in and verify your evaluation. We had wanted to build a culture of self-review within our cluster but were aware of a level of cosiness and thought we needed to make sure we had external challenge and validation and were part of a wider partnership. So all eight schools joined Challenge Partners together and that has been very powerful. The annual QA review was undoubtedly an incentive. It is such a long time between one Ofsted and another. You want an external view more often.

The headteacher of a secondary school in the Midlands valued an external perspective on the school's innovations.

We are trying to do things perhaps a little bit differently than some places. We are very research-led and we are trying to lead staff along different paths than schools in general. We believe that there is a lot of success to share. We want the opportunity for people to come and see that and test through QA reviews whether there is something here or whether we are deluding ourselves. I think access to areas of excellence through the school support directory is also really valuable. I have had lots of people coming into my office saying, 'how about this or that?', 'tell me somewhere that does it better'. So you can say 'ring that person'.

Even in schools that have been consistently outstanding over two or more inspections, reviews can identify blind spots. Such schools, which continue to have a school improvement vision, would previously have commissioned an external assessor periodically to undertake a rigorous and challenging health check. The annual QA review has proved to be capable of identifying what needs improving, even though the news may be unwelcome.

One outstanding school, conscious that many Ofsted reports at that time were stressing assessment and feedback, reviewed its assessment systems and implemented changes. A QA review found that assessment was not good enough. The leadership team was somewhat aggrieved that their work on assessment had not been validated but had to agree that the review was right and that they had suffered *collective complacency*. Because they had established new systems at the top, it did not mean that assessment had really changed *on the ground floor*. The staff gave the lead reviewer a challenging time, but had to concede that the review was right.

(Written evidence)

Most partner schools share their review reports with the governing bodies. As one headteacher said:



The governors like the QA review system. The reports are shared with them. I have always followed a policy of giving them enough information to really challenge me. Governing body meetings are challenging so we really get something out of it. They get that assurance that what we are telling them is independently validated. A recent review told them how the school had progressed since an Ofsted inspection 12 months previously. It gave the governors the assurance that we were on the right track.

In another school, where the new headteacher followed a long-serving head who had ‘left quite suddenly’, governors wanted reassurance that the data they were getting was accurate and could be validated in some way. The headteacher says:

Joining Challenge Partners and having QA reviews met that need in a very positive way in terms of having trained and qualified people to lead the team, senior leaders from elsewhere coming in to review the school, a national framework and a report which provides governors with a robust external view. We found the whole process very positive, particularly the way the review is structured around ‘what went well’ and ‘even better if’. The professional dialogue before and during the review has also been very powerful.

Schools have access to a five-point menu of support opportunities: the provision of information, sources of good practice, collaborative learning opportunities, coaching and mentoring, and evaluation and impact. Fifty-nine per cent of the 217 schools reviewed in 2014/15 requested support or expertise<sup>31</sup> via Challenge Partners. Hub managers are briefed on how to provide support from their hubs.<sup>32</sup>

It is difficult to prove a direct causal link between Challenge Partners’ peer reviews and improvements in outcomes for students, for a number of reasons. The reviews are only one of a number of support and intervention strategies adopted by partner schools. But reviews focus on the effectiveness of school improvement strategies and on teaching, learning and assessment. By evaluating these crucial aspects on an annual basis, reviews help schools sustain their drive and direction. There is strong evidence from partner schools that reviews help them to become more effective in addition to validating their self-evaluation. As one headteacher said, ‘the impact on pupils’ learning is noticeable after a review’.

School improvement trends based on performance data have been rendered unreliable in recent years owing to changes in the reporting of outcomes, and progress data reform of the national curriculum. Neither do inspection judgements provide reliable evidence of school improvement trends owing to frequent changes in the criteria used by inspectors. The number of schools in Challenge Partners is growing and several of the new partner schools are underachieving.

Despite the difficulties, Challenge Partners would do well to analyse performance trajectories as comparative longitudinal data become more



established, not least to be able to demonstrate the achievement of its aims in raising achievement and accelerating the progress of disadvantaged students. This could be done through an annual self-reporting system used by all partner schools.

## 4.2 Follow-up to reviews

### *Additional support*

At the end of the review, the lead reviewer is expected to ask the school whether they would like additional support in the light of the review findings. A survey of 130 schools showed that about one third (42) expressed no need for additional support. A further 10 schools needed more time to reflect after the review before confirming areas for support. In schools that were clear about what they needed to strengthen, the priorities were support for:

- i. leadership and governance, with a focus on middle leader development, followed by training for senior leaders in specific skills such as giving feedback to teachers, assessment, tracking and evaluation, and governor review and training
- ii. whole school curriculum development and subject development, particularly in mathematics, English and science, linked to school improvement planning and subject leadership
- iii. participation in projects (such as early years reporting), interest group conferences (e.g. a conference for schools providing for pupils with severe and/or profound and multiple learning difficulties), programmes such as the 'outstanding teacher' and 'outstanding facilitators' programmes, and the development and moderation of assessments
- iv. improved teaching and learning (five schools).

A wide list of other issues ranged from post-16 special education to presenting data for the pupil premium grant.

There are three main routes for obtaining support. The school itself may find the relevant expertise a) through avenues that include accessing the Challenge Partners' school support directory, b) through linking with the school of one of the reviewers or another recommended school, or c) contacting the hub manager or Challenge Partners.

The hub managers we met are proactive in following up reviews in their partner schools. Challenge Partners informs hubs when reviews are taking place, and they pick up any issues at regular meetings of hub managers. Both Challenge Partners staff and hub managers are focused on providing a quality service to partner schools. One hub manager describes her actions as follows:

I know when a review has been completed. I wait for a bit then contact the partner school to arrange a convenient time to visit and talk face-to-face about how the review went. I can often broker the necessary support with other schools in the hub, but otherwise I pass it on to Challenge Partners. For example, one headteacher said she had quite an issue with

modern languages, finding it difficult to assess the quality of teaching and learning. So we were able to set up some training with an Ofsted inspector. In another case, a headteacher wanted support for her deputy. We were able to put an aspiring head in her school as a placement, which worked well in supporting the deputy. Going round the schools is well worth it. It's time consuming, but people feel they are being listened to. And they also like to tell their stories, which is good, isn't it? And then it means I can follow things up. If I can't do it locally, I can do it nationally. I also broker NLEs and LLEs [national leaders of education and local leaders of education] for schools that need that sort of help. We all have access to a national database of expertise. One school said: 'we've got outstanding writing but I'd really like to see it in another school beyond the LA'. I've been able to say 'would you like to make a link with ...?' Schools feel very supported.

There is a growing demand for support from Challenge Partners via the centre or the hub. Support from the centre is quick and effective. Every report is checked for the school requesting support and the central team first contacts the hub manager to see what can be done locally. When a local solution is neither possible nor appropriate, the central team will offer the school a solution. The organization reports<sup>33</sup> that 59 per cent of the 217 QA Reviews that took place in 2014 (127 schools) led to requests for support, and there were requests unrelated to QA reviews from a further 72 schools. Requests covered 75 different areas, of which the most frequent were:

| Most frequent requests for support via Challenge Partners <sup>34</sup> |                             |
|---|-----------------------------|
| Primary schools   | Secondary schools           |
| 1. Literacy   | 1. Mathematics              |
| 2. School-to-school collaboration                                       | 2. Narrowing the gap        |
| 3. Early years  | 3. Science                  |
| 4. Leadership and management  | 4. Middle leadership        |
| 5. Mathematics  | 5. Modern foreign languages |

The types of support available to partner schools include: providing information; providing experience of good practice; collaborative learning opportunities; coaching and mentoring; and expert evaluation of impact. All partners also have access to a school support directory and can use this independently to access expertise in other schools.

### 4.3 Benefits to the reviewers and their schools

The great majority of reviewers say that involvement in the QA review system, from training to undertaking reviews in other schools, provides exceptional professional development for them as senior leaders. Many schools say the benefits to leadership development are at least as great as those to the school. As one said:

It is an utter privilege to be in another school and to work with like-minded colleagues. I gained hugely in terms of ideas, even from a school requiring improvement. We adopted their idea of ‘learning walk postcards’ to each member of staff seen on the same day. This was a way of giving them immediate feedback after learning walks, solving a problem the school had been wrestling with. Another benefit for reviewers is being out of your own comfort zone and seeing all types of schools, especially those in regions where the situation is very different.

The Challenge Partners approach avoids the risks of connection, even cosiness, of other peer review processes such as those conducted among themselves by trios of schools and those where reviewers are fellow headteachers from within the local authority. By using as reviewers senior leaders from more distant schools, and partnering them with leaders from the reviewed school, QA reviews generate an extraordinary *multiplier effect*. Undoubtedly most reviews validate and if necessary challenge the priorities of the reviewed school and guide it on its journey. But a major spin-off is the expansion of learning by those who take part and what they take up within their own practice or take on to other schools (see figure 3). Engagement in the review training, and participation in reviews, is commonly reported as providing the most valuable professional development experienced by many reviewers and school leaders. It is impossible to measure how much this enhances the system, but multiple individual examples allow Challenge Partners to make a strong claim that it does.

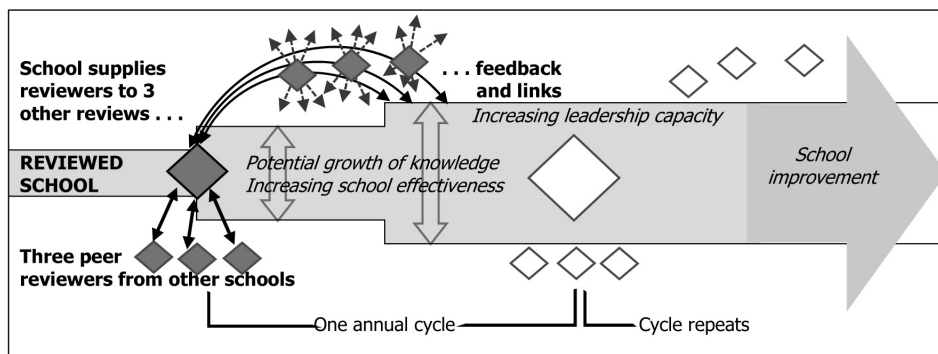


Figure 3. Representation of links and potential for multiple gains for a school reviewed by three peers, and providing three reviewers in turn to other reviews

In all the schools interviewed, reviewers who have been away on QA reviews are given time on their return to share what they have learned at a meeting of the senior leadership team. The school then decides what is worth following up further. We spoke to one school that takes the feedback even more seriously, through a two-part strategy:

The benefits are enormous. The QA review process is important here but what’s more important is going out into other schools. Each time someone returns from a review, a significant portion of subsequent SLT meeting is led by them, distilling what they have learned. ‘These are the things I’ve seen; this is what I learned; this is what they do which we

might adopt.’ Then we reflect on that for two weeks before coming back to the topic and deciding what we are going to do about it. We have learned that this approach is the best way of doing it rather than making instant decisions. People generally come back buzzing and want to tell you a hundred things. Although it might all be laudable, you have your strategy and school improvement plan; you can’t just get pushed and pulled around by some other school that’s doing something nice. So the finding out is the first step and giving people two weeks to think about it before deciding what we are going to do is the second.

The huge benefits to the system, the individuals and their schools of training and deploying senior leaders as reviewers make a big contribution to building capacity for a self-reviewing school system. But these benefits should not outweigh the fundamental value of the review to the school being reviewed. The calibre of reviewers is important, and we consider that no team should be composed mainly or entirely of members on their first review. It is also highly desirable that each review team includes a headteacher reviewer.

The cost–benefit balance of QA reviews is greatest for smaller schools whose reviews are subsidized by Challenge Partners since their subscriptions would not cover the cost. Only the lead reviewers are reimbursed, at a daily rate plus capped expenses. Costs of the *quid pro quo* supply of reviewers are borne by their home schools and can be significant, especially if hotels in London are involved. But no school need release more than one senior leader at a time to undertake a review. Many schools regard the unsurpassed professional development benefits to be well worth the costs incurred. Viewed in this way, participation in a peer review provides good value for money when compared with attendance at typical out-of-school training courses of one or two days, where fees as well as staff replacement costs are involved.

## Part 5

# The quality and quality assurance of QA reviews

### 5.1 Keys to a successful review

Our evidence shows that the integrity of the review depends on three factors above all else: the expertise of the lead reviewer, the quality of reviewers on the team and the stance of the school. The best lead reviewers can compensate for weaknesses in the team, sustain a good relationship with the school and harness the professionalism of both reviewers and the school senior leaders with whom they work. There is room for greater consistency among the lead reviewers in terms of process. While all broadly follow the same pattern as the review unfolds, there are significant variations in practice. Some of these are of little consequence, for example an introduction of external reviewers to staff if the headteacher requests this (which the guidance advises against for fear of the review being too prominent or inspection-like).

Some variations in practice occur, such as the extent to which individual reviewers contribute to the final discussion with the school. Most lead reviewers encourage team members to lead on aspects they have focused on, but a few take on the main share of feedback. Discrepancies like this are reduced through the monitoring of reviews and at lead reviewer annual training days. Training for lead reviewers has stressed the principle of 50/50 contributions by the review team and the associated senior leaders from the school.

The other issue is the number of new reviewers on a team. In some reviews they are nearly all new. In one, we felt that if there had been a greater mixture of experience there may have been more challenge. It was difficult for the lead reviewer to really quality-assure them, but she did a good job.

The stance of the reviewed school is important. Partners interviewed took the review seriously, went to some lengths to provide the reviewers with all relevant information and data, and facilitated the event helpfully. Where reviews were most successful, schools were clear about the questions they wanted the review to answer and were candid about weaknesses as well as strengths. They saw the peer review as developmental rather than inspectorial, and invited searching examination and discussion but not what they termed an 'inspectorial approach'. The great majority of lead reviewers find the right balance and defuse any defensiveness.

### 5.2 Effectiveness of the lead reviewer

Lead reviewers are all experienced independent inspectors who have been trained and accredited by Ofsted. Extension of their contracts with

Challenge Partners depends on maintaining the highest standards in their work, following both the QA review requirements and the code of practice set out for lead reviewers. Challenge Partners has dispensed with the services of a small number of reviewers who, it emerged, did not meet their standards.

The lead reviewer is pivotal to the integrity of the review. Lead reviewers are experienced inspectors, familiar with Ofsted criteria and all the technicalities of external evaluation from analysing data to giving feedback. They have the additional responsibility of both orchestrating and quality-assuring the work of a team in two halves: the external reviewers and the review partners from within the school. There is a weight of evidence to show that most lead reviewers handle this multiplicity of roles well and assure the review against any shortcomings or shortfall in reviewers.

The three reviews observed in the course of this evaluation, together with interviews with reviewers, partners and senior partners, provided ample evidence of the spirit of partnership between external peer reviewers and senior leaders in the schools concerned. Lead reviewers generally are held in high regard by partner school headteachers, although it is not uncommon for the heads of schools that have had three or four reviews to identify one that did not go quite as well as the others. The style and professionalism of the lead reviewer are all-important and success in the role is characterized by professional expertise and open and adroit management of relationships, veering towards neither undue formality nor familiarity.

Evaluations completed by 71 headteachers after their reviews in 2015 scored a number of questions on a scale of 0 to 10, with 10 being the most positive rating, and augmented the scores with comments.

| How well did the lead reviewer manage the review? | Mean rating | Modal rating |
|---|-------------|--------------|
| Headteachers of reviewed schools (N=71)           | 9.36        | 10.0         |
| External team reviewers (N=200)                   | 9.25        | 10.0         |

The overwhelmingly positive responses used such adjectives as excellent, professional, challenging, helpful, supportive and fair – often in combination – when commenting on the attributes of lead reviewers. When headteachers described lead reviewers as excellent, they expanded this, for example as ‘perceptive, rigorous and yet receptive’, ‘clear, fair, challenging and interested’, or ‘clear and focused, with a good balance between challenge and support’. Team leadership is crucial. One lead reviewer ‘led the team very well and communicated with me and my senior team superbly’.

| How well did the review team communicate with the school during the review? | Mean rating | Modal rating |
|---|-------------|--------------|
| Headteachers of reviewed schools (N=71)                                     | 9.15        | 10.0         |
| External team reviewers (N=200)   | 9.20        | 10.0         |

Sensitivity and good communication are essential ingredients of professionalism. Schools appreciate good listeners and respect lead reviewers who ask challenging questions and have a perceptive understanding of the school and what it is trying to do. For example, one – a former HMI – ‘listened well, but her experience and knowledge gave her authority and independence’. Another lead reviewer was said to be ‘very sensitive to people’s feelings during the process but still created the right degree of challenge’. Reviews are not inspections: schools appreciate reviewers who share their expertise. Several headteachers and senior leaders commented on how much they had learned from working alongside the lead reviewer, how they appreciated receiving advice offered on key areas or the helpful comments of lead reviewers.

Challenge Partners encourages lead reviewers to regard the senior leaders in the school as part of the review team. All lesson observations are undertaken jointly and discussed even-handedly afterwards, with the school member of the pair of observers taking responsibility for feeding back to the teacher concerned. Several respondent headteachers commented on this partnership, appreciating lead reviewers who, for example, while being ‘professional, enthusiastic, fair and challenging’ nevertheless ‘encouraged full collaboration of the staff during the review’. Increasingly, senior leaders are also reviewers and know the way the process works.

Very occasionally a lead reviewer did not take the right tone with the school, in one case being ‘too inspectorial – which meant that senior leaders were on edge’, in another being described as ‘efficient and professional but with a manner that was not overly conducive to building a good relationship’. The example set by lead reviewers is important and their influence wanes if, for example, they ‘become too glued to the office – relying only on the evidence of others’; ‘make an inappropriate comment’, or ‘add little to the school’s knowledge or the development of its leaders’.

Challenge Partners has successfully developed and vastly scaled up the provision of QA reviews. Two ‘head reviewers’, both experienced inspectors, provide professional leadership and quality assurance. They are responsible for refining the review procedures and training reviewers and lead reviewers. Training events for reviewers, nominated by partner schools, are commissioned by hubs and usually delivered by one or other of the head reviewers in hub schools. Lead reviewers are updated at an annual meeting.

While the great majority of lead reviewers accomplish effective reviews, there are differences in the way they do it. There is some evidence of minor inconsistencies among lead reviewers in terms of managing the process. This may be due to unwitting divergence, taking short cuts, or compensating for any shortcomings among reviewers. Examples include the following:

- Variation in who leads and contributes to the final discussion with the school. Some lead reviewers lead it entirely and some let the team take parts or even hand over to the team.
- Different degrees of authenticity of reviewing *in partnership with the school*.



- Differences in discharging responsibility for monitoring and guiding team reviewers.
- Different expectations of the written output of reviewers.
- Different perceptions about the lead reviewer's contribution to the evidence base and findings of the review or whether the role is solely managerial.

The annual lead reviewer training (2.2) is designed to iron out such inconsistencies. This raises the question of implications for QA reviews if lead reviewers are no longer Ofsted accredited. Since schools want lead reviewers who have experience of applying the inspection framework and can benchmark the school accurately against Ofsted inspection standards, Ofsted accreditation of lead reviewers is an attraction to partner schools. In the short to medium term, the supply of former HMI and other Ofsted inspectors (who have to commit 32 days a year to remain accredited with Ofsted), or school leaders who have satisfied Ofsted training but do not wish to sustain the level of commitment required by Ofsted (16 days a year) while leading their schools may be sufficient to satisfy the demand for lead reviewers.

### **5.3 The quality of reviewers**

Headteachers (71 surveyed) readily associate the strengths of the review process with:

- i. the professionalism and skill of the review team (25 responses)
- ii. opportunities for professional dialogue and discussion (17)
- iii. external validation of the school's approach and self-evaluation (15)
- iv. the collaborative approach (12)
- v. identification of areas for improvement or development (8).

Comments that give a picture of professional competence valued by headteachers include:

The reviewers quickly understood the school, its context and its history. They drilled down into the data to uncover issues which chimed with those that senior leaders uncovered. Reviewers were fair and helpful in their lesson judgements. Issues identified by the review were well supported by evidence.

The quality and range of the team ensured a balanced and realistic set of evaluations. Reference to the Ofsted framework was very useful to us in our situation ['requires improvement']. The sense that it was all about development as much as review was very reassuring.

The great majority of team members are valued by the reviewed schools for their expertise, the fact that they are peer practitioners from a different context, their interest in the school and the way they relate to colleagues in the schools. Reviewers are well trained (see 2.2) and feel prepared for the task. Many comment on how they value the guidance, and in some cases coaching and mentoring, provided by their lead reviewers. It generally



helps to have a balance of experience in a team, but in some of the teams observed, a first-timer was at least as effective as more experienced reviewers in the team. We identified some concerns by schools about the balance of experience represented in review teams. These included:

- the balance of reviewer experience, ensuring that not all reviewers were new to reviews
- the balance of professional background, with some schools attaching importance to having a headteacher reviewer on the team
- the quality of reviewers' schools, in terms of the desirability of one or more reviewers coming from very good or outstanding schools, particularly if they were reviewing outstanding schools.

Some schools make a strong case for cross-phase expertise within a review team. We found successful examples of secondary review teams that included a primary leader as a reviewer, who provided a valuable perspective on Key Stage 3, and a special school team that included a 16–19 specialist reviewer since the school had recently extended to key stage 5 from being 4–16 years. Lead reviewers generally work across sectors, but include a number with expertise in special education needs and disabilities.

#### **5.4 Robustness of 'estimates' (judgements about the school's overall quality)**

The QA review process is a sophisticated and original approach to school evaluation, tested on an increasing scale over the four years since its inception. The process has been shown to work well, without loss of rigour or challenge, when all players work together in the way that is intended. It makes demands on professionalism. It carries risks, particularly if the right climate is not established or if either reviewers or the school misunderstand how the process should work. These risks appear to be small, since there are very few unsuccessful reviews, i.e. reviews that are seriously flawed or whose outcomes are challenged.

As for the suggestions that reviews are 'soft', our evidence supports the earlier analysis by Challenge Partners that in general they result in judgements equivalent to or tougher than Ofsted inspections.

'To provide a comparable analysis between the Ofsted judgements and QA review estimates we looked at the 79 schools that have hosted QA reviews since September 2013 when the latest Ofsted framework was introduced ... We found that QA reviews estimates are consistent with the school's most recent Ofsted judgement most of the time.' Where they are not, they give a lower (i.e. tougher) overall estimate than Ofsted's most recent grade (in 18% of reviews) and a higher grade compared to Ofsted in 8%.<sup>35</sup>

The Challenge Partners study found no relationship between the outcomes of QA review judgements and the phase of school, lead reviewer or composition of the review team. Asked whether lead reviewers of 130 QA reviews undertaken in 2014–15 thought Ofsted would downgrade the school from its current status 'if they came into the school tomorrow',

lead reviewers responded ‘yes’ (9.3 per cent) or ‘maybe’ (18.6 per cent of reviews). In 10 per cent of those schools, lead reviewers expressed concern about the trajectory of the school.

We have not found the reviews to be less robust than Ofsted inspections, but different: more developmental, focusing on identifying what went well and what could be even better.

One headteacher, whose school was found to require improvement when inspected by Ofsted in 2013, subsequently was supported by a Challenge Partners hub school, became a partner school and had a QA review in 2014. The review decided that the school was still likely to be in the ‘requires improvement’ category and this also applied to school improvement strategies, achievement and the quality of teaching. The school was in denial and found it difficult to accept the QA review report. A subsequent monitoring visit by HMI early in 2015 corroborated the review by finding the ‘senior leaders and governors are not taking effective action to tackle the areas requiring improvement’. The letter commented on the value of external support through Challenge Partners and another school and the ‘sensible and clear recommendations for where further improvement is needed to ensure accurate information on student achievement’.

(Lead reviewer, corroborated by an Ofsted s8 letter)

Involvement of the school’s senior leaders in all aspects of the school does not appear to attenuate or ‘soften’ the review’s findings. They are, after all, party to the evidence that led to those findings. By the end of the great majority of reviews, everyone is in agreement about the outcomes and the report brings no surprises.

The reviews have ‘face validity’ through focusing on aspects considered by the senior partners to be key indicators of school effectiveness (pupil achievement and quality of teaching) and school improvement (school improvement strategies). Leadership is implicit in all these. Reliability is secured through i) benchmarking judgements against Ofsted’s grade descriptors wherever possible, ii) dual observation and evaluation of lessons, and iii) the lead reviewer’s focus on quality assurance during the review.

### **5.5 Quality assurance systems and procedures**

Challenge Partners makes a significant investment in the quality assurance of reviews. Quality assurance has four strands in addition to the training evaluated earlier:

- i. monitoring the on-site performance of peer reviewers
- ii. observing a sample of reviews
- iii. quality-assuring review reports
- iv. surveying the perceptions of schools, reviewers and lead reviewers.

i. Lead reviewers have a crucial on-site quality-assurance role in managing the review – in an unfamiliar school with unknown reviewers and senior leaders. One lead reviewer briefed the team on her quality-assurance role:

I shall come in to some lessons with you to quality-assure the process. I shall be looking at how you manage to draw the senior leaders out as much as possible. That's what I shall be looking for. Some reviewers and senior leaders try too hard to prove themselves and don't give the other much chance. I shall also come into the aspect meetings with you so I get a good grasp of what is going on.

In the lessons where the lead reviewer was also present, this was not a burden and lead reviewers tended to add real weight to the subsequent discussion. Flipcharts listed EBI and WWW items for each lesson but one drawback was that these were not always used in discussions with the team. Individuals used them and the school had them left at the end to use (flip-charted) but more discussion could have led to greater challenge. Lead reviewers quality-assured the observation and discussion processes although this did not always extend to perusal of the completed lesson observation forms, which for some reviewers were too skimpy.

ii. Reviews and the work of lead reviewers are subject to monitoring visits by one of the two head reviewers. One described the process as follows:

We go for the full day session. I shadow the lead reviewer. I don't normally go into lessons with them (because they are already observing the reviewer and senior leader in the classroom) but shadow while in discussions, go to meetings, speak to the head about how the review is going, and speak to the review team about how much support they are getting and how the pre-review analysis day went. I also observe the end of day meeting. I give oral feedback to the lead reviewer but also have a checklist for whether they are doing this and this. Example of things to look for include: 'in the meeting at the end of day 1 are you ensuring that the dialogue is 50/50 between school and team?' and 'how well are you coaching reviewers?' 'How well are you enabling senior leaders to take a lead or have their say?'

iii. All draft reports are checked by one of the head reviewers before being sent by the lead reviewer to the school. Some reports require quite a lot of work, for example, re-ordering findings that are misplaced in the text. When that happens, the lead reviewer is sent an email asking them to remember to put things in the right place. Hence they do get feedback. It can take between 20 minutes and an hour to check and correct each report. Reports are returned to lead reviewers as PDF files within two or three days and are then sent to the school.

Sometimes a school might ask for something to be changed. This very rarely happens, and shouldn't, because the school has been party to the outcomes. Any requests for changes are referred to a head reviewer, who

advises on the appropriate action. Lead reviewers say the review and editing process is a lighter touch than that which applies to inspection reports.

Challenge Partners is aware of some inconsistencies in reporting and have made their expectations clear at lead reviewer training events. We found some variation in the quality of reports and, for example, in the layout of reports across the schools within a hub – which is noticed when those reports are shared across the hub schools. More consistent use of a definitive template would help improve consistency of reporting. Schools are generally content with the quality of review reports, although some are known to make corrections before showing them to the governing body. Although the report is for the professionals in the school and is not published by Challenge Partners, some partner schools can and do choose to put them on their websites.

iv. Satisfaction surveys give the QA reviews and their conduct very high ratings. All headteachers *and review team members* are surveyed after every review, and lead reviewers also complete a QA questionnaire. The small number of issues that arise in these responses are followed up, if necessary by the managing director of Challenge Partners. If appropriate, a lead reviewer will visit and monitor the next inspection undertaken by that lead reviewer, provide feedback or instructions, and track the reviewer's ongoing assignments.

#### *The power of partnership*

Although not a formal strand of quality assurance, one example shows that it would be wrong to underestimate the collective strength of the most effective hub partnerships. Challenge Partner schools are not islands. Whatever other networks they may be part of, membership of Challenge Partners means they are being challenged as well as supported by both their peer hub partners and by Challenge Partners, which monitors performance of all partner schools and feeds that information to the schools and hubs.

If a QA review report is not consistent with hub knowledge of a school, this is likely to be discussed and analysed at a meeting of hub headteachers. They are accountable not only to their school communities but also to each other, such is the power of trust and the principle of moral purpose that links the partners. A striking example is a hub that commissioned and paid for a further Quality Assurance review for a member school that had put pressure on a lead reviewer to say the school was better than the evidence showed. As the senior partner reported:

Occasionally, new headteachers taking up post in Challenge Partner schools do not see why they should have QA reviews or what their value is. One of our partner schools recently appointed a new headteacher. He did not behave well and really pushed the lead reviewer to say the school was good. This could not be resolved so the hub paid for another review led by a very experienced former HMI. The review found that the school definitely required improvement. The headteacher has been replaced.

We leave the last word on quality to a deputy headteacher who is also a secondary hub manager, having experienced two reviews of the school.

My view is that we have all been very impressed by the quality of the lead reviewers. The quality of the review stands or falls by the lead. We have had two very good leads. We also had good and experienced senior leaders as reviewers. On both occasions we were impressed with the professionalism with which the reviews were undertaken, their understanding, the contextual appreciation of the school, and also the opportunity for us to have an input into what we would like them to look at. It is brilliant to get someone else to do some research on your behalf and give you some feedback. Another thing: the colleagues whose lessons were observed really liked the fact that there were senior leaders coming into their classroom – peers, they felt, less scary than inspectors. On both occasions the nature and conduct of the reviewers, their professionalism, their ability to engage, their thoughtfulness about the whole process, has made the reviews go very smoothly and therefore the report and the information that comes out of it earns much respect.

## Part 6

# Looking forward

In this part of the evaluation, we extrapolate from what we know about Challenge Partners and QA reviews to consider how reviews might evolve further, and their contribution to a self-improving school system. We have identified a small number of essential conditions – non-negotiables – for successful peer reviews.

### 6.1 Conditions for the success of quality assurance reviews

#### *The importance of trust*

Our evidence suggests that trust is an essential ingredient of peer review. From the outset, Challenge Partners understood that partnerships that not only support but challenge rely on high levels of trust. At system level, for example across the 300+ Challenge Partner schools, this translates into high social and organizational capital. As David Hargreaves wrote:

... if you know that someone trusts you, you are able to challenge and constructively criticise that person because it is recognised that you are doing so for that person's good. The deeper the trust, the less the challenge provokes defensiveness and denial, which are common responses to challenge in low-trust relationships. When high social capital obtains, the assumption is that challenge will be reciprocal. In fact, reciprocal challenge can reinforce the trust on which it depends, for it is an expression of the concern of each partner to foster the development of the other.<sup>36</sup>

Two examples demonstrate the importance of trust with school partnerships. One large chain of schools withdrew from Challenge Partners because most of the schools were not ready to accept peer reviews. In effect, the social capital in this disparate and widely spread group of schools had not reached sufficiently high levels to enable QA reviews to be viable. Our study of other peer review partnerships confirms the importance of social capital in the partnerships.

In a small proportion of cases, estimated at no more than 1 in 10, a school finds it difficult to accept the findings of the review team, even though there is much less at stake in a review than an Ofsted inspection. The reason is more likely to be a breakdown of trust than an incompetent review. In one example, a school judged by Ofsted to require improvement was in denial about a subsequent challenging QA review report, which had estimated that the school would still be found to require improvement when next inspected. An ensuing Ofsted inspection visit validated the findings of the QA Review and related support:

The academy has been working with Challenge Partners and [another] school. This valuable support has been centred on checking whether teachers are accurately assessing student achievement. This external

support has identified strengths in teachers' practice and made sensible and clear recommendations for where further improvement is needed to ensure accurate information on student achievement.

(Ofsted section 8 report, 2015)

### *A matter of challenge*

A key non-negotiable is that every QA review has to be a challenging process, not a question of superficially testing and rubber-stamping the school's view of itself. There is little evidence that the partnership approach is detrimental to the rigour or probity of the review. But there are a few occasions when a school has been disappointed, even dissatisfied, if the review has provided little critical challenge.

QA reviews are distinctively different from inspections in scope, style and approach but share the same disciplines of collecting and analysing evidence and forming evidence-based judgements informed by inspection criteria (see Annex A). The main difference is that the QA review is commissioned by the school and undertaken in partnership with the school. The review benefits not only the school but equally the reviewers and their schools.

This means, as several schools – including outstanding schools – told us, that they do not have to hide anything from reviewers, since the reviews are for them and aim to help them. This is not perceived to be the case with inspections, when those same schools said they would tend to be more guarded. The schools that benefit most from reviews are those that really want the views of critical friends, validated by an accredited professional evaluator. The whole point of these reviews being conducted by schools, for schools, means that there is everything to gain and little to be lost through robust professional discussion and rigorous examination of the available evidence. Compared with inspections, reviews appear to have less at stake, although one senior partner 'has always felt reviews to be high stakes in terms of staff morale and motivation – and high stakes with governors'.

The suggestion of greater transparency in peer reviews generally – compared with external inspections – is echoed in the NFER report on local authority (LA) safeguarding children peer reviews. Compared with inspection:

One Director of Children's Services noted that an LA might take a different approach to a peer review self-assessment than that for an inspection. He felt that within the peer review 'safe' environment, LAs might share more dirty washing than they would usually share with Ofsted.<sup>37</sup>

### *Capable lead reviewers*

A review cannot be better than the quality of the lead reviewer. We have established that a key condition for successful QA reviews relates to the expertise of the lead reviewer and the competence of the review team. Confidence in lead reviewers has been shown to be very high. Lead reviewers undergo a selection process that assesses their facilitation skills, ability to have productive dialogues and the capacity to manage the review while



coaching and developing the peer reviewers on the team. We judge that it is an advantage to have experienced inspectors as lead reviewers, not only for the experience and skills they bring but also their credibility in estimating where the school is likely to stand if inspected. For schools that are constantly alert to an inspection, it is important that peer reviews are calibrated according to the latest Ofsted benchmarks.

*Adaptation in response to need*

A further factor is ensuring that QA reviews remain fit for purpose. The majority of schools we questioned valued the continuity provided by annual QA reviews and felt that the standard (model 'A') review as described in part 3 of this report was helpful to them and their governors in validating self-evaluation and keeping the school on its toes through the EBI issues. Some of the original partner schools have had four QA reviews since Challenge Partners was formed. We were curious to discover whether these schools would continue to want annual QA reviews into the foreseeable future, and whether the pattern of reviews would continue to meet their needs. The most emphatically affirmative responses tended to come from outstanding schools:

In our case, not having had a full Ofsted inspection for about eight years, it's an obvious advantage to have a review every year so that at least you are auditing teaching and learning and getting independent quality assurance of that. It also proved very helpful to have external eyes looking at our data and challenging our view.

(A senior partner)

Other schools felt that there might be advantages in focusing the review on a particular area every other year, or one year in three. This approach has been piloted, reviewing Key Stage 3 in one school, for example, and mathematics in another:

The single subject review was very helpful. The fact that both reviewers (one a maths ex-HMI) were subject specialists added hugely. They knew exactly what was going on at the coal face. They knew about changes to the specifications, how assessment should work in maths, assessment without levels, and the new approaches to problem-solving and maths mastery. The review had a huge impact on us as a department. An external pair of eyes was so useful. A good example was that one reviewer saw three classes being taught the same thing but in a slightly different way. He questioned our planning and the fact that one approach was so much better than the other two. He also looked at a book sample and his feedback to two members of staff was very helpful to them and they have now moved forward.

(A partner school)

Another school favoured putting different aspects of the school under the spotlight in between having 'a general check'.

As part of a school which has a school improvement vision, you would want someone to come in regularly and do a rigorous health check and challenge. I don't think you need this every year because you have



RAISEonline and other data you can look at. But it is good to focus the spotlight on other things that you do.

Schools generally are content with the current pattern of reviews while they are striving to raise their standards or become outstanding, but think that, over the years, some reviews should be more thematic to avoid them becoming repetitive.

## 6.2 Quality assurance reviews in a self-improving school system

### *Peer-based accountability within a national performance framework*

Implicit in an increasingly autonomous, self-improving school system is that there should be less external inspection as schools take more collective responsibility for quality and standards across the school system. The whole-school accountability scenario in England has evolved in ten-year stages. School self-evaluation evolved rapidly from 2001 after a decade of regular school inspections using a framework of principles and criteria. Peer reviews of schools by schools have expanded rapidly since 2011, when the 2010 White Paper<sup>38</sup> and 2011 Academies Act leveraged both system leadership and school autonomy to new heights. The natural consequence of the drive for a self-improving system is less inspection and more authentic and robust peer review, with individual and school self-evaluation remaining a constant (figure 4).

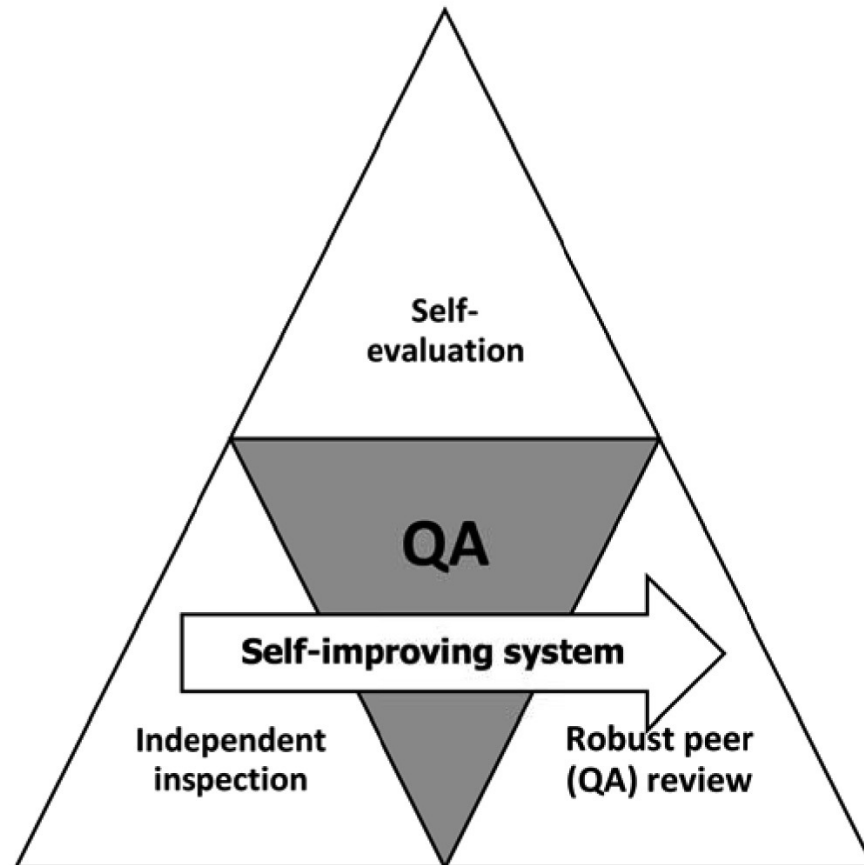


Figure 4. Peer reviews within a performance framework

The state of Victoria, Australia has come to a similar conclusion, influenced by the work of Hargreaves on self-improving schools:<sup>39</sup>

Our goal of creating a self-improving system is advanced by fostering the development of peer-based accountability and by harnessing the collective expertise and experience that resides in [Victoria's] schools (9).

Victoria has built peer review into a wider Performance Framework supported by 'a cycle of performance feedback'.

Peer validation and review represent a critical source of external input and stimulus. Self-evaluation findings are challenged, in a respectful manner, by drawing on the expertise and experiences of peers and external perspectives. Peer validation and review feeds directly into performance reporting ... Performance reporting facilitates transparency (10).

England could well take a leaf from Victoria's book and promote an integrated school performance framework. Challenge Partners has demonstrated through its QA reviews how it is possible to have a robust, independent, expertly led peer review system run by schools for schools that complements periodic inspection. An increasing number of teaching school alliances are using peer review as part of their approach to quality assurance.

They see formative accountability as particularly important at this early stage of establishing the teaching school partnerships. An annual peer review is likely to enable better challenge and support for their development. The peers involved in the review will also learn from their training and the insights gained from undertaking the process itself.

(Gilbert, 2012)

It is time for QA reviews to be recognized for the contribution they can make to school evaluation, improvement and building leadership capacity. 'Challenge' is a significant omission from the six strands of activity that characterize teaching school alliances. QA reviews provide that element of challenge in those partner schools whose hubs are teaching schools. They also contribute strongly to professional and leadership development by generating trained and experienced reviewers among senior leaders in partner schools. Peer reviews provide a mechanism for an annual quality assessment of the outstanding schools that are at the heart of initial teacher training, school-to-school support, action research and professional development, some of which have not been inspected for nearly a decade. It is these outstanding schools that most value the regular QA review.

Teaching school alliances, important players in the self-improving system, need the challenge and quality assurance that authentic peer reviews can provide. Some undertake peer reviews but more teaching schools need to be in a position to review their alliance partners. Challenge Partners, many of which are also teaching school alliances, are piloting reviews of the effectiveness of hubs. Such measures reflect the logical proposition that a self-improving school system must also be a self-reviewing system.

### **6.3 QA reviews and Ofsted inspections: A new relationship?**

In her work on school accountability in a self-improving school system, Christine Gilbert – former HM Chief Inspector – wrote that ‘if Ofsted were to take a different approach to the inspection of those schools that had undertaken a strong self-evaluation process, tested out laterally with peers, change would be dramatic’. She also anticipated the changes that Ofsted introduced from September 2015 in which Ofsted would spend a day in a good school validating whether it was still good, only extending this section 8 inspection to produce a full section 5 inspection report if the inspectors had concerns or felt the school might be outstanding.

Ofsted is changing and is clearly committed to closer partnership with schools. Having brought the organization and management of inspections back in-house after 23 years of contracting out, it is relying much more on trained school leaders to make up inspection teams, led by HMI. Ofsted inspectors and peer reviewers are likely to be drawn from the same pool of practising headteachers and senior leaders who spend some of their time as trained evaluators. Rigorous evaluation skills will be much more evident in school leadership, and the system can only benefit from an injection of such knowledge and skills.

In a system in which:

- i. most outstanding schools are exempt from inspection, unless their performance deteriorates<sup>40</sup>
- ii. good schools are inspected for a day approximately once every three years, unless there are concerns or they have become better than good, and
- iii. inspection attention is focused on inadequate schools and those that require improvement,

there is need for authentic peer evaluation such as that provided through Challenge Partners’ QA reviews. It is only through robust peer reviews that schools can calibrate their self-evaluation, reassure their governing bodies, gain from insights into other schools and grow their leadership capacity through what teachers constantly describe as ‘the best professional development they have ever had’.

In such a scenario, it is important that Ofsted continues to provide the benchmarks and/or criteria against which school quality and standards can be judged. Ofsted frameworks played an essential part in the last decade when schools were becoming proficient in self-evaluation, and they now also provide the scaffolding for peer review. Equally, the skills demonstrated by the most capable HMI are those to which lead reviewers should aspire. Ofsted has a great opportunity to model best practice in school evaluation as well as to validate the peer-review findings of those schools that decide to share them with inspectors.

We must not lose sight of the fact that inspections and QA reviews, while using the same evidence and similar processes, have different audiences and accountabilities. What they have in common is a fundamental commitment to ensuring that all pupils have the best possible outcomes. QA reviews, unlike inspections, have the strength and resources of the sponsoring partnership to

provide the ongoing expertise, support and challenge for all member schools. Inspectors must focus their resource on where the greatest need lies.

Developments in the external evaluation of schools suggest increasing convergence between inspection and peer review, marked not least by Ofsted's renewed encouragement of practising school leaders to become inspectors. HMCI Sir Michael Wilshaw has stated that from September 2015 seven out of ten Ofsted inspectors will be serving practitioners. He hopes by the end of his tenure to see a serving school leader in 100 per cent of all inspection teams.<sup>41</sup>

The multiple gains that accrue so evidently in Challenge Partners' approach to peer reviews may also come to be reflected to some extent through Ofsted's increasing use of 'peer inspectors'. This was recognized by the House of Commons Education Select Committee in a report on the work of Ofsted:

We are convinced not only that inspectors have more credibility when they are serving practitioners, but also that there are benefits to be gained for the inspection service itself as well as for the settings inspected ... The exchange of information and the opportunity to see the most effective practice and to take it back into their own institutions ... is phenomenal.<sup>42</sup>

There are also risks in using practitioner inspectors and peer reviewers alike. These relate to the extent to which these evaluators can step aside from the beliefs and perceptions they have acquired within their own particular school contexts and become impartial evaluators. We know of examples of both inspectors and reviewers who have brought their own 'baggage' inappropriately to an inspection or review. But our evidence suggests that the rewards that accrue from using practitioner evaluators far outweigh the risk – because of the potential for multiple benefits.

For Challenge Partners and other schools engaging in regular peer review, the balance of external evaluation has already shifted from inspection to peer review, in frequency as well as ownership. Such rebalancing is consistent with the direction of travel of a self-improving school system. Good and outstanding schools welcome peer challenge as an antidote to any hint of complacency or self-delusion. School senior leaders have demonstrated the ability to act as effective peer reviewers (or Ofsted inspectors). It does not require a huge leap of faith to envisage a time when the judgement of whether a school is outstanding, or can be recommended to Ofsted as such, is entrusted to its peers!

This has implications for the national inspection system which, in any case, is increasingly focused on underperforming schools, with only a triennial health check of those that are good. Annual authentic peer reviews, if necessary using procedures validated by Ofsted, could reduce the frequency of such health checks while providing more collateral benefits to the system. A move in this direction would contribute to meeting two of the challenges faced by the Department for Education: securing greater value for money and further reducing the burden of Ofsted inspections.

## Annex A. Comparison of the main elements of short (section 8) Ofsted inspections<sup>43,44</sup> and QA reviews<sup>45</sup>

| Aspect                                    | Ofsted (inspections of schools previously judged 'good')   | QA reviews (Challenge Partners)  |
|---|--|--|
| Sponsor                                   | Government   | Challenge Partner schools  |
| Ownership of the report                   | Government and civic society   | The reviewed school  |
| Funding                                   | Government: Ofsted through the Department for Education  | Subscription by partner schools (paid lead reviewer and release of peer reviewers)                                       |
| Lead inspector/ reviewer                  | HMI  | Currently former HMI or Ofsted-trained inspector   |
| Other external team members               | Ofsted-trained inspectors, increasingly serving school leaders   | Trained independent senior leaders from distant partner schools  |
| Degree of independence of reviewers       | Very high  | Very high for external, low for internal reviewers   |
| Involvement of leaders in reviewed school | Constructive and challenging professional dialogue between HMI and school leaders; agreed strategy for visiting lessons  | Full and equal partnership; all lessons are observed jointly and school leaders contribute to the findings of the review |
| Duration                                  | One day in school plus preparation and reporting   | Half day on-site preparation; one and a half days' review, reporting   |
| Frequency                                 | Approximately every three years for good schools, <sup>46</sup> converted from short (section 8) to section 5 inspections where it is considered that the school may be either outstanding or less than good | Annual   |

*Annex A. Comparison of the main elements of short  
(section 8) Ofsted inspections and QA reviews*

|                                |   |   |
|--------------------------------|---|---|
| Scope of inspection/<br>review | Defined in the Ofsted Common Inspection Framework and School Inspection Handbook – section 8  | Defined by Challenge Partners, the school provides focus  |
| Criteria                       | Set by Ofsted. Outcome confirms that the school remains good  | Based on Ofsted criteria but stress WWW and EBI   |
| Feedback                       | Interim and concluding discussion   | Interim and concluding discussion   |
| Circulation of report          | The report, in the form of a letter, is a public document published on the web  | The school owns the report and decides on circulation; normally includes governors and hub school   |
| Follow-up                      | None, for schools that remain good, otherwise s5 inspection of s8 monitoring  | Needs identified and met through hub and/or Challenge Partners: five levels of support offered  |
| Main purposes of the scrutiny  | To provide: independent external evaluation and a diagnosis of what should improve; important information to parents, and public assurances that minimum standards are being met. | To provide: an annual check of self-evaluation; a challenge for the next year; identification of areas of excellent practice, and development opportunities for senior staff. |

# References and notes

- <sup>1</sup> Including alternative education providers.
- <sup>2</sup> ‘Very useful’ describes a score of 8/10 or higher on a 10-point scale from a sample of 71 heads of reviewed schools.
- <sup>3</sup> Matthews, P. and Berwick, G. (2013) *Teaching Schools: First among equals*, DfE/NCTL. Online. [www.gov.uk/government/publications/teaching-schools-first-among-equals](http://www.gov.uk/government/publications/teaching-schools-first-among-equals)
- <sup>4</sup> DfE (2015) *Teaching schools eligibility criteria*. Online. <http://tinyurl.com/o54279m>
- <sup>5</sup> Challenge Partners (2015). Online. [www.challengepartners.org/aboutus](http://www.challengepartners.org/aboutus)
- <sup>6</sup> QAA (2015) *Higher Education Review: A handbook for universities and colleges with access to funding from HEFCE or DEL undergoing review in 2015–16*. Online. [www.qaa.ac.uk/en/Publications/Documents/HER-handbook-15.pdf](http://www.qaa.ac.uk/en/Publications/Documents/HER-handbook-15.pdf)
- <sup>7</sup> Hill, R. and Matthews, P. (2010) *Schools Leading Schools II: The growing impact of National Leaders of Education*. Nottingham: National College of School Leadership.
- <sup>8</sup> DfE (2010) *The Importance of Teaching*. London: The Stationery Office.
- <sup>9</sup> Evidence from the Bradford Partnership and observation of a summer review.
- <sup>10</sup> NAHT School review programme (‘Instead’). Online. <http://tinyurl.com/oayhneg>
- <sup>11</sup> Boyne, G., Day, P. and Walker, R. 2002. ‘The Evaluation of Public Service Inspection: A Theoretical Framework’. *Urban Studies*, 39 (7), 1197–1212 (reference: 1206).
- <sup>12</sup> Gilbert, C. (2012) *Towards a Self-improving System: The role of school accountability*. Nottingham: National College of School Leadership. Online. <http://tinyurl.com/ovv4xkj>
- <sup>13</sup> Durrant, J. (2013) *Peer Challenge Evaluation for Medway Teaching School Alliance*. Canterbury: Canterbury Christ Church University.
- <sup>14</sup> Chapman, E. (ed.) (2014) *Reflection, Challenge and Development, Peer Reviews: The emerging picture*. London: Challenge Partners.
- <sup>15</sup> OECD (2013) *Synergies for Better Learning: An international perspective on evaluation and assessment*. Paris: Organisation for Economic Co-operation and Development.
- <sup>16</sup> The Central South Wales Challenge is investigating the possibilities and potential for a system of peer review across the consortium. See [www.cscjes.org.uk/getattachment/Knowledge-Bank/Peer-Review/Peer-Review-Mark-Powell.pdf.aspx](http://www.cscjes.org.uk/getattachment/Knowledge-Bank/Peer-Review/Peer-Review-Mark-Powell.pdf.aspx)
- <sup>17</sup> Challenge Partners (2011) *Introduction Pack*. Online. [www.challengepartners.net](http://www.challengepartners.net)
- <sup>18</sup> Challenge Partners (2014a) *Quality Assurance Review: Headteacher handbook 2014/15*.
- <sup>19</sup> Challenge Partners (2014b) *Quality Assurance Review: Lead reviewer handbook 2014/15*.
- <sup>20</sup> Challenge Partners (2014c) *Quality Assurance Review: Reviewer handbook 2014/15*.
- <sup>21</sup> Challenge Partners (2014d) *Annual Report (2013)*. London: Challenge Partners. Online. [http://challengepartners.org/assets/CP-Annual\\_report\\_2014.pdf](http://challengepartners.org/assets/CP-Annual_report_2014.pdf)
- <sup>22</sup> Challenge Partners (2015a) *Annual Report (2014)*. London: Challenge Partners. Online. [http://challengepartners.org/uploads/resources\\_one/1426520332-CP\\_-\\_Annual\\_Report\\_-\\_2015\\_-\\_FINAL.pdf](http://challengepartners.org/uploads/resources_one/1426520332-CP_-_Annual_Report_-_2015_-_FINAL.pdf)
- <sup>23</sup> *Ibid.*, 14.
- <sup>24</sup> Berwick, G. (2010) *Moral Capital*. Online. [www.georgeberwick.com](http://www.georgeberwick.com)
- <sup>25</sup> *Reviewer handbook (op. cit.)*, 4.
- <sup>26</sup> Berwick, G. and Matthews, P. (2007) *The Teaching School Concept*. London: Challenge Partners. Online. <http://tinyurl.com/ofw5yl7>. See also Challenge Partners (2015) *Upwards Convergence: An introduction to creating a high performing and equitable system*. London: Challenge Partners.
- <sup>27</sup> Reviewer criteria; see online application form at <http://tinyurl.com/pfyyczy>
- <sup>28</sup> Data from a Challenge Partners online survey, June 2015.
- <sup>29</sup> Challenge Partners (2014a), 7.
- <sup>30</sup> Challenge Partners (2014b), 12.
- <sup>31</sup> Corcoran, R. and Lloyd-Jones, R. (2015a) *Lead Reviewer Training: School to school support*. Challenge Partners presentation.



- <sup>32</sup> Challenge Partners (2015b) *Hub Managers' Toolkit*. London: Challenge Partners.
- <sup>33</sup> Corcoran, R. and Lloyd-Jones, R. (2015b) Presentation on School Support, June.
- <sup>34</sup> Durrant (2013).
- <sup>35</sup> Chapman (2014), 16.
- <sup>36</sup> Hargreaves, D. (2011) *Leading a Self-improving School System*. Nottingham: National College for School Leadership, 23.
- <sup>37</sup> Easton, C., Martin, K. and Walker, F. (2002) *The Impact of Safeguarding Children Peer Reviews* (LGA Research Report). Slough: NFER.
- <sup>38</sup> DfE (2010) *The Importance of Teaching*. London: The Stationery Office.
- <sup>39</sup> Department of Education and Early Childhood Development (2013) *Professional Practice and Performance for Improved Learning: Overview*. Melbourne: State of Victoria.
- <sup>40</sup> Special schools, pupil referral units and maintained nursery schools that were judged outstanding at their previous section 5 inspection are not exempt from routine inspection.
- <sup>41</sup> Wilshaw, Sir Michael (June 2015) speech at the launch of *Future of Education Inspection*. Online. [www.gov.uk/government/speeches/speech-at-the-future-of-education-inspection-launch](http://www.gov.uk/government/speeches/speech-at-the-future-of-education-inspection-launch)
- <sup>42</sup> UK Parliament (2011b) *The Role and Performance of Ofsted*. London: House of Commons Education Committee.
- <sup>43</sup> Ofsted (2015) *Common Inspection Framework: Education, skills and early years from September 2015*. Online. [www.gov.uk/government/publications/common-inspection-framework-education-skills-and-early-years-from-september-2015](http://www.gov.uk/government/publications/common-inspection-framework-education-skills-and-early-years-from-september-2015)
- <sup>44</sup> Ofsted (2015) *School Inspection Handbook: section 8*. Online. [www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/462652/School\\_inspection\\_handbook-section\\_8.pdf](http://www.gov.uk/government/uploads/system/uploads/attachment_data/file/462652/School_inspection_handbook-section_8.pdf)
- <sup>45</sup> Challenge Partners (2015a) *Quality Assurance Review: Lead reviewer handbook*. London: Challenge Partners.
- <sup>46</sup> These arrangements will also apply to special schools, pupil referral units and maintained nursery schools that were judged outstanding at their previous section 5 inspection.