

Peer Challenge Evaluation for Medway Teaching School Alliance

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Executive summary

Peer Challenge follows a model developed within Local Authorities supporting self-evaluation and development within and between organisations. A pilot was initiated by the Executive Principal of the Williamson Trust Schools in Medway, on the basis of evidence that showed Peer Challenge could be a ‘powerful driver for improvement’. In this context it involved groups of head teachers and separate groups of governors working in ‘triads’ to investigate an issue and gather evidence in one another’s schools. They then discussed together what they had learnt and found, after which a summary of process and outcomes was circulated within the triad. The pilot involved three primary and three secondary schools in The Medway Teaching School Alliance (2 of which are member so The Williamson Trust) in the academic year 2012-13.

This evaluation involved generating key questions from documentary evidence which were used to frame two focus group discussions with pilot participants from secondary schools and primary schools. Also attending were the Teaching School Alliance Manager who facilitated the pilot and the Executive Principal of the Trust.

The evaluation found that participants had engaged in a robust and valuable process of Peer Challenge in relation to distinctive areas of focus for school improvement and for governance. Key elements of the cyclic process were identified: clear communication of purposes, principles and expectations; an initial meeting to identify areas of focus and practical details and agree dates; trustful collaboration and open dialogue; carefully planned

and structured group visits to each school with built in flexibility for appreciative enquiry; systematic documentation of process and outcomes and follow-up for maximum benefit.

As well as offering a unique opportunity to gather evidence, evaluate and reflect on issues with critical friends to support improvement in their own schools, participants gained a great deal from the detailed investigation in a contrasting context and the associated collaboration and dialogue. All were keen to develop the process further through another cycle of peer challenge with the same group and to draw others in.

Specific benefits resulted not only from changes recommended or suggested through Peer challenge but also as a result of participants bringing back ideas from visits, which were then implemented, making the most of collaborative opportunities opened up by the Peer Challenge contacts. The kinds of practical changes made included a new homework policy, improvements in behaviour and attendance and new strategies to support Year 10 progress in option subjects. It was noted that investigation of particular areas of focus helped to raised awareness of the issues in schools.

The pilot participants gave clear recommendations for extending and scaffolding Peer Challenge to support improvement within and between schools and identified risks to be avoided and addressed. It was agreed that Peer Challenge has the potential to help networks of schools to build and share knowledge about learning, teaching, leadership and organisational improvement. A vital part of this is the creation and reinforcement of trusting collaborative relationships and powerful critical dialogue between key players, creating a valuable resource to contribute to systemic improvement.

1. Introduction

Peer Challenge is an improvement process that is used by Local Authorities and other organisations to involve participants in supporting one another's self-evaluation and enquiry-based improvement activity. A pilot was launched for schools in The Williamson Trust in the academic year 2012-13, initiated by the Executive Principal of the Trust Schools. Building on evidence that Peer Challenge could be a strong driver for improvement within organisations, the intention was to explore the value of the process in supporting school improvement for selected schools within the Trust, with a view to expanding local involvement pending the outcomes of the pilot, for example into the Medway Teaching School Alliance, as well as disseminating further both locally and nationally.

The pilot involved head teacher and governor groups from three secondary schools and three primary schools meeting to agree a focus for appreciative enquiry in each school and to plan a day visit by the group to each of the schools. The members of the group visiting the host school gathered information, observed activity including lessons and talked with different members of the school community. They discussed what they had learnt and found at the end of the visit. A summary of process and outcomes was then circulated to schools in the triad. Each group of head teachers or governors carried out one cycle of Peer Challenge visits between Christmas and Easter 2013.

The objectives for the pilot were set out by the Executive Principal of the Trust as follows:

A: Host School

- To support the host school on its improvement journey
- To develop reflective practice within the school management
- To improve outcomes for young people in the school

B: Visiting Peer Challengers

- To develop the reflective practice of the Peer Challengers

C: Triad Schools

- To build collaborative capital within the school triad

D: For the development of Peer Challenge for Schools

- To develop a research-engaged practice
- To facilitate learning transfer to schools in other areas.

This evaluation was commissioned from Canterbury Christ Church University to examine evidence from the Peer Challenge pilot project within The Williamson Trust. This interim paper summarises the evaluation for the secondary pilot, involving Sir Joseph Williamson's Mathematical School, The Hundred of Hoo Academy and Greenacre Academy. This will inform the final stage of evaluation with head teachers and governors from participating primary schools.

2. Methodology for the evaluation

The evaluation involves an examination of evidence from the pilot in order to establish the following:

1. What do participants feel are the key elements of the Peer Challenge process?
2. What positive outcomes were achieved in relation to the pilot objectives?
3. What challenges were faced and how might they be met?
4. What aspects of the process were successful and what could be improved?
5. What are the issues in sustaining, scaling up and disseminating the project?

The evaluation began with an examination of documentary evidence from the secondary schools pilot, including

- initial papers written by the Executive Principal, setting out the vision, principles, structure and process for Peer Challenge and objectives for the pilot;
- working papers, including plans for secondary school visits, proformas and information circulated by schools prior to the visits;
- summaries of the visits and outcomes, which included evaluative comments about the process.

From these documents, a series of key questions was derived which formed the basis of the two focus group discussions. The secondary pilot focus group review was led by the external evaluator and attended by the Executive Principal, two of the three secondary head teachers and four governors who had participated in the project. The focus group also included the Alliance Director who had facilitated the activity, particularly for the governors' group. The primary focus group review was led by the Alliance Director and attended by the Headteachers of the 3 participating schools. Essentially the members of the focus group talked through the stages of the process in which they had participated in response to questions. They were also invited to raise their own questions and contribute additional comments with the explicit aim of informing further development of the Peer Challenge approach.

Two sets of notes were taken during the secondary focus group meeting, by the Alliance Manager and by the external evaluator. This was particularly helpful as the Alliance Manager added additional memos to herself in relation to moving the project forward, prompted by the discussion.

The evaluation report concludes with a set of recommendations in moving forward from the pilot.

Summary of analysis of evidence

This summary is set out under headings derived from the set of questions above:

- 3.1 Key elements of the Peer Challenge process
- 3.2 Extent to which the objectives for the pilot were achieved

3.3 Challenges faced and how they might be met

3.4 Aspects of the process that were successful and that could have been improved

3.5 Issues for consideration in sustaining, scaling up and disseminating the project

2.1 *Key elements of the Peer Challenge process*

After initial briefing, a group of governors and the 2 groups of head teachers from the six participating schools met to agree the focus for Peer Challenge, set dates and draft a programme for each visit. A face to face meeting was thought to be essential; participants felt that email or other virtual correspondence would not be so effective, not least as this discussion helps to build essential trust between members of the group and clarifies what each school wishes to gain. Some had not met before, and others had only limited knowledge of one another. Governors said that since opportunities are limited, ‘... we don’t normally talk to each other...we don’t know each other that well...’, but ‘... it’s amazing how helpful it is to meet and discuss’. Two of the head teachers were already working closely together but found that Peer Challenge added another dimension to this relationship and drew the third head teacher in. Participants were not sure whether individuals who were developing completely new relationships, individually and between schools, would be able to progress as quickly with the project but it was clear that individual commitment to the project and to the ‘triad’ group was vital to its success.

Head teachers said that they found it straightforward to identify a focus. They arrived at the initial meeting with clear ideas derived from knowledge of their School Improvement Plans and were able to evidence their choice. The aspects chosen by head teachers were

- Year 10 progress in option subjects compared with core subjects
- how middle leaders were raising standards
- whether Year 8 were being sufficiently challenged
- Key Stage 2 attainment and value added from Key Stage 1
- Writing across the curriculum
- Key Stage 1 attainment

Governors were asked to focus on aspects of their own governance, as distinct from school improvement priorities *per se*. In order to help with the focussing they were given a standard set of ‘20 questions for self-evaluation’ from which they were asked to choose two. They considered this to be extremely valuable to aid the focussing of the visits. The questions were not related to the schools’ Self-Evaluation Forms specifically, but were generic aspects that would be of concern to all governors. The aspects chosen by governors were:

- engaging with students’ responses / sixth form leadership
- behaviour and attendance / engaging with primary schools
- engaging with the school / reporting to different communities.

In each case they were examining how governors engaged with these issues to support school improvement. These areas of focus were described as ‘much more subtle’, counterbalancing the head teachers’ enquiries linked very specifically to school development priorities. Governors explained how the distinctive dimension of governance emerged more clearly where they became more confident and skilled at focussing their enquiries as the pilot progressed. The governors in particular said they were ‘feeling their way’ and would have appreciated hearing from someone who had already engaged in the process

After the initial meeting, the onus was upon participants in each school to make a detailed plan for the visit and circulate the arrangements to all concerned. Head teachers were directly involved in these arrangements. Evidence was circulated before the visits which tended to be succinct and ‘to the point’ to provide a way in for the investigation and give some context. It was not so detailed as to overwhelm the peer challengers and must not pre-empt their enquiry.

The visits themselves, to each school in turn, varied considerably, from a tightly planned series of formal lesson observations in one school, to a ‘free range’ approach where colleagues were invited to go wherever they liked, explore and ask questions. Everyone agreed that head teachers were successful in hosting the day, making visitors welcome and ensuring arrangements ran smoothly. Little was delegated; this seemed to have been taken as a personal responsibility. The head teachers felt that the process became ‘increasingly inspectorial’ from visit one to visit three. All head teachers were comfortable that the Peer Challenge process had been communicated appropriately to staff and students on the visit days and that the approach adopted had been valuable for their schools. Written reports show the criticality and rigour of the process, with some important issues identified for action as a result of challenging questions asked in relation to the evidence provided, for example in one school head teachers noted concerns about consistency of student tracking and about the clarity of rationale and systematic process for moderation, while in another school it was found that self and peer assessment was not being followed up sufficiently. A notable issue across the triad was the extent to which students used feedback effectively. Governors raised questions about how they could engage with schools and listen to local communities. Head teachers were proactive in following up ideas and recommendations and debriefing in their schools.

All participants felt they were ‘breaking ground’ with Peer Challenge, that a great deal of learning was involved. They were keen to ‘invite people back and do it again’, not only to examine new aspects but also to develop the process further. Both governors and head teachers were asking how they could ‘build it into what we do’, extending Peer Challenge further as an integral part of their self-review systems, involving networks of teams challenging each other, including teaching and support staff. They saw the potential for cultural and systemic change that would underpin school improvement with inter-school enquiry and collaboration.

In summary, the key elements of the process as identified by the pilot participants were:

- Clear communication of purposes, principles and expectations, with guidance to scaffold the process;
- Initial face to face meeting to get to know each other, agree focus areas and arrange practical details and dates;
- Clearly identified focus areas with supporting evidence for choices;
- Building of trustful collaboration and open dialogue between committed participants;
- Carefully planned and structured visits to schools with built-in flexibility for appreciative enquiry;
- Systematic documentation of process and outcomes;
- Proactive follow-up by all participants to ensure maximum benefit, for which head teachers took main responsibility.

In the case of the primary pilot, head teachers chose to involve 1 specialist member of staff to accompany each Head teacher on the visits. This ensured that expertise was brought to bear in carrying out the review and also had the effect of widening involvement in the peer review process beyond the head teacher.

2.2 Extent to which the objectives for the pilot were achieved

The ~~two~~**-five** head teachers attending the focus groups agreed that the pilot Peer Challenge cycle had achieved its objectives related to their chosen focus areas. More generally, it seemed to have exceeded expectations as they identified other positive outcomes that were not planned or necessarily expected. The elements of this analysis relating to the objectives set out by the Executive Principal are highlighted in bold italics below.

For head teachers, Peer Challenge is ‘a hook to hang things on’ - a mechanism for bringing aspects more into focus, giving them priority, raising everyone’s awareness of the issues and

giving a starting point for gathering a broader evidence base to support change. Head teachers also recognised the value in giving governors a clearer focus for their engagement with schools to support improvement. One head teacher said that while Peer Challenge was not a 'replacement' strategy and could not be said to be 'pivotal' in school improvement, '.....the more weapons we have in our armoury the better...' and was convinced that '... we are a better school for having done it'. All head teachers were ~~He was~~ able to give examples of practical changes that had been made to practice but said that even if there had been nothing specific like this to report, the experience of opening up a theme for discussion, placing emphasis upon it and discussing it with peers was always going to be a valuable experience. Peer challenge was therefore clearly seen as *contributing to the school's improvement journey*. It fulfilled the objective —of *encouraging reflective practice* on the part of participants. There was more evidence to reflect upon, but additional reflective practice was also fuelled by collaboration and dialogue with peers as 'critical friends': '... we are doing it to ourselves'. This relationship was seen as very distinctively supportive and, due to its openness, was felt to be more challenging and helpful than imposed accountability such as the Local Authority School Improvement Partner who would 'tell you what to do'.

~~An~~~~The~~ other head teacher reiterated the value of Peer Challenge as a tool for self-evaluation and improvement both organisationally and systemically. He viewed the focus as a way of cementing improvement by getting into the depth and detail of what is happening in school. The visits tended to generate practical suggestions that could be implemented in a relatively short timescale, immediately *benefiting student outcomes* (for example bespoke 30 day learning plans for Year 10 students). Indeed participants affirmed that student outcomes were always their concern and priority. One head teacher commented that 'pupil outcomes will improve as a result of the peer review'.

Governors testified that schools had 'benefited amazingly'. The process had opened their eyes and enabled them to see things differently, through comparison with what was happening elsewhere, as well as through feedback from peers' visits to their own schools. One example given was learning how other schools approached maintenance of the school buildings and site, which was additional to their specific focus area. They also benefited from the *collaboration* through a 'sense of being connected to something'. The involvement of both head teacher and governor(s) from each secondary school in Peer Challenge enabled evidence gathered to be fed back for further discussion, *enriching existing conversations and relationships*. Although the primary schools had not undertaken a governors peer review, the head teachers of 2 of the schools felt that there would interest from their governing bodies in engaging in the model.

With regard to the extent to which Peer Challenge was *supporting 'research engagement'*, participants were less certain in their responses but agreed that an evidence based approach brings new realisations and more rigour to evaluation. It allows participants to focus properly on questions about what needs to be improved and how to achieve this. It was clear that members of the focus group have taken their role seriously in piloting Peer Challenge. They were intending to report the outcomes to the National Governors' Association, the Local Authority and the National College for School Leadership, while the Executive Principal was engaged in continuing correspondence with others involved in developing Peer Challenge approaches. *Learning transfer* to schools outside those immediately involved was in the very early stages at the time of evaluation, as evidence from the pilot had only just been gathered together, but there was an impressive strategy for both local and national dissemination, with events and engagements with a range of organisations already booked. —There was also a clear intention to extend involvement locally by drawing more schools into the Peer Challenge network. The primary pilot triad had already engaged 2 further schools and plans were in place to draw them into the peer review. To avoid too large a team, head teachers

were considering developing 2 triads wherein each 'new' school would be partnered with 2 who had already engaged with the process.

Pilot participants were wary of 'pseudo-scientific' quantification of improvement but were confident to account for the positive impact of Peer Challenge as evidenced in the visit summaries and through their own experience. They were able to identify what they called 'proxy measures' of progress, such as improvements in attitudes to learning and better attendance figures. Where schools are working across many different initiatives and strands of improvement activity it is difficult to isolate cause and effect and therefore impossible to attribute improvements solely to Peer Challenge. More powerful is the testimony of pilot participants who, as busy professionals without the luxury of spare time and energy, recognise the value of Peer Challenge as contributing to their school improvement strategies. All the pilot participants remain personally committed to the process and keen to develop it further themselves as well as to extend involvement for their own schools and others in the network, because they can see the **benefits for students**. Moreover, one governor commented that they were particularly concerned to evaluate impact, rather than using the process tactically to 'show how good we are'. This demonstrates the need to ensure all new participants understand that the purpose is development of internal responsibility for improvement, as part of the school improvement agenda, above meeting external accountability demands by evidencing success stories.

Several strands of additional development had occurred as a result of participants being proactive back in their own schools, not only in relation to the areas of focus identified, but also where they had gained other knowledge and ideas they could put into practice. One example was an effective homework system observed during a visit, which was implemented in the visiting head teacher's school within a matter of weeks. Another example was some professional development for Middle Leaders, arranged collaboratively, which 'wouldn't have happened without Peer Challenge'. Primary head teachers reported that 'significant changes are going to be put in place' as a result of the peer review. **Developments arising out of the collaborative work** therefore had unexpected and unplanned benefits for schools.

2.3 Challenges faced and how they might be met

It must be noted that the pilot participants had anticipated and addressed many of the potential challenges and pitfalls for the project, through their own strong personal commitment and high levels of organisation, supported by the Alliance Manager's-Director's facilitation. The participating schools were described as 'mature' in their use of external challenge so staff and students were used to an element of scrutiny from visitors. Participants were selected to give the project a strong foundation for success and this must be remembered when extending the project further and considering the support it may need.

Head teachers in the secondary pilot 'moved fast' and were able to prioritise the initial meeting and visits within the working day, completing the cycle of Peer Challenge for all three schools over a relatively short period. Primary head teachers reported some challenges in securing dates to meet and undertake the reviews. Arranging meetings was also ~~This may be~~ more difficult for governors, who are likely to need to fit the meeting and visits around their own work commitments. Governors' visits were therefore expected to be shorter than the full day visits for the head teacher group. An essential component in the governors' Peer Challenge triad was the facilitation by the Teaching School Alliance manager-Director who convened meetings, made arrangements and documented the process. This was felt to be extremely valuable, if not essential, for governors, while head teachers were in a position to be able to organise themselves. As previously mentioned, the success depended heavily on

the high level of commitment that everyone gave to the project. It was essential to give the meetings and visits priority so that the process would not be undermined for others in the triad by lack of attendance or less efficient organisation or communication.

Head teachers noted that Peer Challenge is founded on trust. They felt that it would be difficult to work in a triad where schools were in direct competition, although they recognised the complexity of systems where ‘competition and collaboration go hand in hand’. Both head teachers and governors appreciated the value of visiting contrasting schools; they were open to experimenting across phases and working with other types of schools, while acknowledging what was to be gained from comparisons and dialogue in similar schools where the same issues might surface. Schools should not be too similar however; the value of seeing familiar issues through a new lens was acknowledged. Over a number of cycles of Peer Challenge it was agreed that a balance could be struck for each participant and participating school over time.

The original vision for the project stated that there should be ‘no scoring or excessive judgements’ made, instead guiding schools towards appreciative enquiry identifying ‘strengths and areas for further consideration’. Contrary to this, the summary for one school does set out a series of Ofsted rated judgements of lessons observed and the Peer Challenge process as interpreted here was described as ‘increasingly ‘inspectorial’ for the head teachers’ group. It was clear that for a given focus there were many different ways to approach the enquiry and that head teachers were gatekeepers for the way the process operated in their own schools. This could of course be influenced by the nature of the discussion at the initial meeting. Participants reported less peer challenge *of the process* (for example to challenge the choice of focus and enquiry methods) and more *within the process* (in relation to the areas of focus as determined by each head teacher). Challenge in relation to the process itself may be an aspect that develops over time, but for the pilot, head teachers were comfortable with the decisions they had made.

The governors involved in the pilot acknowledged that they were individuals already familiar with school visits and had therefore developed confidence in this respect, which was felt to be important in the success of their Peer Challenge work. Still, in hindsight they would have preferred to plan the details of visits together rather than individually after the initial meeting. As they were focusing on their own governance, they did not make any lesson judgements and were looking for evidence of broader engagement and influence rather than targeting individuals and crossing the boundary into operational practice that they did not see as their role. They felt that some governors might not see the kind of activity required by Peer Challenge as their role either, but recognised that it was part of the new requirements for governors and that this would have to be discussed with governing bodies. The Peer Challenge could prove important in supporting governors in this respect, since visits are collaborative and supportive of schools and individuals, lessening pressure on individual governors and helping them to meet expectations in relation to reviewing their own governance. Nevertheless, governors involved in the pilot felt that careful guidance and induction for governors was essential in extending Peer Challenge to other schools.

2.4 Aspects of the process that were successful and what could have been improved

The initial meetings between trios of head teachers and of governors were extremely effective in meeting each other, building trust, clarifying areas of focus and making practical arrangements, including comparing diaries to set dates. It was helpful to have a framework of roles, tasks and deadlines, which for governors was facilitated by the Alliance manager. It was also helpful to have an overall deadline and if possible an event to report to, for example

a particular Leadership, Trust or Board meeting, to give a reasonably tight timescale by which visits must be made and reports written.

There was a high degree of ownership of reporting and documentation. Head teachers wrote summaries for their own schools while governors welcomed the Alliance ~~Manager's~~ Director's support and felt that any new triads would need some clerical assistance, perhaps from a clerk of the board from one of the schools. Although it was agreed that administration should be kept minimal, essential documentation was agreed as follows:

- clear guidance about the principles and aims of Peer Challenge;
- list of '20 questions' for governors;
- selected proformas that could be adapted e.g. for planning a visit, observation, summary report;
- circulation by schools of selected information / data relating to themes in advance of visits (with content and format depending on focus);
- detailed plan for each visit;
- final report for each visit.

The overall impression given by the focus group discussion was that the guidance and documentation used in the pilot had been at the right level so as to scaffold the process without stifling it. Efficiency and speed were helpful in communications: information needed to be kept succinct and was circulated by email sufficiently far in advance, then followed up promptly. It was strongly felt that guidance and adaptable formats enabled participants to own and tailor the process where stringent and inflexible accountability and documentation would be burdensome and unhelpful, undermining the bespoke nature of the enquiries. Participants assumed responsibility for producing something valuable and relevant for themselves and their schools. There was no sense in which reports were produced in order to satisfy the requirement of the Trust or the pilot itself. It was not through appropriate or necessary to circulate reports more widely across the schools network or to 'check' them centrally, but within triads of schools a minimum level of documentation and reporting was recognised as central to the Peer Challenge process.

Although it was stressed that there was honesty at all times, participants noticed a transition towards greater openness and greater clarity of process as the three visits progressed. There was a sense amongst head teachers of greater confidence in the value of Peer Challenge the more forthcoming schools were in sharing their issues and concerns and the more flexible they were in allowing the enquiries to develop organically on the visit days. Governors, in turn, learnt how to 'get to the point' more efficiently in relation to their focus areas, particularly as governance of the chosen issue became distinct from the issue itself. One person wondered if there was a disadvantage in being visited first, since so much had been learnt by the third visit in terms of feeding back more precisely, but it was agreed that Peer Challenge was a learning approach from which everyone benefited wherever in the cycle their school was visited. The process could be gradually honed so that it was increasingly fit for purpose and could be applied again to another cycle. Everyone engaged in exploring the process of the visits as an additional reflective layer of the enquiry.

The visits themselves worked best when there was maximum opportunity to see and speak to as many people as possible to gather a wide range of evidence of different perspectives and views on the focus. Ideally this included both students and staff and could draw in other groups, notably parents. The best visits gave scope for flexibility to follow up lines of enquiry

that emerged on the day. One head teacher explained that he knew he had the option to direct the visits in every detail, but this would not have offered sufficient challenge. It was encouraging that all visitors found staff well briefed and that host schools encouraged transparency rather than 'stage managing' visits. In one case sixth form students gave guided tours according to what visitors wanted to see. Host head teachers were responsible for giving feedback to their staff, including thanks, and this appears to have worked well, but again relies inevitably on head teachers' commitment, understanding and attention to detail. Governors made a point of writing to schools, teachers and student guides to thank them.

Head teachers commented that the very fact that a particular focus had been chosen for scrutiny and that this was communicated to staff had had a galvanising effect, for example making staff consider whether they were, in fact, challenging Year 8 students sufficiently. This is another aspect that could be emphasised further in future cycles so that school improvement priorities were brought to the fore and became a theme for discussion school-wide.

Participants found each visit to be an intense learning experience and came away with ideas and knowledge that extended beyond the respective areas of focus. They also developed skills of observation, discussion, evidence gathering and evaluation. Governors, particularly, conceived of the visits as 'learning walks' (although this was not a requirement but a choice) and were able to visit classrooms where they said they could 'see the values of the school played out in practice'. One governor said she particularly enjoyed and learnt from speaking to students, while head teachers benefited from students as guides, who were able to offer a different perspective, valuable both to visitors and to the host head teacher. Governors said they recognised the criticality in the visits, where it was not possible to 'just sit back and accept what the head teacher said' as this was triangulated by different perspectives, giving a much more rigorous basis for exploration of issues and conclusions reached. They appreciated the added value from visiting collaboratively.

In summary, all aspects of the pilot were reported as extremely successful by all those attending the focus group, which was likely to be due to the commitment and capability of the selected participants in interpreting the brief set out by the Executive Principal, supported by the facilitation of the Alliance ~~Manager~~ Director. This raises a number of important issues in scaling up Peer Challenge, as discussed in the next section of this report.

2.5 Issues for consideration in sustaining, scaling up and disseminating the project

All schools ~~on in the Board of (the Williamson Trust ?)~~ have agreed to set up local triads for Peer Challenge, and a significant number of schools in the Medway Teaching School Alliance have also agreed to initiate triads, so there is already local support for scaling up the initiative. Schools have said that they would appreciate guidance and have requested the outcomes of the evaluation of the pilot. It was clear from the focus group discussion that it is important that the work is not overburdened with bureaucracy, while schools need to have the autonomy to take it forward in their own way to meet local and organisational needs. However it is also important that the spirit and intentions of Peer Challenge are not corrupted in extending it more widely. It has been found in discussions elsewhere that there was concern that head teachers would not welcome the Peer Challenge process. This may be because it might place additional pressure and scrutiny upon schools. Another reason for head teachers' reluctance might be suspicion about revealing weaknesses to competitors, or making the school vulnerable in a process of scrutiny. However the original vision does not

present Peer Challenge as an additional inspection process to increase pressure and critique, but as an opportunity for engaging senior leaders and governors in mutually supportive, positively challenging enquiry and evaluation. Presented in that light, members of the focus group felt that it should not pose any threat.

However, everyone in the secondary-pilot focus groups agreed that Peer Challenge is less appropriate for schools that are graded by Ofsted as Inadequate or Requiring Improvement and for some schools in the most challenging of circumstances it was felt that it would definitely be inappropriate and that they needed different strategies to reach a point of greater strength where Peer Challenge would be helpful. Peer Challenge is probably most effective to support schools in moving from 'Good' to 'Outstanding', and also to sustain 'Outstanding' schools. There might be possibilities to model aspirational practice through this approach for schools that have not yet reached a 'Good' grading, along the lines of the 'London Challenge', for example with a triad of one 'Outstanding' school, one 'Good' school and one school 'Requiring Improvement'. However it could be difficult for competing schools to work together in this way.

It is therefore essential that purpose and process are communicated carefully to potential participants so that Peer Challenge is undertaken with appropriate understanding by those participating directly. It also needs to be explained to all those indirectly participating, for example staff, students, governors and parents who may be observed-, spoken to or reported on and who may be recipients of reports or other information about the process and its outcomes. Subtle adaptations and careful interpretations are likely to be needed to suit local conditions and relationships between schools, for each Peer Challenge cycle, as circumstances continue to change.

Head teachers emphasised that Peer Challenge is one of a number of complementary strategies for improvement, its particular value being an opportunity to select one aspect of improvement that needs deeper and more detailed scrutiny. One head teacher articulated this as 'further in-depth analysis of the [school's] on-going development'. Significantly, he said he saw it as both a school development tool and a system tool for building and 'igniting' local networks - a catalyst for collaborative activity supporting improvement. The ways in which it complemented other approaches were made explicit in his report, for example by cross referencing with the current Ofsted report. An awareness of the strands of improvement activity and the way they interrelate is therefore necessary to enable head teachers and governors to select an appropriate focus for each Peer Challenge cycle. Moreover, the review of governing bodies is going to be higher on the agenda for head teachers in future and Peer Challenge offers a strategy for self-review to contribute to this.

In keeping with the powerful ownership expressed by pilot participants, they felt that the regularity and timing of Peer Challenge cycles could be determined by those involved, particularly head teachers who would wish to tie it in with the annual or bi-annual rhythms of self-evaluation and improvement planning. Different timings would be pertinent for different schools. Pilot participants felt there was potential in additional role-based triads, for example on financial management, and on theming the focus sometimes, for example on 2014 curriculum changes. There were many other potential extrapolations and extensions of the model, for example triads of Heads of Departments or Key Stage leaders within one school could be formed. An important prerequisite was that all participants could commit enough time for all stages of the process, particularly the initial meeting and visits. To aid this, it was found in the pilot that governors from the same school could successfully share membership of the triad. Generally it was felt that the person directly engaged in the triad needed enough influence to be able to effect change.

A number of risks were identified in the focus group discussion, which did not necessarily arise from direct experience in the pilot but could be envisaged and should be guarded against in extending the model further:

- Indiscretion could arise where documentary evidence, observation or experience could be inappropriately communicated, used in a non-respectful way or fall into the wrong hands, laying information open to misuse or misinterpretation out of context.
- Mandatory participation could lead to Peer Challenge being instigated by schools for the wrong motives, to fulfil external accountability requirements, which would devalue it into a burdensome chore.
- Lack of commitment from participants, leading to lack of prioritisation, could undermine or jeopardise visits through inability to attend and repeated rescheduling, leading to slack timescales, frustrating lack of progress and lessening impact.
- Lack of proper guidance and documentation could lead to lack of effective communication, confusion of purpose and lack of follow-through after the visits.
- Delegation of participation or unwise selection of participants might result in participants who do not have the authority to instigate change decisively, limiting impact.
- Lack of integrated time for discussion and planned time for follow-up could reduce impact.
- Misunderstanding of the principles and purposes of Peer Challenge, amongst direct participants and as communicated to those in schools, could lead to an inappropriate balance between appreciative enquiry and inspection, leading to stress and stage management during visits, rather than engagement and learning.
- Inappropriate organisation of triads could result in tensions, lack of trust and lack of openness between schools which would undermine the critical process and limit learning.

In order to address these risks as the project is extended, the process needs to be effectively communicated including its values, principles, purposes and ethics as well as the mechanics of the process, and then appropriately managed and supported, from organisation of the triads through the whole cycle of planning, visiting, reporting and follow-up.

It was agreed that having developed a way of working with one group, it would be counter-productive to shift membership of the triads entirely each time, but that there might be a systematic way of organising for one new member to join an existing couple, both to refresh the ‘challenge’ aspect, guarding against complacency, and to induct more people into the process. This could be promoted, managed and facilitated centrally within a network or system whilst still giving individuals and schools room for proactivity to manoeuvre in order to tailor the process to their needs. It was felt that Peer Challenge could build a significant resource for a network or alliance of schools, where the small group activity would inevitably connect up in various ways within and between schools and open up aspects of systemic development for scrutiny. There was nothing to stop new initiatives springing up as a result of the new collaborative links, managed by head teachers and / or promoted by governors’ networks and this could be celebrated and encouraged centrally. While it might be gratifying to try and track the spreading impact, it might not be necessary where head teachers, governors and others are able to assume responsibility for further developments and are accountable for the investment in terms of impact in schools. This signals a cultural shift towards a greater collective responsibility for improvement across the system or network, which the Executive Principal recognised as Hargreaves’ ‘maturity model’, reshaping the landscape for school networks.

3. Recommendations

A number of clear recommendations emerged from the consideration of evidence from this small-scale secondary pilot of Peer Challenge. Firstly, suggestions are made regarding the principles and logistics of the process: initiating triads, conducting visits and following up. Secondly, recommendations are made about the ways in which this network of schools might build the Peer Challenge approach into its development strategy and scale up the benefits for schools.

3.1 Organising the Peer Challenge Process

Initiating a Peer Challenge triad

- Involve three improving schools (normally good / outstanding) that offer contrasts but are not in direct competition. Those new to the process could be inducted by working with those who have some experience.
- The aims, principles, purposes and ethics of Peer Challenge should ideally be communicated face to face so that there are opportunities for discussion and questions, and reinforced with documentation such as presentation notes and a guidance booklet for future reference.
- Those new to the process would benefit from hearing the accounts of those who have experience. Case studies may help new participants to envisage what is expected and required.
- Ensure that schools and the individuals involved have full guidance, including electronic copies of documentation and proformas for adaptation.
- Governors should be supplied with the list of '20 questions' from which to choose two areas of focus.
- An initial meeting is essential to plan, agree areas of focus and set dates. Participants should bring diaries.
- Ensure that administrative and facilitative support is available where required, especially for governors who might involve their clerks.
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Conducting the visits

- A detailed plan must be circulated to members of the triad for each visit, with arrangements communicated in advance.
- Host schools should provide some initial information or data relating to the focus of the visit, sufficiently in advance. The information should not overwhelm visitors with detail or pre-empt the investigation but should provide a 'way in' to the issue.
- Head teachers hosting visits are responsible for their smooth running and for ensuring that staff, students and others are carefully briefed, for example to make the process distinct from Ofsted.
- Head teachers should avoid 'showcasing' or micro-managing the visit; standing back enables Peer Challenge to have maximum value and impact. Some initial input giving the school context is invaluable at the start of the visit.
- Allow maximum flexibility for 'appreciative enquiry' on the day, with opportunities to gain as many perspectives on the focus as possible, particularly through meeting students. The concept of a 'learning walk' might be helpful for visitors.
- Plan sufficient time for discussion at the end of the visit, agreeing someone to take notes who may or may not be a member of the group.
- Visitors are expected to follow normal ethical protocols in relation to their conduct around the school, interactions with others and confidentiality of information.

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Following up

- Emphasise that head teachers and governors should be proactive in leading change arising from Peer Challenge, instigating short and medium term improvement.
- Built-in time is needed for writing up, planning change, reflecting on the process and evaluating impact.
- Visitors should remember to thank participants, particularly those directly involved in the visits.
- It is important for head teachers to offer a debrief discussion and arrange later feedback of outcomes to all participants in school including staff and students involved.
- It is valuable for head teachers to meet with their governors to discuss Peer Challenge insights and outcomes, including a review of the value of the process to the school and its purpose within school improvement.
- Summary reports may be written by host head teachers or governors following critical discussion in the triad on the visit day. This task can be delegated to a facilitator or clerk. Reports should be circulated within the triad but not more widely.
- Reflections on the Peer Challenge process and summaries of outcomes might be shared in the reports, to support further systemic development.

3.2 Peer challenge for strategic development across a widening network of schools

- Refine initial guidance materials and formats in the light of this evaluation and circulate to the pilot group for comments, before finalising into a Peer Challenge 'pack'.
- Communicate the benefits of the initiative in local networks and gather expressions of interest.
- Collect a small number of representative written (eventually maybe filmed / podcasted) case studies to illustrate the process, benefits and outcomes of Peer Challenge.
- Engineer triads where necessary to ensure the most likely conditions for effective Peer Challenge.
- Consider the nature of administrative and facilitative support needed, particularly for governor triads, and how this could best be provided either through a central system resource or through governing boards' normal clerical support.
- Create more opportunities to share what has been learnt from this and other pilots both locally and nationally and involve more school networks and organisations in Peer Challenge development.
- Continue to gather evidence of the scope of Peer Challenge as it extends to other schools. Research and review adaptations of the model for different groups of schools, different roles and using different formats.
- Embed Peer Challenge into network discussions, so as to reinforce it as a strategy for organisational and systemic improvement, complementing other approaches.
- Consider the nature of the resource that Peer Challenge activity offers for the Alliance or network, so as to maximise its value in terms of intellectual capital - sharing knowledge about teaching, learning, leadership, governance and school improvement – and social capital – new collaborative relationships between schools, opportunities for more voices to be heard and greater professional trust as the foundation for mutual learning and critical support.

Appendix A

A Proposal for a Peer Challenge Project for Medway Schools

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1. Summary

- Borrowing from the peer challenge model used by local authorities, we propose a school-to-school peer challenge process.
- Evidence supports the view that peer challenge can be a powerful driver for improvement
- Three schools come together in a “Triad” to carry out appreciative enquiry in one another’s schools.
- The agenda is set by the host school in discussion with partner HTs
- Each review last one school day with the after school time set aside for feedback
- Review activities include learning walks, book scrutiny, interviews with key stakeholders and review of documentation
- The reviewing team to be made up of 4 colleagues; the HTs plus one other colleague from the other two schools in the Triad.
- Triad is composed of volunteer schools, and may be single phase or multi-phase
- Also a Governor Peer Challenge model involving Governors in a similar “Triad” model, but of shorter duration. In this proposal, no distinction is made between the staff and governor models, but it is intended to develop a slightly different Governor option.

2. Principles of the Peer Challenge Process

- No scoring or extensive judgements - just identified strengths and areas for further consideration.
- Agreement of the scope of the review with the host. Host HT takes ownership of self-assessment topic chosen.
- Final feedback can be in many forms, but with the emphasis being on a format that will help and assist the host school.
- Follow up development support.
- Assist the host school to make progress on their improvement journey.
- Promote an open and transparent dialogue.
- No surprises – regular updates between visiting and host HT during the review.
- Appreciative enquiry approach NOT a deficit analysis.
- Mutual trust to keep the content of the peer challenge confidential to those involved.

3. The Process

The topic of a challenge is entirely at the discretion of the host HT, and should be part of the day job. (i.e. no extra work invented especially for the challenge). Sample topics could be:

- How challenging is the work being set for year 8?
- Is the literacy strategy being consistently implemented?
- What impact has the recently implemented behaviour management policy had?

Peer challenger activities could include:

- Review of the host school’s SEF, Improvement Plan and/or other relevant documents;
- Face to face meetings with the HT and any other relevant people which may include the chair of governors and/or senior leaders, teachers, support staff, children, parents;
- Learning walks and book scrutiny

- Verbal and/or written feedback and advice following the review
- Suggestions on what support might be needed and where it might be found/ brokered;
- Some ongoing challenge and support as improvement planning takes place and begins to be implemented.

4. The Stages of Peer Review

- Choice of self-assessment topic (Host HT)
- Planning discussion by conference call prior to the review (Host and visiting HTs)
- Agree dates for on-site visit and identities of visiting team
- Identify host school lead
- Reading pack – eg SEF, Raise, School Improvement Plan
- Detailed timetable
- Fieldwork
- Presentation of findings
- Response document/Improvement Plan (Host HT)

5. Proposed Pilot

- There will be two pilots, one primary and one secondary, each involving three schools working as a triad.
- The three secondary schools are: Sir Joseph Williamson’s Mathematical School; Greenacre School and the Hundred of Hoo School.
- The three Primary Schools are: Wainscott Primary School, Cliffe Woods primary School, Elaine Primary School.
- Following the pilot, an evaluation report will be compiled outlining lessons learnt and recommendations for future reviews, including thoughts on how to make the process sustainable. (see paragraph 8 below).

6. Learning Transfer

- We have every reason to believe that peer challenge for schools will be a success, based on the experience of the Local Authority model, and on the literature about school leadership, system leadership, and school system leadership.
- We propose to extend an invitation, via Richard Tyndall in the SE CIB programme office or otherwise, to at least one appropriate school leader to join us on one of the pilot peer challenge days, so that they can see first-hand what we are doing, and hopefully be inspired to pilot a similar approach in a different location in order to test its effectiveness
- Peer Challenge support materials. We will also produce some guides to the process as we have piloted it, and some links to learning and other resource materials to support colleagues who may wish to follow us in deploying this model of supportive, collaborative sector-led improvement.

7. Objectives

The objectives of the Peer Challenges are as follows:

A: Host School

To support the host school on its improvement journey

To develop reflective practice within the school management

To improve outcomes for young people in the school

B: Visiting Peer Challengers

To develop the reflective practice of the Peer Challengers

C: Triad Schools

To build collaborative capital within the school triad

D: For the development of Peer Challenge for Schools

To develop a research-engaged practice

To facilitate learning transfer to schools in other areas

8. Evaluation

We will invite Canterbury Christchurch University to undertake an independent evaluation of the pilots, against the objectives set out in paragraph 7 above. The brief will be to report on what went well, and not so well with the actual process of the peer challenge visits, and on the impact that visit had on the subsequent outcomes for young people and the schools. She will also be asked to review the relevant literature around school and system improvement models, and to identify whether or not there is support in the literature for this type of peer challenge model.

Gary Holden

Schools participating in the phase 1 pilot

- **Greenacre Academy**
Headteacher: Andy Reese, Chair of Governors: Sue Butler
- **The Hundred of Hoo Academy**
Headteacher: Gary Vyse, Chair of Governors: Peter Clough
- **Sir Joseph Williamson's Mathematical School**
Headteacher: Eliot Hodges, Chair of Governors: Michael Costello
- **Cliffe Woods Primary**
Headteacher: Tim Watson
- **Hilltop Primary School**
Headteacher: Gavin Evans
- **Wainscott Primary School**
Headteacher: Liz Edwins