

QA Review Shadow Policy for new lead reviewers

Purpose:

The purpose of a shadow review is to enable a new lead reviewer, starting out on their journey, to become familiar with the Challenge Partners philosophy and to learn about the process of leading a review. When someone applies to become a lead reviewer with Challenge Partners, a clear induction process includes training and taking part in a shadow review. Only when a new lead reviewer has successfully undertaken a shadow review, will they be able to lead a review which will be quality assured by a member of the quality assurance team. The success of both the shadow review and the quality assurance review will determine whether the new lead reviewer is offered a place in the lead reviewer pool as a fully trained lead reviewer. Once this has happened, the fully trained lead reviewer can expect to be allocated reviews on mutually agreed dates.

On occasions, a central team member may shadow a review in order to gain more knowledge and understanding about the review process. In every event, it is important that protocols are followed, and expectations are clear. This policy contains detailed information to ensure that all parties concerned are clear about their roles.

The role of the central team.

Before the review:

1. Agree a date for the shadow review with the shadow lead reviewer and the lead reviewer.
2. Three weeks before the start of the review, the central team will inform the school by email that a new lead reviewer will be shadowing the lead reviewer and explain the purpose and process. Both the lead reviewer and the shadow lead reviewer should be copied into this email.
3. Send a copy of the Shadow Review Policy to the shadow lead reviewer, the lead reviewer and the headteacher of the host school.

After the review:

1. Agree a date and time with the shadow lead reviewer for a telephone call to discuss their experience and whether they feel any further support is necessary before they feel confident enough to lead a review on their own.
2. Ensure that the lead reviewer completes and sends the feedback email and the data is held on file. Follow up with the lead reviewer, by telephone, if any concerns have been flagged.

The role of the lead reviewer.

Before the review:

1. Once you have received the email from the central team to the school (you are copied in), you can then email the shadow lead reviewer to introduce yourself and extend a warm welcome. Exchange mobile numbers. Reiterate the purpose and protocols. Remind the shadow lead reviewer of the importance of reading the Shadow Review Policy and understanding all of the review-related documents.
2. Refer the shadow lead reviewer to the feedback that you have to share with the central team at the end of the review, to ensure complete transparency.
3. In your email to the headteacher, mention the attendance and role of the shadow lead reviewer. Reiterate the purpose and protocols. Thank the headteacher for facilitating the process.

4. In your email to the reviewers, mention the attendance and role of the shadow lead reviewer so that they know what to expect. Reiterate the purpose and protocols.

During the review:

1. Ensure that the shadow lead reviewer understands that their role is to shadow you, the lead reviewer, learning the craft by making notes that will be helpful in the future. The shadow lead reviewer should NOT act as an additional reviewer and should NOT take part in any review activities unless it is to shadow the lead reviewer - even if one reviewer or more is missing.
2. Ensure that the shadow lead reviewer understands and demonstrates the protocols at all times.
3. Model best practice at all times.
4. Take every opportunity to explain what you are doing and why.
5. Encourage the shadow lead reviewer to ask questions throughout the review.
6. Encourage the shadow lead reviewer to make notes throughout the review.
7. Deal with any 'red flag' issues (see below) as a matter of urgency by speaking with the shadow lead reviewer privately. If issues do not improve, contact the CP programme lead.
8. Find a few minutes at the end of each day to review the process together, agreeing WWWs and any EBIs.

After the review:

1. Complete the feedback email and send it to the central team. Share the contents of the email with the shadow lead reviewer.
2. Should any issues ('red flags') have arisen, contact the CP programme lead.

The role of the shadow lead reviewer.

Before the review:

1. Read the lead reviewer handbook.
2. Familiarise yourself with all the current documentation.
3. Respond to the email from your lead reviewer.
4. Exchange mobile numbers.

During the review:

1. Adhere to the protocols at all times.
2. Shadow the lead reviewer to all/most activities.
3. Act as an observer not as a reviewer.
4. Keep any talking to a minimum and listen carefully.
5. Ensure that you do not 'get in the way'.
6. Make notes on what you see and hear.

7. Ask any questions as the review progresses.
8. Make the most of opportunities to discuss the process with your lead reviewer at the end of each day.

After the review:

1. Take part in a telephone call with a member of the central team to discuss your experience and whether you feel any further support is necessary before you lead a review on your own.

The role of the school:

Before the review:

1. Respond to the email sent from the central team informing you that a shadow lead reviewer will be attending. Read the Shadow Review Policy and clarify any questions you may have to ensure you understand the expectations.

During the review:

1. Make the shadow lead reviewer feel welcome!
2. Alert the lead reviewer to any concerns ('red flags') that you may have about the shadow lead reviewer - as a matter of urgency.

After the review:

1. Take part in a telephone call from the central team if you wish to discuss how having a shadow lead reviewer was for you. This is an opportunity to share WWWs and any EBIs.

Examples of 'red flags' that would indicate cause for concern about the shadow lead reviewer:

- o Attitude issues such as lack of engagement, insight, sensitivity.
- o Treating the review more like an inspection.
- o Not adhering to one or more of the protocols.
- o Making inappropriate/insensitive comments.
- o Punctuality issues.
- o Inappropriate dress code.
- o Not willing to listen and learn.

Shadow Review - Lead Reviewer Check List:

Have you modelled typically excellent practice in the following areas?

1. Appropriate contact with the school's headteacher and team reviewers.
2. Sharing and emphasising the protocols with everyone involved.
3. Negotiating team reviewers' responsibilities and discussing their CPD needs at the PRA.
4. Generating effective questions during the PRA.
5. Sharing the PRA questions with leaders and reviewers.
6. Encouraging constant collaboration eg all discussions in the base room.
7. Attending learning explorations with each reviewer and evaluating the quality of their discussions. Ensuring that all WWWs and EBIs are evaluative and have examples of impact.
8. Adhering to timings and the timetable.
9. Attending meetings to record first hand evidence for the report and to support reviewers if necessary.
10. Completing the meeting about reviewers' self-assessment with appropriate WWWs and any EBIs that would be helpful for reviewers to be aware of in their next review.
11. Discussing all WWWs and EBIs with all leaders and reviewers together, agreeing all estimates together as one team, reading out the estimate descriptors to ensure clarity. Encouraging school leaders to actually word the EBIs to ensure staff buy-in.
12. Sharing how to write the report using evidence gathered during the review, emphasising that the language of the report should reflect the estimate descriptors and celebrate key elements.
13. Having NO secret meetings with reviewers only, ensuring complete transparency.
14. Clarifying verbally all the WWWs and EBIs during the final meeting, making any changes and additions requested by the school leaders at the time.
15. Reminding the leaders and reviewers to complete their evaluations.

Shadow Lead Reviewer (new Lead Reviewer) Check List:

Do you feel that you have learned enough by observing typically excellent practice in the following areas?

1. Appropriate contact with the school's headteacher and team reviewers.
2. Negotiating team reviewers' responsibilities and discussing their CPD needs at the PRA.
3. Generating effective questions during the PRA.
4. Sharing the PRA questions with leaders and reviewers.
5. Encouraging constant collaboration eg all discussions in the base room.
6. Attending lesson/learning observations with each reviewer and evaluating the quality of their discussions. Ensuring that all WWWs and EBIs are evaluative and have examples of impact.
7. Adhering to timings and the timetable.
8. Attending all meetings to record first hand evidence for the report and to support reviewers if necessary.
9. Completing your section on all reviewers' self-assessment forms with appropriate WWWs and any EBIs that would be helpful for reviewers to be aware of in their next review.
10. Discussing all WWWs and EBIs with all leaders and reviewers together, agreeing all estimates together as one team, reading out the estimate descriptors to ensure clarity. Encouraging school leaders to actually word the EBIs to ensure staff buy-in.
11. Sharing how to write the report using evidence gathered during the review, emphasising that the language of the report should reflect the estimate descriptors and celebrate key elements.
12. Having NO secret meetings with reviewers only, ensuring complete transparency.
13. Clarifying verbally all the WWWs and EBIs during the final meeting, making any changes and additions requested by the school at the time.
14. Reminding the leaders and reviewers to complete their evaluations.

Possible scenarios – as the lead reviewer being shadowed, what would you do?

1. The team has one reviewer missing. The head teacher asks you if the shadow lead reviewer can undertake some of the missing reviewer's activities and is very disappointed when you say no.

Listen to the headteacher's concerns and empathise with the situation. Reiterate the role of the shadow lead reviewer in the review. Explain that taking part in an activity would compromise the shadow lead reviewer's experience and they would miss out on learning from you. You could suggest that two school leaders pair up to enable the activity to go ahead.

2. The team has one reviewer missing. The shadow lead reviewer is keen to get involved and keeps offering to undertake some activities.

Thank the shadow lead reviewer for the offer but explain that taking part in an activity would compromise their experience and they would miss out on learning from you.

3. You overhear the shadow lead reviewer making an inappropriate comment about a learning exploration to one of the school leaders.

This must be addressed immediately. Take the shadow lead reviewer aside diplomatically and explain why the comment you overheard was inappropriate. Discuss and agree whether an apology would calm or escalate matters.

4. Despite discussing the issue previously, the shadow lead reviewer continues to make references to the inspection framework.

This is something that would need to be addressed swiftly and privately. In your pre-review telephone call with the shadow lead reviewer, it is always useful to remind them that there should be no references to Ofsted during the review.

5. The shadow lead reviewer arrives late for the PRA and also for the beginning of Day 2.

Find out the reason why the shadow lead reviewer was first late for the PRA. Although there is likely to be a genuine reason such as traffic hold ups etc. Stress the need to allow more than enough time for the journey. Explain how important it is for the shadow lead reviewer and the lead reviewer to be on time, well prepared and ready to take the lead. During your private discussion with the shadow lead reviewer, you will need to explain that punctuality will have to go into the report as an EBI and will need to be escalated to the central team.

6. The shadow lead reviewer says they have not got time to discuss the review process with you at the end of Day 2 as they need to get home.

Express your disappointment and agree an exact time and duration next day for you to meet together. Explain how important it is for you both to have time to talk together so that the shadow lead reviewer is fully set up to succeed.

7. The shadow lead reviewer interjects during the Strategy and Impact meeting to ask supplementary questions.

This would need to be handled sensitively at the time. Remind the shadow lead reviewer that they are an observer at the meeting and how important it is for the reviewers to lead the meeting themselves as part of their CPD.

8. The shadow lead reviewer enjoys giving personal opinions about their own professional preferences and style.

Explain to the shadow lead reviewer that they are there to represent Challenge Partners and, therefore, should not be sharing personal preferences and style. Stress the importance of having an open mind. Emphasise that both the lead reviewer and shadow lead reviewer need to model having an open mind throughout the whole review.

9. During a meeting, the shadow lead reviewer keeps looking at their mobile phone.



This must be addressed at the time. Explain to the lead reviewer that they must lead by example and, that looking at a mobile phone at any time other than designated breaks contravenes the code of conduct and sets the wrong example to everyone.

10. You notice, throughout the morning of Day 2, that the shadow lead reviewer seems to lack enthusiasm and energy, does not ask any questions and does not make any notes.

Take the shadow lead reviewer aside and ask how things are going. There could be a reason for this such as feeling unwell. If there is no apparent reason for this behaviour, you will need to remind the shadow lead reviewer of the need for them to demonstrate high engagement and enthusiasm at all times. You will need to monitor this throughout the rest of the review.

If there is no improvement as a result of your discussions, explanations, modelling etc, you will need to escalate any concerns to the central team.



Examples of post shadow emails:

SUCCESSFUL SHADOW

EMAIL SUBJECT: QA Review: [NEW LR NAME] Shadow

It is my opinion that the shadow lead reviewer
.....(name) has successfully taken part in the
shadow review at(school name) on
.....(date) and is ready to go forward to lead their own QAR that will be
quality assured by a member of the quality assurance team.

Best wishes,

(lead reviewer name)

UNSUCCESSFUL SHADOW

EMAIL SUBJECT: QA Review: [NEW LR NAME] Shadow

It is my opinion that the shadow lead reviewer
.....(name) has not demonstrated the qualities
necessary during the shadow review at(school
name) on(date) and is not ready to go forward to lead their own QAR.

Best wishes,

(lead reviewer name)