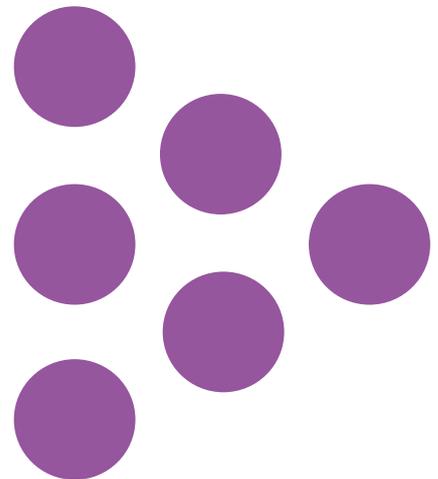

A summary of findings

A Review of Challenge Partners' Trust Peer Review Model

National Foundation for Educational Research (NFER)

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Foreword



Over the last nine years, Challenge Partners has facilitated more than 2000 school Quality Assurance Reviews (QARs). An independent evaluation of these expert-led peer reviews in 2015 found that they delivered ‘multiple gains’, with benefits for the school being reviewed and for peer reviewers, who gained valuable CPD and ideas to take back to their own schools. Systematic analysis of data from QARs has also enabled us to identify areas of excellence within schools, which we share across our network and beyond so that good practice can become common practice.

In 2018/19, guided by a group of trust practitioners, we initiated a pilot to test whether a scaled-up version of our school QAR could deliver comparable ‘multiple gains’ at trust level. We wanted these Trust Peer Reviews to act as a catalyst to development and continuous improvement in the host trusts, and to provide CPD and stimulus for peer reviewers drawn from other trusts so their own organisations could benefit. In a context where there is limited evidence of what effective improvement in school trusts looks like (the work of Greany, 2018 is a notable exception), we aim also to contribute to system knowledge of what works well.

Alongside the challenge and collaboration inherent in our peer review processes, innovation is in Challenge Partners’ DNA. We pride ourselves on the disciplined use of existing evidence and rigorous evaluation of our activities and programmes to further develop that evidence base. I was therefore delighted that a serendipitous conversation with Maddie Wheeler at NFER revealed a common interest in investigating school improvement in school trusts – and so this review of our Trust Peer Review pilot was born, jointly funded by Challenge Partners and NFER.

I am grateful for the way NFER researchers Louise Starks and Tami McCrone threw themselves into understanding our Trust Peer Review model, in just the same way our peer reviewers throw themselves into understanding the trusts they evaluate. I am also grateful to the four trusts which opened themselves up to both pilot peer reviews *and* the NFER review of the pilot.

We asked NFER to undertake a review that was formative and summative. I am delighted that the summative aspect of their review demonstrates how the Trust Peer Review process has indeed delivered ‘multiple gains’. It reveals how trusts “took something away from the review and have taken action as a result”, and how, for example, one peer reviewer felt it was “the best CPD I’ve had this year”, while another reflected that “it drives all our thinking now”. Although only conducted across a small number of Trusts, the findings from this review are promising and offer some early evidence to test further in the next stage of roll-out of the Trust Peer Review.

Most useful to an organisation committed to continuous improvement through challenge and collaboration are the formative aspects of the review. These have shaped the development of the Trust Peer Review model as it is now being implemented across the Challenge Partners network and beyond. The training we provide our lead and peer reviewers, and how we and they work with trusts hosting reviews have all improved as a direct result of NFER’s insights. Just as we expect our schools and trusts to respond purposefully to external challenge and scrutiny, so have we.

Dr Kate Chhatwal OBE
CEO, Challenge Partners



Introduction and Background

Challenge Partners is a practitioner-led, national education charity whose mission is to reduce educational inequality and improve the life chances of all children. Through collaboration, challenge and professional development, schools in Challenge Partners are working to ensure every school community can benefit from the combined wisdom of the education system. In 2019/20, there are over 480 schools in the Challenge Partners' Network of Excellence, 57 per cent of which are academies, drawn from 100 trusts.

In 2018, Challenge Partners began a pilot to test whether a Trust Peer Review could accelerate the development of school improvement capability in the host trust, while providing CPD, insight and ideas for peer reviewers, which would benefit their own trusts. They also hope to use the reviews to contribute to the (currently limited) evidence base of what works in multi-school improvement.

Trust Peer Reviews seek to evaluate the trust's effectiveness in driving improvement in its schools and outcomes for the children and young people it serves. Given the limited evidence of what works in trust school improvement, the review does not evaluate the trust against a pre-defined model or set of assumptions about what effective trust school improvement looks like. It offers no "judgement" but does provide feedback on what is going well and what the trust needs to do to move forward.

Challenge Partners commissioned the National Foundation for Educational Research (NFER) to review the Trust Peer Review (TPR) pilot which was developed and trialled by Challenge Partners across four Trusts during 2018 and 2019.

The aims of this study were to:

- support Challenge Partners in developing a peer review model that is demonstrably improving the performance of school trusts
- identify how effective the model is in providing continuous professional development (CPD) opportunities for peer reviewers that in turn, supports improvements in their own trust
- ensure the peer review model contributes to an understanding of what makes for an effective trust school improvement model.

This publication provides the summary findings from a small study that was conducted through 24 qualitative interviews with:

- Challenge Partners TPR project manager;
- Two Challenge Partners Lead Reviewers;
- Six peer reviewers recruited from school trusts to undertake the TPR;
- Four CEO/senior leaders of the host trusts (trusts volunteering to participate in a TPR);
- Eight headteachers of schools visited as part of the TPR;
- Three Chairs of Trustees.

Findings presented here describe stakeholders' own perceptions of the potential value of the TPR and their experiences of the pilot. NFER have reflected on the key findings and present a series of recommendations to support further development of Challenge Partners' TPR. A more detailed report was provided for Challenge Partners use as they continue to further develop their TPR model.

Key Findings

Overall benefits of the TPR approach

Key stakeholders interviewed (Chairs of Trustees, trust CEO/senior leaders, headteachers and peer reviewers) valued the approach of Challenge Partners' TPR model. The level of collaboration intrinsic to the TPR is a key feature of the model and both the host trust and peer reviewers recognised the unique benefits in this approach.

All four trusts valued Challenge Partners' aspirations as an organisation and were keen to support the trialling and development of a TPR. There was a confidence among trust CEO/senior leaders at the outset of the potential value of the TPR and in the quality of the peer reviewers. Much of this confidence was based on previous experience of their schools' engagement with Challenge Partners through school Quality Assurance Reviews (QARs). For individual trusts the reasons for hosting a TPR included:

- to open up the organisation to external scrutiny;
- to receive support and challenge;
- to improve their development;
- and to give senior leaders the opportunity to experience preparing for an Ofsted.

In addition, peer reviewers recognised the value of undertaking an TPR to their own personal development as a trust CEO. They reported it was a privilege to experience how other trust approached school improvement. Attending the visits helped peer reviewers to understand the structures and strategies of different trusts and enabled them to reflect on areas of development within their own trust.

All four trusts stated they had taken away key areas for development. These included:

- developing a longer term strategy on the vision of their trust
- working to ensure that schools demonstrate the values and principles of the trust
- improving communication across their schools
- updating strategic documents.

Trusts agreed that the report agreed at the end of the review can be used as a tool within the organisation to change things.

Sustainability of the model

All trust CEOs/senior leaders stated that, in principle and based on their experiences, they would be willing to host another TPR. However, they stated they would need to consider the timing of the review and whether another TPR would add sufficient value in terms of delivering more understanding of their strengths and areas for development. Affordability was also a consideration, particularly for CEOs of trusts that do not ‘top slice’ funding from their schools.

For peer reviewers, their constraints included time out to prepare for, travel to, and conduct the TPR.

Challenge Partners could reflect on the viability of the model as it currently stands and could explore ways of flexing the TPR approach. This may be particularly important for the larger trusts where school visits are resource intensive and have an impact on cost.

Challenge Partners have a number of considerations:

- Peer review visits to schools were undertaken in pairs, sometimes in threes and the value of this was not always clear
- Cap the number of school visits in the larger trusts to ensure there is sufficient time to interview the trust senior leaders and to feedback on findings

- The possibility of interviewing headteachers on the telephone to supplement the number of face-to-face school visits where trusts are large;

Further findings

Additional data was generated regarding stakeholders' experiences of the TPR. These are presented below. These were offered in the spirit of improving the model. It should be noted that overall, the feedback from stakeholders was very positive.



Preparing for the Trust Peer Review

Establishing the focus

Trust CEOs/senior leaders stated that they understood the purpose of the TPR and broadly knew what to expect in terms of the areas peer reviewers would be examining. Prior to the start of the review, there was less certainty around the level of probing the peer reviewers would adopt and on what particular areas of the trust they would focus.

Although all peer reviewers understood that the broad purpose of the TPR was to capture the so-called “MAT factor” (the added value of the trust in supporting school improvement), there were uncertainties regarding the avenues of investigation.

Most schools reported that they felt sufficiently briefed about the visit by their CEO/senior leader and understood it was about evidencing the value of the trust and how it supports their school improvement. However, a few reported feeling uncertain about the areas of investigation on the

day and perceived the visit as an opportunity to showcase or to be similar to an inspection. Some did not perceive it to be an opportunity to share any concerns or issues they had with their trust.

Confidentiality

In preparing for the TPR, there was an assumption among peer reviewers and host trusts that information generated would be used sensitively and would be considered confidential. However, when peer reviewers visited schools, no reference was made to confidentiality and how the information generated was going to be used or fed back to the trust. Going forward, to be confident that the TPR interviews generate honest feedback about the performance of a trust, there was agreement that this should be made explicit during the TPR.

Coordination of documentation

A few peer reviewers agreed that the coordination of documents being distributed by Challenge Partners could be improved with the use of a shared portal. One peer reviewer suggested that information requests to trusts could be standardised which would help trusts understand what they needed to share.

Peer reviewers agreed it would be helpful to have a short precis of the host trust by the Lead Reviewer including its values, ethos and structure. One trust interviewee suggested that presentations by the CEO/senior leaders could be recorded ahead of the visit to help peer reviewers understand the trust (especially where the make-up and structure of the trust may be complicated).

The ability of peer reviewers to gain an understanding of the trust

Host trusts were confident that the visits enabled peer reviewers to get a good appreciation of the added value of their trust on school improvement – sometimes referred to as the “*MAT factor*”.

The presentation from the CEO and senior leaders was a crucial aspect of the first morning and helped peer reviewers orientate themselves around the values and ethos of the trust.

Peer reviewers themselves felt confident that they were able to evidence the impact of the trust during the TPR and had access to the key personnel, documentation, and schools to form their opinions.

However, one of the four trusts reported that not all peer reviewers understood how the trust was structured to support school improvement and that it was essential that peer reviewers had an appreciation of different trust structures in order to provide appropriate support and challenge.

Aspects of trusts not explored during the visits

Several stakeholders including a Chair of Governors, a trust CEO and a peer reviewer reported that the visits could have been more challenging. In particular, challenge around the impact of the Trust’s governance could have been more of a feature, and one trust reported that they expected their financial security to have been an area of investigation. However, the TPR explicitly does not seek to review a trust’s governance or financial position per se, only the impact governance and the use of resources has on school improvement and pupil outcomes. This, therefore demonstrates the need for clarity about the areas of focus prior to the visits being undertaken.

Two stakeholders of the 24 interviewed (a Chair of Trustees and a peer reviewer) reported that the visit had too great a focus on schools and not enough on the trusts' strategic leadership of school improvement.

Forming a consensus and reporting the findings

Challenge Partners' practice during the review is to have 'no hidden conversations.' Whilst this ensures there are no surprises in the summary findings, two peer reviewers reported it would have been helpful to agree their findings prior to feeding back to the trust. One Lead Reviewer acknowledged that this was an area that needed some reflection. Two peer reviewers also reported the time allocated to summarising findings at the end of the TPR was squeezed, which may have affected the quality or detail of feedback given to the trust.

To ensure there was consensus around the findings from the TPR among peer reviewers, it was suggested by peer reviewers that they should see the draft report before it is forwarded to each host trust. In addition, having sight of the overall findings from the TPR, including how peer reviewers had reported the trust's strengths and areas for development, would provide peer reviewers with additional insight on effective practice and contribute to their overall continuous professional development. Confidentiality agreements with peer reviewers could be put in place to facilitate the sharing of insight provided in the final report.

Quality and value of the Trust Peer Review report

A review by NFER of the summary reports submitted to host trusts on completion of the TPR shows that reports provided a good level of detail on how each trust supports school improvement. Reports were well balanced with strengths and areas for improvement.

Although trusts had acted on some of the findings related to their vision, strategies and communications, there were many areas for improvement/points for further reflection that had not been acted upon due to conflicting priorities and time. However, trusts did agree that the reports gave valuable points for consideration and an added impetus to make some changes.

Reports are summary findings only and therefore, it is important that all key individuals within the trust can attend the final briefing from Challenge Partners on strengths and areas for development.

To further the understanding of how different trust structures support school improvement, there is an opportunity to draw out more clearly the links between the trust structure and the quality of school improvement support provided by a trust.

Recommendations

Using the findings from the review, NFER present several recommendations for consideration to aid the ongoing development of the Trust Peer Review model.

Engagement and preparation

To help the transfer of relevant documentation prior to the visit, Challenge Partners could design a list of questions pertaining to school improvement strategies (e.g. how do you support pupils with special education needs?) to which the trust can attach documents. This would create a common

framework on the sharing of documents and would enable peer reviewers to adequately prepare in advance of the TPR.

Consider developing a shared site on the Cloud where documents can be uploaded.

Consider formalising a confidentiality strategy that underpins the sharing of information between all stakeholders.

Ensure that schools understand the purpose of the visit is not just to showcase their school and that they recognise a TPR as an opportunity to report on areas of development for their trust.

Due to the extent of reading required to prepare for a TPR, Lead Reviewers could provide a short summary of the key documents for peer reviewers to help them prepare foci for the visit.

Suggest and agree areas of investigation/key questions with the trust to help peer reviewers prepare. This will ensure all parties share a common understanding of the focus of the review. Key questions should be reviewed at the start of each TPR to refresh peer reviewers before visiting schools.

Developing the model

Review the balance between the need to interrogate the trust on particular areas such as the quality of support for school leaders, with visiting schools where trusts are large.

A virtual presentation (web conference or recording) by the CEO/senior leaders of key features of their trust provided ahead of the visits could help peer reviewers prepare their foci.

Ensure that sufficient time is reserved for peer reviewers to confer and corroborate key findings that may challenge the trust prior to reporting back to the CEO/senior leaders.

Consider whether it is necessary for two peer reviewers to attend each school visit.

The peer reviewers' role could be enhanced with a training brief that would cover structures of trusts and how they differ, and key research principles relating to confidentiality and anonymity.

Reporting findings

Ensure the TPR reports contain a summary of evidence on how the structure and operation of the trust supports school improvement.

Consider the added value of peer reviewers reviewing the final report prior to forwarding to the host trust. (Draft confidentiality statements may need to be put in place to enable this.)

Sustainability of the Trust Peer Review model

Challenge Partners should review the model drawing on the findings from this review and work to build a body of evidence going forward to ensure that those participating in a TPR understand and can evidence the value of engaging in a TPR.

Consider designing a theory of change which will help articulate how trusts drive forward school improvement and how the areas of investigation within the TPR can support an understanding of what works.

Challenge Partners

Click the link to find out more about the Challenge Partners [Trust Peer Review here](#).

Contact Challenge Partners on +44 (0) 20 7803 4970 if you'd like to speak to somebody in person.

Or send a message through the Challenge Partners [website](#).

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