#### **Module 2. The Critical Friend**

#### Intended learning outcomes for the module

After completing this module, participants should be better able to:

- · explain the role of critical friend
- · define the characteristics of effective governing bodies
- understand the governors' role in monitoring and evaluation
- appreciate the range of performance information available to the school
- identify ways to ensure that governors' visits to school are productive
- participate more confidently in governors' meetings.

#### **Outline and suggested timings**

Activity number	Activity title	Approx time
2.1	Introductory activities	20 minutes
2.2	Monitoring and evaluation	15 minutes
2.3	Monitoring and evaluation. Activity C	20 minutes
2.4	Visiting the school. Activity D	25 minutes
2.5	Delegation and meetings	15 minutes
2.6	Meetings. Activity E	15 minutes
2.7	Reflection and evaluation	10 minutes

**Note on handouts.** The handouts contain a great deal of background information and THEY ARE NOT MEANT TO BE READ WORD FOR WORD. Please advise participants of the key issues they cover and encourage them to keep them as reference material.

**NB** There is the potential for confusion when using the term SIP. Where appropriate you will want to note whether you are referring to 'school improvement plan' or 'school improvement partner'.

# **Activity 2.1 Introductory activities**

#### **Learning outcomes. For participants to:**

- consolidate their understanding of the strategic role
- be aware of the intended learning outcomes for this module
- recognise the key features of effective governing bodies
- explore the definition of 'the critical friend'

#### **Overall length**

• 20 minutes

#### Resources required

- Slides 1 -6
- Flipchart and pens

#### **Key notes for trainers**

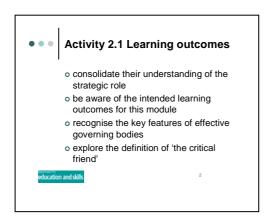
- The emphasis shifts now to the governing body as the critical friend. This is very
  much about how governors operate with a significant focus on their role in
  monitoring and evaluating performance.
- The key message is that governing bodies must strike an appropriate balance of support and challenge.
- It is also important to remind them to be analytical and reflective as they work through the module. Encourage them to ask themselves what are they learning and what do they need to do as a result.

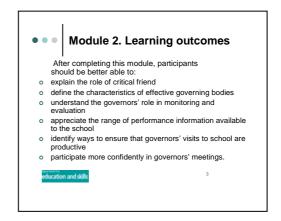
# Activity 2.1 Introductory activities Task 1

- Display slide 1 whilst you revisit key points from module 1.
- Check whether they have any outstanding issues from the previous session. You
  could ask how many of them have been able to follow up on their action points.

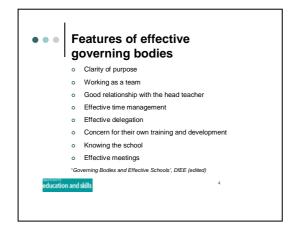


- Ask how many were able to undertake the inter-sessional tasks.
- Slide 2 sets out the learning outcomes for this activity and slide 3 the objectives of this module.





Remind them that you finished the first session by looking at the features of
effective schools and relating them to the work of governing bodies. Now the
focus is on features of effective governing bodies. Use slide 4 to make links to the
content of this session.



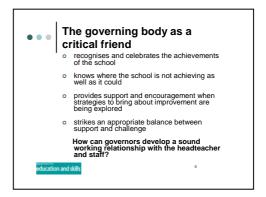
- It is worth spending time on the first two points. Ask if they were given clear messages about the purpose of governing bodies and the priorities for their schools.
- Explore the features of an effective team. Point out the importance of working to people's strengths. Reassure them that they don't all need to know everything about governance but, across the governing body as a whole, key aspects of the work should be covered.
- Compare and contrast their experiences of in-house induction. Discuss to what
  extent they have been able to consider their options re committee membership,
  link roles and so on.

# Task 2. Introducing the concept of the critical friend.

 Begin by using slide 5 to debrief their 'homework'. Take a few examples and celebrate examples of good practice.



 Move onto slide 6 and after covering the bulletpoints ask them to work in 3s and 4s on the question at the end of the slide.



Take feedback listing their ideas on flipchart. These might include points such as
visiting the school, attending INSET, inviting staff to present reports to the
governing body and its committees, attending school events, attachment to a
class, year group or, subject, governors' noticeboard, participating in school
outings and social events.

# **Activity 2.2 Monitoring and evaluation**

#### Learning outcomes. For participants to:

- understand the significance of monitoring and evaluating performance
- understand the role of governing bodies in both
- have considered what should be monitored and evaluated
- know where monitoring and evaluation 'sit' in the five stage cycle for school improvement

### **Overall length**

15 minutes

#### Resources required

- Slides 7 11
- Handouts 1-3
- A SEF(blank) downloadable from www.ofsted.gov.uk
- Example material of the new PANDA report –see below

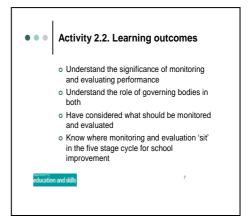
#### **Key notes for trainers**

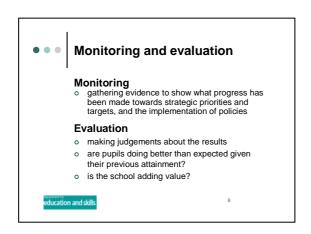
- The words monitoring and evaluation are sometimes used inter- changeably in schools and that can be confusing.
- Governors monitor progress by seeing for themselves on visits to the school, by receiving reports from the head and other staff, and by studying documentation.
- Everyone benefits if there is an agreed strategy about what evidence of progress is to be presented to the governing body and its committees, when, and in what format.
- A new PANDA report is being developed for use in 2005. The new report will not contain benchmark grades and will focus on presentations that include measures of contextualized value added. Example material can be found on the PANDA website: http://www.ofstedpandas.gide.net/.
- The Pupil Achievement Tracker (PAT) will be available as normal in 2005. See <a href="http://www.standards.dfes.gov.uk/performance/pat/">http://www.standards.dfes.gov.uk/performance/pat/</a>
- There are plans to introduce a joint PANDA/PAT in summer 2006.
- Relevant evidence should be used to inform evaluation of the immediate outcomes from the implementation of plans and policies, and the longer term impact. Quality rather than quantity of evidence should be the aim.
- It is important to consider trends over time and whether there is triangulation of evidence. For example if staff cite concerns about behaviour as reasons for leaving, students complain of bullying, parents move their children from the school, exclusions are climbing there would be incontrovertible evidence that behaviour needed to be tackled!
- Schools are expected to be self-evaluating and there are tools such as the Ofsted Self-Evaluation Form to support that process. This will be dealt with in detail in module 3.
- Attainment and achievement may also be confused. They are defined in the slides.

**Activity 2.2 Monitoring and evaluation** 

Task 1

 Slide 7 sets out the learning outcomes for this part of the session.

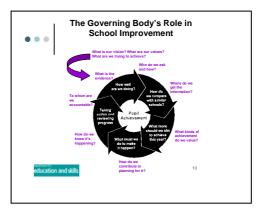




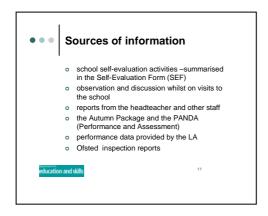
- Use slide 8 to explore their understanding of monitoring. Ask why it is important to monitor progress of plans and policies during the year not just at the end of the cycle. Make sure they cover:
  - -to check whether progress is being made
  - -to identify and share good practice
  - -to clarify what still needs to be improved
  - -to ensure accountability.
- Explore how governors monitor.
- Highlight the fact that governors bring an objective perspective to the process of evaluation. This is a very important aspect of their critical friend role. Besides genuinely celebrating effort as well as success, they have to be able to ask challenging questions such as 'Are we doing as well as we could? Why is it that some children are doing so much better in some subjects than in others?'
- Ask what should be monitored and evaluated apart from the progress being made by pupils? What other factors make a school a good school?
- Use **Handout 1** to summarise the discussion picking out any significant points they have added or omitted.
- Point out that not everything on the list is easy to measure. For example school
  ethos and culture. Ask how they might go about that. N.B Activity D5 provides a
  framework for approaching this. You might wish to provide it as a resource even if
  you aren't doing the activity.

- You might want to explore the issue of staff morale, highlighting the fact that this
  means teaching staff and support staff. Ask what indicators there might be of
  staff satisfaction/dissatisfaction. They may mention staff turnover (not necessarily
  a negative factor), supply budget, feedback from exit interviews, staff involvement
  in extra-curricular activities.
- It is important to stress that judgements about even seemingly intangible aspects of the school's performance should be evidence based.
- Handout 2 provides some questions they might ask in meetings or on visits to the school. This is an opportunity to discuss the way in which questions are phrased; the tone of voice used and so on.
- Use slide 9 to distinguish between attainment and achievement. Governors are
  increasingly aware of the significance of the value added factor so you will need
  to judge whether to explain how chances charts and value added graphs are
  used to judge performance.





- Slide 10 is useful to show the coherence of all the processes that contribute to school improvement. Emphasise that achievement rather than attainment is at the centre.
- Draw this part of the session to a close by showing slide 11. Describe the SEF and explain that you will deal with that in more detail in session 3. Briefly touch on the planned changes to the PANDA and PAT.



• Draw their attention to **Handout 3** which summarises the governors' role in monitoring and evaluation.

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#### **Module 2 Handout 1**

#### What should be monitored and evaluated?

- National Curriculum assessments and tests and/or secondary examination results
- attainment and progress of specific groups of children e.g. boys/girls, children from ethnic minority groups, looked after children, children with special educational needs
- quality of teaching and learning
- pupils' independence as learners
- pupil attendance
- pupils' behaviour, attitudes and self-esteem
- pupil exclusions
- pupil involvement in extra-curricular activities
- number of applications for admission
- · destinations of school leavers
- leadership and management
- school ethos/culture
- staff morale, attendance and commitment
- partnership with parents, agencies, and the wider community
- views of parents, pupils, staff and the community
- information on the school's curriculum, staffing and budget
- the learning environment.

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# Module 2. Handout 2. School performance monitoring questions for governors

Standards	Quality of Teaching	Leadership and Management
<ul> <li>How is our school currently performing?</li> <li>Are our children making better than expected rates of progress?</li> <li>How do standards in year groups, classes, and / or subjects compare with national standards?</li> <li>How does the school's performance compare with LA averages?</li> <li>How does the school's performance compare with that of similar schools?</li> <li>How does the school's current performance compare with its previous performance? What is the trend in results over the last three years?</li> <li>Have some subjects / year groups shown a marked improvement this year? If so, why?</li> <li>Are some groups of pupils doing better than others? If so, why? (e.g. looked after children, gender, ethnicity, SEN)</li> <li>What are the attitudes of pupils towards their learning?</li> </ul>	<ul> <li>How do teachers plan for their lessons?</li> <li>How do teachers ensure that all pupils are appropriately challenged?</li> <li>How do teachers explain to pupils what they are going to teach?</li> <li>How do teachers keep track of progress?</li> <li>What do teachers do when they see pupils underachieving?</li> <li>To what extent do teachers seek the views of their pupils about learning?</li> <li>Does the school know what teaching styles work and why?</li> <li>Can these styles be applied in those parts of the school where results need to improve?</li> <li>What professional support do teachers get to help them teach more effectively?</li> <li>How do support staff contribute to teaching and learning?</li> <li>How do support staff support pupils to ensure they have equal access to opportunities to learn and develop?</li> <li>How do support staff support pupils to help them make their own decisions and take responsibility for their own actions?</li> <li>What professional support do support staff get to help to maintain and improve their contribution to raising pupil achievement?</li> </ul>	Does the governing body and the leadership team:  • provide a clear vision and sense of common purpose among key stakeholders?  • foster high aspirations?  • maintain an explicit focus on pupil achievement?  • plan strategically?  • adopt a proactive stance to change  • demonstrate a commitment to equality and inclusion?  • promote the personal development and wellbeing of learners  • ensure that rigorous self-evaluation keeps the Self Evaluation Form current and informs plans?  • make effective use of performance data  • ensure sound financial and resource management?  • practise distributed leadership?  • ensure that all judgements about performance are based on sound evidence.

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# Module 2. Handout 3. The governors' role in monitoring and evaluation

- Governors need to be part of a whole school self-evaluation strategy. Governors should focus on their strategic role and not on day-to-day management issues.
- The Ofsted Self-Evaluation Form (SEF) provides the framework for monitoring and evaluation. The governing body needs to satisfy itself that the judgements recorded are accurate and based on relevant evidence.
- The School Improvement Plan, along with agreed policies, provides a strategic framework for the work of staff and governors.
- Governors do not need to try to keep track of everything that a school does. They need to decide which are the key indicators they should monitor and evaluate.
- There should be agreement between the head and the governing body about the
  evidence that will be required to demonstrate progress. It should also be made
  clear how and when it will be gathered, by whom and at what point it will be
  considered by the governing body.
- The headteacher is responsible for ensuring the quality of teaching. Governors are not expected to make professional judgements when they observe lessons. They do need to contribute to the process of evaluation, considering summaries of evidence gathered by the head and the staff.
- Responsibilities/specialisms linked to the School Improvement Plan should be identified within the governing body and its committees.
- If governors are able to spend time in school, a protocol should be agreed with staff, to ensure that visits are structured, productive and enjoyable. The emphasis should be on gathering information (monitoring), to inform decision-making by the whole governing body. (evaluation)
- As critical friends of the school, governors should be able to recognise and celebrate success as well as to ask questions. Maintaining an appropriate balance between support and challenge is crucial.
- The governing body should evaluate its own practice on a regular basis and may benefit from an external perspective when doing this.

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# Activity 2.3 (C) Monitoring and evaluation. Cont.

### The resources for these activities are in the activities section.

#### Aim of the activity. For participants to:

 engage in one of a number of activities associated with monitoring and evaluation.

#### **Overall length**

20 minutes

#### **Key notes for trainers**

- The learning outcomes for each activity are listed below together with the resources required
- Each activity could be a managed in 25-30 minutes.

#### C1. Using the SIP as a basis for monitoring and evaluating progress

To understand:

- what questions governors could ask in order to know what progress has been made with the strategic plan
- what evidence could be presented to the governing body
- who could provide it?
- how?
- When?

The SIP extracts from B6 are used again here. N.B. The primary example is based on assessment. Point out that governors could not expect to receive information about individual pupils or teachers.

#### Resources

- Slide 12
- Handouts C1-1, C1-2, C1-3, C1-4
- Cribsheet C1-1
- Flipchart

#### C2. Analysing pupil performance data

To understand:

- what type of performance data is available to schools
- how to interrogate performance data

This activity is based on the new format 2004 anonymous PANDAs on the Ofsted website.

#### Resources

- Slide 13
- Guidance document 'Introducing the New PANDA Report' on <a href="https://www.ofstedpandas.gide.net/">https://www.ofstedpandas.gide.net/</a>
- Extracts from the Anonymous PANDAs on <a href="http://www.ofsted.gov.uk/publications/index.cfm?fuseaction=pubs.summary&id=3">http://www.ofsted.gov.uk/publications/index.cfm?fuseaction=pubs.summary&id=3</a>
   968

#### C3. Monitoring and evaluating key aspects of the school's performance

To understand what evidence you might look for to find out how effective your school is in:

- teaching and learning
- creating the learning environment
- · securing pupil involvement in extra-curricular activity
- managing pupils' behaviour
- maintaining staff morale, attendance and commitment
- communicating with parents and the wider community

Governors are invited to think of practical ways to monitor and evaluate the above aspects of a school's performance. You could divide the group into 3s and 4s each starting at a different point on the list to ensure all points are covered.

#### Resources

- Slide 14
- Handout C3
- Cribsheet C3
- flipchart

#### C4. Link Governors. Asking the right questions

To understand what questions you could ask if you were:

- the Literacy Governor OR
- the Numeracy Governor OR
- the Special Educational Needs Governor

to gain a clearer understanding of progress in your area. Again the group could be divided into 3s and 4s each considering a different role.

#### Resources

- Slide 15
- Handout/cribsheet C4
- Flipchart

It is unlikely that any one activity will draw out all the key points so you could summarise by reminding them to read Handout 3.

# **Activity 2.4 (D) Visiting the school**

#### Aim of the activity. For participants to:

 engage in one of a number of activities associated with visiting the school. practice

#### **Overall length**

• 25 minutes

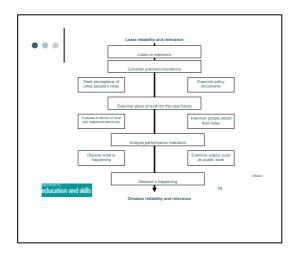
#### **Key notes for trainers**

- An introductory task is included
- The learning outcomes for each of the subsequent activities are listed below together with the resources required
- Each activity could be managed in 25-30 minutes.
- Individual governors do not have an automatic right to enter the school whenever they wish. But they need to be able to visit from time to time in order to develop their understanding of the school so that they can make sound judgments within the governing body about the conduct of the school.
- Governors should arrange their visits with the headteacher.
- It is very useful to have a visits policy agreed by staff and governors.
- The governing body should plan visits to cover the key priorities in the school improvement plan. Because the plan will evolve from the SEF it should cover issues such as the emotional and physical safety of children, how much they enjoy their learning and so on as well as their attainment and progress.
- Each visit should have a clear focus.
- Visits by governors can be useful and informative. They do not replace
  professional inspection or the monitoring and evaluation carried out by the
  headteacher.

Adapted from Chapter 4 of A Guide to the Law for School Governors.

# Activity 2.4 (D). Visiting the school. Task 1

- Introduce this activity by asking 'why should governors spend time in the school during the working day?'
- Remind them of the ideas they shared earlier in the session about building the working relationship with the headteacher and staff.
- Use slide 16 to show how Ofsted weights evidence. 'Observe it happening' has the greatest value.



Task 2. Activity 2.4 (D) Visiting the school. Cont.

The resources for these activities are in the activities section.

#### Key notes for trainers

- The learning outcomes for each activity are listed below together with the resources required.
- Each activity could be managed in 25-30 minutes

Choose from one of the following activities.

#### D1. Developing a protocol for visits

To understand:

- what should be considered when producing a protocol for governors' visits to the school
- how to decide the focus for a visit
- what governors should always do and never do before, during and after a visit for both staff and governors to feel confident about the process.

A partially completed proforma is provided which governors are asked to work on in groups to complete.

#### Resources

- Slide 17
- Handout D1-1
- Cribsheet D1

#### D2. Visits. Learning from experience

To understand:

- the dos and don'ts of school visits
- whether visits they have made were productive and if so, why.

Governors are first invited to complete a simple questionnaire. Then they have an opportunity to consider in groups any visits they have made, to ask whether they were productive and if so, to identify why. The cribsheet for D1 may be useful when leading the feedback session.

#### Resources

- Slide 18
- Handout D2-1
- Cribsheet D2

#### D3. Visits. Video based activity

To understand:

- what constitutes effective and poor practice in governors' visits
- what governors always do and never do before, during and after a visit for both staff and governors to feel confident about the process

The video extract 'A Walk on the Wild Side' shows two different approaches adopted by governors making visits to school. The trainer's brief suggests discussion questions.

The cribsheet for D1 is relevant for the feedback session.

#### Resources

- Slide 19
- Trainer's brief D3
- Cribsheet D1
- Flipchart

#### D4. Reporting on visits

To understand:

 what constitutes good practice in reporting to the governing body on visits undertaken

The handout provides three different examples of reports written following visits. They are asked which are the most useful and why. Then they go on to produce 'Do' and 'Don't' lists for a governor writing his or her first report.

Handout D4-2 is a suggested proforma for recording visits, which you can distribute during feedback. The second example is based on this format.

#### Resources

- Slide 20
- Handouts D4-1, D4-2
- Cribsheet D4

### D5. Monitoring the school's culture/ethos

To understand:

• how to monitor the less tangible factors that make a school an effective school

The task is to imagine that their governing body wishes to evaluate the ethos/culture of the school. Governors are asked to add their ideas to a checklist of evidence for their colleagues to focus upon when they visit the school. The handout gives space for governors to list the evidence they might see and hear on a visit.

### Resources

- Slide 21
- Handout D5
- Cribsheet D5

# **Activity 2.5. Delegation and meetings**

#### Learning outcomes. For participants to:

- understand the principles of delegation
- be aware of the key points about the conduct of meetings
- know how to be effective in meetings

#### **Overall length**

• 15 minutes

#### Resources required

• Slides 22- 24

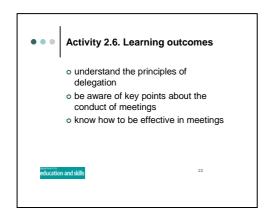
#### **Key notes for trainers**

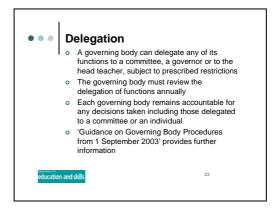
- An effective governing body, working strategically, will set its meeting dates for the year and its key agenda items. These will relate to, amongst other things, timescales in the SIP. Draw their attention to the year planner on www.governornet.co.uk.
- Deregulation means that governing bodies have greater freedom about their size and the way they operate.
- A governing body can delegate many of its statutory functions to a committee, a governor or the headteacher. The governing body must review the delegation of functions annually.
- Governing bodies can decide how and when to elect the chair and vice-chair.
   Those standing for election must withdraw when a vote is taken.
- Governors who are paid to work at the school cannot stand for chair or vice-chair of the governing body though they can chair committees.
- Governing bodies must meet at least three times a year.
- The clerk must give each governor, associate member, and the headteacher (if
  not a governor) written notice of a meeting, a copy of the agenda and any papers
  to be considered at the meeting, at least seven days before the meeting.
- The quorum for any governing body meeting and vote is one half (rounded up to a whole number) of the total number of governors in place, i.e. excluding any vacancies.
- The governing body can decide what, if any, committees it will establish and must determine the membership, proceedings and terms of reference. It must convene committees and panels to deal with pupil discipline and staffing issues such as pay, grievance, discipline, as and when necessary.
- Each committee must have a chair and a clerk. Governors can clerk committees but not the governing body
- Two or three governors must be appointed to conduct the headteacher's appraisal.
- Governing bodies can invite associate members to join committees if additional expertise is needed. The governing body can assign limited voting rights to associate members at the time of appointment.
- Associate members can chair committees but cannot be in the majority.
- Minutes must be available for anyone who wishes to see them, excluding confidential items.

See A Guide to the Law for School Governors for further information.

# Activity 2.5. Delegation and meetings Task 1

Slide 22 describes the focus of this activity.





- Slide 23 summarises key points re delegation.
- Use slide 24 to check participants' knowledge of the procedures associated with meetings. Alternatively, if you set activity E3 as an inter-sessional task you could provide the cribsheet and give them a few minutes to check their answers.



# **Activity 2.6 (E) Meetings**

#### Aim of the activity. For participants to:

engage in one of a number of activities associated with meetings

The resources for these activities are in the activities section.

#### **Overall length**

15-20 minutes

#### **Key notes for trainers**

- Only short activities have been included in this section, in this edition to enable the module to be completed in the two hour session.
- The role play from the 2003 update could be updated and used in a session specifically on effective meetings.
- If you use activity E2 it will take 20 -25 minutes because it is video based.

#### Choose from one of the following activities.

#### E1. Being effective in meetings

To understand

- what will help them to maximise their effectiveness in meetings
- how to apply previous experience from a range of contexts

This activity invites governors to work in groups to consider what will help them to be effective in meetings. They could list all their ideas then diamond rank them.

#### Resources

- Slide 25
- Cribsheet E1
- flipchart and pens

#### E2 Video based activity on being effective in meetings

To understand:

- how governing body practice can help or hinder their participation in meetings
- practical strategies that will enable them to overcome potential barriers

The video could be viewed from a variety of perspectives, for example what should the chair do to improve matters? However the focus here is on what new governors can do to maximise their confidence and effectiveness.

The governor is shown attending his first meeting of the finance committee. It is shambolic and no attempt is made to explain the context or to involve the new governor. Exasperated he complains about how the meeting is being run. The trainer's brief suggests questions to prompt discussion. This could be run as a whole group discussion rather than group work and feedback which would reduce the time needed.

#### Resources

- Slide 26
- Trainer's brief E2
- Video extract -Time and the word

#### E3 Quiz on Procedures

To understand:

• the procedures which apply to governing body meetings

It has been suggested that this be used as an inter-sessional task. This would remove the need to talk through slide 24. You could simply provide the cribsheet and deal with any queries arising.

#### Resources

- Slide 27
- Handout E3-1
- Cribsheet E3

#### E4 Why have committees?

To understand:

- how committees can enhance the work of governing bodies
- the structures of their own governing bodies
- how their interests and expertise might be applied in their governing bodies

This activity asks governors to list all the possible benefits of having a committee structure, the possible disadvantages, and how they might be overcome. It's a good opportunity to draw on their own experience.

#### Resources

- Slides 28 and 29
- Cribsheet E4
- Flipchart and pens

# Activity 2.7. Reflection, action planning and evaluation

### The aims of the activity are to:

- reflect on learning
- evaluate the session

### **Overall length**

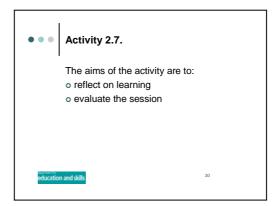
• 10 minutes

#### Resources

- Slide 30
- Handout 4 if you choose to set inter-sessional tasks
- Evaluation sheet

## Task 1: Plenary discussion and evaluation

Introduce the session using slide 30.



- Remind participants that they are thinking about what they have learnt. Revisit the intended learning outcomes for the module.
- If time allows ask participants to share one action point they have decided upon as a result of their learning. You might focus on how they will feedback to their governing bodies.
- They might want to:
  - -find out how the governing body is involved in the SEF
  - -check whether their governing body has a visits policy.
- Ask participants to complete any evaluation sheets you choose to use. An example is provided in the introduction to this toolkit.
- If you are setting inter-sessional tasks you will need to distribute resources for these now.

# Module 2 Handout 4 Inter-sessional tasks

- Read a recent report from the headteacher to the governing body. Ask yourself how much it tells you about how the school is performing. In particular what did you learn about pupils' attainment and progress?
- Read the minutes for the same meeting. To what extent do they show that the governing body engaged in constructive discussion about the report?