



Embedding Formative Assessment scale-up evaluation

Evaluation report

July 2024

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THE  
**BEHAVIOURAL  
INSIGHTS  
TEAM**







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## About the evaluator

The project was independently evaluated by a team from the Behavioural Insights Team (BIT): Dr Patrick Taylor; Rizwaan Malik; Ellie Stretch; Pujen Shrestha; Neus Torres Blas; Tim Hardy; Kim Bohling; Ingrid Broch-Due, and Dr Alex Sutherland.

The principal investigator was Dr Patrick Taylor.

BIT has world-leading experience delivering and evaluating education interventions. We have delivered 50+ education randomised controlled trials across 2,600+ schools, including pilots (e.g. Taylor *et al.*, 2019), larger trials (e.g. Wright *et al.*, 2019), and scaling evaluations (e.g. Bogiatzis-Gibbons *et al.*, 2021). We have developed a deep understanding of contemporary scaling issues in the English education system, as well as the relevant frameworks and literature, having delivered two scaling evaluations, and two scaling support projects as part of the Education Endowment Foundation's Capability Building Fund.

We also have extensive experience of scaling our own interventions. For example, our relationship building intervention for the National Tutoring Programme (NTP) was disseminated to all organisations in the NTP network. Our student engagement intervention on the Hegarty Maths platform reaches approximately 600,000 students globally per year.

As Head of Programmes at Envision, Dr Taylor led the scaling of numerous educational programmes, delivering in hundreds of schools and colleges each year. As Director of Programmes at Youth United, he oversaw the £10M scaling of 2,000 youth clubs into the most deprived communities in the UK.

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## Executive summary

### 1.1. The project

This evaluation is a collaboration between the Schools, Students, and Teachers Network (SSAT) and the Behavioural Insights Team (BIT). It focuses on the scale-up of a professional development programme for teachers called Embedding Formative Assessment (EFA).

SSAT describes itself as: ‘a membership organisation, bringing together schools and academies from across the UK and globally that are committed to achieving deep social justice’<sup>1</sup>. EFA is a professional development programme that aims to improve pupil outcomes by embedding the use of formative assessment strategies across a school. In the programme, schools receive initial training, two years of ongoing support from a mentor, and detailed resource packs to run structured monthly workshops, known as Teacher Learning Communities (TLCs). The programme focuses on enhancing understanding of formative assessment strategies, reflecting on formative assessment practice in the classroom, shared problem solving, and planning for future practice. Between TLCs, teachers conduct structured peer observations focusing on the use of formative assessment strategies. Black and William (2009) define formative assessment as practices in which:

*...evidence about student achievement is elicited, interpreted, and used by teachers, learners, or their peers, to make decisions about the next steps in instruction that are likely to be better, or better founded, than the decisions they would have taken in the absence of the evidence that was elicited. (Black and William, 2009)*

A simple example of a strategy that teachers learn about through the programme is the design and use of hinge questions—multiple-choice questions that are used during a class to check the understanding of the group on a topic before moving on.

The evaluation had two broad aims. First, we wanted to improve our understanding of what it takes to effectively scale-up educational interventions in the English state school system. We hope to provide useful information to intervention providers, policymakers, and school leaders on this topic. Second, we wanted to provide practical and timely insights to SSAT that supported them to scale up.

This report summarises findings from the four-year project. A mixed-methods approach was taken, using data from schools and from SSAT. At the school level, ten case studies were conducted, combining observations and interviews with school staff. School surveys were carried out at three time points with all schools that were part of scaling at the time of the survey distribution. At the SSAT level, a combination of observations, interviews, document reviews, and administrative data reviews were conducted. We also ran workshops with SSAT to help them to document and develop their scaling strategy, as well as rapid feedback meetings that supported them to understand and act upon our analysis over the course of the project.

The project began in December 2019 and finished in December 2023.

**Table 1: Summary of findings**

Research theme	Finding
Strategy	SSAT made many substantial changes to their programme strategy to support scaling. Changes to the organisational processes included the automation of their Customer Relationship Management (CRM) processes, the expansion of the central delivery team, and the recruitment of consultants as

<sup>1</sup> See <https://www.ssatuk.co.uk/about/>.

	<p>EFA mentors to increase reach. The programme content remained largely the same throughout the research period, however, updated materials will be introduced for the 2024/2025 academic year.</p> <p>After missing recruitment targets in the first year of the research, SSAT widened and improved their marketing strategy, with support from the Education Endowment Foundation (EEF). This along with a school fee subsidy from the Department for Education (DfE) helped them to exceed recruitment targets in the second year of the research.</p>
Structures, systems, and processes	<p>SSAT collected a range of qualitative and quantitative monitoring and evaluation (M&amp;E) data on the programme—some of these data were collected through online forms, which made analysis more straightforward and reduced the burden on SSAT staff, which in turn supported the scaling of the intervention.</p> <p>SSAT's M&amp;E approach relating to programme outcomes was deemed to be a proportionate and efficient approach to impact management (given the existing impact evidence from an effectiveness trial), and no further improvements were suggested in this area. During the first year of the research, some potential improvements to M&amp;E were identified across school reach and recruitment, programme implementation, and programme quality. We suggested (in summary) that SSAT: i) ensure complete data was collected where possible; ii) collect more structured quantitative feedback from stakeholders; iii) conduct periodic analysis of the data collected; and iv) develop formal M&amp;E plans relating to each area. Improvements were made in all of these areas by the research.</p>
Reach and recruitment	<p>In the build-up to the 2021/2022 academic year, a total of 23 schools were recruited to the programme, of which 14 began the programme that year— this was considerably lower than the target of 50 new schools that SSAT was aiming for. In 2022/2023, the recruitment target was revised to 150 schools due to the introduction of the DfE subsidy (which covered 70% of the fee to schools). The subsidy seemed to have a large positive effect, with 120 schools recruited and 80 starting delivery that year. The other main factor affecting the low recruitment rate in 2021/2022 seemed to be a concern from schools about increasing the workload for their staff (particularly in the wake of Covid-19, when staff absence was still high).</p> <p>Over half of the schools, which started the programme over the two-year period had above-average levels of free school meals (55%). The majority of schools were rated 'Good' or 'Outstanding' by the Office for Standards in Education, Children's Services and Skills (Ofsted) (84%), with a higher percentage of subsidised schools rated 'requires improvement' than fully-funded schools (22% vs 10%).</p> <p>In total, 718 schools entered the sales pipeline between January 2019 and May 2023, with an overall conversion rate of 12%. This compares favourably to the conversion rate for full fee paying schools only, which was 4% at the end of the 2021/2022 academic year.</p>
Fidelity	<p>SSAT staff suggested that the intervention contains three essential features: i) teachers participating in TLCs and reflecting on their practice; ii) teachers observing one another between TLCs; and iii) producing personal action plans to support them as they try new techniques in their classroom. In an end of year implementation survey, mentors reported a very high level of fidelity with these core components (94 to 100% of schools delivering faithfully depending on the component). In a survey carried out by BIT that went directly to schools, school leads, TLC leaders, and classroom teachers agreed that the TLCs and peer observations were central to the programme (and reported sticking faithfully to these components), but there was some evidence to suggest a less consistent approach to personal action planning.</p>

	<p>A wide range of adaptations to the programme (made by school leads, TLC leaders, and classroom teachers) were identified—including small changes to the language used within the programme, changes to the delivery format, changes to the size of the TLC groups, as well as more substantive changes to the programme content. None of these adaptations were significant deviations from the programme’s theory of change. Indeed, they were considered by SSAT to be appropriate and necessary for scaling. Factors that influenced the effectiveness of adaptations to the intervention included regular opportunities for TLC leaders and school staff to provide feedback on the programme to the school’s leadership; and the quality and regularity of the relationship between the school lead and the EFA mentor.</p> <p>Intervention fidelity was encouraged by SSAT via the EFA mentors but was largely the responsibility of the school lead and TLC leaders. Some schools developed innovative systems to reward and incentivise adherence, while others incorporated EFA into their performance management processes. Some of the schools with the highest fidelity took additional measures to build staff buy-in to the programme, which in turn encouraged adherence.</p> <p>Fidelity to the intervention was monitored by SSAT (through the EFA mentor), the school lead and TLC leaders. The EFA mentor monitored intervention fidelity through a series of informal (often virtual) calls with the school lead, coupled with an in-person visit to the school at the end of the first year of implementation. The level of monitoring conducted by school leads and TLC leaders varied across schools. Schools with the highest fidelity to the programme tended to have school leads and TLC leaders that actively monitored staff attendance at TLC sessions and their completion of peer observations and personal action plans. Some schools took a less active approach to monitoring fidelity given the additional pressures that they had been under in the wake of Covid-19, which often resulted in lower overall fidelity to the intervention.</p> <p>When we compare implementation surveys with EFA mentors and those with class teachers, we sometimes find that mentors substantially overestimated fidelity. For example, 100% of mentors believed that their schools were running TLC sessions for the correct amount of time (75 minutes), but only 40% of teachers reported that this was the case. This inconsistency shows how important it is to collect data from reliable and/or multiple sources when scaling.</p>
Contextual factors	<p>Thirteen school-level factors were identified as supporting the adoption and implementation of the programme including: having a school lead with the capacity and enthusiasm to run the programme well; and having a wider group of teachers who were willing and able to facilitate the programme’s communities of practice.</p> <p>Three external factors were found to support the programme scale-up: the availability of government subsidy for the programme fee; dissemination through existing school networks; and government endorsement of the programme in official Continuing Professional Development (CPD) frameworks.</p>
Sustainability	<p>This research explored sustainability in terms of the embeddedness of the programme in schools, and its institutionalisation at levels above the school. There was evidence to suggest that the programme had changed teacher’s classroom behaviours at this stage of implementation. Around 94% of teacher survey respondents in year two of the research noted that they had used EFA strategies within their teaching, and 56% agreed that their general teaching practices had changed as a result of participating in the programme (N=456). Mentors and School Leaders were monitoring for embeddedness in various ways, including learning walks, book reviews, and informal conversations. A range of factors affected embeddedness, such as the stability of EFA leadership, support from senior leaders and teacher workload. Survey data suggests that the programme had</p>

	<p>encouraged teachers to use EFA strategies in their classrooms and that some teachers wanted specific elements of the programme to persist beyond the end of implementation in their school.</p> <p>There was also some evidence to suggest the institutionalisation of the programme at levels above the school, such as Multi-Academy Trusts (MATs), education organisations, and international schools.</p>
Cost	<p>The cost of the programme to schools who paid the full fee was £2.02 per pupil per year. For subsidised schools, this fell to £1.51. Both figures are larger than the estimated cost from the effectiveness trial, seven years earlier, which was £1.20. So, the scaling effort so far has not resulted in overall cost efficiency, though efforts to grow are still fairly new, and the programme still only reaches a very small proportion of the total school population. The increased cost comes from increasing the level of support to schools (two additional days of in-person support) and inflation.</p>

## 1.2. Interpretation and recommendations

We make the following recommendations, based on the findings of this report, and generalising them slightly for intervention providers in this field. We also draw out new recommendations for policymakers and the leaders of schools and networks of schools (e.g. MATs). These recommendations were refined in a findings and interpretation workshop with SSAT and the evaluation team at the EEF.

**Table 2: Recommendations for scaling education interventions in the England context**

Actor	Recommendations for scaling
Policy-makers	<p><b>Subsidise interventions that are proven to be effective:</b> Decision-makers in schools are time-poor, and they do not always prioritise or know about the evidence when buying interventions. If we know something is cost-effective, then central government subsidy could be a prudent use of resources. Our analysis suggests that larger subsidies for schools that require improvement (according to Ofsted) are also worth considering. Targeting subsidies and other support in geographic areas (such as the DfE's Education Investment Areas<sup>2</sup>) should be done with caution as it can have the unintended consequence of overwhelming schools in those areas with interventions.</p> <p><b>Support the development and/or creation of organisations:</b> That have the capacity and capabilities required to scale interventions. Many evidence-based education interventions are developed and delivered by organisations that do not have this capacity and capability and some that do not wish to develop it. The sophisticated capabilities in intervention marketing and management discussed in this report can only be developed in organisations that have delivery at scale as their core objective.</p> <p><b>Hold government-funded interventions to account with the right metrics:</b> Once an intervention has been proven to be effective through an effectiveness trial, it adds almost nothing to ask for the reporting of outcome data (pupil attainment data in this case) in the absence of a robust comparison group. Instead, delivery organisations should be asked to collect reliable data on reach, adherence to core components and quality.<sup>3</sup></p>

<sup>2</sup> <https://bit.ly/3ZP4b57>.

<sup>3</sup> It should be noted however, that the scale required for a true effectiveness trial (i.e. in real world conditions with a representative sample) is rarely reached in education. For example, the 140 schools reached in the EFA effectiveness trial, represents about 4% of

	<p><b>Implement policies that reduce teacher attrition and turnover:</b> Implementing evidence-based, whole-school change (or even less comprehensive programmes) takes time and consistency of effort. The current staffing issues in England's schools are a serious barrier to such efforts.</p>
Intervention providers	<p><b>Develop a scale-up strategy:</b> That is appropriate for the intervention. Consider the strategic choice areas that are key for effective scaling, and review these periodically throughout the scaling process. Our framework on p. 16 can be a guide for this.</p> <p><b>Develop a formal plan for M&amp;E:</b> Including: i) targets; ii) the questions that the delivery organisation would like to answer; iii) the data that needs to be collected to answer those questions; iv) the required analysis of that data; v) when that analysis should be completed; vi) who is responsible for completing the analysis; and vii) what could be done with the findings (e.g. whether any results trigger certain actions or feed into an annual development process, etc.). This allows delivery organisations to act in an intentional and structured way on M&amp;E and makes the organisation more resilient to staff changes. The plan should cover data on (at least) the recruitment process, implementation, quality, and programme results. For more detailed recommendations on reach and recruitment, implementation, quality, and outcomes data see section 4.2. 'Structures, systems, and processes.'</p> <p><b>Automate and streamline internal processes:</b> Scaling an educational intervention will likely place additional burden on staff, and all internal processes that can be automated or streamlined should be in advance of the scale-up phase. In some cases, this will require investment in new technology.</p> <p><b>Collect and analyse data on your sales pipeline to improve your reach:</b> The recruitment of schools to an intervention, particularly at scale, should be supported by comprehensive monitoring of the sales process. The collection of data at key points throughout the process will allow delivery organisations to determine staged recruitment outcomes and the school response at each stage. Analyse your pipeline data to identify improvements to your sales process. See section 4.3. 'Reach and recruitment' for analysis of SSAT's pipeline data.</p> <p><b>Identify and encourage the facilitators of effective adaptation of the intervention:</b> Effective adaptation is critical for interventions to be adopted in a wide range of contexts. Providers should carefully consider the components of the intervention that can be adapted if necessary, and how delivery staff and managers can be supported to make adaptations as effectively as possible. For example, findings in this evaluation showed that effective adaptations to EFA were facilitated by regular, semi-formal feedback mechanisms between school staff and the school lead. See section 4.4. 'Fidelity and adaptation' for our findings.</p> <p><b>Identify and manage school level and external factors affecting adoption and implementation:</b> School-level factors—like the level of alignment between the school's priorities and your intervention, the engagement of senior leaders, and the other initiatives currently underway—can affect whether and how well your intervention is implemented. Broader contextual factors— like the central government policy priorities, local geography and infrastructure, and school networks— can also influence the success of your scaling efforts. Try to understand, which features of the wider context are most important for your intervention and address them in your strategy. See section 4.5. 'Contextual factors' that were important for EFA.</p> <p><b>Provide guidance to schools on how to sustain the impact of the intervention:</b> If embeddedness is an intended outcome of the intervention, providers should provide schools with guidance on how to</p>

the c.3,400 secondary schools that are in the total population, so is very unlikely to be representative of that population. So, we also arguably need much bigger effectiveness trials to be conducted before we aim for a national scale.

	<p>achieve this, paying special attention to adaptation to individual school contexts. See section 4.6. 'Sustainability', which gives some ideas on how to do this well.</p> <p><b>Provide guidance to schools on how to monitor long-term impact:</b> Schools are often interested in monitoring the impact of interventions themselves, especially if they have paid for them. Providers can share guidance on how to monitor impact in a standardised way at the school level and then collate this data across participating schools for programme-level monitoring.</p>
School and network leaders	<p><b>Develop and implement a long-term, joined-up plan for improvement:</b> One of the reasons that EFA is thought to be effective, is that it is long-term, whole-school, and focuses on embedding practice. Programmes like this will struggle to be effective if they are competing with other improvement initiatives at the same time, or if they follow-on from a completely different approach. Sometimes it is necessary to drop one or more initiatives before you can effectively adopt a new one.</p> <p><b>Be informed consumers:</b> Our research suggests that, when buying interventions, schools may place the advice of colleagues on a similar footing to the evidence. School decision-makers should ensure that they know how to tell good evidence from bad (especially the core concepts of causal inference). And they should apply this knowledge when buying interventions to support school improvement. The EEF has good guidance for schools on this topic.<sup>4</sup></p> <p><b>Appoint an effective leader:</b> The success of improvement programmes depends a lot on their leadership. Appoint someone with the right capabilities and a passion for the programme to lead the programme. Key among these capabilities are project management skills, the ability to communicate effectively with different stakeholders (from governors through to frontline staff), and strong technical knowledge and skill in relation to the programme's content. If this leader has to change midway through, appoint a strong successor and manage the transition carefully. It is usually a good idea for the headteacher to be the ultimate sponsor, with a member of the senior leadership team as the day-to-day lead.</p> <p><b>Senior leaders who teach should participate:</b> 'Senior-leadership buy-in' is often mentioned as a factor that affects the implementation of new interventions. Our research suggests that this should go beyond providing sign-off and support. If senior leaders teach, and a whole-school intervention is implemented to improve teaching, then they should participate as peers with all other class teachers. When they do not, it discredits the intervention.</p> <p><b>Give feedback to intervention providers:</b> Creating programmes that are evidence-based, meet the needs of schools and can operate at scale is hard. Giving feedback (especially through structured impact management processes, like programme review meetings and surveys) is a valuable way that schools can help and, in turn, benefit.</p> <p><b>Distribute responsibility for encouraging fidelity and embeddedness:</b> Intervention fidelity will likely be higher when encouraging and monitoring fidelity happens at multiple levels. For example, this responsibility could be shared between the lead organisation, the lead contact in the educational setting, and any staff that support the implementation of the intervention. Embeddedness can be encouraged and monitored through learning walks, book reviews, schemes of work, and informal conversations between staff.</p>

<sup>4</sup> <https://educationendowmentfoundation.org.uk/education-evidence/using-the-toolkits>

## Introduction

### 2.1. Background and intervention

Despite considerable research in recent years, identifying whole-school educational interventions that are cost-effective in improving pupil outcomes has proved challenging. At the same time, there has been growing demand from the education sector for programmes and interventions that have a proven evidence base. Embedding Formative Assessment (EFA) is one such whole-school intervention that has evidence for improving pupil outcomes (Speckesser *et al.*, 2018).

EFA is a two-year professional development programme that aims to improve pupil outcomes across all subjects by embedding the use of formative assessment strategies in a school. The programme was developed jointly by the Schools, Students, and Teachers Network (SSAT), Dylan William, and Siobhan Leahy. William defines formative assessment as practices in which ‘evidence about student achievement is elicited, interpreted, and used by teachers, learners, or their peers, to make decisions about the next steps in instruction that are likely to be better, or better founded, than the decisions they would have taken in the absence of the evidence that was elicited’ (Black and William, 2009).

The programme was developed by SSAT to address three perceived barriers to EFA: a lack of understanding of the value of formative assessment; a lack of time dedicated to embedding it; and the complexity involved in changing teachers’ practices. Taking account of these challenges, EFA combines regular workshops, ongoing feedback, and clear guidance in an attempt to make formative assessment part of routine practice.

To support delivery, schools receive detailed resource packs to run structured monthly workshops, known as Teacher Learning Communities (TLCs), which focus on enhancing understanding of formative assessment strategies, reflecting on formative assessment practice in the classroom, shared problem solving, and planning for future practice. Between TLCs, teachers conduct structured peer observations focusing on the use of formative assessment strategies.

More information on the EFA programme can be found in [the report of the effectiveness trial](#) that preceded this evaluation (Speckesser *et al.*, 2018) and on SSAT’s website<sup>5</sup>.

### 2.2. Study rationale and aims

#### 2.2.1. Rationale and aims

EFA is a well-developed and well-tested intervention. An effectiveness trial of the programme by the Education Endowment Foundation (EEF) with 140 schools found that students in the intervention schools made two additional months’ progress in their Attainment 8 General Certificate of Secondary Education (GCSE) score versus students in comparison schools (Speckesser *et al.*, 2018). As a result of this success, SSAT is trying to scale up the programme, with funding from the EEF and the Department for Education (DfE).

Other programmes of formative assessment have also been shown to have positive effects when implemented well. One study estimated a very large positive effect (up to half of a GCSE grade per student), and a meta-analysis of studies on this approach suggests that about three months’ additional progress can be achieved if formative assessment practices are supported by good professional development (EEF, 2015). However, some studies have estimated negative effects (EEF, 2015), and some research has shown that effective formative assessment practices can be difficult to implement (Gorard *et al.*, 2014). The process evaluation for the EFA effectiveness trial also highlighted substantial variation in implementation at the school level; however, SSAT felt most of the observed adaptations were acceptable and part of the necessary flexibility of the programme.

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<sup>5</sup> The full report can be accessed at: <https://bit.ly/3lOqpAi>.

Only a small number of successful educational programmes have been scaled up, with the process of scaling being formally evaluated. So, while there is strong evidence to suggest that EFA—and formative assessment more broadly—can be an effective way of increasing pupil attainment, implementing it well at scale is not a given.

Given this context, the Behavioural Insights Team (BIT) has been appointed by the EEF as an independent evaluator to assess and better understand the process, outcomes, and impact of scaling up. This report summarises the key findings and recommendations that we hope are useful for delivery organisations, school leaders, and policymakers involved in scaling educational programmes in the English schools system.

### 2.2.2. Scaling targets

SSAT received funding and support from the EEF and the DfE to enable the scaling of EFA. SSAT and the EEF agreed scaling targets separate from this evaluation, but which have been monitored throughout the evaluation. Where the evaluation refers to the ‘scaling of EFA’, this is a reference to the scaling targets agreed with the EEF.

The initial targets involved SSAT scaling the delivery of EFA from 20 secondary schools<sup>6</sup> to an additional 125 secondary schools between September 2020 and July 2022, with the following specific targets:

- 50 new schools starting in the 2020/2021 academic year (‘year one’ of the research); and
- 75 new schools starting in the 2021/2022 academic year (‘year two’ of the research).

Due to issues relating to Covid-19, and some additional funding provided by the DfE during the scaling effort, the scaling targets were revised. SSAT’s new target was to recruit 150 new schools by July 2022. To support the achievement of this new target, the DfE started subsidising the fee paid by schools for the programme. Normally, the programme costs schools £5,299 for two years support, and this is what the new schools that were recruited in 2021/2022 had to pay. With the DfE subsidy, new schools paid £1,589 (30% of the standard fee).

This report covers both SSAT’s initial scaling plans and the unsubsidised schools that were recruited in 2021/2022, as well as schools recruited through the DfE subsidised route in 2022/2023.

## 2.3. Research questions

The research questions cover the following seven interrelated topics:

- strategy;
- structures, systems, and processes;
- reach and recruitment;
- fidelity;
- contextual factors;
- sustainability; and
- cost.

A full list of the research questions can be found in Appendix A. The questions were updated to reflect the DfE subsidy and new scaling targets, specifically to investigate variation according to scaling strategy (full fee vs subsidised).

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<sup>6</sup> The target technically related to ‘schools with a secondary phase’, but ‘secondary schools’ is used in the report as a shorthand.

## Research design and methods

### 3.1. Summary of design

As illustrated in **Table 3**, a mixed-methods approach was taken to the research to explore the seven research topics. The research design was broken down into four phases, which were defined with SSAT to help ensure that feedback and interim findings were given to SSAT in as timely a manner as possible.<sup>7</sup> Each phase focused on a subset of topics and specific inquiry lines for the main actors using a range of methods and data sources at the SSAT level, at the individual level, and at the school level.

At the SSAT level, a combination of observations, interviews with SSAT strategic leads and EFA mentors, document reviews, focus groups, workshops, and administrative data reviews covered all research topics.

At the individual level, two sets of online surveys to TLC leads and class teachers were sent to the whole sample of schools receiving the intervention at three time points, covering four topics: reach and recruitment; fidelity; contextual factors; and sustainability.

At the school level, ten case studies were conducted to gain an in-depth understanding of how the programme is being implemented. They combined three semi-structured observations of key programme sessions, namely: the TLC workshop, peer feedback sessions, and lesson observations; four semi-structured interviews with the EFA school lead, TLC leads and two classroom teachers; the two school surveys; and administrative data from SSAT. The observations specifically addressed three research topics: fidelity; contextual factors; and sustainability, and the interviews additionally covered the topic of 'reach and recruitment'. In addition to this, a cost evaluation was conducted using structured interviews and administrative data. A detailed description of the data collection methods can be found in [Appendix B](#).

Although a census approach to the surveys and a stratified purposive sampling strategy to the case studies were attempted (further details in the [study plan](#)), challenges with school engagement posed difficulties in practice to achieve this goal, ultimately leading to lower survey response rates than expected and a convenience sample of schools. Therefore, it should be noted that findings cannot be generalised to all schools taking part in the programme. Details of the samples can be found in [Appendix D](#) and [Appendix E](#).

The quantitative and qualitative data were combined following a convergent parallel approach (Humphrey *et al.*, 2019; Fetters *et al.*, 2013). It means that both types of data collection occurred in a similar time frame (a timeline of research activities can be found in [Appendix C](#)), were analysed separately (details on the analytic approach to each of them can be found in [Appendix B](#)) and integrated during the interpretation of the findings phase. This design allowed the researchers to compare, contrast, and/or combine the different sources, triangulating them to understand the implementation processes more comprehensively.

The integration strategy occurred through a *merging* approach, meaning that two sources of data were brought together for analysis and comparison (Fetters *et al.*, 2013) to address the overarching research questions. For the quantitative analytics, frequency and percentage statistics were calculated to explore actors' views. For the qualitative analytics, the interviews were analysed using the six-step approach by Braun and Clarke (2006), which involved coding the transcripts and identifying emerging themes, and for the case study data, a framework approach was applied using within-case analysis being conducted before between-case analysis (Ritchie *et al.*, 2013). All information was organised according to research topics to allow merging and understanding of how the interventions were delivered at scale from different perspectives. A higher-order integration interpretation was conducted afterwards by the principal investigators to provide practical recommendations.

The present report uses a *narrative* approach to report findings, specifically through a *weaving* approach where both qualitative and quantitative findings weave back and forth around the main research topics. Regarding the fit of the quantitative and qualitative data, the integration resulted mainly in an *expansion* of understanding (Fetters *et al.*, 2013).

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<sup>7</sup> Interim report that includes the first three phases available [here](#).

**Table 3: Summary of research design, methods, and phases**

Phase:	1 and 2. Mapping strategy, resources, and processes	3. Year one implementation	4. Year two embeddedness	5. Final reporting
Research questions topics	Strategy; Structures, systems and processes; Reach and recruitment; Fidelity; Contextual factors; Sustainability; and Cost			
Focus of phase	Monitoring and evaluation (M&E) infrastructure, organisational processes, defining fidelity, Management Information (MI) collection and uses	M&E of year one in school programme implementation	M&E of year two in school programme embeddedness and sustainability	Strategy and support
Data collection methods	Admin data, document review, SSAT observations and interviews, senior leadership team interviews	Admin data, school surveys, school observations and interviews, SSAT observations and interviews	Admin data, school surveys, school observations and interviews, SSAT observations and interviews	Analysis feedback workshop with SSAT
Lines of inquiry with SSAT strategic leads	Strategy for scaling, defining fidelity, M&E infrastructure, and school recruitment process	Strategy for scaling, fidelity management, barriers to and enablers of fidelity, organisational challenges of scaling, reach and recruitment, contextual factors outside schools, cost	Changes to strategy, fidelity management, barriers to and enablers of fidelity, organisational challenges of scaling, reach and recruitment, contextual factors outside schools, sustainability, cost	Interpretation of findings
Lines of inquiry with EFA mentors	Defining fidelity, fidelity management	Fidelity management, barriers to and enablers of fidelity, contextual factors inside schools	Fidelity management, barriers to and enablers of fidelity, contextual factors inside schools	Interpretation of findings
Lines of inquiry with school staff	Barriers to and facilitators of adoption	Fidelity management, barriers to and enablers of fidelity, contextual factors inside schools, contextual factors outside schools, response to sales approach, cost	Fidelity management, barriers to and enablers of fidelity, contextual factors inside schools, contextual factors outside schools, response to sales approach, cost	Not applicable

## Findings

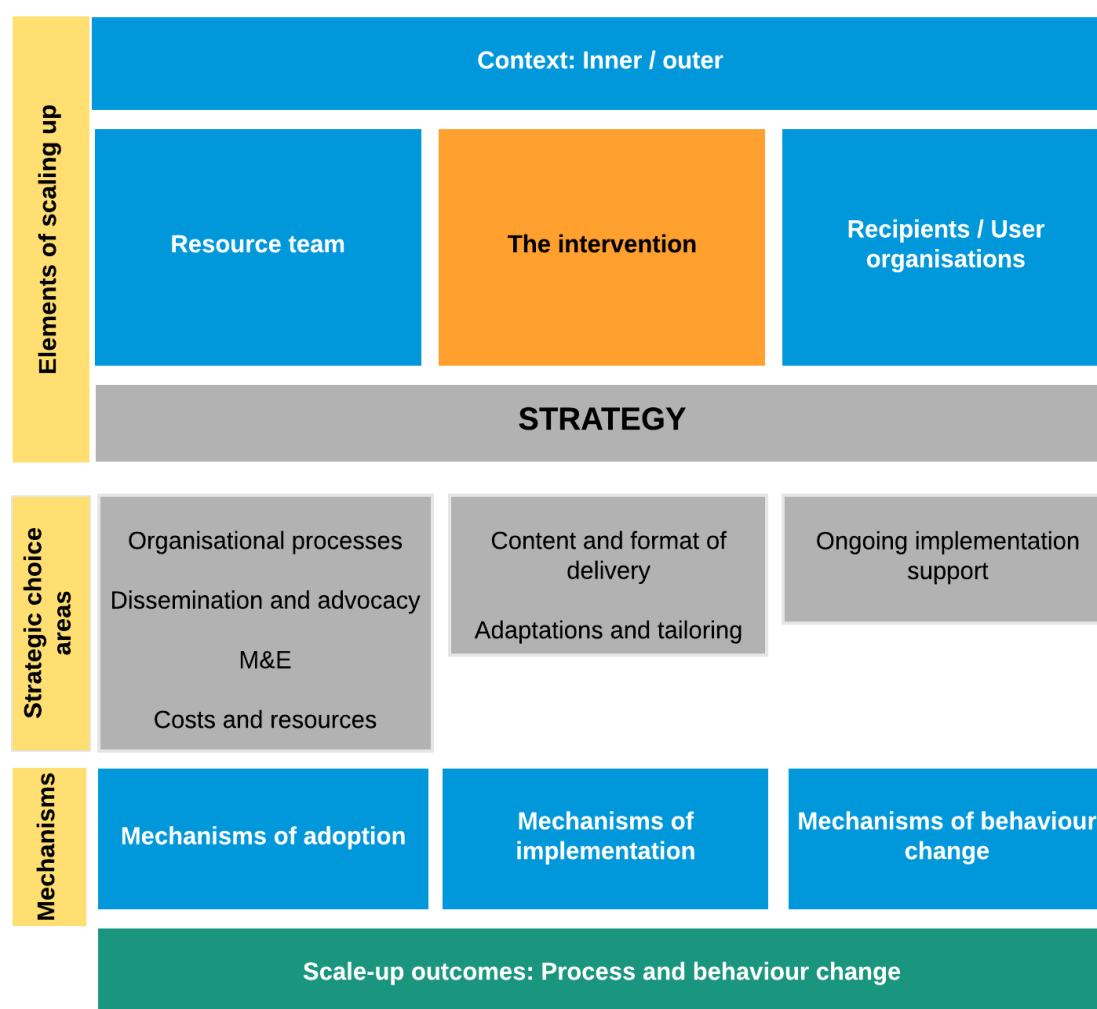
### 4.1. Strategy

#### 4.1.1. Scaling framework

In partnership with SSAT, a framework<sup>8</sup> was developed to build a shared understanding of their scale-up approach, and to support BIT's' analysis throughout the evaluation. Where some frameworks focus solely on the intervention and how it should be adapted for scale, this framework includes five elements of the scale-up process: i) the resource team (SSAT); ii) the intervention (the EFA programme); iii) the user organisation (schools); iv) the context of operation; and v) the strategy. These core components could be applied to the scale up of other programmes in an educational context.

The strategic choice areas (in the grey boxes in **Figure 1**) outline the various plans and actions that allow SSAT to roll-out the programme on a larger scale. It is the sum of the plans that enable SSAT (the resource organisation) to transfer EFA (the intervention) to schools (the recipients) and that allows them to implement the programme. These are summarised in **Figure 1**.

**Figure 1: Scale-up framework**



<sup>8</sup> The framework draws primarily on two existing scale-up frameworks by the World Health Organization and ExpandNet (2010 and 2009) and the Institute for Healthcare Improvement (Barker et al., 2015).

### 4.1.2. Strategic choices

Following a review of the programme after the effectiveness trial, SSAT has focused their scaling strategy on five key areas.

1. *Organisational processes*: SSAT have implemented a range of measures to improve the efficiency of their organisational processes, including the automation of Customer Relationship Management (CRM) processes and transferring elements of mentor support and management to be online. The team responsible for EFA has expanded, incorporating a dedicated Programme Lead, a Project Officer, and a Project Manager. SSAT have also changed their approach to mentor recruitment, now recruiting education consultants who have the capacity to take on a larger number of schools while keeping the total number of mentors lower and manageable for training and support.
2. *Dissemination and advocacy*: The EFA sales funnel consisted of marketing through various channels, including emails, social media, conferences, features in Teach Secondary magazine and SecEd, Open Days hosted by EFA Ambassador schools, and the Education Lead speaking directly to schools. A host of events with Dylan William (a recognised and respected school improvement academic) was organised in the DfE target regions to raise the profile of the programme during the recruitment of Wave 2 schools. The EEF has a new recruitment and engagement team that has also supported the recruitment of Wave 2 schools. Dissemination and advocacy plans mainly targeted headteachers and members of a school's senior leadership team. However, SSAT's Education Lead increasingly engaged with some local authorities, Multi-Academy Trusts (MATs) and international schools about broader dissemination of the programme.
3. *M&E*: SSAT routinely collected data on recruitment and school characteristics, such as the proportion of pupils with English as an Additional Language, the level of pupils on Free School Meals (FSM), the school's Ofsted (Office for Standards in Education, Children's Services and Skills) rating, and the school's current educational outcomes. SSAT also collected a range of data relating to implementation, including contact details for the key school contacts, the results of a fidelity survey completed by mentors, conversation records between the school lead and the mentor, and surveys of teachers and pupils. The new CRM system introduced also allowed SSAT to identify the click rates and open rates for emails, which helped them to begin tracking the effectiveness of various marketing messages.
4. *Content and format of delivery*: The content of the TLCs has remained the same throughout the research period. However, the programme lead has developed new programme materials that are officially being launched for the 2023/2024 academic year. Some of the changes support the scaling of the programme, such as additional recordings of Dylan William and accompanying handouts that are designed for teachers who are unable to attend a session (e.g. due to working part-time). The TLC sessions have also been reordered to promote staff buy-in.
5. *Ongoing implementation support*: The programme is designed so that mentors are the main point of contact and support for schools. If mentors are unable to respond to a query, they will contact the team at SSAT. The programme lead produced documents that provide suggested solutions to common problems to help mentors address schools' concerns without needing to ask SSAT.

### 4.1.3. Scale-up outcomes

Central to SSAT's strategy for scaling were their intended outcomes for the scale up. Based on discussions with SSAT and other materials seen at the start of scaling, their scale-up outcomes can be categorised into four distinct areas, as seen in **Table 4**.

**Table 4: Scale-up outcomes**

Category	Target outcomes
Organisational outcomes	Recruit and train sufficient mentors to support schools
	Two models of delivery developed, i.e. one- and two-year versions

Reach	<p>Original targets:</p> <ul style="list-style-type: none"> <li>• 50 new schools starting in the 2020/2021 academic year; and</li> <li>• 75 new schools starting in the 2021/2022 academic year</li> </ul> <p>First revised targets:</p> <ul style="list-style-type: none"> <li>• 50 new schools starting in the 2021/2022 academic year; and</li> <li>• 75 new schools starting in the 2022/2023 academic year</li> </ul> <p>Second revised target: 150 new schools recruited by July 2022</p>
Embeddedness	<p>Schools implement the programme within the broad parameters for fidelity of the programme</p> <hr/> <p>Teachers across all subject areas are using formative assessment</p>
Cost	EFA is scalable at a reasonable cost

The actual number of schools against the recruitment targets varies according to interpretation. SSAT include schools that have completed and submitted the paperwork to sign up to the programme in their recruitment targets. However, for the purposes of the evaluation we have conducted analysis based on schools having actually begun programme delivery (i.e. delivered their first TLC session), due to some drop out between signing up and delivering the programme. Following our definition, 14 schools started the programme in the 2021/2022 academic year and 80 schools started in 2022/2023, with more (approximately 80) schools scheduled to begin delivery in September/October 2023. Factors affecting school recruitment are documented in section 4.3. 'Reach and recruitment' below.

## 4.2. Structures, systems, and processes

When we began the evaluation, SSAT already had a clear sense of some simple structural changes to the central and delivery staff teams that were needed to support scaling (described above). They also had some M&E activities in place, but our initial assessment of their scaling strategy suggested that these plans were less well-developed. As a result, a comprehensive review of SSAT's M&E data and systems was completed in the first year of the evaluation and detailed findings and recommendations specific to the EFA programme were shared with SSAT in a feedback deck and the interim report. Many of the recommendations from the interim report have now been implemented by SSAT. The key findings and recommendations from this review should be considered in the scale up of other education interventions, and suggested good practice is summarised below. This good practice combines strengths identified in SSAT's approach to M&E with our recommended improvements. Overall, SSAT considered these recommendations to be feasible, valuable, and proportionate.

In relation to all data:

- *M&E plan*: Develop a formal plan, including: i) targets; ii) the questions that the delivery organisation would like to answer; iii) the data that needs to be collected to answer those questions; iv) the required analysis of that data; v) when that analysis should be completed; vi) who is responsible for completing the analysis; and vii) what could be done with the findings (e.g. whether any results trigger certain actions or feed into an annual development process, etc.). This allows delivery organisations to act in an intentional and structured way on

M&E, making the organisation more resilient to staff changes and making it easier to induct new staff. The plan should cover data on (at least) the recruitment process, implementation, quality, and programme results.<sup>9</sup>

#### Reach and recruitment data:

- *Recruitment tracker*: Use a centralised tracker to monitor progress against recruitment targets.
- *Pipeline dashboard*: Use a live dashboard that automatically updates with expression of interest (EOI), types of interest expressed, and what action has been taken to progress to booking. Collect data in a timely manner (e.g. as soon as a school joins the pipeline) and store data in a logical and organised way (e.g. one record per school, with linked records for staff within schools).
- *Link to national data*: Use a matching process with national databases (e.g. DfE admin data) to gather school characteristics data for each school, analyse this data, and consider whether there are schools with specific characteristics that need to be targeted.
- *Feedback data*: Collect feedback from schools that have entered the sales pipeline to determine reasons for their interest in the programme, and continue to monitor this over time, including at the point where schools drop out of or finish the programme. Use this data to modify processes where necessary.

#### Implementation data:

- *Fidelity survey*: Use an online system to collect objective data on implementation (e.g. attendance registers). Where objective data is too difficult to collect, surveys can be used to capture this data. These surveys should include mostly quantitative questions that can be easily analysed to provide snapshot findings throughout programme delivery. They can also include a small number of qualitative questions to contextualise the quantitative findings, but not too many that analysis becomes burdensome. Where possible ensure that all surveys feed into the CRM (or equivalent) so that all programme information is in one system and that auto-dashboards are created to review results as they come in. If surveys are used, then be aware that this data is less reliable—schools are likely to report higher fidelity than the reality.
- *Key contact for schools*: In the case of the EFA programme, each school has an allocated mentor who completes implementation surveys on behalf of a school. While this results in second hand information, it has also led to a very high completion rate. It would be beneficial to have a key contact who is responsible for either completing data requests on behalf of a school (where appropriate) or reminding staff at their school to complete data requests to encourage a high response rate.

#### Quality data:

- *Event feedback surveys*: Collect survey data after the completion of any programme event (in the case of EFA this included Launch Days and training). Ideally conduct these surveys online, use a QR code™ for ease of access, and link them to the CRM (or equivalent).
- *Event observations*: Depending on the nature of the event, programme staff or researchers could observe programme events using a structured observation framework and triangulate this data with the event feedback surveys.
- *End-of-programme survey*: Collect survey data at the point when schools are finishing the programme. Analyse this data together with data from other surveys (implementation, event feedback) to look for common themes and identify areas for improvement.

#### Outcome data:

- *EFA programme*: The programme had already been subject to a rigorous effectiveness trial by the EEF with positive results. This evidence of impact is combined with good monitoring of fidelity and quality, including a qualitative assessment of whether the school has its own good M&E processes in place, and the school lead's assessment of impact in their school. Additional outcome measures were not deemed necessary in this instance,

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<sup>9</sup> As part of a separate piece of work funded by the DfE and the EEF, BIT has worked with SSAT to create a comprehensive M&E plan.

however the evaluation of the scale-up of other programmes may require the development of appropriate outcome measures for the monitoring of programme results.

### 4.3. Reach and recruitment

#### 4.3.1. The EFA sales process

**Table 5: The EFA sales pipeline<sup>10</sup>**

Phase	Data point
Awareness	Data point 1: Download a web document
EOI	Data point 2: Fill out a form about EFA
	Data point 3: Attend an Open Day
	Data point 4: Meeting with a member of the recruitment team
	Data point 5: Meeting with the programme lead (generally reserved for headteachers or someone who can make a decision about programmes)
Pre-commitment	Data point 6: Booking form sent to a school decision-maker
	Data point 7: Completed booking form received by SSAT (at this point the school is included in SSAT's recruitment numbers)
Started programme	Data point 8: School started delivery of the programme (i.e. delivering the first TLC)

In the English context, since academisation and a reduction in government coordination and budgetary control, scaling educational interventions now often requires the recruitment of schools on an individual basis, or through MATs. This means that organisations that deliver support services for schools, like SSAT, need a sales process that accounts for a large volume of customers (c.25,000 schools in England). This is in contrast to the previously more centralised approach to school coordination, in which programmes could be 'sold' to one customer (e.g. central government for national roll-out) or 317 customers (e.g. England's Local Authorities).<sup>11</sup>

With this context in mind, SSAT has developed a 'sales pipeline' for EFA that consists of four phases.

<sup>10</sup> Different types of school staff engage in this pipeline, but usually senior staff, and especially those with a role in teacher development at the school. Towards the end of the pipeline, the headteacher or a designated senior leader will be responsible for signing off the school's participation.

<sup>11</sup> An example of a more centralised approach to school improvement is DfE's National Numeracy Strategy that began in 1999 (Ofsted, 2002).

**Table 5** provides an overview of the pipeline, with the data points available to SSAT in each phase.

#### 4.3.2. Changes to approach for scalability

SSAT made three key changes to their sales approach for scaling after Wave 1. The programme team made these choices based on their judgement of what might help, rather than on any data. Based on anecdotal feedback from schools in the pipeline, they believed that these changes were particularly important for the effective recruitment of Wave 2 schools. Other education programmes looking to scale may wish to adopt similar approaches.

- *Wide recruitment by post:* For Wave 2 recruitment, SSAT sent direct mailings of programme flyers to all secondary schools in England.
- *Ambassador School Network:* SSAT made use of their Ambassador schools by asking them to host Open Days for prospective schools to attend.
- *Speaker events:* In the case of EFA, Dylan William is a key messenger for the programme. SSAT arranged multiple speaker events with Dylan William in the DfE specified regions to target schools that met the funding requirements.

#### 4.3.3. Recruitment outcomes

In the 2021/2022 academic year 23 schools were recruited (i.e. reached data point 7 in **Table 5**), 14 of which began the programme in the 2021/2022 academic year.<sup>12</sup> In the 2022/2023 academic year 120 schools were recruited, 69<sup>13</sup> of which began the programme in the 2022/2023 academic year (with more due to start in Autumn Term 2023/2024).

Over half of the schools, which started the programme over the two-year period had above-average levels of FSM (55%). The majority of schools were rated 'Good' or 'Outstanding' by Ofsted (84%), with a higher percentage of subsidised schools rated 'requires improvement' than fully funded schools (22% vs 10%). Schools were concentrated in the West Midlands (23%), London (20%), with half of subsidised schools located in the North (24%), Yorkshire and the Humber (22%), and West Midlands (38%) as stipulated in the DfE funding requirements. Schools in the effectiveness trial were less likely to be rated 'Good' or 'Outstanding' by Ofsted (77%) and had a much lower proportion of pupils eligible for FSM (30%). One explanation for these differences could be that the programme was fully subsidised in the trial.

Please see [Appendix E](#) for a breakdown of the demographic characteristics of the recruited schools across 2021/2022 and 2022/2023, broken down by funding model.

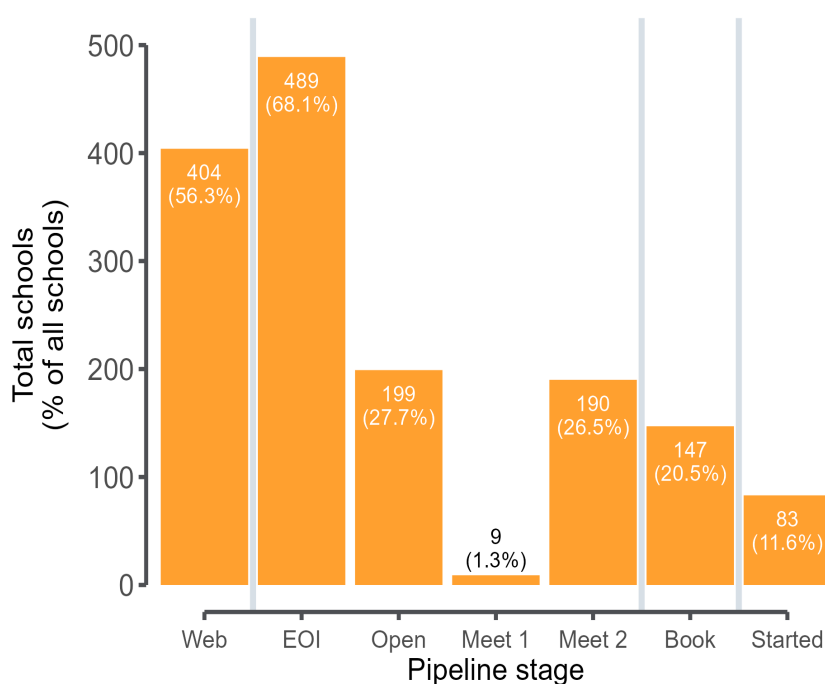
#### 4.3.4. School response to the sales process

Between January 2019 and May 2023, 718 schools entered the sales pipeline, with 14 new schools starting the programme in the 2021/2022 academic year and 69 starting in 2022/2023. This represents an overall conversion rate of 12%, which compares favourably to the conversion rate for full fee paying schools only, which was 4% at the end of the 2021/2022 academic year.

**Figure 2** shows the number of schools that engaged with each stage of the sales pipeline in this time period. The sign-up process is not linear, and schools can enter the pipeline at any point between downloading a web document ('Web') and meeting with the programme lead ('Meet 2'). So, the chart shows that, for example, 56.3% of the 718 schools who engaged in some form during the period downloaded a web document, whereas only 26.5% of the schools met with the programme lead.

<sup>12</sup> The remaining nine schools started the programme in the subsequent academic year.

<sup>13</sup> This number excludes nine schools that received funding from other sources to allow for comparison between fully self-funded schools and DfE subsidised schools, and two schools for whom we did not have data at the point of analysis.

**Figure 2: Number of schools reaching each stage of the sales pipeline**

Notes:  $N = 718$ . This covers all secondary schools interacting with the pipeline between January 2019 and May 2023, with the exception of a small number that received local government subsidies that put them out of scope for this evaluation (EEffective Kent and Learn Sheffield schools). Grey lines separate the four pipeline phases described in **Table 5**.

#### 4.3.5. Factors affecting the number of schools entering the sales pipeline

Five factors<sup>14</sup> were identified that influenced the number of schools entering the sales pipeline. The findings specific to EFA have been summarised below, with headline recommendations that should be taken into account when making predictions for the sales pipeline and conversion rate for similar education programmes.

- *Use 'trusted messengers'*: School leaders were influenced by the opinions and recommendations from other senior leaders, and particularly those that are working in contexts similar to theirs. They were also influenced by individuals such as speakers at conferences and people they followed on social media, e.g. Twitter.
- *Advertise the evidence base for the programme*: School leaders noted that they had been searching for an intervention that was tried and tested in a range of schools, and that had robust evidence of impact. They suggested that amplifying the evidence base for EFA would likely increase the number of schools wanting to find out more about it.<sup>15</sup>
- *Use school networks*: Some school leaders noted that they had become aware of the EFA programme, and subsequently entered the sales pipeline, because the programme had been recommended to them through the MAT or local authority.
- *Communicate clearly about available funding*: In some cases, school leaders had been aware that they could access funding through their local authority for Continuing Professional Development (CPD), and that this subsidy first prompted them to research different CPD programmes. The pipeline analysis above suggests that the DfE subsidy introduced in year two of the research also substantially increased the sign-up rate. For schools that were not able to access such subsidies, there were some concerns around the cost of the programme. School leaders noted the importance of being able to quickly find information about programme cost.

<sup>14</sup> An additional factor was included in the interim report: 'stage in the school improvement journey' due to the high proportion of schools that had an Ofsted rating of 'Good' or 'Outstanding', however this finding did not stand with the larger sample of schools across both years of the research so was removed.

<sup>15</sup> A mailer trial conducted by BIT tried to establish whether the 'trusted messenger' approach was more or less effective than an 'evidence-based' approach and found no significant difference (Bohling *et al.*, 2022).

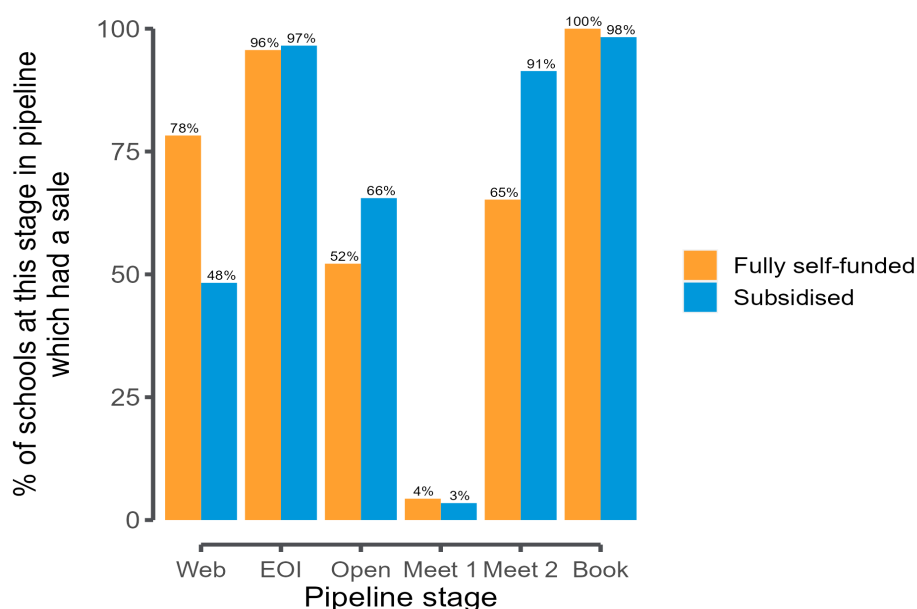
- *Ensure the programme website is user friendly:* Some school leaders found the SSAT website to be difficult to use. In some instances, this had made it challenging to find the information needed to determine whether EFA might be appropriate for their school.

#### 4.3.6. Factors affecting the conversion rate for schools in the sales pipeline

Interviews with senior leaders identified eight broad factors that influenced the likelihood of a school in the sales pipeline converting to a full sign up. Some of these may also apply to other education programmes.

- *Engagement with other schools on the programme:* School leaders noted that they were influenced considerably by their engagement with other EFA schools. Hearing other teachers speaking positively about the programme influenced their likelihood of signing up.
- *Exposure to programme resources:* Some leaders noted that they had had the opportunity to review some of the TLC content before making the decision to sign up for the programme. This opportunity helped confirm that the programme materials were high quality and reduced the perceived risk of proceeding.
- *Alignment with existing school priorities:* Some school leaders noted that their decision to sign up for the programme depended on the extent to which they saw the programme as aligning with the school's broader priorities. Some also commented that they were seeking a professional development programme that would help to embed previously taught CPD.
- *Engagement with delivery organisation:* Some leaders noted that conversations with the programme lead at SSAT were particularly impactful. This is reflected in **Figure 3** below, where it can be seen that the conversion rate for schools that had a call with the programme lead (labelled 'Meet 2') is higher than for some other activities and was especially effective for schools eligible for the DfE subsidy. However, it should be noted that data from the sales pipeline suggests that some interactions with SSAT may be less effective—in particular, as seen in **Figure 3**, the conversion rate from 'Meet 1' (an optional meeting with a member of the recruitment team) was low.
- *Perceived programme flexibility:* Some schools were wary to commit to a two-year programme (which was considered to be substantially longer than other CPD programmes), particularly due to concerns about repetition and waning teacher engagement.
- *Teacher workload:* Some school leaders noted that the length of the TLC sessions, and the requirement for class teachers to run the sessions, would lead to a rise in teacher workload, which made them less inclined to sign up for the programme.
- *Perceived need for support:* Some leaders suggested that their reluctance to sign up for the programme stemmed from the fact that they wanted to implement a well-evidenced intervention, but that they wanted to retain flexibility and autonomy to implement the programme in a way that suited their school. As a result, they had considered whether they needed to sign up for the programme or whether they could implement the core components of the programme themselves.
- *Access to subsidy:* As shown in **Table 6** below, the median time from entering the pipeline to a sale was 189 days overall but was considerably shorter for subsidised schools (165 days) than for those that were fully self-funded (353 days). It makes sense that school leaders will put more thought into a decision when it costs the school more money, however, there is likely to be a loss of momentum when a school is in the pipeline for an extended period of time.

**Figure 3** gives an indication of the effectiveness of each stage of the pipeline. It shows the percentage of schools who engaged in the stage that ended up starting the programme. So, for example, 91% of the subsidised schools who met with the programme lead ('Meet 2') ended up starting the programme.

**Figure 3: Percentage of schools signing up for the programme from each phase of the sales pipeline****Table 6: Time (in days) from entering pipeline to starting the programme**

	All schools started (N=83)	Schools started fully self-funded (N=23)	Schools started subsidised (N=60)
Mean	274	415	224
Minimum	0	36	51
25th percentile	129	168	125
Median	189	353	165
75th percentile	272	582	210
Maximum	1,007	958	1,007

#### 4.4. Fidelity and adaptation

The extent to which fidelity should be specified and adaptations should be allowed are key questions when scaling a complex programme. Once this has been decided, appropriate systems and processes need to be in place in order to manage fidelity and support modifications.

#### 4.4.1. Essential features of intervention

The essential features of the intervention, as perceived by those involved with programme delivery and implementation, varied depending on the role of the individual being asked. SSAT programme staff generally considered implementation to involve four key activities: i) teachers participating in TLCs and reflecting on their practice; ii) teachers observing one another between TLCs; iii) producing personal action plans to support them as they try new techniques in their classroom; and iv) the length of the programme being two years.

In general, all school-based participants—the school lead, the TLC leaders, and classroom teachers—considered: i) TLCs; and ii) peer observations to be central to the programme. The length and structure of the TLC sessions were identified to be core features of the intervention in interviews with some school leads. It appeared that the emphasis on TLC sessions needing to be 75 minutes and comprising certain repeated activities, had been understood by these leads.

*The structure of the sessions, the way that they essentially repeat themselves are really good, because it gives you that familiarity of it, and there is still that flexibility for people to take ownership of it, a little bit.*  
(School lead)

Observations were perceived to be a key element of the programme, as they encouraged teachers to put into practice what was discussed at the TLCs. As such, 62% of surveyed teachers perceived the observations to be extremely or very important for embedding the programme, compared to 58% for the TLCs and 47% for the personal action plans (based on 456 responses to the teacher survey in year two of the research). However, challenges with timetabling and teacher workload led to lower engagement with this activity in some schools. Around 31% of surveyed teachers did not think it was likely that they would be able to attend their next observation.

Personal action plans, considered a core feature of the intervention by SSAT, were not perceived to be an essential feature of the intervention by some school-based participants. Some staff did not see the value in the approach, while others did but felt that they did not need to complete it as it would not be checked by the school lead.

*I think we're supposed to complete an action plan, but it's not normally checked by anyone, so you don't necessarily have to do it.* (Classroom teachers)

Although 78% of teachers in the school survey were aware that the personal action plans had to be completed after each TLC session or monthly, only 66% of them managed to do so (N=456). However, in the SSAT end of year fidelity survey, 100% of mentors reported that personal action plans were being completed after each session (see **Table 23** in Appendix H). This lack of alignment between fidelity survey and teacher interview findings suggests that mentors and school leads may not have a clear picture of fidelity and often overestimate it.<sup>16</sup>

School staff consistently commented that an essential feature of the programme was the way that it facilitated dialogue and reflection between staff cross-departmentally, through both the TLC sessions and peer observations. Teachers noted that schools, and secondary schools in particular, can be highly siloed, with staff interacting regularly with those in their departments and hardly at all with teachers outside their department. In one school the cross-departmental working was a welcome continuation after Covid-19.

*[A] key thing for us is that it involves being in amongst a group of people you don't usually work with...doing this post-COVID...we'd already worked in bubbles and worked with people across the school...and I think that gave us a bit more of an incentive to maintain that and to do that momentum again.* (School Lead)

Overall, there was some confusion and uncertainty from school staff about what the most important elements of the programme are, and which elements of the programme are adaptable. School staff were largely aware that the programme had a strong evidence base, but this had led to some schools feeling uncertain about changing elements of the programme for fear of removing an aspect of the intervention that made it effective. Some of these schools noted that they would benefit from further explicit guidance that made clear the aspects of the programme that should: i) never

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<sup>16</sup> We have checked whether this difference in results between the fidelity survey and teacher survey is due to a difference in the samples and it is not. When we restrict the sample of the teacher survey to include only teachers from those schools for whom we have fidelity survey results, we see the same differences in results.

be changed; ii) be changed with good reasons and with consent from their mentor; and iii) be adapted to suit the needs of their school.

#### 4.4.2. Adaptation of intervention

Five common adaptations were observed during the case study research activities and were considered appropriate for the scaling of the programme.<sup>17</sup>

- *Language:* Some School Leads had adapted the language of the programme to make it more familiar and amenable to their staff. For example, some school leads had replaced 'peer observations' with 'peer drop-ins' or 'peer feedback', usually due to a school's historical use of high-stakes observations to monitor teacher performance and associated anxiety with the term 'observation'.
- *Timing:* School Leads seemed to be aware of the requirement for TLC sessions to be 75 minutes long, however there was some evidence of schools reducing the session length, motivated either by fitting with the school timetable or by a perceived ability to condense the content. In BIT's school survey data in the second year of the research, only 40% of responding classroom teachers reported that TLCs lasted for 75 minutes, and a further 40% reported their TLCs to last for 60 minutes or less (N=456). In SSAT's fidelity survey, 100% of mentors reported that TLCs lasted for approximately 75 minutes. This lack of alignment between what teachers reported and what school leads reported could be another indicator that a substantial group of mentors and school leads were not aware when fidelity dropped. Around 96% of schools followed the recommended frequency for the TLCs and held them approximately once per month, according to the SSAT fidelity survey (**Table 23**, N=47).

*I just feel like the sessions could have been jammed down to 55 minutes or 50-minute sessions. Or an hour at least. (Classroom teacher)*

- *Group size:* In some schools the size of the TLC groups was beyond the recommended size by SSAT.<sup>18</sup> This was usually in response to staff absence (in relation to Covid-19 in the first year of the research), and to a high number of part-time staff.
- *Content:* In some instances, the school lead had adapted the content of the programme, especially the TLC session content, to ensure it was relevant to the teaching staff and pupils in the school. For example, one school had changed references in the strategies to ones that their pupils would be more aware of.

*I've spent a lot of time literally looking at what the focus is of each week, and then just doing what I need to do to make it as relevant to what staff already know, or can access, or had training in before. (School lead)*

- *Delivery mode:* Some schools had made use of technology to implement alternative modes of programme delivery. In one case study school, teachers were able to video record their lessons as an alternative to performing in-person observations. In several schools, teachers completed and submitted their action plan using an online system instead of the paper-based system (as originally recommended by SSAT). An identified risk of this change was that staff would have their laptops out during TLC sessions, which could cause distraction. However, when the school lead had identified this risk, steps were taken to ensure the laptops were only used at specific times, usually at the end of the session.

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<sup>17</sup> After the research was complete, SSAT developed some 'traffic light guidance' on fidelity, to help schools to make effective adaptations. This guidance lists common adaptations and assigns them a colour, where red indicates that a change cannot be made, amber suggests that a change should be made with caution, and green suggests that it is okay to adapt as schools see fit. Under this taxonomy, the five common adaptations identified in the research would be classified by SSAT as follows:

- Language: Changes are encouraged (Green).
- Timing: 75 minutes should be protected for each session (Red). However, SSAT also informs schools that not all meetings will take 75 minutes; particularly if the groups are smaller in number.
- Group size: (Amber).
- Content: (Amber). SSAT acknowledges that content needs to be adapted sometimes, particularly to align EFA with previous CPD initiatives.
- Delivery mode: (Green).

<sup>18</sup> The recommended size is 8–14 teachers. Groups of approximately 30 teachers were observed in the most extreme cases.

*We were having a conversation right at the start of the TLCs about whether to do it by hand...or whether it might be better to do it electronically. I think the electronic format is better because it allows you very quickly...go back, check it. What did I do two sessions ago? (TLC leader)*

The process for agreeing adaptations for the programme varied considerably, often based on the intensity of the proposed modification and on school-level factors. There were three levels to the escalation of proposed changes.

- *In-house*: Some school leads felt able to make minor modifications to the programme themselves, without discussing with their mentor. This was particularly likely in schools where the school lead had a strong understanding of the core mechanisms of the EFA programme, which gave them the confidence to make small changes as they knew these would not interfere with the key elements of the programme.
- *Mentor*: In general, however, school leads often consulted their mentor before making a modification, either during check-ins organised by their mentor or by contacting their mentor directly. This was especially likely to happen where they reported having a positive relationship with their mentor. Mentors varied in their willingness to permit changes to the programme. There were some suggestions that newer, less experienced mentors tended to be stricter in their implementation than more experienced mentors, perhaps due to a shallower understanding of the core mechanisms of the programme.
- *SSAT*: Depending on the nature of the request, mentors would sometimes escalate to the SSAT programme lead. This was more likely when the mentor was less experienced with the programme.

Five key factors that influenced the effectiveness of adaptations to the intervention were identified.

- *Feedback opportunities*: In schools where there were mechanisms in place for the school lead to receive feedback on the programme in good time, effective and useful adaptations could be made that improved staff buy-in and overall intervention fidelity. School leads at case study schools were using various formal and informal strategies to achieve this, ranging from discussions with TLC leaders immediately after sessions to regular feedback forms shared with all participating teachers.
- *Mentor–school lead relationship*: Where the school lead perceived the mentor to be available and accessible, they were more likely to ask questions about possible modifications. This meant that the mentor was able to provide support to ensure that any deviations were appropriate, or to push back on deviations that the mentor thought the school should not be making. Some school leads also appreciated their mentor actively offering support, rather than only responding to questions.
- *Mentor quality*: Where mentors had a strong grasp of the essential features of the programme, they were able to provide good advice to schools that helped them make effective adaptations. School-based mentors appeared to be particularly good at this, with their experience of delivering the programme giving them an insight into adaptations that had worked for them in the past. Importantly, these mentors saw the programme as necessarily flexible, rather than rigidly prescribed.
- *Fidelity to the programme*: The school's fidelity to the programme, as perceived by their mentor, was also considered to be a factor influencing their ability to make effective adaptations. Where mentors saw their schools as implementing the programme with low fidelity, they were less willing to permit adaptations. This was largely due to the mentor having concerns that making adaptations might add to the workload of the school lead, which could reduce fidelity even further.
- *Access to technology*: The ability for schools to make effective technology-related adaptations largely depended on the technical ability of the school lead, as well as concerns about privacy and data protection. In multiple cases, a school wanted to record the TLCs to allow staff that had missed the session to catch up on the content or record a class when they were unable to make an observation in person, but they had decided it was not possible for data protection reasons.

#### 4.4.3. Encouraging intervention fidelity

The factors that encouraged intervention fidelity can be broken down into SSAT-level factors and school-level factors.

SSAT-level factors:

- *Mentor–school lead relationships*: Where school leads held strong relationships with their mentors, they were more likely to seek advice on how to encourage intervention fidelity. School leads noted that they were more

likely to proactively reach out in this way to their mentor when they felt their mentor would be non-judgemental, and when their mentor had made them feel like they did not mind being bothered with small requests.

*My mentor also made clear that I could email anytime with any concern—small or big—and they would be able to help me out. So, I did that a few times!* (School lead)

School-level factors:

- *Supporting TLC Leaders* TLC Leaders commented on the high workload. To address this, some schools had taken measures including allocating TLC Leaders protected time for the programme, assigning every TLC group with two TLC leads to share the burden, and some school leads had made efforts to reduce the associated administrative tasks.
- *Whole-school encouragement:* School-wide strategies such as meeting mentions and emails were used to remind staff about the importance of the programme. For the TLCs in particular, the participation of the senior leadership team was perceived to be a sign of encouragement for other teachers to attend and take the programme seriously.

*We just try and make sure that everyone is talking and thinking about the programme all the time. There's lots about EFA on the noticeboard in the staff room, and we're also putting it in the Teaching & Learning newsletter which is pinned up in every faculty office.* (School lead)

- *Performance management:* Schools with higher fidelity tended to have more formal ways of measuring fidelity, for example, by integrating engagement with the EFA programme into the official performance management system. However, some respondents felt that including EFA in performance management processes could have a negative impact on teacher motivation.

*If it comes into performance management, and staff are held formally accountable for it, does it begin to feel a bit forced? Teachers' attitudes towards it will change because they're now doing something because they're being told they have to, rather than because they want to.* (Mentor)

- *Building staff buy-in:* School leads and TLC leaders used strategies to encourage staff engagement, such as seeking feedback, adapting to the school context, and making efforts to build staff understanding of the mechanisms that help make the EFA effective. These factors all depended on the commitment of the school lead to the programme.

#### 4.4.4. Monitoring intervention fidelity

Fidelity to the intervention was monitored by SSAT (through the EFA mentor), the school lead, and the TLC leaders.

SSAT (EFA mentor):

- *Online check-ins:* Mentors typically held a series of informal virtual check-ins with the school lead throughout the year. Mentors suggested that they were able to judge fidelity to the programme (to an extent) through these check-ins, particularly based on the confidence and knowledge that the school lead demonstrated in the sessions.
- *In-person visits:* Mentors visited each of their schools at least once per year, where they observed TLC sessions, met with the TLC leaders, met with classroom teachers, and observed a range of lessons. In doing so, they were able to determine whether the programme was being implemented appropriately, and whether the key elements of the programme were in place. Following visits at the end of each year of implementation, the mentor completed the SSAT fidelity survey, in which they rated the school on various aspects of their implementation. The full results of the SSAT fidelity survey are shown in Appendix H.<sup>19</sup>

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<sup>19</sup> Only two schools had answered the End of Year 2 survey by the time of drafting this report. Due to the low number of observations, we have only included responses for End of Year 1.

School lead:

- *TLC attendance and engagement:* Some school leads consistently monitored teachers' attendance at the TLC sessions, usually by asking the TLC leaders to take a register, which was passed on and recorded. In the latest teacher survey 78% of responding teachers were aware that their attendance at TLCs was being monitored. Some school leads also dropped into different TLC groups to informally monitor levels of engagement with the sessions.
- *Personal action plans:* Some school leads had systems in place to monitor the completion of personal action plans. This was made more straightforward where the systems were online. At one school, the online system automatically notified the school lead when a teacher submitted their action plan, which meant that the school lead could follow up with individual teachers when they became aware that personal action plans were being submitted unexpectedly early during a TLC session.
- *Peer observations:* Some school leads also sought to monitor the completion of peer observations, though this presented greater challenges as it was often self-reported.
- *Hands-off approach:* Some school leads had decided to take a more hands-off approach to monitoring fidelity, mainly due to either a school culture that resisted monitoring teacher behaviour and performance, or a belief that staff should be trusted. However, results from the SSAT fidelity survey with mentors and the BIT survey with teachers suggest that attendance and other forms of monitoring took place in the majority of schools.

TLC leaders:

- *TLC leader role:* The extent to which TLC leaders monitored fidelity to the programme varied depending on perceptions of the TLC leader role. In some schools, it was assumed that the school lead was responsible for all fidelity monitoring, but this was sometimes unrealistic due to their other responsibilities. In other schools, TLC leaders took on some of the aforementioned responsibilities such as monitoring session attendance and the completion of personal action plans. This appeared to be a more efficient approach, and classroom teachers seemed to prefer the TLC leaders (who were often regular teachers or middle leaders) to check whether they had completed various activities, as opposed to the school lead (who was usually a senior teacher).

## 4.5. Contextual factors

Effective scaling needs to take into account the factors in the context beyond the intervention that might affect adoption and implementation.

### 4.5.1. School-level factors affecting adoption and implementation of EFA

Thirteen school-level factors were found to affect the adoption and implementation of EFA.

- *Alignment with other CPD:* Teachers were more likely to embrace the programme when it was perceived to link with other CPD priorities the school had pursued. School leads purposefully adapted the language of the programme to mirror that of previous CPD initiatives that the school had focused on, which made the programme seem more manageable and reduced the feeling of teachers being overloaded with new concepts to work on.
- *Competing school priorities:* Schools that used EFA as their primary professional development programme for staff tended to see quicker adoption of the programme than those with multiple programmes. However, other priorities outside of CPD, such as exams, also led to some logistical issues with timetabling the programme activities.
- *EFA school lead:* Where school leads had passion, enthusiasm, and greater capacity to lead the programme, implementation was more effective. In general, where school leads had this high level of passion for the programme, they were more able to persuade teachers within the school of the benefits of the programme, which increased teachers' intrinsic motivation to engage with the programme, which in turn improved adoption of the programme. The ability of the school lead to have difficult conversations with staff was also noted as being an important factor influencing the implementation of the programme. In schools with higher fidelity to the programme, it was apparent that the school lead was more comfortable chasing up members of staff that were not fully engaging with the programme.
- *School leadership:* Where school leaders had high engagement with the programme, adoption was quicker, and implementation was improved. In some schools, it was clear that the headteacher and other senior leaders had

engaged with the research behind the EFA programme and had carefully thought about how the programme could help the school achieve their medium-term ambitions. The attendance of school leaders at the TLC sessions was also perceived by teachers to indicate the importance of the programme.

- *School culture:* For schools that had an ‘open door’ culture (with regular informal observations), adoption of the programme was more straightforward. In contrast, the over-monitoring of performance led to teachers in some schools being more wary, particularly of the peer observation element of the programme. Teachers in some schools also had a high level of mistrust towards the senior leadership team, which led to a reluctance to share during TLC sessions if senior leaders were present. However, in other schools, the mixing of senior leaders and classroom teachers in the TLC sessions was seen as a key strength of the programme.
- *School size:* There was some evidence to suggest that smaller schools had more cohesive staff bodies, which increased their willingness to engage with TLCs. Some respondents also suggested that in smaller schools the school lead may have a better understanding of staff personalities, and that this would help them to allocate effective TLC groups.
- *Staff:* There was evidence that some experienced staff were more resistant to programme adoption, due to the fact that they had experienced so many CPD programmes before and that some found the formative assessment approaches to be too basic. This challenge was effectively mitigated by some school leads who adapted the programme content to suit their staff. Schools with a lot of part-time staff also faced logistical challenges with implementation.
- *Students:* In some schools, poor pupil behaviour was noted as a particular challenge, and there was some suggestion that this was exacerbated by high levels of pupil poverty. Poor student behaviour made teachers less willing to trial new formative assessment approaches in their classrooms, hindering implementation.
- *TLC leaders:* The ability of TLC leaders to facilitate active discussions in their TLC groups influenced staff engagement with the programme. Some schools noted that selecting TLC leaders that were personable, well-liked by their peers, and had the ability to have difficult conversations where necessary supported overall implementation of the programme.
- *Workload:* High workloads made it difficult for some teachers to complete peer observations, and in some cases, prevented them from attending TLC sessions. However, some teachers noted that the programme itself had a lower workload than anticipated for a CPD programme.
- *Teacher turnover:* High staff turnover, including of senior leads, means that interest in prioritising formative assessment for teacher CPD can quickly change. This is a recurring challenge faced by SSAT, and changes in school leads can especially impact the school buy-in and programme fidelity.
- *Technology:* Some schools were able to use technology as a facilitator of implementation, for example, some teachers used ‘On View’ cameras to record their lessons for their partner to observe, mitigating the challenges around scheduling an in-person observation. However, at other schools, this was not possible due to data protection regulations around recording students.
- *Impact of Covid-19:* In the first year of the research, Covid-19 had caused challenges such as increased staff absence, and in some instances had led to schools pausing the programme entirely.

#### 4.5.2. External factors affecting programme scale up

Three external factors were found to influence the programme scale up.

- *Funding:* SSAT struggled to recruit schools in 2021/2022, but the DfE subsidy introduced in 2022/2023 contributed to increased interest and school recruitment. At some case study schools, access to the subsidy had influenced their decision to sign up to the programme. This suggests subsidising the programme has had a positive impact on the trajectory of the scale up. The analysis in section 4.3.3. ‘Recruitment outcomes’ (above) supports this, with approximately five times as many schools starting the programme in the subsidised year than in the unsubsidised year; a pattern mirrored by a much higher sales conversion rate in 2022/2023. Some of this effect may have been driven by Covid-19 (which was still a major factor in schools not signing up or starting the programme in 2021/2022), but the substantial subsidy seems to have played a substantial role as well.
- *School networks:* As discussed in section 4.3. ‘Reach and recruitment’, word-of-mouth recommendations affected the number of schools in the sales pipeline, and this is especially the case for pre-existing school networks. Accessing these networks could, therefore, have a considerable impact on the scale-up efforts,

particularly where the networks consist of a large number of schools. SSAT has been in conversation with the Chief Executive Officers (CEOs) of MATs and are developing a process for recruiting entire networks of schools.

- *Programme profile:* The profile of the programme has been raised among teachers, for example, through references in the Early Career Framework (a DfE framework of standards<sup>20</sup> to support early career teachers). Such references enhance the respectability of the programme, which is believed to have benefited the scale up.

## 4.6. Sustainability

This research explored sustainability in terms of the embeddedness of the programme in schools, and its institutionalisation at levels above the school. Most case study schools were in the first year of programme delivery, meaning school leads were in the earlier stages of planning for and monitoring the embeddedness and sustainability of the programme. The stage of programme delivery should be taken into consideration when interpreting the findings in this section and is reflected in the recommendations.

### 4.6.1. Indicators of embeddedness

In the EFA programme, 'embeddedness' means the extent to which formative assessment is integrated into the planning and everyday practice of all learning activities. There were four main ways that mentors and school leads monitored the embeddedness of the programme.

- *Learning walks:* Both mentors and school leads used school-wide observations or learning walks to look for tangible changes in classroom practice. Mentors were able to conduct these observations during their in-person visits, with the caveat that these only occurred once per year and teachers may have had advanced warning about the visit. Some school leads noted that they carried out learning walks regardless but had begun observing for formative assessment practices.
- *Book reviews:* Mentors and school leads found it helpful to review pupil's books for evidence of formative assessment, such as quizzes or hinge questions, which indicated the embedding of the programme in classroom practice.

*I was with a colleague today, who came in a different lesson, and we were looking through books that you do. We were like, 'Oh, actually, they're all EFA strategies. (School lead)*

- *Schemes of work:* Some school leads looked for evidence of formative assessment strategies being embedded when they reviewed schemes of work. In particular, where teachers shared lesson planning within the department, it was noted that if the formative assessment strategy was incorporated into the shared lesson plan, then most teachers in the department would likely use it as they all used the same resources. For some school leads, this was a strong indicator of embeddedness.
- *Conversations:* Some mentors and school leads assessed embeddedness through conversations with teachers, especially in the early stages of the programme when they did not expect to see significant changes in classroom practice. Most case study schools were in the first year of programme delivery at the time of the research visit, and so this was a common method of monitoring for early signs of embeddedness.

*The way people talk about it, it's almost second nature to use [EFA] terminology to describe what you're doing. (Classroom teacher)*

The methods used to monitor embeddedness varied and were often generic Quality Assurance processes rather than tailored to EFA. School leads who expressed a keen interest in measuring the impact of the programme were uncertain about how to best monitor the embeddedness.

*If we go and do a review of embedding formative assessment, what is it that we're going to be looking for? How are we going to recognise it? It's a piece of work for us to do. The impact in the classroom is something that we've got to be considering. (School lead)*

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<sup>20</sup> <https://www.gov.uk/government/publications/early-career-framework>.

#### 4.6.2. Factors affecting embeddedness of intervention

Six key factors were found to affect the embeddedness of the programme.

- *Stability of EFA leadership:* In some schools, the school lead changed during the course of programme delivery for various reasons. This had sometimes led to a loss of momentum during the handover process, as the original school lead had been the initial champion of EFA in the school. However, in some schools the replacement school lead was considered to be of higher quality than the original, leading to positive changes in programme implementation.

*The way [new EFA lead] has done it, it's a lot more structured into how our school does things. I think the first year felt very much like the programme had just been dropped on to [school] with no thought about what actually goes off within [school].* (TLC leader)

- *Staff body:* In schools with a high turnover of staff, school leads noted that this would impact the likelihood of embeddedness. This was especially the case due to the length of the programme, as the benefits of developing knowledge and strategies for formative assessment over time can be lost if large number of teachers left part-way through. School leads had similar concerns where they had a high proportion of part-time staff who were not always able to complete programme activities.
- *Support from senior leaders:* In schools where, senior leaders were highly engaged with the programme, staff were more convinced that the programme would become embedded and that the programme activities would continue beyond the two years. Engaged senior leaders were also more concerned about measuring the impact of the programme across their school over time, to incentivise continued buy-in from staff. Some teachers suggested it would be useful if senior leads provided examples of embeddedness they had observed to inspire other staff.

*Our senior leadership team have been very receptive and have appreciated the model and like it themselves, so they'd be happy to support [the continuation of TLCs].* (School lead)

- *Teacher workload:* As with programme implementation and fidelity, the time available for teachers to work on developing and practising formative assessment techniques in their classrooms impacted embeddedness. In schools where teacher workload had impacted the uptake of peer observations, teachers were especially sceptical about the continuation of observations beyond the end of the programme.
- *Staff buy-in:* The attitude of staff towards the programme activities was an indication of embeddedness. In some schools, teachers noted that the peer observations encouraged them to embed formative assessment techniques into their lessons ahead of an observation so that it would become standard practice. However, in other schools, there was concern that teachers would only use formative assessment practices during the ten-minute observation period, as they were aware when the observation would happen.

*You have to have been doing [formative assessment] for quite a bit before someone sees you with it, so it becomes quite normal. So, it's quite a subtle way for it to be a bit more embedded!* (Classroom teacher)

- *Programme flexibility:* The ability of school leads, TLC leaders, and teachers to adapt the programme to meet their needs and the needs of their school was a facilitator of teacher buy-in and therefore EFA. As discussed in section 4.4. 'Fidelity and adaptation', some school leads had effectively adapted elements of the programme depending on the school context and, especially, the prior experience of their teachers, to maintain a high level of teacher engagement. However, it was more challenging for some teachers to adapt the learnings than others, for example, teachers of art and physical education struggled to apply the provided examples to their subject contexts.

#### 4.6.3. Sustainability of the programme following scale up

There was evidence to suggest that the programme had changed teacher's classroom behaviours at this stage of implementation. Around 94% of teacher survey respondents in the second year of research noted that they had used EFA strategies within their teaching, and 56% agreed that their general teaching practices had changed as a result of

participating in the programme (N=456). Around 64% of respondents intended to carry on using formative assessment practices (N=583)—a figure that is likely to grow as teachers spend more time on the programme. These figures were also reflected in feedback from school leads, some of whom noted that they had seen tangible changes in the teaching behaviours of teachers at their schools since the programme began. Taken together, this evidence suggests that teachers may continue to use the strategies past the end of the programme.

There was evidence that some teachers wanted specific components of the EFA programme to persist beyond the end of implementation in their school. Around 30% of respondents reported wanting the TLCs to continue following the end of the programme (though it is important to note a further 26% had no view either way). At some case study schools, school leads and other staff members appreciated the TLC session format, particularly the cross-departmental working and the opportunity for more junior teachers to take on leadership responsibility, and hoped to continue sessions as a result. At some schools, the school leads were planning new content for the continuation of TLCs.

*We'll definitely keep the TLC groups themselves and having leads who are not currently school leaders...[it] has given a lot of people a lot of oomph and direction with their career...so we love that. (School lead)*

A similar assessment was made of peer observations, with 41% of respondents wanting these to persist past the end of the programme. However, at some schools challenges with teacher workload meant that teachers had been unable to complete peer observations even during the programme, so this seems less realistic.

Teachers have limited capacity for CPD and there was some concern that this programme would be forgotten once the next one started. Some teachers suggested that there was a need for continued structured activities beyond the end of the programme for sustained impact.

*I think having an end point of [the programme] might be a bit of a problem...in the sense of, I've done my paper folder, I'll put that on the shelf...I think it still needs to be timetabled in as part of a CPD programme in school. (TLC leader)*

#### 4.6.4. Institutionalisation of the programme

The data collection in this research focused on schools, with the only other research participants being SSAT staff, and findings around the institutionalisation of the programme are therefore limited. However, there was some evidence to suggest that the programme has been institutionalised at four levels above the school during the scale-up.

- *MATs*: SSAT have had interest from MAT CEOs in signing up all schools in their network. They are working on a strategy to make it more straightforward for schools to join the programme at the MAT level.
- *Education organisations and networks*: SSAT are working with educational organisations, such as EEFective Kent (a network by the EEF) and Learn Sheffield (a not-for-profit schools organisation) to recruit schools to the programme.
- *Chartered College of Teaching*: SSAT have formed a partnership with the Chartered College of Teaching (a professional body for teachers), so that member teachers who have completed the EFA programme will receive an exemption of ten credits for the Chartered Teacher Status.
- *International schools*: International interest in the programme has led to schools in the United States, Egypt, and The Netherlands signing up for the full programme offer, as well as ongoing conversations with more schools.

## 4.7. Cost

### 4.7.1. Costs for schools

The information about costs for schools was collected through 15 semi-structured interviews with school leads in two evaluation waves. The schools were purposively sampled to get a balance of large and small schools. The financial

costs and the aggregation of staff time were computed following the 'ingredients method' in the EEF cost evaluation guidelines (EEF, 2019).<sup>21</sup>

The average cost of EFA for one school was around £4,508.86, or £1.66 per pupil per year when averaged over three years.<sup>22</sup> This cost is the average of all financial expenditures related to the programme that were reported by the 15 schools in the sample. **Table 17** in Appendix F presents the sample averages for the different types of financial costs. Some of these averages mask large differences across schools and we report the range of values for each component to reflect this.

The main components of the cost were:

- the programme fee for the two years (£6,299)<sup>23</sup>, for which schools got at a discounted price of £5,299 in Wave 1 from the EEF scaling grant, and £1,589.70 in Wave 2 thanks to the Accelerator Fund subsidy from the DfE;
- printing and materials for the TLC (£300 on average), which went from £0 (for schools that did not print) up to £500;
- teacher cover for the TLCs, peer observations, and attending the Open Day (£1,077 in total); and
- travel expenses to attend the optional Open Day (£37 on average).

There was high variability in the amount spent by schools on teacher cover. Some schools held the Launch Day on in-service training days when they had no teaching duties, while others did not so they had to purchase external cover. There were also large differences in the amount spent between schools that could use internal cover for observations and those that had to resort to external cover.

The cost to schools decreased each year: the average cost of year one of the research was £4,121.10, which included the programme fee, acquisition of materials, and cover for the Launch Day; and the average cost for year two of the research was £409. The main expenses for schools in year two of the research were printing materials and teacher cover for the TLC sessions.

Some schools reported additional costs related to the programme, like paying for refreshments for the TLC sessions (an average of £145 per year), paying a compensation wage to the TLC leaders for their time in the programme, or having to buy pre-requisite equipment like interactive whiteboards. These additional costs were not included in the main figures above.

After scaling up the programme, the cost per pupil per year was £0.46 more expensive than the £1.20 in the effectiveness trial. The main driver of this difference seems to be an increase in programme fees over time (which were £3,895 in the effectiveness trial in the 2015/2016 academic year). However, the cost per pupil differed between unsubsidised and subsidised schools. We call unsubsidised schools those in Wave 1 of recruitment that paid the full fee of £5,299 (and a school in Wave 2 that paid £6,299), and subsidised schools those from Wave 2 of recruitment, which received the Accelerator Fund subsidy so they only had to pay 30% of the programme fee. Thanks to the subsidy, the total cost for subsidised schools (including the reduced fee and other financial expenditures, without refreshments) was £3,802 on average, or £1.51 per pupil per year, while the unsubsidised schools spent £5,343 on the programme on average, or £1.81 per pupil per year.<sup>24</sup> This quantity went up to £5,970 (£2.02 per pupil) for those schools in Wave 1 that did not receive any kind of external funding. This means that schools recruited in Wave 2 paid, on average, £2,168<sup>25</sup> less

<sup>21</sup> [Cost\\_Evaluation\\_Guidance\\_2019.12.11.pdf \(d2tic4wvo1iusb.cloudfront.net\)](https://www.eef.org.uk/media/1000/2019.12.11.pdf)

<sup>22</sup> The number of schools in the sample for the cost evaluation analysis was 15 schools.

<sup>23</sup> The full and unsubsidised programme fee for non-SSAT members is usually £6,299. This price was paid by one school in our sample recruited in Wave 2 that was not eligible for the subsidy.

<sup>24</sup> Our sample had eight subsidised schools and seven unsubsidised schools.

<sup>25</sup> The amount is smaller compared to the £3,709 difference in fees, as the average expenses for subsidised schools in the 2022/2023 period, excluding programme fees, were approximately £1,000 higher. This increase in the average is primarily due to one school that spent an unusually high amount on external cover for peer observations (£4,160). The headteacher stated that this amount is an upper estimate, as they used a combination of internal and external cover but lacked more precise data. If we assume they only required external cover for half of the observations, the average expenses for subsidised schools would decrease to £1.28 per pupil, which is closer to the cost in the EEF effectiveness trial.

compared to schools in Wave 1 that had no external funding. In both waves, the cost per pupil was more expensive than in the effectiveness trial.

As part of the cost evaluation, we also examined how affordable the programme was for schools. The schools that did not receive the Accelerator Fund subsidy used a variety of ways to fund the programme fee with internal or external funding. These included using their internal CPD budget, having the MAT pay for it, or looking for subsidies from their local authority. In addition to using their CPD budget or the MAT's, some subsidised schools used their Pupil Premium budget.

We asked the school leads in the subsidised schools whether they would have been able to sign up without the fee reduction, and the responses were mixed. Two small schools (with less than 600 and 300 students) said their budget was too small and had signed up because of the subsidy. Another school clarified that they would have signed up, but they would have had to make cuts in the budget elsewhere to afford it, like reducing individual training. One of the school leads that said they could not afford the full fee and pointed out that the subsidy influenced their decision, as they had other priorities for their CPD budget.

Apart from the financial costs, we also computed the amount of time that teachers spent on the programme. We used the following assumptions to count staff time, in line with the EEF cost evaluation guidelines (EEF, 2019):

- all meetings and activities that schools would have done regardless of the programme (e.g. regular staff check-ins) were not included in the calculations; and
- we have computed the time according to their role in the programme, which could be either as school lead, TLC leader, or classroom teacher. Time spent by headteachers and other senior leadership team members outside of their participation in one of those three roles has not been included, like time spent during the sign-up process or check-ins with school leads to monitor the programme.

In terms of staff time, all teaching staff had to spend the following time on the core components of the programme:

- nine TLC sessions per year of 75 minutes (which is equivalent to 11 hours and 15 minutes per year); and
- eight peer observations each year of 10–20 minutes, and a short feedback chat (equivalent to two hours per year).

**Table 20** and **Table 21** in Appendix F report the average time spent by school leads, TLC leaders, and classroom teachers in each type of activity over the two years of the EFA programme. The range of values is also reported to show the variability across schools.

School leads spent significantly more time on the programme compared to TLC leaders or classroom teachers. The largest amounts of time were spent on preparing the TLC sessions and carrying out quality monitoring and feedback activities, such as: doing feedback surveys with classroom teachers; recording teacher attendance at TLC sessions and peer observations; holding debriefs after TLCs; updating the senior leadership team; or observing sessions. There was a lot of variability in the monitoring activities reported by schools: while some school leads did not do any additional monitoring apart from preparation meetings before TLCs and attending the TLC sessions, another spent 63 hours in a year monitoring lessons by classroom teachers.<sup>26</sup> Another school carried out interviews to select TLC leaders. Some school leads also reported spending between 0 and 36 hours per year on preparing TLC sessions, some of it during unpaid time.

#### 4.7.2. Costs for SSAT

The information on delivery costs was collected through interviews with SSAT staff and financial reports for the project. The direct cost for SSAT to deliver the programme in one school for Waves 1 and 2 was approximately equal to the

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<sup>26</sup> The time spent by school leads attending and monitoring TLC sessions has been included under 'Delivery' in **Table 21** Appendix F, so it is not included under 'Programme monitoring and management'.

programme fee of £5,299, which is equal to £5,000 for programme support plus £299 for the EFA pack of materials. According to SSAT, the £5,000 for programme support covers the following costs<sup>27</sup>:

- SSAT staff costs of managing the programme and coordinating with the schools and mentors;
- printing of training materials;
- company overheads;
- Staff costs of mentors for in-school delivery;
- travel and accommodation for the mentors (if required); and
- standard marketing and recruitment activities, which include emails and promotion on social media.

Immediately before this scale-up effort, the fee for programme support (excluding the resource pack) was equal to £6,000.<sup>28</sup> SSAT staff stated that following the subsidised expansion of the programme, the direct costs per school decreased by around £1,000. This reduction in cost enabled them to offer the reduced programme fee from £6,299 to £5,299. The decrease in cost was primarily due to two factors: i) improved efficiency in the programme administration resulting from its implementation in a larger number of schools, as well as from improvements in organisational processes detailed in section 4.1.2. 'Strategic choices' of this report; and ii) savings in travel and accommodation expenses for mentors, as the increase in the number of recruited mentors allowed for a better geographical matching of mentors to schools. The savings in travel costs are estimated to be £100 per school.

The programme fee was priced to cover all delivery costs in schools that the programme is scaled up to during the two years of the programme. Approximately 70% of the fee covers the implementation costs of year one of the programme, which includes the in-school training from mentors, and the remaining 30% cover the costs for year two of the programme.

However, the fees did not cover the costs of the additional activities needed to expand and develop the programme. These were (see section 4.1. 'Strategy' of this report for more detail on the scaling strategy and actions):

- improvement of organisational processes;
- promotional activities: these included in-person speaker events with Dylan Wiliam, organising Open Days with EFA Ambassador schools and creation of the Ambassador School Network, wide recruitment by post, features in teaching media;
- establishing internal monitoring and Quality Assurance processes;
- recruitment and training of new EFA mentors to support the higher number of schools and a bigger geographical spread; and
- review, update, and develop new programme materials.

The cost of these activities was covered by the EEF Scale Up grant<sup>29</sup> and the DfE Accelerator Fund Grants 1 and 2, with the exception of the last item on the list, which was funded by SSAT themselves. The funds by the Accelerator Fund were also used to subsidise the programme fees for schools, so SSAT could offer a greatly reduced fee of 30% to the schools in Wave 2. According to SSAT, without this external funding and relying only on programme fees, scaling up would have taken much longer. SSAT has confirmed that the programme fees and the grant funding were enough to cover the delivery of the programme to all recruited schools during the scale up, and no further grant funding will be required to sustain delivery.

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<sup>27</sup> We could not obtain a more detailed breakdown of the direct delivery costs and profit markups as this was deemed commercially sensitive information by SSAT.

<sup>28</sup> See footnote 23 on the full programme fee. We have also noted that in 2017, during the effectiveness trial, the fee was substantially lower, so it has fluctuated over time.

<sup>29</sup> As a condition of the EEF Scale Up grant, the Senior Education Lead in SSAT had to conduct individual meetings with schools that qualified for grant funding and had expressed an interest to sign up. The staff time for these meetings was also funded by the grants.

## Discussion

### 5.1. Conclusions

SSAT developed and implemented a range of measures to support the scaling up of the EFA programme. This included changes to personnel, growing the EFA team, and introducing a range of (digital) efficiencies to support scaling. However, SSAT were unable to reach their target number of schools in the 2021/2022 academic year. There was some evidence to suggest that this was—at least partly—driven by the lasting impact of Covid-19 on the UK's education system, with some schools more reluctant to begin new programmes, especially intensive programmes like EFA, during a period of such instability. Other factors—such as a school's exposure to EFA before signing up, and their concerns about the flexibility and potential burden of the programme—were also identified, and help to explain the low sales conversion rate of 4% in year one of the programme.

In year two of the programme (the academic year 2022/2023), after receiving extra funding from the DfE, they recruited a total of 120 schools, with a sales conversion rate of 12%. Evidence indicated that the DfE subsidy, which reduced the cost of the programme for schools from £5,299 to £1,589, was key here.

There was evidence of variable levels of fidelity across schools that were implementing the programme, which was driven by a range of factors. In particular, some of the schools with the highest levels of fidelity to the programme implemented a range of innovative and school-specific measures to encourage staff to engage positively with the programme, and coupled this with regular, consequential monitoring of fidelity. This was often facilitated by the engagement, motivation, and skill of the school lead. Effective monitoring of the programme, and positive relationships between school leads and mentors, allowed school leads to make appropriate and responsive adaptations during delivery. Some schools were facing challenges such as high staff turnover, high teacher workload, and lasting impacts of Covid-19, which affected both teacher engagement and the capacity to monitor fidelity. Some discrepancies between EFA mentor reports of perceived fidelity (through SSAT's annual implementation survey) and teacher reports (through BIT's evaluation survey) suggest that fidelity was lower than SSAT thought. As the annual mentor implementation survey is the core management information used by SSAT on this topic, we have recommended reviewing this.

Most case study schools were in the first year of programme delivery, meaning school leads were in the earlier stages of planning for and monitoring the embeddedness and sustainment of the programme. School leads were generally monitoring for embeddedness through their standard practices for Quality Assurance, such as learning walks and book reviews, but some school leads were uncertain about how to best measure impact over time. Survey data suggests that teachers were using EFA practices in their regular teaching as a result of the programme, but there was less certainty around the longevity of programme activities. It is therefore suggested that, SSAT monitor embeddedness over an extended period of time, beyond the second year of the programme.

In terms of the [scaling framework](#) that we used to structure this research, we found three parts of it to be particularly helpful. Breaking the 'Elements of scaling up' into four categories (the context, the resource team, the intervention, and the user organisation) helped us to describe and develop SSAT's scaling strategy. The 'Strategic choice areas' that related to these elements seemed to cover all of the important categories that a scaling strategy should. And, finally, having a clear sense of the aims of the scale up (the 'Scale-up outcomes') was crucial. The 'Mechanisms' part of the framework felt less helpful and was not used by SSAT or the evaluation. We are reflecting on this and developing a refined framework in our new scale-up evaluation in early years settings.

### 5.2. Recommendations

Detailed recommendations based on the research activities and findings have been made to SSAT, and can be found in Appendix G. Below, we provide a summary of these recommendations, generalising them slightly for intervention providers in this field. We also draw out new recommendations for policymakers and the leaders of schools and networks of schools (e.g. MATs), that we believe follow from our findings (**Table 7**). These recommendations were refined in a findings and interpretation workshop with SSAT and the evaluation team at the EEF.

**Table 7: Recommendations for scaling education interventions in the England context**

Actor	Recommendations for scaling
Policymakers	<p><b>Subsidise interventions that are proven to be effective:</b> Decision-makers in schools are time-poor, and they do not always prioritise or know about the evidence when buying interventions. If we know something is cost-effective, then central government subsidy could be a prudent use of resources. Our analysis suggests that larger subsidies for schools that require improvement (according to Ofsted) are also worth considering. Targeting subsidies and other support in geographic areas (such as the DfE's Education Investment Areas<sup>30</sup>) should be done with caution as it can have the unintended consequence of overwhelming schools in those areas with interventions.</p> <p><b>Support the development and/or creation of organisations:</b> That have the capacity and capabilities required to scale interventions. Many evidence-based education interventions are developed and delivered by organisations that do not have this capacity and capability, and some that do not wish to develop it. The sophisticated capabilities in intervention marketing and management discussed in this report can only be developed in organisations that have delivery at scale as their core objective.</p> <p><b>Hold government-funded interventions to account with the right metrics:</b> Once an intervention has been proven to be effective through an effectiveness trial, it adds almost nothing to ask for the reporting of outcome data (pupil attainment data in this case) in the absence of a robust comparison group. Instead, delivery organisations should be asked to collect reliable data on reach, adherence to core components, and quality.<sup>31</sup></p> <p><b>Implement policies that reduce teacher attrition and turnover:</b> Implementing evidence-based, whole-school change (or even less comprehensive programmes) takes time and consistency of effort. The current staffing issues in England's schools are a serious barrier to such efforts.</p>
Intervention providers	<p><b>Develop a scale-up strategy:</b> That is appropriate for the intervention. Consider the strategic choice areas that are key for effective scaling and review these periodically throughout the scaling process. Our framework on p. 16 can be a guide for this.</p> <p><b>Develop a formal plan for M&amp;E:</b> This includes: i) targets; ii) the questions that the delivery organisation would like to answer; iii) the data that needs to be collected to answer those questions; iv) the required analysis of that data; v) when that analysis should be completed; vi) who is responsible for completing the analysis; and vii) what could be done with the findings (e.g. whether any results trigger certain actions or feed into an annual development process, etc.). This allows delivery organisations to act in an intentional and structured way on M&amp;E and makes the organisation more resilient to staff changes. The plan should cover data on (at least) the recruitment process, implementation, quality, and programme results. For more detailed recommendations on reach and recruitment, implementation, quality, and outcomes data, see section 4.2. 'Structures, systems, and processes'</p>

<sup>30</sup> <https://bit.ly/3ZP4b57>.

<sup>31</sup> It should be noted however, that the scale required for a true effectiveness trial (i.e. in real world conditions with a representative sample) is rarely reached in education. For example, the 140 schools reached in the EFA effectiveness trial, represents about 4% of the c.3,400 secondary schools that are in the total population, so is very unlikely to be representative of that population. So, we also arguably need much bigger effectiveness trials to be conducted before we aim for a national scale.

	<p><b>Automate and streamline internal processes:</b> Scaling an educational intervention will likely place an additional burden on staff, and all internal processes that can be automated or streamlined should be in advance of the scale-up phase. In some cases, this will require investment in new technology</p> <p><b>Collect and analyse data on your sales pipeline to improve your reach:</b> The recruitment of schools to an intervention, particularly at scale, should be supported by comprehensive monitoring of the sales process. The collection of data at key points throughout the process will allow delivery organisations to determine staged recruitment outcomes and the school response at each stage. Analyse your pipeline data to identify improvements to your sales process. See section 4.3. ‘Reach and recruitment’ for analysis of SSAT’s pipeline data</p> <p><b>Identify and encourage the facilitators of effective adaptation of the intervention:</b> Effective adaptation is critical for interventions to be adopted in a wide range of contexts. Providers should carefully consider the components of the intervention that can be adapted if necessary, and how delivery staff and managers can be supported to make adaptations as effectively as possible. For example, findings in this evaluation showed that effective adaptations to EFA were facilitated by regular, semi-formal feedback mechanisms between school staff and the school lead. See section 4.4. ‘Fidelity and adaptation’ for our findings</p> <p><b>Identify and manage school level and external factors affecting adoption and implementation:</b> School-level factors—like the level of alignment between the school’s priorities and your intervention, the engagement of senior leaders, and the other initiatives currently underway—can affect whether and how well your intervention is implemented. Broader contextual factors—like the central government policy priorities, local geography and infrastructure, and school networks—can also influence the success of your scaling efforts. Try to understand, which features of the wider context are most important for your intervention and address them in your strategy. See section 4.5. ‘Contextual factors’ that were important for EFA</p> <p><b>Provide guidance to schools on how to sustain the impact of the intervention:</b> If embeddedness is an intended outcome of the intervention, providers should provide schools with guidance on how to achieve this, paying special attention to adaptation to individual school contexts. See section 4.6. ‘Sustainability’, which gives some ideas on how to do this well</p> <p><b>Provide guidance to schools on how to monitor long-term impact:</b> Schools are often interested in monitoring the impact of interventions themselves, especially if they have paid for them. Providers can share guidance on how to monitor impact in a standardised way at the school level and then collate this data across participating schools for programme-level monitoring</p>
School and network leaders	<p><b>Develop and implement a long-term, joined-up plan for improvement:</b> One of the reasons that EFA is thought to be effective, is that it is long-term, whole school, and focuses on embedding practice. Programmes like this will struggle to be effective if they are competing with other improvement initiatives at the same time, or if they follow-on from a completely different approach. Sometimes it is necessary to drop one or more initiatives before you can effectively adopt a new one</p> <p><b>Be informed consumers:</b> Our research suggests that, when buying interventions, schools may place the advice of colleagues on a similar footing to the evidence. School decision-makers should ensure that they know how to tell good evidence from bad (especially the core concepts of causal inference). And they should apply this knowledge when buying interventions to support school improvement. The EEF has good guidance for schools on this topic<sup>32</sup></p>

<sup>32</sup> <https://educationendowmentfoundation.org.uk/education-evidence/using-the-toolkits>

**Appoint an effective leader:** The success of improvement programmes depends a lot on their leadership. Appoint someone with the right capabilities and a passion for the programme to lead the programme. Key among these capabilities are project management skills, the ability to communicate effectively with different stakeholders (from governors through to frontline staff), and strong technical knowledge and skill in relation to the programme's content. If this leader has to change midway through, appoint a strong successor and manage the transition carefully. It is usually a good idea for the headteacher to be the ultimate sponsor, with a member of the senior leadership team as the day-to-day lead

**Senior leaders who teach should participate:** 'Senior leadership buy-in' is often mentioned as a factor that affects the implementation of new interventions. Our research suggests that this should go beyond providing sign-off and support. If senior leaders teach, and a whole-school intervention is implemented to improve teaching, then they should participate as peers with all other classroom teachers. When they do not, it discredits the intervention

**Give feedback to intervention providers:** Creating programmes that are evidence-based, meet the needs of schools and can operate at scale is hard. Giving feedback (especially through structured impact management processes, like programme review meetings and surveys) is a valuable way that schools can help and, in turn, benefit

**Distribute responsibility for encouraging fidelity and embeddedness:** Intervention fidelity will likely be higher when encouraging and monitoring fidelity happens at multiple levels. For example, this responsibility could be shared between the lead organisation, the lead contact in the educational setting, and any staff that support the implementation of the intervention. Embeddedness can be encouraged and monitored through learning walks, book reviews, schemes of work, and informal conversations between staff

### 5.3. Limitations

This research has a number of limitations that should be considered when interpreting the findings. First, the number of case study schools is small, and so findings cannot be generalised to all schools taking part in the programme. Second, there is likely to be self-selection bias in the case study and survey samples. Schools were asked to host a case study visit on a voluntary basis, meaning that the sample is likely to be biased towards schools with higher programme engagement. Similarly, completion of the school surveys was voluntary, so it is possible that schools where the EFA lead and staff body was more engaged had higher response rates than others. We ran a prize draw in each survey to try to mitigate this risk. We achieved a response rate of approximately 10% for class teacher surveys, and approximately 30% for TLC leader surveys (depending on the wave). Third, the initial plan had been to visit six Wave 1 schools twice in each year of the research. A lack of response from schools meant that only one repeat visit was completed, and new case study schools were recruited instead. While this enabled comparison between school experiences of scaling strategies (subsidised vs self-funded), it meant that nine out of ten case study schools were in the first year of programme delivery at the time of the research visit, limiting the evidence we were able to collect on the embeddedness and sustainability of the programme. Finally, this research tried to answer a large number of interrelated questions. We believe that we have managed to generate useful insights across all the research topics. However, there are some topics that we were not able to fully address. For example, we have not captured good overall sense of how SSAT's scaling strategy evolved over time and there is a lot more to be discovered about the contextual factors that influence scaling. The future research topics that we suggest in section 5.4. 'Future research and publications' should begin to address this issue.

### 5.4. Future research and publications

This research focused a single attempt to scale a programme in English secondary schools. It aimed to support that scaling effort through regular feedback and some associated capability building with the delivery organisation. It also

aimed to gather lessons learned to improve our understanding of how to scale effectively in the English schools context. We believe that we have comprehensively addressed the first aim over the course of this work.<sup>33</sup> The findings and recommendations above make a good contribution to the second aim, but there is scope for much more work there. In particular, we think that future work on this topic should focus on five areas:

- We should conduct more primary research across a range of organisations and settings that have successfully scaled or are in the process of scaling, to uncover new lessons and to explore how the lessons from our research apply (or not) for different types of programmes, delivery organisations, and settings.
- We should conduct randomised controlled trials that test different approaches and messages for recruiting schools to evidence-based programmes. These trials could be run as part of new efforts to scale programmes in England.
- We should conduct more research with people in the system beyond schools and intervention providers, to better understand the contextual factors that could support scaling. This should include gathering data from key staff in local authorities and MATs, policy officials, and politicians.
- We should engage a range of stakeholders (intervention providers, schools, key staff in local authorities and MATs, education policy, and scaling experts) to develop a strategy framework for scaling education interventions in England. Current frameworks are generic or come from other fields of policy, and the challenge in the English education system is big enough to warrant a context-specific theory.
- It would be helpful to research the current capacity and capabilities for scaling in the system, identifying the gaps that could be addressed through capacity building and/or the creation of new organisations.

This additional primary research and theory building should engage deeply with the existing literature on scaling for social impact, with the aim of producing a practical, evidence-informed guide for intervention providers, schools and school network leaders, and policymakers on scaling evidence-based education interventions in England.

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<sup>33</sup> Some of the more detailed findings that are specific to SSAT and the EFA programme can be found in our interim report (Taylor *et al.*, 2023).

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## Appendices

### Appendix A: Research questions

The detailed list of questions here expands upon the main questions set out in the body of the plan. We include additional questions here (identified by sub-bullets in italics) to set out our thinking about how we might develop these areas of research.

#### Topic 1: Strategy

- 1.1. What is SSAT's strategy for scaling up the EFA programme?
- 1.2. How does SSAT's strategy for scaling evolve over time?
- 1.3. What factors influence changes to the scaling strategy?
- 1.4. What role does the EEF play in helping SSAT to achieve readiness for scaling up?

#### Topic 2: Structures, systems, and processes

- 2.1. What challenges are there organisationally when making a sizeable change in the scale of implementation of the EFA programme, and how are these overcome?
  - What changes are made in organisational structure and processes to make the intervention scalable?
- 2.2. How well do SSAT's M&E systems support data-based decision-making and how can they be improved?
  - Are they flexible enough to respond to changing needs?

#### Topic 3: Reach and recruitment

- 3.1. What is SSAT's sales process/pathway to sales for the EFA programme?
  - Does this vary according to the scaling strategy? If so, how?
- 3.2. How many and what types of schools are SSAT reaching and successfully recruiting?
  - What is the pace of scale up and what factors affect this?
  - Does this vary according to the scaling strategy? If so, how?
- 3.3. How do schools respond to the sales approach?
  - What are the barriers and facilitators to schools signing up to the programme, and how could the barriers be overcome?
  - Does this vary according to the scaling strategy? If so, how?

#### Topic 4: Fidelity

- 4.1. What are the essential features of the intervention, and what adaptations are appropriate (and required to support scaling)?
- 4.2. How does the approach taken to scaling support or hinder fidelity?
- 4.3. How is intervention fidelity managed?
  - What measures are taken (both at the SSAT and school levels) to encourage fidelity of implementation?
  - How is intervention fidelity monitored?
  - What is the process for agreeing modifications to the intervention?
  - What action is taken when essential features of the intervention are not consistently implemented?
- 4.4. What are the barriers to, and enablers of, the effective adaptation of EFA?
  - Does this vary according to the scaling strategy? If so, how?

#### Topic 5: Contextual factors

- 5.1. What school characteristics affect the adoption and implementation of EFA and how (e.g. culture, school-type, leadership, subject(s) taught, characteristics of individual teachers and mentors)?
  - Does this vary according to the scaling strategy? If so, how?

- 5.2. What are the facilitators and barriers—in the context outside of schools—to scale up of the EFA programme (e.g. education policy, funding, networks between schools)?

## Topic 6: Sustainability

- 6.1. What indicates that EFA has been embedded in school practice?
- Does this vary according to the scaling strategy? If so, how?
- 6.2. What are the facilitators of, and barriers to, embedding the EFA programme in a school?
- Does this vary according to the scaling strategy? If so, how?
- 6.3. How viable is it for schools to sustain the use of EFA on an ongoing basis after the end of the scale up? What are the factors that affect this?
- Does this vary according to the scaling strategy? If so, how?
- 6.4. Is EFA being institutionalised at levels other than the school? What are facilitators of, and barriers to, 'vertical' scaling up, and how can the barriers be addressed?
- Does this vary according to the scaling strategy? If so, how?

## Topic 7: Cost

- 7.1. What is the cost of implementing EFA over three years during the scale up?
- What is the overall cost of implementing the programme as part of the scale up for: a) SSAT; and b) schools?
  - What is the cost of implementing the programme in year one for: a) SSAT; and b) schools?
  - What is the cost of implementing the programme in year two for: a) SSAT; and b) schools?
- 7.2. How acceptable is the overall cost of implementation to: a) SSAT; and b) schools?
- Does this vary according to the scaling strategy? If so, how?
- 7.3. Is scaling up becoming more cost efficient over time?
- 7.4. Is it financially sustainable for SSAT to continue EFA delivery across schools that the programme is scaled up to, without the support provided by the EEF?

## Appendix B: Methodology

### Data collection methods<sup>34</sup>

#### School case studies

A collection of ten comparative case studies of participating schools were conducted to gain an in-depth understanding of how the programme is being implemented. Each case study involved a one-day visit to a school that consisted of observations of a TLC workshop, interviews with the EFA lead, TLC leaders, and classroom teachers, and an interview with the school's EFA mentor. Semi-structured observation guides were used to capture field notes, and semi-structured interview guides were used for all interviews.

Schools were recruited by SSAT to the EFA programme in two cohorts ('waves')—Wave 1 schools were recruited to start in September 2021, and Wave 2 schools were recruited to start in September 2022. Data collection took place across both waves. Six case study visits were conducted with Wave 1 schools and five were conducted with Wave 2 schools (with one repeat visit to a school, bringing the total number of case study schools to ten). It had been planned that the case studies would include repeat visits for all six Wave 1 schools, however low engagement led to one repeat visit and four new case study schools being recruited instead.

A stratified purposive sampling strategy was used to target schools based on key characteristics, including school size and Ofsted rating. Fidelity rating (i.e. low or high), as defined by SSAT, was also taken into consideration. However, challenges with school engagement for the case study research ultimately led to a convenience sample that did not have as much variation in characteristics as initially planned.

#### School surveys

Two online surveys were conducted with all Wave 1 schools, with the two key EFA staff groups in each school: TLC leaders; and classroom teachers. Both surveys covered fidelity, contextual factors, and sustainability. A baseline survey was issued during the first term (in October 2020) to capture early impressions, and a follow-up survey, covering the same topics, was issued towards the end of the academic year (in April 2021) to see if responses changed over the course of a year. A further online survey was carried out with all Wave 1 and Wave 2 schools in the second year of the evaluation.

A census approach was used for all survey sampling, where all members of each sampling population were invited to complete the relevant surveys. For the first year of sampling, the sampling population comprised all Wave 1 schools. For the second year of sampling, the sampling population comprised all Wave 1 and Wave 2 schools that were enrolled in the programme. A full breakdown of the sample for each of the surveys can be found in Appendix C.

#### SSAT observations and interviews

Two types of sessions that were delivered directly by SSAT were observed: one EFA Open Day and one EFA Launch Event. Open Days were hosted by Ambassador schools (schools that have embedded EFA and have volunteered to host Open Days) and provided an opportunity for staff from interested schools to learn more about EFA. The Launch Event was for EFA school leads, TLC leaders, and school governors to introduce the programme at a high level and ensure that the senior school staff understood their roles. These observations were selected for convenience and were independent of the case studies.

Semi-structured interviews were conducted with key members of the SSAT team. The first round of interviews took place before the first year of scaling started, and further interviews were carried out after one and two years of scaling. The purpose of these interviews was to understand how the organisation was structured and any changes that had been made or were planned in order to support scaling.

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<sup>34</sup> See Appendices D and E for sample characteristics.

## **Sales interviews**

To better understand school leaders' broader perceptions of the programme and sales approach, a series of six semi-structured interviews were conducted with school senior leadership team members who were in the sales pipeline for EFA. These interviews focused on responses to the EFA sales approach, as well as perceived barriers and facilitators to signing up to the programme.

It had been planned that these interviews would include senior leadership teams that were not interested in taking up the programme, as well as those that were unsure and those who were in signing up. Given challenges to recruitment driven by ongoing Covid-19 disruption, it was not possible to interview senior leadership teams that were not interested in the programme.

## **Administrative data review**

SSAT's M&E processes were analysed in two stages. The first stage of the M&E review involved an evaluation of the data that was collected and analysed by SSAT, and the systems that were used for this purpose. The second stage of the M&E review involved analysis of the actual data that was collected on fidelity and reach and recruitment at the end of the first year of scaling. This analysis was conducted for all Wave 1 schools, as well as at the case study level in order to integrate it with the qualitative findings.

## **Analytic approach**

For the interviews with SSAT staff and reach and recruitment interviews with senior leadership teams, the six-step approach by Braun and Clarke (2006) was used, which involved coding the transcripts and identifying emerging themes. For the case study data, a framework approach was applied using within-case analysis being conducted before between-case analysis (Ritchie *et al.*, 2013). This enabled a systematic approach to analysis that was grounded in participants' and schools' accounts.

For all qualitative analysis, a balance was maintained between deduction (using existing knowledge and the research questions to guide the analysis) and induction (allowing concepts and ways of interpreting experience to emerge from the data). Verbatim participant quotations and case examples are used to provide evidence and exemplify the theme(s) discussed in the paragraph before the quotation.

As qualitative data can only be generalised in terms of range and diversity and not in terms of prevalence, the analytical outputs focus on the nature of experiences, avoiding numerical summaries or language such as 'most' and 'majority'.

## Appendix C: Research timeline

The key research activities and deliverables for each phase are outlined in **Table 8**.

**Table 8: Project timeline**

Phase	Timing	Key activities
1. Set-up and kick-off	Dec. 2019 – Mar. 2020	<ul style="list-style-type: none"> <li>• Kick-off meetings with SSAT and the EEF</li> <li>• Finalise data sharing documents and arrangements</li> <li>• EFA document review</li> <li>• Scaling strategy theory of change workshop</li> <li>• Theory of change summary report (March 2020)</li> </ul>
2. Organisational processes, defining fidelity, MI data review	Apr. 2020 – Aug. 2021	<ul style="list-style-type: none"> <li>• Study plan finalisation (April 2021)</li> <li>• Pre-mortem workshop and summary report (April 2021)</li> <li>• Interviews with key SSAT staff to map organisational processes and define programme fidelity (current and at scale)</li> <li>• Review MI extracts</li> <li>• First feedback (July 2021)</li> </ul>
3. Year one school implementation, reach and recruitment	Sept. 2021 – Aug. 2022	<ul style="list-style-type: none"> <li>• Pre- and post-surveys with school staff</li> <li>• Case studies (x6 schools)</li> <li>• Analyse MI</li> <li>• Interviews with key SSAT staff about strategy, organisational capacity and processes</li> <li>• Second feedback (Dec 2021)</li> <li>• Third feedback (July 2022)</li> <li>• Interim report (Sept 2022)</li> </ul>
4. Year two school embeddedness and sustainability	Sept. 2022 – Aug. 2023	<ul style="list-style-type: none"> <li>• Pre- and post-surveys with school staff</li> <li>• Case studies (x10 schools)</li> <li>• Analyse MI</li> <li>• Interviews with key SSAT staff about strategy, organisational capacity and processes</li> <li>• Fourth feedback (July 2023)</li> </ul>
5. Final reporting	Sept. 2023 – Feb. 2024	<ul style="list-style-type: none"> <li>• Final findings and post-mortem workshop (Oct 2023)</li> <li>• Final report (draft Nov 2023, final Feb 2024)</li> </ul>

## Appendix D: Research samples

**Table 9: Survey samples**

Participant group	Estimated population size in Wave 1 <sup>35</sup>	Estimated population size in Wave 2	Baseline survey responses in Wave 1 (% of estimated pop.)	Endline survey responses in Wave 1 (% of estimated pop.)	Wave 2 survey (% of estimated pop.)
TLC leaders	98	420	38 (10.9%)	57 (16.3%)	127 (30.2%)
Classroom teachers	980	4,200	120 (3.4%)	142 (4.1%)	456 (10.9%)

**Table 10: Case study sample<sup>36</sup>**

School	Year visited	SSAT fidelity rating	Ofsted rating	Size (no. of pupils) <sup>37</sup>
1	One	High	Good	<1,000
2	One	High	Good	<1,000
3	One	High	Good	>1,000
4	One	High	Outstanding	>1,000
5	One	High	Good	>1,000
6	One and two	High	Good	<1,000
7	Two	Medium	Requires Improvement	>1,000
8	Two	Medium	Good	>1,000
9	Two	Medium	Good	<1,000
10	Two	Medium	Good	>1,000

<sup>35</sup> Based on an average of 7 TLC Leaders and 70 Class Teachers per school. A total of 14 schools in sample in Wave 1 and 60 schools in sample in Wave 2.

<sup>36</sup> Fidelity rating based on results from the SSAT fidelity survey. Ofsted rating and size obtained from: <https://www.get-information-schools.service.gov.uk/>.

<sup>37</sup> A total of 1,000 pupils is used as the cut-off because this is the average size of a secondary school in England (DfE, 2023).

## Appendix E: School recruitment demographics

**Table 11: Percentage of students eligible for FSM in schools that have started<sup>38</sup>**

	Schools reached (N=718)	Fully self-funded schools that have started (N=23)	Subsidised schools that have started (N=58)
Percentage of students eligible for FSM			
<10	18.0%	17.4%	5.2%
10–19	33.4%	30.4%	29.3%
20–29	21.9%	26.1%	22.4%
30–39	15.5%	21.7%	25.9%
40–49	6.5%	0.0%	6.9%
50–59	1.3%	4.3%	3.4%
60–69	0.3%	0.0%	0.0%
Missing	3.2%	0.0%	6.9%

Notes: The average for schools in the comparator group (all secondary schools in England and Wales, which are not in our sample) is 19.8%. In total, 2 of the 83 schools who started do not have data on their type of funding.

<sup>38</sup> 'Reached' means that the school engaged with the first stage of the pipeline. 'Started' means that the school had delivered at least the first TLC workshop. FSM data obtained from: <https://www.get-information-schools.service.gov.uk/>

**Table 12: Ofsted ratings for schools that have started**

Ofsted rating	Schools reached (N=560)	Fully self-funded schools that have started (N=23)	Subsidised schools that have started (N=45)
Outstanding	18.0%	19.0%	11.1%
Good	63.8%	71.4%	66.7%
Requires improvement	16.4%	9.5%	22.2%
Serious weaknesses	0.7%	0.0%	0.0%
Special measures	1.1%	0.0%	0.0%

Notes: These figures exclude schools whose Ofsted rating is missing. The percentage of schools in the comparator group rated as 'Outstanding' or 'Good' is 74.6%.

**Table 13: Geographical region for schools that have started**

	Schools reached (N=718)	Fully self-funded schools that have started (N=23)	Subsidised schools that have started (N=58)
Region			
East Midlands	7.4%	4.3%	15.5%
East of England	9.2%	13.0%	3.4%
London	16.6%	34.8%	5.2%
North East	5.2%	0.0%	13.8%
North West	17.0%	8.7%	10.3%
South East	12.3%	17.4%	3.4%
South West	6.0%	8.7%	3.4%
West Midlands	16.2%	8.7%	37.9%
Yorkshire and the Humber	10.3%	4.3%	6.9%

**Table 14: Size of schools that have started**

	Schools reached (N=718)	Fully self-funded schools that have started (N=23)	Subsidised schools that have started (N=58)
Number of pupils			
<201	0.6%	0.0%	1.7%
201–400	3.2%	0.0%	6.9%
401–600	7.4%	8.7%	12.1%
601–800	13.5%	8.7%	8.6%
801–1,000	19.4%	30.4%	29.3%
1,001–1,200	18.9%	17.4%	17.2%
1,201–1,400	12.5%	13.0%	6.9%
1,401–1,600	12.3%	21.7%	1.7%
1,601–1,800	6.1%	0.0%	3.4%
1,801–2,000	2.2%	0.0%	3.4%
>2,000	0.7%	0.0%	1.7%
Missing	3.2%	0.0%	6.9%

Notes: The average for schools in the comparator group is 959 pupils.

**Table 15: Opportunity Area status for schools that have started**

	Schools reached (N=717)	Fully self-funded schools that have started (N=23)	Subsidised schools that have started (N=57)
Opportunity Area status			
Yes	5.7%	13.0%	5.3%
No	94.3%	87.0%	94.7%

Notes: These figures exclude schools whose Opportunity Area status is missing. The percentage of schools in the comparator group with Opportunity Area status is 4.6%.

## Appendix F: Cost tables

Table 16: Summary of financial costs for schools\*

Type of cost	Item	Year one Mean (Min – max)	Year two Mean (Min – max)	Year three** Mean (Min – max)	Total cost over three years	Total cost per student per year
Training and programme costs	Programme fee	£3,094.51 (1,589.7 – 6,299)	0 (0)	0 (0)	£3,094.51	£1.14
Equipment and material	Printing and photocopying booklets	£99.48 (0 – 315)	£97.45 (0 – 315)	£5.01 (0 – 72.5)	£201.94	£0.07
	Materials	£98.28 (0 – 500)	0 (0)	0 (0)	£98.28	£0.04
Teacher cover	Teacher cover for optional Open Day	£34.64	0 (0)	0 (0)	£34.64	£0.01
	Teacher cover for Launch Day	£419.50 (0 – 1,440)	0 (0)	0 (0)	£419.50	£0.15
	Teacher cover for TLCs and peer observations	£311.43 (0 – 4,160)	£311.43 (0 – 4,160)	0 (0)	£622.86	£0.23
Other costs	Travel expenses for optional Open Day	£36.60 (0 – 350)	£0.54 (0 – 7.5)	0 (0)	£37.14	£0.01
Total		£4,121.10	£409.41	£5.01	£4,508.86	£1.66

\*The table excludes money spent on refreshments, any type of wage bonus for TLC leaders, and acquisition of pre-requisites.

\*\*Some schools from the first wave of recruitment experienced programme delays and restarts due to Covid-19 and took three years to finish the programme.

**Table 17: Financial costs (all schools)**

Type of cost	Item	Start-up / recurring	Year one		Year two		Year three		Total cost over three years	Total cost per student per year*
			Mean	(Min – max)	Mean	(Min – max)	Mean	(Min – max)		
Training and programme costs	Programme fee	Start-up	£3,094.51	(1,589.7 – 6,299)	–	–	–	–	£3,094.51	£1.14
Equipment and material	Printing and photocopying booklets	Recurring	£99.48	(0 – 315)	£97.45	(0 – 315)	£5.01	(0 – 72.5)	£201.94	£0.07
	Materials	Start-up	£98.28	(0 – 500)	–	–	–	–	£98.28	£0.04
Teacher cover	Teacher cover for Open Day	Start-up	£34.64	(0 – 190)	–	–	–	–	£34.64	£0.01
	Teacher cover for Launch Day	Start-up	£419.50	(0 – 1440)	–	–	–	–	£419.50	£0.15
	Teacher cover for TLCs and peer observations	Start-up	£311.43	(0 – 4160)	£311.43	(0 – 4160)	–	–	£622.86	£0.23
Other costs	Travel expenses for Open Day	Recurring	£36.60	(0 – 350)	£0.54	(0 – 7.5)	–	–	£37.14	£0.01
	Total								£4,508.86	£1.66

\*Total cost per student per year has been computed dividing the total cost over three years by the average number of pupils in the schools of the cost evaluation sample, which was 906 pupils.

**Table 17** shows the average financial expenditures in the schools that were part of the sample. The table excludes any expenditures on refreshments, special wage bonuses for TLC leads, and acquisitions of pre-requisites.

The numbers of all cost tables in Appendix F are approximations given by the school leads that were interviewed at the end of the first year of the programme. The averages for the second year of the programme assumed that recurring costs were the same as in the first year. The costs are broken down into three years, following the EEF cost evaluation guidelines (EEF, 2019). Some schools in the sample had to pause the programme or spread the TLC meetings over an additional year due to Covid-19, so they had recurring costs in the third year, which is reflected in the table.

**Table 18: Financial costs (unsubsidised schools)**

Type of cost	Item	Start-up / recurring	Year one		Year two		Year three		Total cost over three years	Total cost per student per year*
			Mean	(Min – max)	Mean	(Min – max)	Mean	(Min – max)		
Training and programme costs	Programme fee	Start-up	£4814.29	(2,500 – 6,299)	–	–	–	–	4814.29	1.63
Equipment and material	Printing and photocopying booklets	Recurring	£74.69	(0 – 180)	£71.35	(0 – 180)	£10.03	(0 – 70.2)	156.07	0.05
	Materials	Start-up	£72.29	(0 – 500)	–	–	–	–	72.29	0.02
Teacher cover	Teacher cover for Open Day	Start-up	£27.14	(0 – 190)	–	–	–	–	27.14	0.01
	Teacher cover for Launch Day	Start-up	£178.29	(0 – 1,000)	–	–	–	–	178.29	0.06
	Teacher cover for TLCs and peer observations	Recurring	£28.57	(0 – 200)	£28.57	(0 - 200)	–	–	57.14	0.02
Other costs	Travel expenses for Open Day	Start-up	£1.07	(0 – 7.5)	£35.71	(0 – 250)	–	–	37.86	0.01
	Total								£5,343.07	£1.81

\*Total cost per student per year has been computed dividing the total cost over three years by the average number of pupils in the unsubsidised schools of the cost evaluation sample, which was 985 pupils.

**Table 18** shows the average financial expenditures in the unsubsidised schools that were interviewed for the cost evaluation. We show separate tables for subsidised and unsubsidised schools, so it is easier to see the variability in programme fees and other costs paid by schools in the two waves.

The table excludes any expenditures on refreshments, special wage bonuses for TLC leads, and acquisitions of pre-requisites.

**Table 19: Financial costs (subsidised schools)**

Type of cost	Item	Start-up / recurring?	Year one		Year two		Year three		Total cost over three years	Total cost per student per year*
			Mean	(Min – max)	Mean	(Min – max)	Mean	(Min – max)		
Training and programme costs	Programme fee	Start-up	£1,589.70	(1,589.7 – 1,589.70)	–	–	–	–	£1,589.70	£0.63
Equipment and material	Printing and photocopying booklets	Recurring	£124.26	(9 – 315)	£123.55	(9 – 315)	–	–	£247.81	£0.10
	Materials	Start-up	£1.14	(0 – 7)	–	–	–	–	£1.14	£0.00
Teacher cover	Teacher cover for Open Day	Start-up	£42.14	(0 – 160)	–	–	–	–	£42.14	£0.02
	Teacher cover for Launch Day	Start-up	£660.71	(0 – 1,440)	–	–	–	–	£660.71	£0.26
	Teacher cover for TLCs and peer observations	Recurring	£594.29	(0 – 4,160)	£594.29	(0 – 4,160)	–	–	£1,188.57	£0.47
Other costs	Travel expenses for Open Day	Start-up	£42.14	(0 – 160)	–	–	–	–	£72.13	£0.03
	Total								£3,802.21	£1.51

\*Total cost per student per year has been computed dividing the total cost over three years by the average number of pupils in the unsubsidised schools of the cost evaluation sample, which was 837.

**Table 19** shows the average financial expenditures in the unsubsidised schools that were interviewed for the cost evaluation. All subsidised schools that were interviewed for the cost evaluation finished the programme in two years. The table excludes any expenditures on refreshments, special wage bonuses for TLC leads, and acquisitions of pre-requisites.

**Table 20: Summary of staff time for schools\***

		School lead	TLC leaders	Classroom teachers
Type of cost	Item	Mean (min – max)	Mean (min – max)	Mean (min – max)
Recruitment	Attending Open Day	4h 35' (0 – 24h)	48' (0 – 6h)	0 (0)
	Admin for sign up and meeting with SSAT	3h (0 – 13h)	0 (0)	0 (0)
Training	Pre-Launch and Launch Day	6h 05' (2h – 9h)	3h (0 – 6h)	3h 45' (2h – 8h)
Preparation	Preparing TLC sessions	24h 50' (0 – 72h)	16h 50' (2h 55' – 54h)	0 (0)
Delivery	TLC sessions*	21h 45' (11h 15' – 22h 30')	21h 45' (11h 15' – 22h 30')	21h 45' (11h 15' – 22h 30')
	Peer observations	3h 40' (0 – 12h)	3h 55' (40' – 12h)	3h 55' (40' – 12h)
Programme monitoring and management	Check-ins with EFA mentors	4h 40' (2h – 8h)	0 (0)	0 (0)
	End of year visit	8h 10' (4h – 14h)	5h 30' (0 – 14h)	2h 50' (0 – 12h)
	Quality monitoring and feedback** <sup>39</sup>	15h (0 – 126h)	1h 50' (0 – 18h)	10' (0 – 50)
Total time over three years***		84h 30'	54h	28h 45'
Hours per month (18 months)		3h 50'	2h 30'	1h 20'

\* A school dropped out of the programme after completing only half of the 18 TLC sessions after two years. Their time has been included as reported in the table averages.

\*\* This category includes activities like surveys, debriefs after TLC, end of term check-ins, or Quality Assurance of lessons.

\*\*\* One school took three years to complete the programme due to Covid-19 interruptions.

<sup>39</sup> This category of staff time is not included in the tables of the cost evaluation guidance for the EEF evaluations (December 2019). We included it for its relevance in this programme and the non-negligible amount of hours some school leads spent on these activities.

Table 21: Detailed breakdown of staff time

Type of cost	Item	Type of teacher	Year one		Year two		Year three		Total hours over three years (in hours)
			Mean	(Min – max)	Mean	(Min – max)	Mean	(Min – max)	
Recruitment and sign up	Attending Open Day	School leads / headteachers	4.5	(0 – 24)	0.4	(0 – 6)	–	–	4.9
		TLC leaders	–	–	0.8	(0 – 6)	–	–	0.8
		Classroom teachers	–	–	0.4	(0 – 6)	–	–	0.4
	Admin for sign up and meeting with SSAT	School leads	3.0	(0 – 13)	–	–	–	–	3.0
Training	Pre-Launch and Launch Day	School leads	6.1	(2 – 9)	–	–	–	–	6.1
		Senior leadership team members	3.0	(0 – 6)	–	–	–	–	3.0
		TLC leaders	3.7	(2 – 8)	–	–	–	–	3.7
Preparation	Preparation of TLC sessions	School leads	12.5	(0 – 36)	12.3	(0 – 36)	0.2	(0 – 9)	25.1
		TLC leaders	8.5	(1.6 – 27)	8.4	(1.6 – 27)	0.2	(0 – 9)	17.1
Delivery	TLC sessions	School leads	10.8	(6.25 – 12.5)	10.3	(3.75 – 11.25)	0.75	(0 – 9)	21.8
		TLC leaders	10.8	(6.25 – 12.5)	10.3	(3.75 – 11.25)	0.75	(0 – 9)	21.8
		Classroom teachers	10.8	(6.25 – 12.5)	10.3	(3.75 – 11.25)	0.75	(0 – 9)	21.8
	Peer observations	School leads	1.8	(0 – 6)	1.8	(0 – 6)	0.07	(0 – 1)	3.7

Type of cost	Item	Type of teacher	Year one		Year two		Year three		Total hours over three years (in hours)
			Mean	(Min – max)	Mean	(Min – max)	Mean	(Min – max)	
		TLC leaders	2.1	(0.33 – 6)	1.8	(0.33 – 6)	0.07	(0 – 1)	3.9
		Classroom teachers	2.1	(0.33 – 6)	1.8	(0.33 – 6)	0.07	(0 – 1)	3.9
Programme monitoring and management	Check-ins with EFA mentor	School leads	2.3	(1 – 4)	2.3	(1 – 4)	0.14	(0 – 2)	4.6
	End of year visit	School leads	4.1	(2 – 7)	4.1	(2 – 7)	0.17	(0 – 2)	8.3
		TLC leaders	2.8	(0 – 7)	2.8	(0 – 7)	0.17	(0 – 2)	5.7
		Classroom teachers	1.4	(0 – 6)	1.4	3.75	0.17	(0 – 2)	3.0
	Quality monitoring and feedback (surveys, debriefs after TLC, end of term check-ins, Quality Assurance of lessons)	School leads	7.5	(0 – 63)	7.5	(0 – 63)	0.07	(0 – 1)	15.1
		TLC leads	0.9	(0 – 9)	0.9	(0 – 9)	–	–	1.8
		Classroom teachers	0.1	(0 – 0.43)	0.1	(0 – 0.43)	–	–	0.1

## Appendix G: Detailed recommendations for SSAT

The first year of the research focused on providing SSAT with rapid feedback so they could implement changes to the programme within the lifetime of the project. In the second year, the focus shifted to embeddedness and the differently funded routes for the programme. **Table 22** documents all recommendations made to the SSAT, mostly in the first year but with some additional recommendations on embeddedness from the second year of the research.

**Table 22: Recommendations for SSAT**

Related research topics	Date	Recommendation
Reach and recruitment	Jul. 2021	Review the objectives and content of the online Open Days: <ul style="list-style-type: none"> <li>communicate objectives of the event clearly to Host Schools (to ensure presentations and discussion centres on the impact of EFA rather than programmatic details)</li> <li>develop a suggested structure for the event, including suggested talking points for each section</li> <li>embed a Quality Assurance process in which the slides developed by the Host School are reviewed by SSAT before the event</li> </ul>
Reach and recruitment	Jul. 2021	When drawing on evidence for sales materials, ensure the evidence is presented in a simple, clear, and compelling manner
Reach and recruitment	Jul. 2021	Generate evidence on the effectiveness of different sales materials and approaches (e.g. the printed sales materials), potentially generating return on investments in terms of costs and conversions
Reach and recruitment	Jul. 2021	Build additional staff capacity to support sales so the organisation is less reliant on a single 'voice'
Reach and recruitment	Dec. 2021	The current data in the CRM on school characteristics (Ofsted rating, % FSM, etc.) is incomplete. You might want to collect complete data on key characteristics for each school. To save time, this could be done through a mass upload and matching process using DfE admin data
Reach and recruitment	Dec. 2021	Start collecting regular feedback from schools on: <ul style="list-style-type: none"> <li>reasons for sign up, e.g. a quick web survey or question in first EFA mentor session</li> <li>reasons for staying, e.g. an annual web survey or question in end of year reflection session</li> <li>reasons for not signing up, e.g. a quick web survey</li> <li>reasons for leaving, e.g. a quick web survey and/or exit interview</li> </ul>
Reach and recruitment	Dec. 2021	Conduct periodic aggregated analysis of reach and recruitment data (including the proposed new feedback data). This should be done as part of a planned development process for your recruitment activities (e.g. an annual review)
Reach and recruitment	Dec. 2021	Create a formal M&E plan for reach and recruitment that includes: <ul style="list-style-type: none"> <li>targets for reach and recruitment (possibly developing these by having targets for specific school types, beyond those specified by funders like the EEF)</li> <li>what questions you want to answer about reach and recruitment</li> <li>what data you collect to answer those questions</li> <li>what analysis you do on the data</li> <li>when you do that analysis</li> <li>who is responsible for the analysis</li> <li>what you do with the results of the analysis (e.g. whether any results trigger certain actions, whether the results feed into an annual development process, etc.)</li> </ul>

Reach and recruitment	Jan. 2022	Ensure sales materials reference EFA's ability to embed other CPD and Teaching and Learning initiatives
Reach and recruitment	Jan. 2022	Ensure sales materials reference CPD practices that EFA is aligned to, making clear that EFA is complementary (rather than duplicating)
Reach and recruitment	Jan. 2022	Review and tweak messaging on EFA's time commitment, noting how time burden can be minimised and why the two-year commitment is so important. Clearly explain the benefits of a longer-term programme in sales materials, and directly address concerns about waning staff engagement
Reach and recruitment	Jan. 2022	Provide schools with guidance on how other schools have addressed practical challenges like ensuring EFA does not increase total working hours (e.g. allocating 'twilight CPD' hours to EFA)
Reach and recruitment	Jan. 2022	Provide schools with guidance on how other schools have ensured EFA does not result in overly burdened TLC leaders
Reach and recruitment	Jan. 2022	Ensure the benefits of SSAT support are clearly articulated in marketing materials
Reach and recruitment	Jan. 2022	Review content of emails and check that it follows behavioural science principles, such as ensuring the 'Call for Action' is always in the top line. This could be done with support from the BIT under the EEF Capability Building Fund
Reach and recruitment	Jan. 2022	Ensure sales materials reference the potential of a subsidy
Reach and recruitment	Jan. 2022	Ensure that the total cost to a school is clear in all relevant communications
Reach and recruitment	Jan. 2022	Emphasise the range and diversity of schools that EFA has been implemented successfully in
Reach and recruitment	Jan. 2022	Develop a set of Frequently Asked Questions to provide to prospective schools. Many of the recommendations made in this document could be addressed through these Frequently Asked Questions. Suggested questions might include: <ul style="list-style-type: none"> <li>• Can I see examples of the EFA materials?</li> <li>• Can I try the EFA materials out in my school before deciding whether to sign up?</li> <li>• How does EFA relate to other CPD initiatives?</li> <li>• How long is the programme?</li> <li>• Why is the programme two years?</li> <li>• Can the programme be made shorter than two years?</li> <li>• What are the benefits of receiving support from the SSAT for implementation of the EFA?</li> <li>• Why are the TLC sessions 75 minutes?</li> <li>• Will EFA lead to an increase in workload for staff?</li> </ul>
Reach and recruitment	Jan. 2022	Share the sample EFA materials with schools that express interest in the programme
Reach and recruitment	Jan. 2022	Explore options to formalise the opportunity for schools to 'try out' EFA before officially signing up (e.g. by providing senior leadership teams with a 'taster pack' to run)

Reach and recruitment	Jan. 2022	Increase the number of one to one calls that programme leads undertake with prospective schools
Reach and recruitment	Jan. 2022	Incentivise existing schools to recruit peers in their network
Reach and recruitment	Jan. 2022	Identify individuals in SSAT's network with a public profile that would be willing to write/tweet about the EFA programme
Strategy (mentors)	Jul. 2021	Formalise and embed the learnings from the mentor recruitment process (e.g. by updating job descriptions, developing a structured interview guide)
Strategy (mentors)	Jul. 2021	Shift to a hybrid model of mentoring on a permanent basis, with more online mentoring and less face-to-face visits. This could help ease recruitment and matching burdens as EFA scales
Strategy (mentors)	Jul. 2021	Review ongoing support and CPD offer for mentors: <ul style="list-style-type: none"> <li>• generate evidence on the effectiveness of blogs as a method for mentor learning</li> <li>• if blogs written by mentors continue to be a core element of supporting mentor development, develop a Quality Assurance process for the blogs to ensure that they are sharing genuinely useful practices</li> <li>• explore alternative ways for mentors to share best practice. One suggestion from interview participants was to hold a series of mentor meetings in regional hubs</li> <li>• interview participants suggested the benefit of the education lead hosting webinars during the year to update mentors on changes and additions to the resources. This would also be a helpful way to reinforce fidelity to the programme</li> </ul>
Strategy (mentors)	Dec. 2021	Start collecting and analysing data on mentor reach and recruitment in the same way that you do for schools. For example: <ul style="list-style-type: none"> <li>• a recruitment database and pipeline</li> <li>• feedback from mentors on: <ul style="list-style-type: none"> <li>○ reasons for sign up</li> <li>○ reasons for staying</li> <li>○ reasons for not signing up</li> <li>○ reasons for leaving</li> </ul> </li> </ul>
Strategy (mentors)	Dec. 2021	Start collecting and analysing data on mentor training and support in the same way that you do for schools. For example: <ul style="list-style-type: none"> <li>• implementation data: <ul style="list-style-type: none"> <li>○ activities completed, participation of mentors in each</li> <li>○ start date</li> <li>○ end date</li> </ul> </li> <li>• Quality data: <ul style="list-style-type: none"> <li>○ feedback from mentors</li> <li>○ observation of trainings</li> </ul> </li> <li>• Outcomes for mentors: <ul style="list-style-type: none"> <li>○ self-reported learning</li> <li>○ assessments to test knowledge/skills</li> </ul> </li> </ul>
Fidelity	Jul. 2021	Review the objectives for the online launch event for participating schools: <ul style="list-style-type: none"> <li>• e.g. given that school staff only have one hour with their mentor now (rather than a full day), it may be appropriate for staff to work through the online materials (inc. watching pre-recorded videos on the rationale for the programme) before the meeting. This would allow the meeting with their mentor to focus on their questions and concerns, and could deal with the more practical aspects of running effective TLCs</li> </ul>

		<ul style="list-style-type: none"> <li>central to the EFA programme is the idea that effective delivery (of formative assessment) requires practice and support, not just learning why it is important. The same is likely to be true for effective delivery of TLCs, and it could be appropriate to provide TLC leads with the opportunity to practice facilitating a TLC discussion</li> </ul>
Fidelity	Jul. 2021	Include a series of multiple-choice questions for school staff to complete after working through the online training. This would help the mentor to assess where there may still be gaps in understanding and where to follow up with further support or resources
Implementation	Dec. 2021	Ensure all mentors can use and do use the webform for the implementation survey, and remove the paper option
Implementation	Dec. 2021	Give the implementation survey to mentors at start of the year in their induction pack
Implementation	Dec. 2021	Make all web surveys feed into your CRM and retire the 'master spreadsheet'. Depending on your system, this may require using a third-party survey app that is supported by your CRM
Implementation	Dec. 2021	After linking all web surveys to your CRM, use the CRM to: <ul style="list-style-type: none"> <li>create auto-dashboards for the programme team to easily review results as they come in</li> <li>create report templates (that automatically produce key statistics and charts) for periodic reviews</li> <li>create trigger emails for the programme lead when a survey/conversation record comes in and/or when a survey value is below a threshold (i.e. triggering a phone call)</li> </ul>
Implementation	Dec. 2021	Create a formal M&E plan for implementation that includes: <ul style="list-style-type: none"> <li>targets for implementation</li> <li>what questions you want to answer about implementation</li> <li>what data you collect to answer those questions</li> <li>what analysis you do on the data</li> <li>when you do that analysis (e.g. review part of each form when it comes in, end of year review of aggregated data, etc.)</li> <li>who is responsible for the analysis</li> <li>what you do with the results of the analysis (e.g. whether any results trigger certain actions, whether the results feed into an annual development process, etc.)</li> </ul>
Implementation	Dec. 2021	Begin collecting the following extra data on implementation: <ul style="list-style-type: none"> <li>the proportion of teachers participating in EFA in each school</li> <li>feedback on adaptations, barriers, and enablers to implementation</li> <li>data on implementation after the two-year programme is complete (this should be linked to the development of the ongoing support model)</li> </ul>
Structures, systems, and processes	Jul. 2021	Scaling may necessitate an increase in headcount and company size. SSAT should consider how to maintain effective communication practices as the company grows, and should be aware of this as a potential risk area that comes with growth
Quality	Dec. 2021	Formally interview mentors, assessing them against the desired qualities listed in your Quality Assurance framework, and take notes from these interviews
Quality	Dec. 2021	If observation of potential mentors during their training is an important part of your Quality Assurance process (as suggested in the 'EFA programme Quality Assurance process' document) then we suggest using a semi-structured observation guide, covering the qualities that you are looking for, to help structure and record your observations

Quality	Dec. 2021	Create a webform, linked to your CRM, for mentors to complete their conversation records
Quality	Dec. 2021	Create a webform for the launch event survey, ideally linked to your CRM, and remove the paper option. A platform like Slido, e.g. allows you to post a simple code on your power that participants can enter into their smartphone and complete the survey immediately with very little friction. (If you do not have the in-house expertise to update your CRM and survey systems in this way, then you may consider using some of your scale-up funding for development support)
Quality	Dec. 2021	Add some multiple-choice questions to the end-of-programme survey for school leads on the quality of the core components of the support you provide, e.g.: <ul style="list-style-type: none"> <li>● teaching resources</li> <li>● facilitation resources for TLC leaders</li> <li>● planning resources for school leads</li> <li>● structure and content of mentoring support</li> </ul>
Quality	Dec. 2021	Start formally observing new mentors delivering the launch events. Set-up this observation programme in a way that can be easily scaled (e.g. with experienced mentors conducting the observations, rather than the head of programmes being responsible for all observations)
Quality	Dec. 2021	Conduct periodic aggregated analysis of the launch event and end-of-programme evaluations. This should be done as part of a planned programme development process (e.g. an annual review)
Quality	Dec. 2021	Develop your 'EFA programme Quality Assurance process' document into a more complete M&E plan for quality that includes: <ul style="list-style-type: none"> <li>● what questions you want to answer about quality</li> <li>● what data you collect to answer those questions</li> <li>● what analysis you do on the data</li> <li>● when you do that analysis</li> <li>● who is responsible for the analysis</li> <li>● what you do with the results of the analysis (e.g. whether any results trigger certain actions, whether the results feed into an annual programme development process, etc.)</li> </ul>
Embeddedness	Jul. 2023	Programme content should include more examples of implementing formative assessment practices in non-core subjects such as Art and Physical Education to reduce the burden of imaginative adaptation on individual teachers and encourage school-wide embeddedness
Embeddedness	Jul. 2023	Programme implementation guidance should provide suggestions of how to best deliver the programme when some staff members are part-time, e.g. providing TLC resources in alternative formats, recording TLC sessions
Embeddedness	Jul. 2023	Programme materials should include guidance for school leads on how to monitor embeddedness across the school, including during the programme itself, to standardise teacher approaches and allow them more opportunities to identify and address challenges
Embeddedness	Jul. 2023	Programme materials should include a short guidance document for a discussion between the school lead and other senior leads to illustrate ways in which the senior leads can support embeddedness, e.g. by sharing examples of embeddedness in staff meetings
Embeddedness	Jul. 2023	Programme implementation guidance should provide a suggestion for the continuation of light-touch programme activities beyond the end of the two years, e.g. resources for one TLC session per term for the third year
Embeddedness	Jul. 2023	The experience and commitment of the school lead has a notable impact on the success of the programme in a school. The process for selecting a school lead

		should be reviewed to ensure the best candidate is identified, as well as guidance on how to re-allocate the responsibilities when a school lead leaves the role
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## Appendix H: SSAT fidelity survey results

Table 23: Results from the SSAT fidelity survey (responses for end of year one)

Question	n (n/N %)		
	Wave 1 (N = 7)	Wave 2 (N = 40)	Overall (N = 47)
TLCs are meeting approximately once per month (mostly every three to five weeks) over the course of the year?			
No	0 (0%)	2 (5%)	2 (4.3%)
Yes	7 (100%)	38 (95%)	45 (96%)
TLCs held are approx. 75 minutes			
No	0 (0%)	0 (0%)	0 (0%)
Yes	7 (100%)	40 (100%)	47 (100%)
Peer observations are taking place regularly (not necessarily every month)			
No	0 (0%)	3 (7.5%)	3 (6.4%)
Yes	7 (100%)	37 (92%)	44 (94%)
Personal action plans are being completed after each session			
No	0 (0%)	0 (0%)	0 (0%)
Yes	7 (100%)	40 (100%)	47 (100%)
The school is monitoring the impact of the project effectively (score 0–3)			
1 = Minimal monitoring, some feedback collected	1 (14%)	3 (7.5%)	4 (8.5%)
2 = A variety of monitoring strategies are used, and feedback is shared	4 (57%)	14 (35%)	18 (38%)
3 = Impact is measured in a wide variety of ways, e.g. through learning walks, lesson observations, student and teacher feedback, which is shared and acted on to maximise the impact of the programme	2 (29%)	23 (57%)	25 (53%)
The school has fully committed to the project providing wrap-around support (score 0–3)			
1 = Minimal support in place, which has not been maintained over time or infrequent	1 (14%)	0 (0%)	1 (2.1%)
2 = Staff have been given regular support in between meetings for peer observations and practice shared through other meetings/briefings/communications	5 (71%)	23 (57%)	28 (60%)
3 = Staff are supported beyond TLC meetings, with support/time to complete peer observations. The programme has a high profile with staff and students. There is regular input, e.g. through briefings, meetings, newsletters, celebrations, and sharing practices	1 (14%)	17 (42%)	18 (38%)

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