



## **Making external school review effective**

### **Findings from the 2012 Windsor International Conference on School Improvement through Inspection and External Review**

Richard Churches  
Carole McBride



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The remaining conference materials (including the slides from Pam Sammons' conference presentation: 'School improvement: studying the processes of education change') and summaries of presentations can be found on the accompanying CD-ROM and on the CfBT Education Trust website.



## Acknowledgements

We are grateful to CfBT Education Trust's team of conference organisers led by Sarah Jeffery, Events Co-ordinator at CfBT, for their support in publicising and administering this conference event.

We would also like to thank the conference presenters and speakers. Extended biographies are included in Appendix II on the CD-ROM.

## Conference presenters

### **Jackie Barbera – CPD and Enterprise (Education), Liverpool Hope University**

Jackie has worked at Liverpool Hope in the faculty of Education since 1999, during this time she has had a number of roles including Director of Undergraduate teacher training programmes, senior manager for quality assurance and more recently since 2009 Director of Continuing Professional Development.

### **Richard Churches – Principal Adviser for Research and Evidence Based Practice, CfBT Education Trust**

Richard's school inspection consultancy work has included being an Ofsted Registered Inspector and delivering training for the Dubai Schools Inspection Bureau and Ministry of Education Supervisors in Saudi Arabia and Oman.

### **Maureen Dwyer – Chief Inspector, National Education Inspectorate, Jamaica**

Maureen leads the National Education Inspectorate in Jamaica. The NEI is responsible for assessing the standards attained by the students in primary and secondary schools at key points during their education.

### **Mike Hewlett – Chief Inspector, BSO, CfBT Inspection Services, CfBT Education Trust**

Mike is an experienced international inspector whose work in the evaluation of school quality and the accreditation of schools in the Gulf States, Middle East and SE Asia spans more than 15 years.

### **Charlotte Jones – Senior Education Consultant, CfBT Education Trust**

Charlotte joined CfBT from Hay Group Management Consultants where she advised education sector clients on change management and skills development, and where her work was highly commended by the UK's prestigious Management Consultancy Awards 2010.

### **Linda Kelsey – Consultant Project Leader, CfBT Education Trust on behalf of National Education Evaluation and Development Unit, South Africa**

Linda has been involved in over 2000 inspections over 18 years. These include maintained and independent schools in the UK, the Middle East, the Far East, local authorities and initial teacher education providers.

**Tony McAleavy – Education Director, CfBT Education Trust**

Tony has corporate oversight of the educational impact of all CfBT Education Trust activities. He advises the trustees on our public domain research programme. He has played a major part in the development of CfBT Education Trust's international consultancy practice, and he has worked particularly extensively on a growing portfolio of education reform projects in the Middle East.

**Neil McIntosh – Chief Executive (retired 2012), CfBT Education Trust**

Prior to joining CfBT Education Trust Neil was Director of Voluntary Service Overseas (VSO). Before this he was Director of Shelter. He created, and was the first Chairman of, Homeless International, a specialist NGO which initiates and finances innovative settlement projects and encourages inter-agency co-operation in developing countries. Neil retired as CEO of CfBT Education Trust in 2012.

**Jawaher Al Mudhahki – Chief Executive, School Review Unit, QAEET, Bahrain**

Jawaher is responsible for the school quality assurance process in Bahrain. This includes The Schools Review Unit, The Vocational Review Unit, The Higher Education Review Unit and The National Examinations Unit.

**Jameela Al Muhairi – Chief of Bureau, Dubai Schools Inspection Bureau**

Jameela set up and now oversees the work of the Dubai Schools Inspection Bureau. Since its establishment in 2007, DSIB has inspected the 150 private schools in Dubai on an annual basis.

**Nawal Khaled Muran – Director of School Evaluation and Accreditation, Federal Ministry of Education, United Arab Emirates**

Nawal leads school evaluation and accreditation work at the Federal Ministry of Education in the UAE. The goal of the Ministry of Education is to assess schools, not only against each other, but also against the highest international standards.

**Paul Rafferty – Head of Training and Recruitment, CfBT Inspection Services, CfBT Education Trust**

Paul is currently the Head of Recruitment and Training with CfBT Inspection Services. As such, Paul undertakes inspections on behalf of Ofsted across a variety of remits. He leads on the Professional Qualification for School Inspectors (PQSI) for CfBT Inspection Services.

**Mike Raleigh – Education Consultant**

Mike taught mainly in secondary schools before moving into advisory work, first in London and then in Shropshire, where he was deputy county education officer. He worked for Ofsted for ten years, leading the Secondary Education Division and the Northern Regional Division.

**Sir Jim Rose – Chairman of the Education Committee, CfBT Education Trust**

Sir Jim Rose was formerly Her Majesty's Inspector (HMI) and Director of Inspection for the Office for Standards in Education (Ofsted). His senior posts within HMI have included Chief Inspector of Primary Education (3–13), responsibilities for Special Educational Needs, the education of ethnic minority pupils, and initial teacher training.

**Professor Pam Sammons – Department of Education, Oxford University**

Professor Sammons is Professor of Education at the Department of Education in the University of Oxford and Course Director of the MSc in Educational Research Methodology. She has been involved in educational research for the last 30 years with a special focus on school effectiveness and improvement, school leadership, the early years and equity in education.

**Adrian Simm – Principal Inspector, CfBT Inspection Services, CfBT Education Trust**

Adrian has been an Ofsted Registered Inspector since 1995 whilst seconded from school headship, as a practitioner headteacher/inspector. He has been a full-time inspector since April 2005 with particular expertise in the inspection of maintained special schools, pupil referral units, residential schools and primary schools.

**Liz Slater – Education Consultant**

Liz has run her own successful business specialising in education consultancy and project management since 2002. Prior to this, she worked for 14 years on a range of educational policy areas at the Department for Education, in local authorities, as a teacher, and as an editor of commercial textbooks.

**Chris Taylor – Principal Consultant, CfBT Education Trust**

Chris has been involved in education for more than 40 years, beginning his career by teaching history in secondary schools and as a local authority adviser in the south west of England. He qualified as an Ofsted Registered Inspector in 1994 and has been a member of national advisory groups responsible for reviewing the National Curriculum for England.

**Lesley Traves – Head of Inspections, CfBT Inspection Services, CfBT Education Trust**

Lesley is Head of Inspections for CfBT Inspection Services. She has worked for CfBT Education Trust for eight years, spanning two Ofsted contracts, as Principal Inspector and Deputy Head of Inspections. She trained as an Additional Inspector in 1996 and has undertaken many inspections since then, mainly in primary schools, nurseries and in schools causing concern.



## About the authors

**Richard Churches** is Principal Adviser for Research and Evidence Based Practice at CfBT Education Trust. He is a Fellow of the RSA and was one of the first 800 teachers to be identified as outstanding, as part of the Advanced Skills Teacher programme, which aimed to identify the top 4,000 teachers in England. Richard has worked in a wide range of countries, including Abu Dhabi, Bahrain, Dubai, Egypt, England, Northern Ireland, Scotland, Wales, India, Ireland, Italy, the Netherlands, Jordan, Oman, Pakistan, Qatar, Saudi Arabia, South Africa and the United States of America.

**Carole McBride** is CfBT Education Trust's Head of Consultancy with a remit that covers both the management of CfBT's staff consultants and providing high-level consultancy to CfBT's clients in her own right. Carole has inspected schools in the north of England since 1990 and was formerly a Director of Primary Associates, a company specialising in Ofsted school inspection and review, which is now part of CfBT. In her current role Carole provides professional leadership for several international school evaluation/inspection projects.



*“How can inspection and review improve learning outcomes?”*

## 1 Introduction

### Aim of the conference

The research theme of the conference was the impact of external review. Specifically, the conference sought to address the question:

- How can inspection and review improve learning outcomes?

The structure and the content of the conference were built around features which have emerged through the delivery of effective review and inspection work across the world.

### The structure of this report

The first part of this report includes a summary of the approach taken, a review of the literature and the overall conference and research findings which are presented in the form of a road map for ease of access. There are also some short examples from the conference presentation. The full presentation summaries and conference materials can be found on the accompanying CD-ROM and on the CfBT Education Trust website.

### The conference and approach

In 2012 CfBT Education Trust hosted a two-day conference which included inputs from keynote speakers, workshops and presentations from country delegates about their experience of managing the work of school inspectors and related external review activities. There were case studies from Bahrain, Dubai, India, Jamaica, South Africa, the UAE Federal Ministry of Education and the United Kingdom. Formal presentations were interspersed with practitioner workshops led by experienced practitioners from across CfBT Education Trust, as well as experts who are currently working with the organisation’s research team.

### Themes

The conference was structured into four themes with four additional workshops:

- **Theme 1** – A global view of accountability and effectiveness
- **Theme 2** – The inspection framework and its impact on school effectiveness
- **Theme 3** – Building local capacity
- **Theme 4** – Building ownership and involvement
- **Workshop sessions covering:**
  - Accrediting inspector training
  - Performance management of inspectors
  - Inspecting British schools overseas
  - Creating outstanding inspection practice

Sessions covered a very wide range of contexts from highly-embedded systems (such as the Ofsted framework in England), to relatively recent national approaches in the Middle East, through to the training and deployment of illiterate female parents in rural India, to effecting change through increased client voice (building on approaches argued for by the World Bank in 2004 that aim at shortening the route to accountability). In total, 19 internationally recognised speakers delivered the





sessions and the conference was attended by nearly 50 delegates with substantial experience in the delivery of school inspection and external review. All discussions and question-and-answer sessions were recorded for later use in the final synthesis of evidence.

### Pre-conference interviews and research

Prior to the conference, CfBT Education Trust employees with a long engagement with inspection, school improvement and external review identified five core areas for use in the content analysis of conference presentation and conference discussions. These five areas were:

- The use and characteristics of effective frameworks
- Reviewer skills and qualifications
- The role of objectivity and transparency at policy and delivery level
- The contribution of school internal review processes and their alignment to national approaches
- The effect of including parent and student views

It was also noted that it is critical to remember where successful outcomes come from, namely schools, and not inspection itself (which should be seen as a lever for change and not as the outcome). This point was strongly emphasised in Sir Jim Rose's opening remarks which can be found in full on page 24.

#### Where successful outcomes come from

Sir Jim Rose's opening remarks strongly emphasised the need to recognise that successful education outcomes emerge from what he called the virtuous triangle of:

- High-quality pedagogy
- High-quality curriculum
- High-quality parenting

Before the conference, telephone interviews were conducted with key CfBT Education Trust members of staff with a specific focus on the question of accountability and autonomy. The purpose of these interviews was to draw out key areas that might be significant in relation to creating the right balance between autonomy and accountability within an inspection/review system and the relevance of local context.

These interviews supported and added weight to the importance of the five areas that were identified above. These areas were then used as a starting point for the synthesis of evidence presented in the different sessions during the conference and in the conference workshops and discussions. In particular, interviews pointed to a strong sense of moral purpose as being at the heart of effective school inspection and external review. As one interviewee put it:

*"The goal is essentially a question of moral purpose. Properly conducted, inspection helps schools to improve the education of children and young people. Students have only one childhood and it is a moral imperative on all adults involved in education to help students to fulfil their potential."*



The responsibility on Government to ensure effectiveness was also noted:

*“Government has an obligation towards raising parental and community understanding of the national and international standards that school performance is measured against to ensure higher accountability levels.”*

At the same time it was seen as essential that inspection be grounded in evidence and research, whilst simultaneously reflecting ongoing changes and developments in the local system, a theme which was later returned to on several occasions during the conference presentations and discussions.

*“There is something powerful and important about the notion of ‘what good teaching and learning is’ being publicly (and clearly) stated, particularly if that view not only represents research evidence but also the next priority for the particular system you are working in.”*

Finally, all the interviews pointed to the centrality of effective school leadership in the process and therefore the need for review to integrate, support the development of local school levels of review capacity and improve school management practices.

*“Thinking about Pam Sammons’ research, she suggested that when schools were re-inspected the biggest change had happened to management practices. Now although people look at that and say that therefore increased accountability has little effect on teaching and learning I don’t think that that is the route that change comes through. For example, prior to about 1998 people didn’t do things like target-setting in England; but when Ofsted reports began to say to headteachers, ‘You must identify the performance of students and set targets’, this began to impact on management practice, with schools holding individual teachers much more to account.”*

### **Purpose of the literature review**

A literature review was carried out of the peer-reviewed international research evidence from three main education databases.<sup>1</sup> The purpose of this review was to look for research perspectives which might be considered to support the findings from the conference evidence and pre-conference interviews. The evidence from the literature review was then later used to triangulate the conference findings and can be found in section 3 of this report, where the conference findings are compared to evidence from the literature in the form of a matrix.

The review revealed 635 international peer-reviewed journal articles and papers (2002–2012) which referred to school inspection or school quality review areas in the title or abstract. Of these, 156 were scrutinised in detail. Specifically the literature review focused on the identification of evidence which was of relevance to policymakers in relation to enhancing review effectiveness and mitigating issues which might prevent effectiveness. A total of 35 contained evidence that was of relevance to policymakers in relation to offering practical recommendations for improving the effectiveness of external school review.

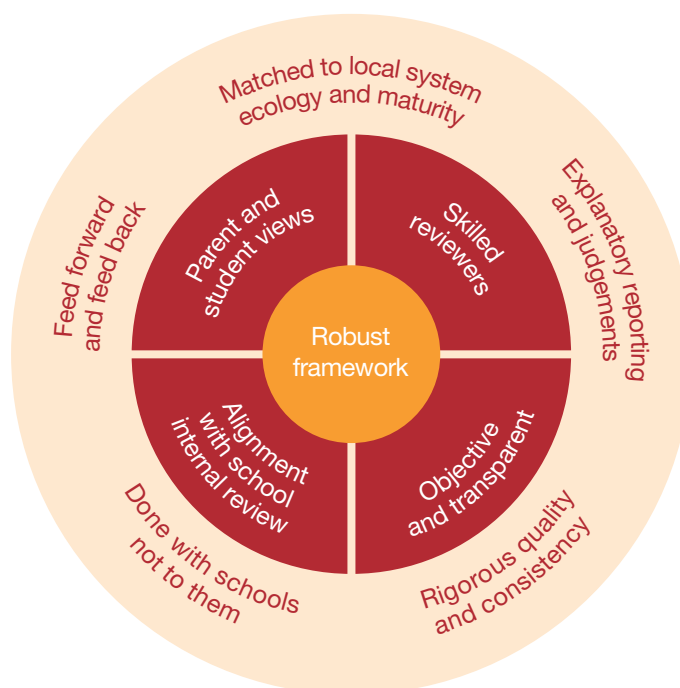
<sup>1</sup> The literature review used the ProQuest Dialog Platform to search the Australian Education Index (1977 – current), British Education Index (1975 – current) and ERIC (1966 – current) databases.



## Summary of findings

Synthesising the evidence from the conference, and related research activities, five characteristics appear to underpin effective external school review. These are as follows:

- Characteristic 1** Use of a robust review framework underpinned by research evidence
- Characteristic 2** Inclusion of parent and student views during review
- Characteristic 3** Deployment of a skilled reviewer workforce
- Characteristic 4** Objective evaluation and transparency
- Characteristic 5** Alignment of evaluations with school internal review processes and development planning



Furthermore, where external review is most effective these five characteristics are underpinned by the following five principles:

- Principle 1** Judgements and reporting are explanatory
- Principle 2** Evidence is used to feed forward into future system reform as well as to feed back on the current state of the system, with the best practice also using the evidence to 'feed sideways' to provide school-to-school post-inspection support
- Principle 3** There is a matching of method and framework content to the local educational ecology and system maturity
- Principle 4** There is a sense that inspection is 'done with schools, not to them'
- Principle 5** There is rigorous quality assurance and consistency



## 2 The characteristics and principles as a road map for effective practice

*“... effective frameworks direct inspectors and reviewers to factors that education research has shown have the most influence on student outcomes.”*

This section elaborates on the main conference findings discussed above and includes some short examples from the conference presentations and workshops which provide further illustrative materials (the full conference presentation and workshop summaries can be found on the CD-ROM with supporting conference materials).

### Characteristic 1 – Use of a robust review framework underpinned by research evidence

Effective school review should be underpinned by a **robust framework for school inspection**. This framework should be designed specifically for the context of the country and be aligned to the purpose of review in that country. At the same time, effective frameworks direct inspectors and reviewers to factors that education research has shown have the most influence on student outcomes.

#### Schools matter for life chances and so, therefore, does the research evidence

Professor Pam Sammons' presentation highlighted the need for school inspection and external review processes to be rooted in research and evidence in relation to school improvement. Her review of the school effectiveness literature has suggested that there are ten processes that are important for school improvement:

- Clear leadership
- Developing a shared vision and goals
- Staff development and teacher learning
- Involving pupils, parents and the community
- Using an evolutionary development planning process
- Redefining structures, frameworks, roles and responsibilities
- Emphasis on teaching and learning
- Monitoring, problem-solving and evaluation
- Celebration of success
- External support, networking and partnership

A full summary of Prof Sammons' presentation **School improvement: studying the processes of education change** can be found on the CD-ROM along with the session Powerpoint.

### Characteristic 2 – Inclusion of parent and student views during review

The power of community accountability and a respect for and an **acknowledgement of the views of parents and students should be embedded within the process**. Where this is effective it is characterised by the gathering and analysis of these views in a way which integrates them into the inspection or review evidence base, ensuring that this evidence is weighed equally with other significant evidence.



### Characteristic 3 – Deployment of a skilled reviewer workforce

Where school inspection is the method of review, **a skilled and ‘professionalised’ workforce of inspectors**, who have progressed through a stringent selection, training and induction process; and who carry a high degree of credibility with the institutions they inspect, are deployed. Teams of such inspectors apply the framework evaluation criteria objectively with intelligence and rigour; and understand the nuances of the context within which they are applied.

#### Quality training of inspectors delivers quality judgements in Bahrain

Social reform has included education reforms which are aimed at upgrading the skills of Bahrainis by developing education and training to enhance their abilities to meet the requirements of the labour market. The development of the Quality Assurance Authority for Education and Training (QAAET) is part of it.

In line with these priorities a rigorous and effective process for training school inspectors has been implemented. Central to the approach in Bahrain is the concept of capacity building and the development of local inspection expertise. To support this, the School Review Unit (SRU) has implemented three levels of training and accreditation:

- Trainee Reviewer (Level 1)
- Team Reviewer (Level 2)
- Lead Reviewer

The Ministry of Education nominates applicants and these are seconded to the SRU for a period of one to four years. Annually this amounts to approximately 25–30 people. The QAAET hires approximately 10–15 of these, with approximately 90% becoming Certified Reviewers. Those who demonstrate leadership skills can go on to become Lead Reviewers.

The full process and competences required of inspectors are described in the session summary on the CD-ROM: **Developing the workforce of the School Review Unit in Bahrain** (presented by Dr Jawaher Al Mudhahki of the Quality Assurance Authority for Education and Training, Bahrain).

### Characteristic 4 – Objective evaluation and transparency

**Objective evaluation based on standard operating procedures** is consistently applied with constant, rigorous quality assurance of the inspection processes. In particular, the inspection framework provides clear definitions of inspection terminology. Inspection results are publicly available and easy to interpret. A degree of separation at government level can also enhance transparency and objectivity.

#### Common features that underpin effective frameworks

Chris Taylor (CfBT Education Trust) outlined how important it is to ensure that frameworks are contextually appropriate in order for them to be effective whilst at the same time having common features. These features include the following:

- Having a public statement of criteria and presenting the aspects of the work of schools that inspectors will inspect, or reviewers will review. Specifically, they provide a clear explanation of the indicators of relative quality that will be explored during an evaluation.
- Being public documents; transparency is essential.



- Being based on the notion that students' academic performance and personal development are the ultimate measure of school effectiveness.
- The fundamental recognition that effective inspection and review involves forming a judgement about student outcomes and then explaining why they are as they are. CfBT Education Trust frameworks therefore support the proposition that it is the quality of the teaching that holds the key to this explanation.
- Emphasising the importance of leadership in creating the conditions in which teaching quality can thrive and students can achieve good outcomes as a result.

Chris Taylor's experience of working with governments on the design of inspection and review frameworks can be found in his session summary: **International perspectives on framework design** on the CD-ROM.

### Characteristic 5 – Alignment of evaluations with school internal review processes and development planning

There is a **strong alignment between the key processes of internal review and school development**, with these processes linked to school self-evaluation within the inspection methodology. Related school-based activity that has a positive effect on education quality over time, specifically in relation to the quality of teaching and learning, is therefore expected.

#### Integrating external and internal review processes in the United Arab Emirates

The strategic partnership between CfBT Education Trust and the Federal Ministry of Education in the United Arab Emirates includes four programme objectives:

- School improvement through a combination of external school evaluation and school self-evaluation training
- Evaluation and accreditation of both public and private schools in Ajman, Fujairah, Ras Al Khaimah, Umm Al Qwain, Sharjah and public schools in Dubai
- Professional development of Emirati educators so that they can become school evaluators
- The use of an international standard evaluation framework and process by Emirati evaluators

In relation to the school improvement cycle as a whole, four key areas have made a difference. Firstly, school self-evaluation training for all schools prior to formal evaluation helps the schools to create action plans for school improvement that are evidence based and aligned with the framework. Secondly, using skilled and experienced local evaluators who are also zone supervisors has cascaded new knowledge about school evaluation and how to improve schools. Thirdly, using school principals as evaluators has similarly embedded the framework into schools. Finally, school evaluation reports and recommendations are being used to define school improvement objective and priorities.

A detailed summary of this approach and accompanying materials can be found in on the CD-ROM in **Self-evaluation and school improvement in the United Arab Emirates** (presented by Nawal Khaled Muran of the Federal Ministry of Education, United Arab Emirates).



### Principle 1 – Judgements and reporting are explanatory

It is important for inspection and review to be ‘explanatory’. This explanatory process must be focused on explaining the relationship between inputs such as teaching and the output of learning. At the same time there needs to be a clear relationship between the way in which explanation is achieved and the evidence base for what works (particularly the research evidence in relation to teacher effectiveness).

Explanatory processes should be present at all levels during review, from moment-by-moment evaluations in the classroom through to the synthesising of findings and overall judgements about quality. In the classroom, for example, effective review processes often require those making the judgements to write only using processes such as ‘evaluative judgement’ – in which the cause of a strength or weakness in learning is specifically related to the activity of the teachers (e.g. *Learners made slow progress because the teacher did not explain the purpose of the learning well*). Closely related to this is the need for explanation to be publicly available.

### Principle 2 – Evidence is used to feed forward into future system reform as well as to feed back on the current state of the system, with the best practice also using the evidence to ‘feed sideways’ to provide school-to-school post-inspection support

At the same time, effective inspection methods should be seen as an opportunity to identify future priorities for action (‘feed forward’, as well as defining clearly the current state of service quality – ‘feed back’). This means that inspection methods and approaches will need to evolve and develop to keep pace with improvement as it begins to take place. A good example of inspection driving policy change can be seen in Dubai where the process of inspection has been used to ensure that Islamic education is taken as seriously as other subjects by the private sector (discussed in detail in the session summary on the CD-ROM).

Equally, inspection can be used to share good practice (a sort of ‘feed sideways’ between schools) as has also been shown in Dubai, through the sharing of practice between schools (so called ‘expertise exchange’) and in Abu Dhabi, Jamaica and Bahrain, where deep engagement with existing principals has been a parallel aim of the process (again these areas were elaborated on in the conference sessions and materials).

#### Continuing developments and raising the bar to improve standards in Dubai’s international schools

The Dubai Schools Inspection Bureau (DSIB) was founded in December 2007 as the school inspection department of the Knowledge and Human Development Agency and completed its fourth annual cycle of inspections in March 2012. Inspections take place annually in Dubai and the framework used has been reviewed year on year and has become more demanding in certain areas. For example, there is now greater emphasis on evaluating students’ attainment in relation to the standards expected internationally as well as by the curriculum they are following.

In relation to the impact of inspection on school improvement, 40 schools have improved their overall performance since their first inspection. Sixteen have shown a decline in overall performance and six schools have closed since 2008/09.



*“... an effective framework is one which is designed to be mindful of the context...”*

Year on year, the numbers of students in private schools has increased and there has been a steady increase in the number of schools which are graded as Outstanding or Good – a significant level of progress, bearing in mind that the inspection framework has also become increasingly challenging year on year.

The story of the development of the current framework and its revision can be found on the accompanying CD-ROM in **Improving the quality of education through the Dubai Schools Inspection Bureau** (presented by Jameela Al Muhairi of the Dubai Schools Inspection Bureau).

### **Principle 3 – There is a matching of method and framework content to the local educational ecology and system maturity**

Although there appears to be a core structure to effective inspection, at the same time it is essential that any review process is ‘fit for purpose’ in relation to the current ecology of the school system that it is seeking to influence. Ecological fitness appears mediated by areas such as levels of autonomy and accountability, the balance of self-evaluation and external review and the question of ‘who should be an inspector’. For example, some systems may not yet be mature enough for self-evaluation to be part of the framework; whilst others may not yet have a stable enough education system to allow for a top-down, government-led accountability approach and may need to place accountability at a more local community-led level in the first instance.

Adopting a view which begins to define taxonomy of system maturity might also help to explain why some highly effective systems seem to not require an inspectorate because of high system maturity achieved through outstanding levels of teacher effectiveness. Equally different ecologies may require a different level of pressure and support. A good example of this, as was noted by Chris Taylor (Principal Consultant, CfBT Education Trust), is where there may be a need for different emphasis within an inspection framework relating to academic and affective educational quality; and what it means to teach well in different contexts.

#### **Contextualisation and integration with school self-evaluation in practice in Jamaica**

The establishment of the National Education Inspectorate (NEI) was part of the Public Sector Modernisation Programme undertaken by the Government of Jamaica. At the heart of the success of the process in Jamaica has been the creation of a genuine strategic partnership between the Department for Schools’ Services (DSS) the National Education Inspectorate and local School Improvement Activities, in which the Inspectorate has been able to facilitate an active relationship between national data and regional and school level improvement. Thus the DSS is responsible for students’ assessment data, census data and schools’ self-evaluation data. The NEI takes on the performance profiling of schools, produces inspection reports and generates recommendations at a school programme and policy level.

You can read a full description of how the NEI operates in the session summary and accompanying materials on the CD-ROM in **Contextualising the inspection framework at the National Education Inspectorate in Jamaica** (presented by Maureen Dwyer of the National Education Inspectorate, Jamaica).





#### **Principle 4 – There is a sense that inspection is ‘done with schools, not to them’**

Therefore, an effective external review framework is one which is designed mindful of the context and with a view to finding a way to deeply embed the process within that system. For example, the specific ‘sensitisation’ of schools to the process of inspection has become a key area of focus; in both the Abu Dhabi and Jamaica conference sessions the speakers discussed specific examples of where a clear need for this has been identified and why. In Bahrain, and many of the other countries represented at the conference, inspectors have been specifically recruited from the local education context, both to ensure local understanding and to build capacity in the system. Training schools well so that they can self-evaluate, where appropriate, between inspections and reviews, is also an effective addition to an inspection framework.

#### **Principle 5 – There is rigorous quality assurance and consistency**

Finally, where inspectorate-driven external review is the right ecological solution, it is clear that high-quality training and quality assurance is fundamental, particularly where inspection reports are publicly available. This emerged in all of the conference presentations, although there were different approaches to this question – from the emerging use of a formal accreditation process in several countries through to the construction of a rich collective dialogue related to consistency among the illiterate parents in India who were conducting reviews of quality. The India example is discussed in detail in the session summary on the CD-ROM (***Community-based accountability in India***) and is the subject of a CfBT Education Trust research report (Galab et al., 2013). It was also suggested that the question of quality and consistency should include a focus on what is outstanding practice as well as there being consequences for poor performance in relation to both pressure and support.



### 3 Evidence from the literature that supports the conference findings

*“Three previous CfBT Education Trust research papers have explored the effectiveness of external school review and/or inspection.”*

#### Previous CfBT Education Trust research

Three previous CfBT Education Trust research papers have explored the effectiveness of external school review and/or inspection.

Whitby (2010) conducted a literature review related to school inspection and experiences from high performing systems. This review compared inspection in England, Hong Kong, the Netherlands, New Zealand, Scotland and Singapore. In particular, the report noted the importance of a combination of self-evaluation with external inspection and high levels of commonality between inspection criteria. Furthermore, Whitby (2010) and Barber (2004) suggest that effectiveness can be enhanced through a degree of separation at government level. It is also clear that the amount of support and guidance schools received in self-evaluation and inspections appears to affect the impact of inspections.

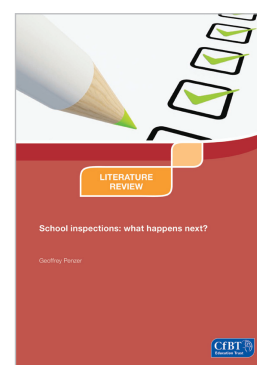
Penzer (2011) in a further literature review, looked at a wide range of sources of evidence from a number of countries (the Czech Republic, Denmark, England, Flanders, Germany, Hong Kong, Ireland, the Netherlands, New Zealand, Northern Ireland, Portugal, Scotland, Singapore, Slovakia, Spain, Sweden, Wales). Penzer concluded that:

*“School inspection has the potential to be a powerful force for good and can be used to drive school improvement. However, the tensions generated between its roles in providing accountability and in supporting improvement can impact on the mechanisms through which improvement arises from inspection.”* (Penzer, 2011: 16)

Alongside this, it is clear that there is no universally ‘right’ approach. Rather the question of local inspection structure needs to be addressed country by country. A third paper on the characteristics of outstanding inspectors (Raleigh, 2012) presented in Workshop D during the conference, is summarised on the CD-ROM.

Penzer’s findings beg a number of questions, not least of which is the question of whether there may be some common feature of effectiveness (even though systems, by definition, need to evolve and develop their own context-appropriate structures and frameworks). This gap in the current literature provided the rationale for the conference and the subsequent recommendations outlined in this paper. In the light of this, rather than repeat the evidence presented by Whitby and Penzer, the aim of this literature review was to identify:

- a) evidence which supports the Characteristics and Principles identified during the conference as important for effectiveness; and
- b) issues of ineffectiveness, that applying the Characteristics and Principles could mitigate.





The tables below present the main relationships between the conference findings and this review.

### Summary findings from review of literature, 2003–2012

Country/context	Authors	Lessons for policymakers	Conference findings									
			Robust framework	Parent and student views	Skilled reviewers	Objective and transparent	Aligned with school review	Explanatory reporting	Feed forward and feedback	Matched to local system	Done with, not to	Quality consistency
England	Shaw et al. (2003)	<ul style="list-style-type: none"> <li>Inspections improve GCSE results where achievement is already higher or lower than average. Pointed towards the potential of including self-review to improve overall effectiveness.</li> </ul>					•				•	
European review	Meuret and Morlaix (2003)	<ul style="list-style-type: none"> <li>Although there is some evidence that inspection is likely to be useful it is more praised by policymakers than it is liked and really used by schools.</li> </ul>				•	•				•	•
Wide review of countries with focus on England	Barber (2004)	<ul style="list-style-type: none"> <li>Data generated by accountability is the key to enhancing professional knowledge about best practice. There is, therefore, the possibility of a virtuous circle, connecting teachers to the public.</li> <li>Effectiveness may be improved through a degree of separation at government level.</li> </ul>		•	•	•			•			
Trinidad and Tobago	London (2004)	<ul style="list-style-type: none"> <li>The language used during inspection can have a negative effect if it is over-technical and formulaic.</li> </ul>	•		•			•				
England	Rosenthal (2004)	<ul style="list-style-type: none"> <li>There can be a negative effect during the year of an inspection.</li> <li>Adjustments must be made so schools continuously seek to maintain and improve.</li> </ul>					•		•			
England: failing schools	Matthews and Sammons (2005)	<ul style="list-style-type: none"> <li>Consequences for poor performance have an effect.</li> <li>Schools identified as least effective are more likely to sustain improvement after inspection.</li> <li>Identifying a school as requiring 'special measures' may make a contribution to the raising of standards and inclusion.</li> </ul>	•	•		•						
England	Plowright (2007)	<ul style="list-style-type: none"> <li>There is a need for an integrated model of school improvement which brings together accountability and inspection, self-evaluation and school improvement within the context of promoting the notion of a learning organisation.</li> </ul>	•				•				•	
The Netherlands primary schools	Blok et al. (2008)	<ul style="list-style-type: none"> <li>Although self-evaluation is highly rated by school leaders, it is often of low quality and unable to provide the answers to the type of school improvement questions that schools had formulated.</li> <li>Suggests a need for high-quality training and a balance of external and internal review as a means of mitigating these issues.</li> </ul>						•		•	•	



Country/context	Authors	Lessons for policymakers	Conference findings									
			Robust framework	Parent and student views	Skilled reviewers	Objective and transparent	Aligned with school review	Explanatory reporting	Feed forward and feedback	Matched to local system	Done with, not to	Quality consistency
The Netherlands	Ehren and Visscher (2006; 2008)	<ul style="list-style-type: none"> <li>Feedback about weakness and the assessment of weak points as unsatisfactory when combined with agreements about improvement activities make a difference in promoting school improvement.</li> </ul>			•						•	
Eight inspectorates in seven European countries	Jannssens and van Amelsvoort (2008)	<ul style="list-style-type: none"> <li>School self-evaluation is stronger where countries place more national accountability demands on self-evaluation.</li> <li>A mix of self-evaluation and national inspection with a steer towards improvement is the most promising combination.</li> </ul>	•				•				•	
Hong Kong	MacBeath (2008)	<ul style="list-style-type: none"> <li>Learning needs to be centre stage in any explanations.</li> <li>Importance of having a balance of internal and external evaluation.</li> </ul>	•				•	•			•	
England	Sammons (2008)	<ul style="list-style-type: none"> <li>Balancing pressure and support within a context of zero tolerance may be effective.</li> <li>However, effects of disadvantage are complex to overcome.</li> </ul>	•		•	•			•		•	•
US, North Carolina	Ahn and Vigdor (2009); Fruehwirth and Traczynski (2011)	<ul style="list-style-type: none"> <li>Schools facing sanctions improve performance.</li> </ul>	•	•		•						
Post-apartheid South Africa	Biputh and McKenna (2009)	<ul style="list-style-type: none"> <li>Did not sufficiently 'address the impact of educators' experience of the preceding systems.'</li> <li>'Surface compliance' rather than engagement.</li> </ul>								•	•	
England	Hall and Noyes (2009)	<ul style="list-style-type: none"> <li>The effectiveness of self-evaluation alone can be mediated by school context, although this is important in generating internal improvement discussion.</li> <li>Schools need to avoid focusing on the system of evaluation over interpretation of evidence.</li> </ul>				•	•			•	•	
The Netherlands	Luginbuhl et al. (2009)	<ul style="list-style-type: none"> <li>More intense inspections produce larger improvements than less intensive ones.</li> </ul>	•	•	•		•					•



Country/context	Authors	Lessons for policymakers	Conference findings									
			Robust framework	Parent and student views	Skilled reviewers	Objective and transparent	Aligned with school review	Explanatory reporting	Feed forward and feedback	Matched to local system	Done with, not to	Quality consistency
England	McCrone et al., (2009)	<ul style="list-style-type: none"> <li>The inspection process was generally perceived by school leaders as contributing to school improvement and as giving impetus to drive forward.</li> <li>Achieved a direct positive impact on school improvement in terms of assessment and, to some extent, quality of teaching and attainment.</li> </ul>	•	•	•	•	•				•	•
Macau	Morrison (2009)	<ul style="list-style-type: none"> <li>There may be particular issues for inspection in small states and territories.</li> <li>Importance of local tailoring, 'home grown' approaches informed by external systems, combining self-review and external inspection.</li> </ul>					•			•	•	
Nigeria	Ochuba (2009)	<ul style="list-style-type: none"> <li>Points to the need for employment/deployment of qualified and experienced inspectors, induction of new inspectors and capacity building for practising inspectors and adequate legal provisions for enforcing compliance by schools and proprietors.</li> </ul>	•	•				•				•
Cyprus	Brauckmann and Pashiardis (2010)	<ul style="list-style-type: none"> <li>Importance of using robust appraisal instruments that have undergone extensive scrutiny (even where a good balance of internal and external evaluation is present).</li> </ul>	•				•	•			•	
Germany	Dedering and Muller (2011)	<ul style="list-style-type: none"> <li>Notes mixed evidence on inspection and suggests importance of using inspection as a means of initiating school development and support.</li> </ul>					•	•	•	•	•	
Pakistan	Jaffer (2010)	<ul style="list-style-type: none"> <li>Important for inspection to be related to the 'big picture' and a degree of systems thinking, particularly in relation to a shared perception of quality.</li> </ul>	•	•	•							•
New Zealand and the Netherlands	Ladd (2010)	<ul style="list-style-type: none"> <li>Looking for lessons for the US, suggests the importance of clarity in relation to individual school accountabilities and independence of policymaking bodies.</li> </ul>	•	•	•							•
US, Chicago	Neal and Schanzenback (2010)	<ul style="list-style-type: none"> <li>Schools facing high stakes accountability may tend to over-focus on students at a performance threshold at the expense of the lowest-performing.</li> </ul>	•	•						•	•	



Country/context	Authors	Lessons for policymakers	Conference findings									
			Robust framework	Parent and student views	Skilled reviewers	Objective and transparent	Aligned with school review	Explanatory reporting	Feed forward and feedback	Matched to local system	Done with, not to	Quality consistency
Hong Kong	Wong and Hiu Li (2011)	<ul style="list-style-type: none"> <li>Effectiveness is achieved through a balance of internal and external evaluations with a focus on school empowerment and improvement.</li> </ul>		●			●		●	●	●	
Perspective and review of evidence	Gaertner and Pant (2011)	<ul style="list-style-type: none"> <li>Robust validity of the process and criteria used in inspection is essential for effectiveness, particularly in 'high stakes' contexts.</li> </ul>	●		●							●
Scotland	MacKinnon (2011)	<ul style="list-style-type: none"> <li>Identifies issues that can arise when there is a mismatch between concepts and structures used in school evaluation and policy aims.</li> </ul>	●		●							●
Ireland and Iceland	McNamara et al. (2011)	<ul style="list-style-type: none"> <li>Teachers need support to carry out effective self-evaluation. It should not be assumed that they are able to do this without training and skills.</li> <li>Support does not have to be extensive but it does have to be there.</li> </ul>	●							●	●	
England	Allen and Burgess (2012)	<ul style="list-style-type: none"> <li>Schools only just failing see an improvement over the following two to three years; this improvement occurs in core compulsory subjects.</li> <li>There is a less positive impact on lower-ability pupils. Tackling schools that are 'just' satisfactory or 'coasting' could be a potentially important area for development.</li> </ul>	●					●		●		
The Netherlands	Ehren et al. (2012)	<ul style="list-style-type: none"> <li>Where specific test results are part of an accountability system, schools may not adhere to guidelines for administration.</li> </ul>	●						●		●	
England	Perryman (2007; 2009; 2012)	<ul style="list-style-type: none"> <li>Inspection may have negative emotional impacts.</li> <li>Notes that there is a risk that schools identified as weak may focus on just the process of passing an inspection, rather than the wider goals of school improvement; and it may even result in some schools attempting to fabricate evidence.</li> </ul>							●	●	●	



## 4 International conference on school improvement through inspection and external review: conference themes

The conference presentations were organised into five interrelated themes:

### Theme 1 – A global view of accountability and effectiveness

Two keynotes by Professor Pam Sammons (University of Oxford) and Liz Slater (an independent education consultant who is working closely with CfBT Education Trust on several research reports) addressed this theme by discussing international perspectives on school improvement and worldwide approaches to accountability.

### Theme 2 – The inspection framework and its impact on school effectiveness

This theme was explored in three talks. The first of these, delivered by Jameela Al Muhairi (Chief of Bureau, Dubai Schools Inspection Bureau) discussed the use of school inspection in Dubai to improve the quality of education. This was followed by a presentation from Maureen Dwyer (Chief Inspector at the Jamaican National Education Inspectorate) which explored how the inspection framework in Jamaica has been contextualised to maximise its impact. The final session in this theme summarised CfBT Education Trust's experience of framework design across a wide range of contexts. This was presented by Chris Taylor (Principal Consultant, CfBT Education Trust).

### Theme 3 – Building local capacity

Dr Jawaher Al Mudhahki (Chief Executive, Quality Assurance Authority for Education and Training, Bahrain) explained how the workforce in the School Review Unit had been developed.

### Theme 4 – Building ownership and involvement

This theme was opened by Nawal Khaled Muran (Director of School Accreditation, Federal Ministry of Education, United Arab Emirates) who discussed the use of self-evaluation as a mechanism for school improvement in the UAE. It was followed by a presentation of evidence from a recent CfBT Education Trust research project which looked at community-based accountability. This was given by Charlotte Jones (Senior Education Consultant, CfBT Education Trust) and Richard Churches (Principal Adviser for Research and Evidence Based Practice, CfBT Education Trust).

#### Four workshop sessions covered the following areas:

- A. Accrediting inspector training – Paul Rafferty (Head of Training and Recruitment, CfBT Inspection Services) and Jackie Barbera (Liverpool Hope University)
- B. Performance management of inspectors – Lesley Traves (Head of Inspections, CfBT Inspection Services) and Adrian Simm (Principal Inspector, CfBT Inspection Services)
- C. Inspecting British schools overseas – Mike Hewlett (Chief Inspector for British Schools Overseas, CfBT Inspection Services)
- D. Creating outstanding inspection practice – Mike Raleigh (CfBT Inspection Services)

The opening conference remarks are summarised on the following pages, and all conference papers can be found on the accompanying CD-ROM.



## 5 Opening conference remarks

*“It should be possible to see ‘where a framework comes from’ and its relationship to the evidence base.”*

The conference was opened by Sir Jim Rose, Chairman of the Education Committee at CfBT Education Trust, Neil McIntosh, Chief Executive, and Tony McAleavy, Education Director.

### **Tony McAleavy**

Tony McAleavy opened the conference by thanking delegates for their attendance and noting the great distances that some delegates had travelled in order to support CfBT Education Trust in making this a truly global conference. He also mentioned the importance of having frameworks for inspection and evaluation underpinned by the research, something that was a central theme in the conference. From such a perspective:

- it is essential that the lineage of a framework should be clear
- it should be possible to see ‘where a framework comes from’ and its relationship to the evidence base
- if the goal is to have impact and to make improvements then we also need to know what excellence looks like with a framework ‘coming from’ the evidence base.

This raises the question of what the key actions are that headteachers and teachers need to take in order to create excellence. There should therefore be a powerful relationship between the school effectiveness literature and school improvement through review and inspection methodology.

### **Sir Jim Rose**

Building on these observations and drawing on his experience of inspection, which began in 1975 when he was appointed as Her Majesty’s Inspector, through to his retirement as Director of Inspection for Ofsted in 1999, Sir Jim Rose reflected on the fact that the English education system is currently undergoing the most radical and far-reaching change that had occurred for a generation. Current government policy could be seen as ‘having two hands’. On the one hand schools are being given an unprecedented amount of autonomy and on the other hand they have to operate under an unprecedented amount of accountability. However, this has been the case for quite some time. The belief is that schools and school leaders will become the key drivers of systematic self-improvement, although the meaning of accountability, in the new scheme of things, is not altogether clear. In a sense, England can be said to be actively exploring how accountability and autonomy can support self-improvement, a theme that this conference also seeks to address. If this relationship can be unpicked and understood then we will be well on the way to understanding how inspection can and should be used to effect change.

Sir Jim Rose noted that there has been a long tradition of accountability in this country including:

- the national curriculum, examinations
- national testing
- school performance tables
- publicly available inspection reports.





However, if you were to ask parents which of those things is uppermost in their mind when they are choosing a school for their child it is likely that nine out of ten would say the inspection result: looking to the information available on the internet to find the inspection report for their intended school or schools. This places an enormous responsibility on inspectorates to get it right. At the heart of this issue is the question ‘if you had two different teams of inspectors inspecting the same school at the same time would they come up with consistent judgements?’

Therefore, there is a top priority in relation to:

- how criteria are defined
- what kind of frameworks are put in place and how providers and governments are made accountable to schools, parents and to children in making sure that that degree of consistency runs through every activity that takes place.

A key mechanism is, and must remain, the publication of the results of inspection or evaluation. Thus inspection shines a light on poor performance and weak service. There is a need to balance that emphasis, even to overtake it, by making sure that the process also shines a light on best practice and really good service. What inspection can tell us about that remains an important area for development; in doing so, inspection can be made more ‘fit for purpose’. Therefore, the key focus today is the question of how we can make accountability fit for purpose, so that schools see that the stronger they are on accountability, the stronger they are on service delivery, autonomy and in their ability to make improvements themselves. Sir Jim Rose also noted how important it is for systems to give time for initiatives to ‘bed in’, something which governments should be alert to as they design change. Critical in his view was the need to focus educational change effort generally on what he called the ‘virtuous triangle’ of high-quality pedagogy, high-quality curriculum and high-quality parenting, recognising that, unless these are in place, all else is peripheral.



### Neil McIntosh

Neil McIntosh completed the opening remarks by putting the conference in context. He noted that inspection is about assessing quality, not quantity; although this needs to be as objective as possible, to some degree it will be subjective. Another important consideration is the relationship between the private and the public sectors. CfBT Education Trust is a private organisation but one which provides a public service, often working on behalf of governments. One important aspect of its identity in working in areas such as education (which is largely dominated by governments) is its ability to remain sceptical of monopoly state provision. If CfBT Education Trust were not, it would not exist. Some might say that governments are about social control; it is perhaps more accurate to say they are interested in social cohesion. This is a legitimate activity for government to involve themselves in.



Neil McIntosh went on to suggest that inspection, from this perspective, is perhaps one of the most malleable and flexible instruments available to governments to allow them to exercise oversight of social cohesion in education. If it is used well it can be an extremely powerful instrument. But it can be used for ill too. It is a powerful instrument and needs to be used with care. Finally, he pointed to the teacher's perspective, noting that his organisation has, in a way, always existed for teachers both in terms of logistics and professional support.

Central to that is the notion of getting adequate teachers to be good and good teachers to be outstanding. There are very few teachers for whom that upward trajectory is not the goal. Inspection in this context is a very overt form of supervision and more invasive a procedure than most workers in modern society have to undergo. Furthermore, it is almost unique as far as professionals are concerned. Enormous work has been undertaken in education to move from the position where teachers close their classroom door and no one comes inside except the children. It is highly desirable that teachers should be receptive to people coming in and observing their lesson, but it is a very overt form of supervision and it therefore behoves all working in this area to use the process sensitively as well. He closed by noting that the context for this conference therefore has two levels: a broad political one and a narrower one focused on the sense of individual teacher well-being.

**The remaining conference materials (including the slides from Pam Sammons' conference presentation: 'School improvement: studying the processes of education change') and summaries of presentations can be found on the accompanying CD-ROM and on the CfBT Education Trust website: [www.cfbt.com/research](http://www.cfbt.com/research)**



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