



Formative evaluation of the Lincolnshire teaching assistants scale-up campaign

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The Education Endowment Foundation (EEF) is an independent grant-making charity dedicated to breaking the link between family income and educational achievement, ensuring that children from all backgrounds can fulfil their potential and make the most of their talents.

The EEF aims to raise the attainment of children facing disadvantage by:

- identifying promising educational innovations that address the needs of disadvantaged children in primary and secondary schools in England;
- evaluating these innovations to extend and secure the evidence on what works and can be made to work at scale; and
- encouraging schools, government, charities, and others to apply evidence and adopt innovations found to be effective.

The EEF was established in 2011 by the Sutton Trust as lead charity in partnership with Impetus (formerly Impetus Trust) and received a founding £125m grant from the Department for Education. Together, the EEF and Sutton Trust are the government-designated What Works Centre for improving education outcomes for school-aged children.

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Executive summary

The project

The EEF's national campaign to scale up the use of research evidence on making the best use of Teaching Assistants (TAs) was launched in 2015 together with an evidence-based **EEF guidance report** (Sharples, Webster and Blatchford, 2015) which included seven **recommendations** for schools. The first regional pilot, conducted in **South and West Yorkshire between September 2016 and July 2017**, involved the commissioning of organisations to act as 'advocacy providers' who supported schools to implement the EEF recommendations. This report presents findings on the second regional pilot, which the EEF initiated using an approach that embedded scale-up in school improvement structures and processes within Lincolnshire between September 2017 and July 2018. An additional report (**Teaching assistants regional scale-up campaigns: lessons learned**) has been published alongside this, which draws out lessons learnt from the two different approaches to scale-up. All reports can be found [here](#) on the EEF website.

The EEF's aims were to: secure the use of TA evidence and research in every Lincolnshire school to improve outcomes for children and young people; learn with Lincolnshire stakeholders about key features of effective and sustainable scale-up; and create a sustainable network of 'evidence-ready' schools. EEF worked with influential system leaders to develop an operational model - the Mobilise programme.

The Mobilise programme was operationalised through a three-tier cascade model. Regional leads designed training and resources based on the EEF recommendations. Cluster leads attended s base camps where the regional leads delivered the training using a professional learning communities (PLC) format. The cluster leads then delivered the PLC to their group of school-based leads in cluster meetings. School-based led subsequently led the implementation of the EEF recommendations in their schools. The intention was that school-based leads would replicate the cluster meeting PLC with staff in their own schools. Regional leads provided support to cluster leads and regional and cluster leads supported schools. Prior to the cascade activities, two roadshows for head teachers were held at which the EEF delivered inputs on the recommendations. During the campaign, schools were also invited to an Intervention Fair, which showcased structured evidence-based TA-led interventions, and a HR workshop on 'Managing Change'.

Key conclusions

1. The embedded approach to scale-up, which aligns the development of an operational model with local/regional priorities, context and structures, appears to be effective in engaging large numbers of schools in research use.
2. The Mobilise model appears to have had some impact on aligning practices in Lincolnshire schools more closely with the EEF recommendations compared to comparison schools in relation to TA/teacher communication and the training of TAs and teachers. There appears to have been limited impact on the deployment of TAs and classroom practices and very little impact on the use of structured evidence-based TA-led interventions. These findings should be considered with caution given the use of significance tests from multiple analyses and possible survey response biases. The active control condition of a high level of national and regional promotion of the EEF guidance may have increased engagement with the EEF recommendations in the comparison schools.
3. There is some evidence to indicate that Mobilise has increased 'research readiness' at school and county level and some positive indicators of sustainability.

4. The Mobilise model was generally well received by schools. Fidelity to the evidence was maintained as it was delivered by the regional leads to the cluster leads and then to school-based leads. However, school-based leads were selective in deciding what to share in school and a number of school-related factors enabled or impeded implementation.
5. System-level brokerage by EEF was an important catalyst, support and means of steering, particularly in the early phases, but also gave rise to some confusion in relation to governance. System-level brokerage appears to be most effective when brokers: are knowledgeable experts in the research, research scale-up and leading strategic level change across schools; provide focus, energy and passion; support and challenge stakeholders; facilitate linkages to experts and resources; and are associated with a positive brand and reputation.
6. The embedded model of scale-up is potentially replicable as it focuses on an area's context and priorities. A number of contextual factors in Lincolnshire, heightened receptiveness to the model.

What are the findings?

The Mobilise programme was successful in engaging schools: 283 schools (73%) of all Lincolnshire schools took part. Recorded drop-out of schools was low (6%), but there was a notable decline in attendance at cluster meetings over time, indicating declining engagement.

Survey findings indicate that Mobilise had the most impact on TA/teacher communication (which relates to the EEF recommendations 4 and 7) and the training of TAs and teachers (recommendations 4, 5 and 6), and on increasing the proportion of schools with a written policy or guidance on TA deployment. However, there were many areas of practice related to TA deployment and classroom practices (recommendations 1, 2 and 3) where there were no statistically significant changes associated with Mobilise. The only statistically significant positive effects found were: TAs ensuring that pupils retain ownership over their learning and responsibility for their work; teachers deploying TAs during lessons to respond to the 'real-time' needs of pupils; and teachers and TAs having a precise and shared understanding of their respective roles. These findings should be considered with caution given the use of significance tests from multiple analyses and possible survey response biases. Qualitative findings indicate that the most frequent change was TAs working with pupils across the attainment range, but this outcome is not supported by the survey findings. There was little evidence of change in the use of structured evidence-based TA-led interventions (EEF recommendations 5 and 6). Across most areas of practice change, the modal response from participants was that change was partly due to the Mobilise project. Differences in implementing the EEF recommendations between the Lincolnshire schools and the comparison schools may have been reduced due to the active control condition of a high level of national and regional promotion of the EEF guidance.

Mobilise appeared to be associated with the development of 'research readiness'. At school level this included increased commitment to using research, wider engagement of staff, and the establishment of structures and processes to support research use. At the county level an infrastructure was developed to support research use.

Qualitative findings indicate that fidelity to the evidence was maintained as it was delivered in PLCs to the cluster leads and then to school-based leads. However, variation in approaches to implementation in schools appeared to lead to variations in fidelity and, in some instances, seemed to limit the extent and nature of changes in practices that occurred.

Enabling attributes and mechanisms associated with EEF's role in initiating, steering and supporting the development of an embedded model in Lincolnshire were perceived to be:

- Knowledge and expertise of the TA evidence, research on scale-up and leading change across schools.
- Focus, energy, motivation, momentum and passion for research use.
- Brand and reputation.
- Support and challenge.
- Facilitation of linkages to experts and resources.

Mobilise activities were generally perceived to be high quality, although the Intervention Fair was less well received. Enabling attributes and mechanisms associated with the delivery of the Mobilise programme were perceived to be:

- Key influencers promoting the programme and directly engaging in recruiting schools.
- A facilitated professional learning community (rather than 'training') approach, developed into a package of activities and resources for cascading which maintains fidelity to the evidence.
- Comprehensive preparation of cluster leads and ongoing support from regional leads.
- Cluster meetings where cluster leads have high-level facilitation skills, are authentic in co-constructing learning and provide time for reflection and action planning, and where the meetings are regularly attended by school-based leads who are willing to share their experiences.
- Support for school-based leads from cluster leads.
- Detailed monitoring and follow-up of schools who are disengaging.

The qualitative data indicates that the implementation of the EEF recommendations in schools was more effective when:

- School-based leads were committed and enthusiastic.
- School leaders were committed to implementation and school-based leads had or were given the authority to implement change.
- Teachers and TAs were responsive to change.
- There was a clear process for implementation, with time scheduled for all staff to participate in a professional learning community that mirrored the cluster meeting activity.

Reported indicators of sustainability in survey and interview data include:

- Schools' intentions to continue embedding the EEF recommendations on TAs.
- Improved school-readiness for research use.
- County-level infrastructure and strategy fosters and supports research use and strengthened school networks.

The contextual conditions in Lincolnshire that particularly supported implementation of an embedded model of scale-up included:

- Strategic alignment between Lincolnshire leaders' aim to develop a new approach to engaging schools in school improvement, and EEF's aims.
- Organisations and structures that engaged all schools in the county and had the capacity to deliver the operational Mobilise model at scale.
- The capability and commitment of key Lincolnshire stakeholders.

How was the evaluation conducted?

A mixed methods design informed by the project theory of change was adopted, comprising pre- and post-delivery surveys of head teachers in all schools in Lincolnshire, and a comparison group in all schools in Kent and Medway; telephone interviews and focus groups key stakeholders, participants

and heads of non-participating schools; two school case studies; and observation of an early steering meeting, roadshows, a base camp and a 'Lessons learned' workshop.

This evaluation team also conducted a parallel mixed-methods evaluation of the EEF's approach to scaling its TA guidance in South and West Yorkshire (see the **Sheffield Hallam report**, Maxwell et al., 2019) and reports a set of overarching lessons learnt across these two evaluations in Maxwell et al. 2019. This report is published alongside these **two reports and a report from the Institute for Fiscal Studies on the impact on pupil attainment of the South and West Yorkshire campaign** (Sibeta et al. 2019)

Introduction

The EEF Teaching Assistant (TA) scale-up campaign

The Education Endowment Foundation (EEF) campaign to scale up the use of research evidence on making better use of Teaching Assistants (TAs) began with the launch of an **evidence-based guidance report** (Sharples, Webster and Blatchford, 2015) (the EEF guidance). This summarised existing research on effective use of TAs, set out **seven recommendations for the best use of teaching assistants** (the EEF recommendations - summarised in Figure 1 and detailed in Appendix 1), and offered guidance on implementing the recommendations.

Figure 1: The EEF recommendations: 'Making the best use of TAs'

Recommendations for the use of TAs in everyday classroom contexts

1. TAs should not be used as an informal teaching resource for low-attaining pupils.
2. Use TAs to add value to what teachers do, not replace them.
3. Use TAs to help pupils develop independent learning skills and manage their own learning.
4. Ensure TAs are fully prepared for their role in the classroom.

Recommendations for the use of TAs in delivering structured interventions out of class

5. Use TAs to deliver high-quality one-to-one and small group support using structured interventions.
6. Adopt evidence-based interventions to support TAs in their small group and one-to-one instruction.

Recommendations on linking learning from work led by teachers and TAs

7. Ensure explicit connections are made between learning from everyday classroom teaching and structured interventions.

Since the launch of the EEF guidance, it has been promoted widely by EEF and via EEF partners. This promotion and dissemination included:

- Hard copies of the EEF guidance and promotional emails to all schools in England in June/July 2015.
- Email promotion by the EEF Chief Executive to a wide range of educational stakeholders, including all Local Authorities in June/July 2015.
- A range of organisations publicising the EEF guidance to their schools and associates including: Challenge Partners, Achievement for All, The Key, Unison, National Education Trust, Cornwall LA, Berkshire LA (summer and autumn 2015); additionally, Ofsted referred to the guidance in the School inspection update November 2016.
- Promotion via 75-100 presentations at EEF and other events for schools across 2015, 2016 and 2017.
- Promotion via social, print and broadcast media during 2015, 2016 and 2017. This included a press release for the publication of the EEF guidance report in March 2015 and articles on the guidance, including: in the TES, The Economist, Radio 4 Today Programme, Education Business, and the National Governors' Association magazine.
- Presentation at national and international policy conferences.
- Development of an online course via the TES, which was available from June 2016 onwards.

Further details of promotional activities, which set the 'business as usual' context for the scale-up campaign in Lincolnshire, are set out in Appendix 2. This also includes details of the substantial

activity led by the Maximising the Impact of TAs (MITA) programme and resources that are available on the MITA website. While MITA is a separate entity from the EEF scale-up campaign, one of the lead academics has been substantially involved in creating and promoting the EEF guidance. The national opportunity to access MITA support and resources also needs to be considered as 'business as usual'. EEF is currently undertaking a separate randomised controlled efficacy trial of the MITA programme.

The first 'Making the best use of TAs' scale-up project was delivered in South and West Yorkshire from September 2015 to July 2016. EEF deployed a 'commissioned' approach - selecting seven advocacy providers to recruit schools and provide workshops and other support to facilitate the implementation of the EEF recommendations. Findings of the implementation and process evaluation are reported in **Maxwell, Willis, Culliney et al.** (in press) and the impact evaluation is presented in **Sibieta et al.** (in press)

This evaluation examines the second project initiated by EEF in the TA scale-up campaign, which led to the delivery of the Mobilise project in Lincolnshire over the 2016/2017 academic year. **A summary comparison of the two TA projects** that draws out key 'lessons learnt' across these projects will be published in Summer 2019 alongside this report.

The embedded approach to scale-up in Lincolnshire

EEF's approach to scale-up in Lincolnshire differed from the approach deployed in South and West Yorkshire. Instead of commissioning advocacy partners, an approach embedded within county-wide school improvement processes at scale was developed and tested. This sought in the first instance to work closely with influential system leaders within the Lincolnshire Local Authority (LA) area to develop a model of scale-up that was integrated within county-wide school improvement processes and activities that reached all schools in the county. In this model of scale-up EEF committed resources to initiation of the campaign and on-going steer, support and challenge. Resource for delivery of the campaign was leveraged within the county.

EEF's aims

EEF's three overarching aims in working in Lincolnshire were to:

1. Secure the use of TA evidence and research in every Lincolnshire school in order to improve outcomes for children and young people.
2. Learn together about key features of effective and sustainable scale-up of the use of research evidence.
3. Create a sustainable network of schools that are 'evidence-ready' and able to take on new evidence rapidly and effectively in the future.

There were three distinct stages in the Lincolnshire scale-up campaign: i) scoping, ii) development and set-up of the Mobilise project, and iii) delivery of Mobilise.

Scoping phase

The scoping phase, from October 2015 to January 2016, was initiated by EEF. Key activities undertaken by the EEF campaign lead, a member of the EEF mobilisation and school engagement team, and an external education consultant during this period were:

- Using contacts in Lincolnshire to help establish initial trust and credibility and establish the work as important, exciting, ground-breaking and high-status.
- Meetings with senior-level stakeholders (e.g. the Director of Children's Services) to begin mapping and networking to identify key influencers and to understand Lincolnshire's priorities.

- Meetings with key influencers to further engender trust and commitment to an ambitious approach and extend EEF's understanding of the motivations and incentives for different partners and stakeholders.
- Presentation at the Lincolnshire Learning Partnership (LLP) Board to gain approval for Lincolnshire's involvement as an EEF partner. The LLP comprises elected representatives of primary, secondary and special schools, a representative of chairs of governors, and representatives from Lincolnshire LA, the Department for Education (DfE), and the Church of England Diocese of Education. The LLP meets bimonthly to discuss issues, challenges and opportunities facing schools in Lincolnshire.
- Meeting with a small embryonic LLP steering group for the project to agree a way forward that could be presented to the LLP.
- Telephone communication to identify and problem-solve issues that were impeding progress, and to re-build momentum, re-engage some key influencers and speed the establishment of a larger steering group that would have credibility and influence across Lincolnshire.

Development, set-up and recruitment phase

The development, set-up and recruitment phase, from February 2016 to August 2017, was led by the LLP, with steering, support and challenge from EEF through attendance at meetings, and direct communication with key stakeholders (face-to-face and telephone). The LLP set up a strategic steering group comprising representatives from schools, Lincolnshire Teaching Schools Together (the six Lincolnshire teaching schools) and the LA to oversee scale-up development and delivery and ensure accountability. All schools were invited to join the steering group resulting in an initial group size of approximately 40. To enable effective operation, a smaller operational sub-group of around 15 members met half-termly and fed back to the larger steering group. The steering group was accountable to the LLP. The main activities of the steering group during the development, set-up and recruitment phase were:

- Designing the delivery model for what they termed the Mobilise project, with steering from EEF particularly in terms of ensuring fidelity to the evidence and learning from research on scale-up.
- Commissioning Lincolnshire Learning Schools Together to deliver the project. This was operationalised through the Kyra teaching school who took full responsibility for delivery, reporting, monitoring and evaluation.
- Recruiting two Mobilise regional leads.
- Securing resource for the project through the LLP and from the LA.
- Promoting Mobilise through multiple channels, including steering group members contacting schools directly.
- Overseeing a process for schools to self-identify with a cluster to work with during Mobilise delivery and for each cluster to identify a cluster lead. Twenty-six clusters were formed, each comprising between four and 14 schools.
- With EEF, launching Mobilise at an LLP conference in April 2016.

The Mobilise delivery model

The aims of the Mobilise project as determined by the LLP during the development phase were to:

- Improve outcomes for children and young people in Lincolnshire.
- Strengthen the already-established school improvement partnerships and support sector-led work.
- Mobilise and utilise existing partnerships of schools to become 'evidence-ready' as a mechanism for sustainable scale-up and school improvement.

- Create ownership and passion at cluster level and school level for the process of school improvement through the use of the evidence about TAs, i.e. avoiding a 'top down' or 'done to' approach.
- Exemplify excellent practice in the county, and share this widely, e.g. teachers and leaders honestly sharing their journey of leading change in this area, and the impact of their work.
- Create further coherence, transparency and inclusion in partnership working across all Lincolnshire schools.

Delivery phase

The delivery phase, from September 2016 to July 2017, was operationalised using a three-level cascade model facilitated by two regional leads at the county level, 26 cluster leads working with clusters of four to 14 schools, and school-based leads in each of the 283 participating schools. Delivery was steered and monitored by the Mobilise steering group. EEF provided lighter touch steering, support and challenge than during the earlier phases. This included ensuring fidelity to the evidence in the materials produced, continuing to ensure that evidence in relation to effective approaches to facilitating the scale-up of research-use was considered in design decisions, and maintaining the focus on improving pupil outcomes. EEF's input during this phase was via meetings, some 'base camps' (see below) and by telephone.

Roadshows

The EEF delivered two roadshow events in September and October/November 2016 in four separate geographical locations in order to maximise engagement across the county. Roadshow 1 and roadshow 2 were offered two additional times each to cater for delegates unable to make the original dates scheduled.

The first roadshow sought to provide a high-level overview of the 'Making the Best Use of Teaching Assistants' findings and was deliberately aimed at head teachers and senior leaders in order to encourage meaningful whole-school buy-in.

The second roadshow entitled 'Acting on the evidence' was intended to offer more practical insights for implementation, and was targeted more at school-based leads (although head teachers and SENCOs were also invited). In addition to the EEF input, there was also a presentation from a Sheffield-based head teacher giving their 'Top Ten Tips' for implementing the research, based on their own experiences.

Training for cluster leads and school-based leads

Training based on the EEF recommendations, with accompanying resources, was developed by two regional leads and the research lead from the teaching school. This training was cascaded first to cluster leads in workshops called 'base camps'. Cluster leads replicated this training in cluster meetings with school-based leads. The school-based leads were then expected to replicate the training in their own school, as well as work directly with staff in the school to implement the EEF recommendations. Training was designed using a professional learning community (PLC) approach, so that participants at each level in the cascade had time to reflect on implementation and develop action plans as well as engage with new evidence and learning.

Base camps

The specific aim of the base camps was to prepare the cluster leads to deliver the modelled PLC in their own cluster meetings. A broader aim of the base camp training was to develop cluster leads as leaders and 'pioneers of research' who would promote the implementation of appropriate, evidence-based good practice in Lincolnshire schools.

The base camps were scheduled as follows:

- Two consecutive days in September 2017.
- One day in November 2017.
- A two or three-hour training session every six weeks over the remainder of the academic year (six sessions in total).

Each base camp comprised:

- Modelling of the PLC that cluster leads were to facilitate in cluster meetings.
- Sharing of cluster leads' experiences of facilitating the previous cluster meeting and providing advice to each other on appropriate approaches moving forward.
- Sharing of resources and materials for use in cluster meetings.

Due to the number of cluster leads and the size of the county, cluster leads were organised into two different groups for the purposes of base camp delivery. Each group participated in the same base-camp activities but in a different geographic location.

Cluster meetings

The aim of cluster meetings was to prepare the school-based leads to deliver the PLC modelled in the cluster meeting in their own schools and to support them in driving forward the implementation of the EEF recommendations in their schools. Each cluster lead facilitated six cluster meetings with their group of school-based leads. These three-hour meetings were scheduled at six-weekly intervals.

Typically, a cluster meeting included the following components:

- Warm-up activity.
- Review of school-based leads' action plans and their work in school to implement the EEF recommendations since the previous cluster meeting.
- Introduction of a new piece of research, linked to one of the EEF recommendations, with the opportunity for silent reading.
- Discussion of the research, facilitated by the cluster lead, with a focus on linking it back to the EEF recommendations.
- Creation of a mini-action plan by each school-based lead, to be completed within six weeks. A significant amount of time was set aside to enable these action plans to be finalised within the session.
- Reflection to close the session.

Support for cluster leads and school leads

In addition to training, regional leads provided support to cluster leads in a variety of forms, including responding to specific queries by email or telephone and administrative support. Regional leads also communicated directly with senior leaders of schools where attendance at cluster meetings was poor and visited schools struggling to implement the recommendations. Cluster leads supported schools by responding to queries from school-based leads by email or telephone, and in some instances, visits to schools.

Other activities for participants

An optional workshop on 'Managing change' was facilitated by an HR consultant in November 2016. This included a focus on changing TA contracts. Schools were also invited to an Intervention Fair in January 2017 where seven evidence-based interventions were showcased. (See the Methods section for further details of the interventions).

Resources

Resources were hosted on the Mobilise website from November 2017 onwards. They included the resources available on the EEF 'Making the best use of TAs' campaign webpage, additional resources produced in South and West Yorkshire, resources sourced or developed by the Mobilise team, and, as the project continued, resources produced by participating schools.

Regional, cluster and school-based lead roles

The main activities undertaken by regional and cluster leads have been set out in the outline of the development phase activities above. A more detailed list of their main responsibilities is provided in Appendix 3.

The main activities expected of school-based leads were:

- Meeting with cluster leads half-termly through the PLCs, and then leading a similar approach to professional development in their own schools.
- Acting as an advocate for the EEF guidance in school, modelling and delivering a robust approach of 'faithful adoption' and maintaining fidelity to the evidence.
- Championing a research-ready approach and the use of evidence-based practice.
- Monitoring and evaluating provision, strategies, training and impact on outcomes for children.
- Linking practice to whole-school improvement policy, liaising closely with the senior leadership team and key strategic partners in school (e.g. SENCO, Pupil Premium Lead, etc.) and integrating the work into the school strategic improvement plan.
- Providing ongoing support for teachers and teaching assistants.
- Brokering additional training, collaborative school-to-school working and support from cluster leads and regional leads where necessary.

There were no major shifts in the expected purposes of the roles of regional leads, cluster leads and school-based leads throughout the year. Regional and cluster leads were mostly able to undertake the role as intended, but some school-based leads were not able to carry out their role as intended due to a number of contextual factors. Findings on the implementation of roles are presented in the Feasibility chapter (Findings 4).

As the Feasibility chapter also evidences, there was a high degree of adaptation of the training model within schools to fit school structures and the time available for staff to engage with the project.

Background evidence

Policy context

Evidence-informed practice within schools has been a policy intention of successive governments in England over at least the last 20 years (DfE, 1997; DfE, 2010; DfE, 2016). Although 'evidence-informed practice is now viewed by educational policymakers in England as a driver of school and system self-improvement' (Brown and Greany, 2017, p18), longstanding issues remain. These relate both to the supply side, i.e. the production of high quality research evidence that is relevant to practice settings, and to the use of such evidence by schools. The EEF, founded in 2011, now plays a major role in improving the supply side through providing grants for randomised controlled trials (RCTs) of interventions with high potential to impact positively on the attainment of disadvantaged children and young people. EEF also have a remit to develop awareness of, and facilitate the use of, research evidence in order to bridge the 'gulf' (Powell et al., 2017) between research production and its use. EEF have deployed a range of initiatives to fulfil this remit, including this project - the second EEF-led 'scale-up' campaign targeting the use of research evidence to improve the use of TAs. Full details of EEF's scale-up activities can be found at <https://educationendowmentfoundation.org.uk/scaling->

up-evidence/. In late autumn 2018, EEF will be publishing a report that summarises key findings and lesson learnt across a number of different scale-up campaigns.

Knowledge mobilisation processes and strategies

There growing body of evidence on knowledge mobilisation processes, particularly from medicine and health-related fields, provides a frame of reference for developing understanding of how research knowledge, in this case about making the best use of TAs, can be presented and deployed to change practice in schools. Early models of knowledge mobilisation have relied on a linear, one-way 'transfer' of evidence from researchers to practitioners (Best and Holmes, 2010) through traditional dissemination methods such as academic papers, reports and conferences. However, more recent research indicates that knowledge flows are complex and rarely linear (Powell et al., 2017). Furthermore, the flow of knowledge across the boundaries between different professional groups (for example, researchers and teachers) can be 'sticky' due to social and cognitive differences (Ferlie et al., 2005). Recent research assessing how schools and teachers in England use research evidence also highlights the importance of the organisational context, particularly leadership capacity and commitment, and the impact of the educational policy context, in determining research use (Coldwell et al., 2017). This indicates the need for active knowledge mobilisation strategies that 'take account of competing definitions of knowledge, the internal and external contexts, the parties involved, the organisational factors and the political dynamics' (Powell et al., 2017, p 202).

Reviews of research (see for example, Hemsley-Brown, 2004; Nelson and O'Beirne, 2014; Nutley et al., 2007; and Langer, Tripney and Gough, 2016) identify a range of strategies that have been deployed to mobilise knowledge. These include: improving the quality, relevance and accessibility of research findings; raising awareness of evidence; transforming and communicating evidence for use; and supporting end-users to engage with and use evidence to inform practice. However, as Langer, Tripney and Gough (2016) note, there is limited evidence on the relative effectiveness of different approaches. The evidence base on the effective use of research evidence in schools is particularly limited (Brown and Greany, 2017) and there are very few studies that provide evidence of impact on pupil outcomes (Coldwell et al., 2017, Nelson and O'Beirne, 2014). This point is brought sharply into focus in the findings of a number of EEF evaluations of projects that were designed to engage schools in adopting interventions or practices based on research-evidence, which did not show impact on pupil attainment. See, for example, the 'Literacy Octopus' RCT (Lord et al., 2017) trial. Sharples (2017) identified several reasons that may explain the lack of impact found in the EEF research-use evaluations which stemmed from the interventions being too 'light touch' and lacking multiple strategies to support research use. The reasons included failure to generate sufficient opportunity and/or motivation to engage with the research and lack of capability to act on the evidence (Sharples, 2017). More broadly other reasons suggested for the lack of evidence of impact is the 'lack of systematic approaches to KMb [knowledge mobilisation] *within* and *across* organisations' (Cooper, 2014, p 30) and the under-developed use of research to inform practice in schools. It can be argued that research use in schools has increased since Dagenais's (2012) systematic review concluded that 'the available research suggests that the use of research-based information is hardly a significant part of the school-practice scenario' (p 296), although more recent research indicates that the degree to which schools use research varies considerably (Coldwell et al., 2017, Nelson et al. 2017).

The EEF 'Making the best use of TAs' campaign seeks to increase the use of the research evidence on TAs in schools and, through the evaluation, add to the evidence base on effective knowledge mobilisation in educational contexts. Support for the overarching 'campaign' approach can be found in Langer, Tripney and Gough's (2016) scoping review of social science literature which 'suggests that advocacy and awareness-raising campaigns are effective in supporting behavioural change' (p 2).

The research object in the TA scale-up campaign is the EEF guidance document including the seven recommendations. Research summaries, such as the EEF guidance, are reported to have the potential to increase research use providing that they have academic integrity, are written in an

accessible manner, and address issues that are relevant to a practitioner audience. However, these claims rely heavily on self-report. A small-scale, randomised controlled trial of doctors' use of research summaries (Mukohara and Schwartz, 2005) found that while the doctors appreciated the ease of access to the information, it had little impact on their use of research. The extent to which research summaries impact on practice depends not only on the design of the summaries but also on the ways in which the summaries are communicated, and the support provided for implementation. As Sharples (2013) observes, 'packaging and posting' is unlikely to lead to behaviour change.

Within the Lincolnshire scale-up campaign, brokerage operated at different levels. EEF operated as a system-level broker seeking to maintain the fidelity to the evidence, while the regional leads, cluster leads and school-based leads acted as brokers at different levels within the school system. The potential of intermediaries in facilitating research use is being increasingly recognised in knowledge mobilisation literature and was highlighted in Campbell and Levin's (2012) discussion paper prepared to support EEF in developing knowledge mobilisation practices that could challenge educational disadvantage. Cooper's (2014) cross-case analysis of 44 research brokerage organisations in Canada found that they undertook (in varying combinations and using varying approaches) the following brokerage functions: linkages and networking; awareness; accessibility; engagement; organisational development; implementation support; capacity building; and policy influence. There are, however, very few studies that examine the ways in which intermediary organisations enable research use or that measure their effectiveness (Cooper & Shewchuk, 2015; Sharples, 2013).

The intended aims of brokerage by EEF and within Lincolnshire broadly align with, or provide the basis for developing approaches that are consistent with, a number of factors that promote research use, such as:

- Enhancing the opportunity, capability and motivation to use research evidence and engendering leadership commitment.
- Supporting effective communication, which takes account of variations in school contexts and the impact of the wider educational policy context.
- Facilitating the contextualisation and transformation of research by combining it with practice-based knowledge.
- Fostering networking, which as part of a wider collaborative social learning process, develops deeper understanding and supports a sense of ownership and a positive attitude towards research use.
- Incorporating the opportunity for informal peer-to-peer flows of knowledge, which are more likely to be believed and acted upon.
- Providing support for implementation that takes account of organisational barriers to evidence-informed improvement.

(Sources: Brown and Greany, 2017; Coldwell et al., 2017; Cooper, 2010 and 2014; Greany and Maxwell, 2017; Hemsley-Brown, 2004; Langer, Tripney and Gough, 2016; Nelson and O'Beirne, 2014; Nutley et al., 2007; McLaughlin et al., 2004; Sharples, 2013.)

The Mobilise model may at a superficial level appear to be a cascade 'train the trainer' model, a format that has largely been discredited for failing to lead to change in schools (see for example, Kennedy, 2005, Dichaba and Mockhele, 2012). However, its design in using a PLC format that builds in engagement in discussion of the research, sharing of learning, action planning and reflection on implementation, does address at least some of the issues with cascade models, as well as aligning with features of effective brokerage identified above.

Brokerage occurred at multiple levels within the Lincolnshire scale-up campaign. EEF acted as a system-level intermediary, while regional leads, cluster leads and school-based leads acted as intermediaries at the three different levels within the Mobilise operational model. Emerging evidence,

not robustly tested, relating to brokers suggests that the following attributes, knowledge and skills are likely to support effective engagement with and use of research:

- Brokers who are trusted and credible.
- Effective communication and interpersonal skills.
- Understanding of research methodology and the cultures of both researchers and users, together with a broad overview of the research literature.
- Ability to find and assess relevant research, communicate with researchers, present research in different ways as applicable to different contexts, and translate complex information into meaningful resources for users.
- Entrepreneurial skills such as networking, problem-solving, innovating and negotiating.
- Established linkages, partnerships and/or collaborations with organisations the intermediary is seeking to influence.
- Understanding of the principles of adult learning and ability to design interactive workshops.

(Cooper, 2010 & 2014; Lavis et al., 2006; Lomas, 2007; Sin, 2008).

Project rationale

The key driver in establishing this scale-up pilot was to test a model that was embedded within a regional school system. The EEF implementation team's rationale for this approach was that it had stronger potential to engage schools at scale, was more likely to lead to sustainable change and would address the broader aim of developing evidence-ready schools than the commissioned approach to scale-up piloted in South and West Yorkshire. The choice of Lincolnshire for this pilot arose from existing professional relationships and an element of serendipity in a chance meeting, which provided the opportunity to explore the idea of an embedded model and a set of contextual conditions that created a climate receptive to this approach, including:

- Under-performance on some pupil attainment measures in some schools and some localities with a high proportion of disadvantaged learners.
- The absence of any other EEF trials/evaluations or dedicated activity to promote the EEF guidance.
- The challenges presented by size and geographical diversity, which made Lincolnshire an appealing area to test a scale-up campaign that aimed to include all schools.
- The creation of a new governance structure in the county for school improvement, led by the newly formed **Lincolnshire Learning Partnership (LLP)**, a body led by schools and supported by the Local Authority. The establishment of the LLP coincided with the end of the existing school improvement partner's contract and marked a deliberate shift across the county towards a sector-led model for school improvement.

The programme theory of change was explored by the evaluators through a series of early interviews with the EEF campaign lead and consultant and the Mobilise implementation team (see Project Team section below). Analysis of these stakeholder interviews and the knowledge mobilisation literature was then used by the evaluators to construct the scale-up logic model which visually summarises the path from inputs to intended outcomes (Figure 2). The text below provides a more detailed account of the underlying theory of change.

Inputs to the Lincolnshire campaign relate to the three sequential phases of the Lincolnshire scale-up campaign - the scoping phase, development phase and the delivery phase described earlier. The initial outputs relate to reach and engagement. The intention was to recruit and retain all schools in Lincolnshire. The engagement of Lincolnshire schools with the programme inputs was expected to lead, as a first step, to the intermediate outcomes of increased awareness and understanding of research on the best use of TAs, increased engagement with the research and persuasion as to its

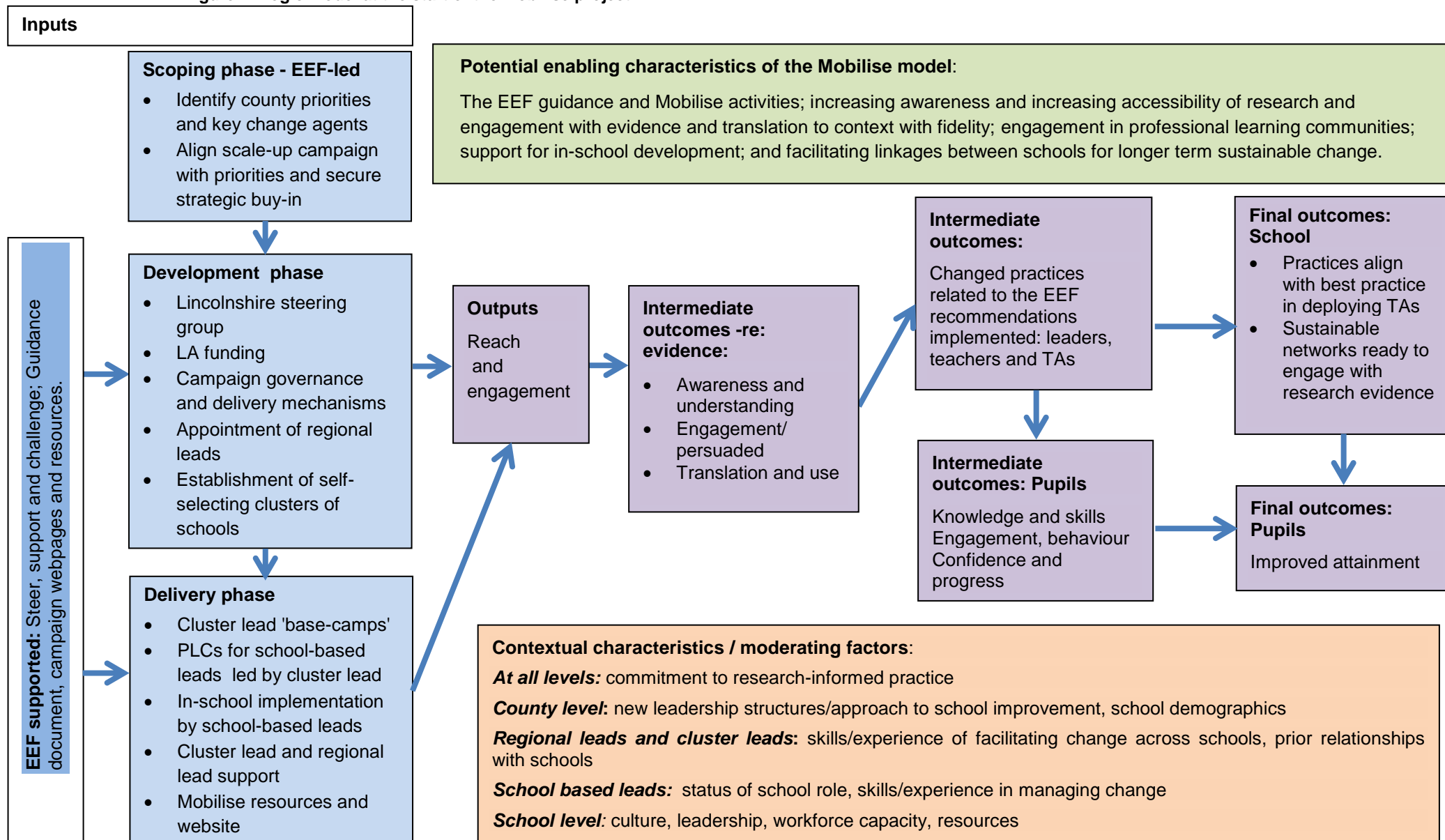
value; and increased use of the research to underpin changes in the deployment and practices of TAs in school.

These more conceptual changes were expected, in turn, to lead to further, more practical, intermediate outcomes. The first of these outcomes is the implementation of changes to align leadership, teacher and TA practices more closely with the EEF recommendations. This then leads to intermediate outcomes for pupils, spanning improved knowledge and skills, confidence, engagement, behaviour, and progress. Final outcomes expected were improved pupil attainment and, at the school level, best practice in the use of TAs and the establishment of sustainable networks of schools ready to engage with other research evidence.

Potential enabling characteristics of the Lincolnshire scale-up campaign identified by stakeholders were: the EEF guidance, together with the Mobilise activities; the increasing awareness and accessibility of research and increasing engagement with evidence and translation to context with fidelity; engagement in professional learning communities; support for in-school development; and facilitating linkages between schools for longer-term sustainable change.

Contextual factors that potentially could act as moderating factors were identified by stakeholders at all levels within the school system. At the county level these included the new leadership structures and approach to supporting school improvement and school demographics. The skills and experience of regional leads and cluster leads in facilitating change across schools, and their prior relationships with schools, were also perceived to be important. At the school level, potential moderating factors spanned the role of the school-based lead and their skills and experience in implementing change, as well as the school culture, leadership, workforce capacity and resources. The degree of commitment to research-informed practice at all levels within the school system was also perceived as important.

Figure 2: Logic model at the start of the Mobilise project



Evaluation remit

The main focus of the evaluation was to examine the effectiveness of EEF's approach to scale-up in Lincolnshire and explore the factors and mechanisms that brought about or impeded the implementation of the EEF recommendations in Lincolnshire schools in order to ascertain the appropriateness of applying such an approach more widely. While the Mobilise project contributes to a wider ambition of the LLP to improve partnership working between Lincolnshire schools to underpin a sustainable model of school improvement, this aspect was not within the remit of this evaluation. The evaluation did however examine the extent to which participating in Mobilise has led to the creation of a network of schools which was ready to seek out and engage effectively with research evidence in the future.

A further purpose of the evaluation was to compare the embedded approach to scale-up taken in Lincolnshire with the commissioned approach taken in South and West Yorkshire which also aimed to engage schools in implementing the EEF recommendations on the best use of TAs.

Research questions

The research questions addressed in this report are:

Evidence of promise:

1. Is there evidence that the EEF guidance is being delivered and implemented with fidelity at scale?
2. Does / in what ways does this result in change in schools' awareness, understanding and use of the EEF guidance and evidence-based interventions?
3. Does / in what ways does this result in the creation of a sustainable network of schools that are 'evidence-ready' and able to take on new evidence rapidly and effectively in the future?
4. Does / in what ways does this enable the LLP to understand and develop effective strategies for the sustainable scale-up of the use of research evidence?
5. Does / in what ways does the evidence support EEF/LLP's theory of change?

Feasibility

6. How does the approach unfold in practice?
7. What are the barriers and facilitators to it happening as intended?

Scalability

8. Is the approach used by EEF - of understanding Lincolnshire's priorities and contexts, and then working within them - one that could be replicated elsewhere?
9. What contextual factors have enabled the approach? Which are Lincolnshire-specific and which are likely to apply elsewhere? How does this impact on replicability?
10. Is the approach affordable from the perspective of EEF, schools, and the LA/LLP?
11. Does the approach result in sustainable change?

Ethical review

The evaluation was given ethical approval by the Faculty of Development and Society Ethics Committee at Sheffield Hallam University prior to commencement of the study. Copies of the information sheet and consent forms are provided in Appendix 4. Information was provided for survey participants in a covering letter for postal surveys and at the start of the online survey, together with a link to the project information sheet. Survey participants were informed that by completing the survey they were consenting for their data to be used anonymously in the evaluation.

Opt-in consent was gained from all interviewees. While the evaluators have tried, as far is possible in reporting, to protect the anonymity of all interviewees, it is likely that some of the key stakeholders leading the development and implementation of the Lincolnshire campaign and Mobilise model will be recognisable by colleagues. All these key stakeholders consented to take part in the evaluation on the basis that although they would not be named they may be recognisable in the report.

Project team

The Sheffield Institute of Education (SIOE) team who undertook the implementation and process evaluation comprised:

SIOE evaluation team	Responsibilities
Dr Bronwen Maxwell	Evaluation director. Qualitative data collection and analysis. Mixed methods triangulation. Reporting.
Ben Willis	Evaluation manager. Qualitative data collection and analysis. Reporting.
Dr Martin Culliney	Survey lead. Analysis of survey and management information data. Reporting.
Mike Coldwell	Senior advisor and quality assurance.
Sarah Reaney	Uptake of structured TA-led interventions analysis.

The EEF team responsible for initiating and supporting the implementation of Mobilise were:

EEF implementation team	Role
Professor Jonathan Sharples	EEF campaign lead
Frankie Sulke	EEF campaign advisor

The team leading the development and implementation of Mobilise in Lincolnshire were:

Mobilise implementation team	Role
Heather Sandy	Lincolnshire Learning Partnership Chair and Assistant Director Children's Services, Lincolnshire Local Authority
Helen Barker	Head of Kyra Teaching School
Vanessa Hopkinson	Full-time Mobilise regional lead
James Siddle (Autumn term), Kathryn Malone (Spring and summer term)	Part-time regional leads

Methods

Overview of research design

The implementation and process evaluation¹ utilised a concurrent mixed methods design comprising:

- Pre- and post-campaign surveys of all schools in Lincolnshire and all schools in the comparator authorities of Kent and Medway.
- Analysis of recruitment data, attendance data and data on participation in structured TA-led interventions that were promoted by the Mobilise project.
- Longitudinal interviews with the EEF implementation team and strategic stakeholders and the regional leads in Lincolnshire.
- Interviews or focus groups with cluster leads at the midpoint or end of the Mobilise project.
- Telephone interviews with school-based leads at the end of the campaign.
- Telephone interviews (and email responses²) with senior leaders from non-participating and withdrawn schools.
- In-depth case studies of two participating schools that have made significant changes as a result of the scale-up campaign, after campaign completion.
- Observations of an LLP steering group set-up meeting, roadshow events, a base camp and an end-of-campaign meeting of stakeholders facilitated by EEF to explore what had been learnt³.
- Cost analysis.

All survey, interview and observational data were collected by the evaluators. Analysis of all primary and secondary data (management information data and data on the uptake of structured TA-led interventions) was undertaken by the evaluators. Data collection activity, the analysis of individual data sources and the combination of findings across data sources was structured using the logic model (Figure 2) and underpinning theory of change. The alignment of data collection activity to the three phase of the scale-up approach identified in the logic model is presented in the project timeline (Table 5). Designing data collection in this way enabled the plausibility of the theory of change underpinning the logic model to be examined and to draw out how, and in what circumstances, the Mobilise model led to schools adopting practices that aligned with the EEF recommendations and their preparedness to make greater use of research evidence in the future.

Data were combined to make claims to address the three key evaluation criteria as follows (Table 1):

¹ The project protocol is available at:

https://educationendowmentfoundation.org.uk/public/files/Projects/Evaluation_Reports/Campaigns_-_Lincolnshire_TA_Campaign_Protocol_AMENDED.pdf

² Minor variation to protocol : to secure sufficient responses from non-participating head teachers they were given the option to participate in a telephone interview or answer questions by email

³ Minor variation to protocol: the evaluators took the opportunity to attend relevant meetings as they were put in place to inform their understanding of the development and operation of the Lincolnshire campaign

Table 1: Combination of data sources by evaluation criteria

Evaluation criteria	Data sources
Evidence of promise	<p>Changes in participating and non-participating schools in Lincolnshire over the project period and comparison to a comparator group outside Lincolnshire related to the following outcomes:</p> <ul style="list-style-type: none"> • Awareness and understanding of the guidance and evidence-based interventions • The deployment of TAs • Uptake of evidence-based TA interventions • Fidelity of implementation of the EEF guidance • Readiness and capability to take on new evidence in the future. <p><i>Indicator measures in pre- and post-surveys and interpretation and deeper exploration through school and stakeholder interviews and school case studies. Quantitative exploration of effect of participation (captured through a scale measure of participation - see section on reach and engagement below) on awareness of guidance, changes in the deployment of TAs and uptake of evidence-based interventions.</i></p> <p>LLP's understanding of how to develop effective strategies for the sustainable scale-up of the use of research evidence - and how this changed over the project. <i>Perceptions of LLP leaders and delivery staff, and perceptions of EEF gathered through stakeholder interviews and schools' experiences of strategy implementation from interviews and case studies.</i></p> <p>Evidence to support EEF/LLP's theory of change. <i>Probing theory of change assumptions and the relationship between inputs and outcomes, in telephone interviews with school-based leads, school case studies, and stakeholder interviews.</i></p>
Feasibility	<p>The campaign approaches at county, cluster and school level, and the facilitators and barriers to implementation. <i>EEF's, Lincolnshire strategic and operational leaders', and participant and non-participant school leaders' intentions, perceptions and experiences explored through interviews and case studies and supplemented by evaluators' attendance at LLP meetings and launch events. Post-campaign Lincolnshire survey questions to indicate the extent to which different facilitators and barriers were experienced by participating and non-participating schools.</i></p> <p>Reach and engagement. <i>A scale measure of participation based on school-based leads' attendance at cluster meetings.⁴</i> <i>An exploratory quantitative analysis was undertaken to identify whether participation was related to school characteristics that appear to impact on participation e.g. Free School Meals (FSM); size; and attainment.</i></p> <p><i>Non-participant school leader interviews to explore reasons for non-participation and post-campaign survey to indicate the extent to which the barriers identified apply more widely.</i></p>
Scalability	<p>Potential for replication of EEF's approach to understanding Lincolnshire's priorities and contexts, and then working within them, including the contextual facilitators and barriers and the extent to which they are context specific. <i>EEF/LLP and school perceptions collected through interviews.</i></p> <p>Affordability <i>Data for cost calculations and perceptions on costs collected during stakeholder and participating school leaders' interviews.</i></p> <p>Sustainability <i>Participating school leaders' intentions to continue implementing the guidance and use other evidence to inform practice were captured across schools in the post-survey and explored in interviews. Stakeholders' perceptions were captured through interviews.</i></p>

⁴ See section below on recruitment and engagement data for an explanation of the change from a categorical variable in the protocol to a scale variable.

Data collection

Pre- and post-campaign surveys

Pre- and post-campaign surveys were sent to head teachers or other senior leaders in primary, secondary and special schools. These surveys were intended to gauge the effectiveness of the TA campaign in Lincolnshire by asking a range of Likert-scale questions to provide a pre- and post-campaign comparison of practices related to the EEF recommendations. The questions were replicated from the post-campaign survey in South and West Yorkshire to enable comparison in the final combined report. The post-campaign survey (Appendix 5) also included Likert-scale questions for Lincolnshire participants on the quality of Mobilise events, support and resources and approaches to facilitating the implementation of the EEF recommendations in school.

To enable robust evaluation of the TA campaign in Lincolnshire, a comparison sample was chosen. As Lincolnshire is one of the few areas of England to continue with selective secondary education, it could be argued that an appropriate comparator would also need to operate the same admissions regime. Thus, Kent and Medway were chosen to serve together as the comparison area. While these two Local Authorities are part of the same county, they are separate educational jurisdictions. However, both have selective secondary education. Both Local Authorities were chosen to form a combined comparison group, because the higher total population resulting from adding both sets of schools together would lead to a larger achieved sample size. Initial analysis to look for potential match districts found Kent to be similar in terms of FSM and KS2 attainment. Coupled with selection policy, Kent seemed a suitable fit. Medway did not look similar to Lincolnshire but we added it due to same selection regime and desire to increase comparator numbers, which proved to be a good decision given low response rates.

The baseline survey was sent out in September 2016 to all eligible schools in Lincolnshire. This does not include North Lincolnshire or North East Lincolnshire, which administer education systems in their respective districts. The Mobilise project did not operate in these areas. The baseline survey was also sent to all schools in the Kent and Medway Local Authorities one week after the Lincolnshire survey.

The post-campaign survey was sent to all schools in Lincolnshire, Kent and Medway in September 2017, regardless of whether they took part in the baseline survey. Envelopes containing questionnaires were mailed to each school in Lincolnshire, Kent and Medway. An email containing a link to the online version of the survey was also sent to all schools in the study areas. The letter accompanying the hard copies of the surveys also included a link to the online version. Where the relevant information was available, these communications were addressed to the school head teacher by name. Letters and emails explicitly stated that the survey was to be completed by the head teacher or another senior member of staff. The baseline survey was promoted at Mobilise launch events. To boost response rates, reminder emails were sent and telephone calls were made for both the pre-campaign and follow-up surveys.

The survey design treats the school as the unit of analysis. As such, it was intended that only one response per school would be returned. However, as the survey was distributed in both online and paper format, a small number of duplicates were received. In such instances, the submission with fewer instances of missing data was selected for analysis. It was necessary to exclude duplicates from the sample so that each of the schools that took part in the survey was counted only once.

Achieved sample

The baseline survey was sent to 357 schools in Lincolnshire, with 253 responses amounting to a response rate of 71%. Survey completion was strongly promoted by the LLP and schools who had not already completed the survey were given the opportunity to complete a paper version at the first Mobilise roadshow. In Kent and Medway, 136 of the 733 eligible schools completed the baseline survey, a response rate of 19%. The follow-up surveys were sent to the same schools and achieved response rates of 27% (n=97) in Lincolnshire and 14% (n=105) in Kent and Medway. Findings should

be treated with caution as a result of these response rates. The response rate was low among comparison schools as they were not involved in the programme and were offered no incentive to take part in the evaluation. It is likely that the Lincolnshire post-campaign response rate fell due to the survey being distributed after Mobilise delivery had ended, although this was deemed necessary to gauge schools' practices in the year following Mobilise delivery, as opposed to merely asking hypothetical or prospective questions.

The decision to target the survey at head teachers and senior leaders was based on the assumption that only individuals in such positions could comment authoritatively on TA deployment and practice across the entire school. This was deemed important as the survey design treated schools as the unit of analysis, aiming to collect data at the school level.

Table 2 shows how survey respondents reported their own roles within their school and demonstrates that the survey was completed by the intended staff group of head teachers and senior leaders. A higher number of Lincolnshire respondents were head teachers in the baseline survey (72%) than in the post-campaign survey (64%). For Kent and Medway (KM) respondents, the pattern was reversed, with more head teachers completing the follow-up survey (72%) than the baseline (64%). Please note that the figures here are based on all respondents. In subsequent sections of the report, we present data from only those respondents who participated in both waves of the survey, to ensure more robust comparisons (see Table 3, below).

Table 2: Achieved sample for pre- and post-campaign surveys

Q2. Role	Lincs Pre %	KM Pre %	Lincs Post %	KM Post %
Head teachers	71.5%	64.0%	60.8%	75.2%
Other senior leader	24.9%	36.0%	38.1%	23.8%
Other	3.6%	0.0%	1.0%	1.0%
N	253	136	97	105
Response rate	71%	19%	27%	14%

Source: SHU survey (row percentages). All responses from baseline and follow-up surveys.

Table 3 shows the number of schools participating in the Mobilise programme, according to the management information (MI) provided to the evaluation team. These schools are profiled in the chapter entitled Findings 1. The table below also shows the number of schools in Lincolnshire and the comparison area that responded to both waves of survey. These schools form the sample used in Findings 2. The remainder of the current section profiles these schools, comparing key characteristics against local and national averages. In Findings 3 and Findings 4, we present results from retrospective questions on perceptions of Mobilise that were only included in the Lincolnshire post-campaign survey, drawing on data from all respondents who indicated that their school took part in the programme. We do not restrict the sample used in this section to complete cases as this would overlook responses from participants that did not return the baseline survey. It is not necessary to use complete cases when dealing with indicators for which no pre/post comparison is attempted.

Table 3: Samples used in analysis throughout report

	Lincs participants (MI)	Lincs participants (survey)	KM respondents
N	283	80	47
% of population	79%	22%	6%

Source: SHU survey and Mobilise MI data. All respondents completing both baseline and follow-up surveys.

All institutions categorised in Edubase as Colleges or Independent Schools in the field 'MINORGROUP' were not sent the survey. This left 357 schools in Lincolnshire and 733 in Kent and Medway. When comparing the achieved sample to the local and national population averages in the

tables below, we therefore exclude Colleges and Independent Schools in order to produce valid comparisons. All data on school characteristics were obtained from the DfE Schools Comparison Service (<http://www.compare-school-performance.service.gov.uk/download-data>). These figures relate to the 2015-16 academic year, which were the most recent data available during the year that the programme was running.

Primary schools are over-represented in the Lincolnshire survey sample. Maintained schools are overrepresented compared to the local average and underrepresented compared to the national average, while academies and special schools are underrepresented compared to the Lincolnshire average and overrepresented compared to the average for England. Survey respondents tended to come from schools that were larger than the local average. Lincolnshire schools in the sample are likely to have fewer Free School Meals (FSM) pupils than local or national average, yet this trend is not replicated in the comparison group. Lincolnshire schools that took part in the survey had higher KS2 attainment than the local average. KS4 attainment in Lincolnshire schools that responded to the survey was also higher than the Lincolnshire average with 74% of pupils gaining at least five GCSEs at grade A*-C including English and maths. In summary, the Lincolnshire primary schools that participated in the survey had attainment and pupil deprivation similar to both the local and national average, but participating Lincolnshire secondary schools in the survey sample had lower pupil deprivation and far higher attainment. The differences in attainment and pupil deprivation between schools only responding to the baseline survey and those who did both is negligible. GCSE attainment in Kent and Medway was lower than in Lincolnshire, with 49% of pupils gaining five A*-C grades including English and maths, which is equal to the overall figure for England. Schools from Kent and Medway responding to the evaluation surveys had lower attainment (41% with five A*-C grades including English and maths) than the local or national figure. A full discussion of school characteristics can be found in Appendix 7.

Management information data

The evaluation team was provided with the following management information data by the Mobilise team at the end of the programme:

- Schools recruited.
- Formal withdrawal from the programme.
- Attendance by a school representative at the roadshows, Intervention Fair and 'Managing change' HR workshop.
- School-based lead attendance at each of the six cluster meetings.
- Provision of Maximising the practice of TAs MPTA training in the school. This provision was formally outside of the Mobilise programme but was delivered by the regional lead. It is highly likely to have supported the implementation of EEF recommendations so we report the number of schools who participated in the training.

The protocol also included an intention to collect data on the completion of action plans. However, monitoring of the production of action plans was dropped by the regional leads in response to schools perceiving this to be overly burdensome. This, together with other factors, led to a change from the protocol in the how the measure of participation was constructed. This is explained in the analysis of management information data later in this chapter.

Uptake of structured evidence-based TA-led interventions

To collect information on which schools participated in structured evidence-based TA-led interventions, each of the evidence-based intervention providers showcased at the Intervention Fair were contacted, firstly by email and then with a follow-up telephone call. These interventions were:

- Catch Up Literacy

- Catch Up Numeracy
- Switch-on Reading
- Switch-on Writing
- ABRA (ABRACADABRA: Online reading support)
- Power of 2 (One-to-one mathematics coaching)
- Nuffield Early Language Intervention (NELI)
- Digital feedback.

Where available, information was collected on: Lincolnshire or Kent and Medway schools using the interventions in 2015-16, Lincolnshire or Kent and Medway schools signing up to use the intervention in 2016-17, and schools from Lincolnshire or Kent and Medway that expressed an interest but did not sign up. Key information about the intervention training type and availability to potential participants in Lincolnshire and Kent and Medway was also collected.

Interviews and focus groups

Thirty telephone interviews were conducted in total over the duration of the evaluation: five with EEF team members, four with Lincolnshire strategic stakeholders, five with the regional leads, three with cluster leads, 15 with school-based leads and three with senior leaders in schools that did not participate in Mobilise or withdrew at an early stage (see Table 4). Data were also gathered from 13 cluster leads who attended one of two focus groups and from 11 email responses received from a further 11 non-participating senior leaders⁵.

The interviews with the EEF team, Lincolnshire strategic stakeholders and the regional leads took place at three points during the scale-up campaign: the first in the lead-in to or at the start of Mobilise delivery in September 2016, the second half-way through the delivery period and the third following completion of delivery. Cluster leads were interviewed in March 2017 or June-July 2017 and the cluster lead focus group was held in June 2017. School-based leads were interviewed after completion of the programme in July or September 2017.

Table 4: Interviews and focus groups conducted

Group	Interviews conducted	Focus groups conducted	No of unique participants
Interviews			
EEF team	5		2
Strategic stakeholders	4		2
Regional leads	5		2
Cluster leads	3		3
School-based leads	15		15
Senior leaders non-participating schools	3		3
Focus groups			
Cluster leads		2	13
Email responses			
Non-participants' interviews or email	3 interviews 11 emailed returns	11	11

All the interviews were conducted using semi-structured interview schedules, audio-recorded and transcribed. Interviews typically lasted 60 to 75 minutes with strategic and operational stakeholders,

⁵ This broadly aligns with the original research protocol that specified telephone interviews with 15 school leads, 5 senior leaders from non-participating schools, EEF leads, LLP stakeholders, regional leads and clusters leads; along with 2 exemplar school case studies.

45 to 60 minutes with cluster leads and school-based leads and 20 minutes with non-participating/withdrawn school leaders. The interview topics, drawn from the Mobilise logic model and informed by the evaluation questions, are summarised in Appendix 8.

Interview sampling strategy

Strategic and operational stakeholders were chosen purposively on the basis of their direct involvement in, and knowledge of, the Mobilise project and the Lincolnshire context. Cluster lead interviewees were selected randomly and the focus groups were constructed from an opportunistic sample of attendees at a base camp.

Stratified random sampling was used to select school-based leads. The list of participating schools was screened so that it only included schools that had attended at least three of the five cluster meetings that had taken place at the time sampling was undertaken. The screening was to ensure that interviewees would be able to reflect on the impact of Mobilise and their experiences of participation. This resulted in a list of 206 schools. Fifteen of the 26 clusters were randomly selected. The clusters were mapped geographically and some very limited purposive substitutions made to ensure geographical representation. Within each cluster, a random number generator was used to select one school-based lead and two substitutes. Where all three school-based leads refused to be involved the process was repeated. A grid was created to monitor representation across school-based lead role, school phase/type (primary, secondary and special), Ofsted rating, and attainment. When it was necessary to use one of the two substitutes in a cluster, the selection was sought to ensure that variation across the key characteristic in the grid was maintained. The characteristics of the achieved sample of schools were tabulated and appropriate variation was evident. This table is not reported, in order to protect the anonymity of the schools and therefore the interviewees.

A random sample of 51 senior leaders, who according to the Mobilise management information data had not participated, were contacted and given the option of participating in a telephone interview or providing an email response to core interview questions. It transpired that some of those who responded had actually had some engagement in Mobilise but had withdrawn at an early stage.

Exemplar school case studies

Two schools were chosen randomly from a small sample of schools identified by the regional lead as having engaged significantly with the campaign, made good progress in implementing the EEF recommendations but had not been on an established trajectory in addressing TA deployment prior to Mobilise. Each case study comprised interviews with the school-based lead, separate focus groups with teachers and TAs and a review of documentary evidence. There were seven participants in each case study.

The purpose was to understand school perspectives and experiences of the Mobilise project in depth and how their engagement has been translated into change within the school. Fidelity of implementation, feasibility and sustainability were also explored. The case studies were intended to provide illustrative examples of how Mobilise, in conducive conditions, could stimulate significant change.

Observations

The evaluators undertook observations of an early Mobilise steering group, four roadshow launch events, one base camp meeting and the EEF-facilitated event for stakeholders to share their learning from the project. Observations were recorded in field notes. The main purpose of all the observations was to enable the evaluators to gain a more in-depth understanding of the Mobilise programme and how it was perceived by key stakeholders. In addition attendance at the roadshows was used as an opportunity to introduce the evaluation and gain support for participation in data collection.

Quantitative data analysis

Survey analysis

Data from the four online surveys (Lincolnshire pre- and post-campaign, Kent/Medway pre- and post-campaign) were downloaded and merged into a single file to allow comparisons between the two groups at the base-line and after completion of the Lincolnshire campaign..

In the Findings 2 chapter (Evidence of promise - Changes in school practices), we examine a series of 28 survey items relating to TA deployment and practice, TA training, the use of interventions, and TA/teacher communication. We analyse these scale variables using ANCOVA regression, complying with EEF guidance on analysis of trials data, instead of using alternatives such as difference-in-difference and gain scores. While this study does not use an experimental design, we believe that this technique is the most suitable, although the same analyses using a difference-in-difference approach yield very similar results. For brevity, these figures are not published here but are available from the evaluation team upon request.

These ANCOVA regression models enable us to compare change on the measures in question between the two study areas over time, with baseline values for each given outcome included as predictors alongside a dichotomous geographical indicator (Lincolnshire; Kent/Medway). Further detail on the analytical approach, including properties of the predictor variables, treatment of missing cases and interpretation of results, can be found in the Findings 2: Evidence of promise. We recognise concerns over using significance tests from multiple analyses, yet current EEF statistical analysis guidance acknowledges that the Bonferroni correction and alternative approaches for dealing with these concerns are conservative and we have not used them here.

For the categorical survey items, we simply present frequencies or cross-tabulations, with Lincolnshire and Kent and Medway responses for both baseline and follow-up surveys tabulated together so that the reader can see differences between the four groups of respondents. It is not appropriate to calculate chi-square statistics for these tables as not all observations are independent - in other words, schools are counted twice within the same table as they responded to both the pre- and post-campaign surveys. However, despite the absence of test statistics for these tables, this is the clearest way to present the data.

Analysis of management information data

The protocol set out the intention to create a categorical measure of school participation based on a range of variables identified during the Mobilise development phase that the evaluators considered would be valid indicators of participation. As the programme was implemented it became evident that the best proxy for school engagement was school-based leads' participation in cluster meetings given that school-based leads were responsible for implementing the changes they learnt about in cluster meetings in their schools. Reasons for this change to the protocol were firstly that data were not available on some of the proposed indicators due to changes to the Mobilise model as it was implemented. For example, the regional leads ceasing to monitor the production of action plans. Secondly, as the details of the model were firmed up, it became evident that some of the proposed variables were not valid indicators of participation. In particular, attendance at the 'Managing change' HR workshop and Intervention Fair were not intended to be core elements of the programme, but were offered to support those schools who wished to focus on these elements. Because the revised participation measure was based on attendance at six meetings, a scale variable rather than categorical variable was created to use in the analysis.

Descriptive statistics can be found in the Findings 1 chapter, along with commentary on the characteristics of schools that attended well or withdrew from the programme. At the end of the Findings 2 chapter, there is a brief discussion summarising the results of regression models

estimating the relationship between TA practice with respect to EEF recommendations and the number of cluster meetings attended. The full results of these analyses are presented in Appendix 8.

Participation in structured evidence-based TA-led interventions

When collecting the intervention data, it was clear that for some providers no system was in place to record the data required to enable the evaluators to assess impact on participation in structured evidence-based TA-led interventions. As a result of this, there was a high level of missing data. Complete datasets on uptake for the last two years were only available for the Catch Up interventions, making comparisons between intervention providers impossible. Furthermore, the lack of commercial status of some interventions limited the offer that they made, so the interventions were not necessarily available in Lincolnshire and/or Kent and Medway. Due to the paucity of data, descriptive summaries were viewed as the most appropriate way to mitigate these issues. Further details on the data available from individual intervention providers are displayed in the Findings 2 chapter.

Qualitative data analysis

Interviews

All interview data were transcribed and analysed using the NVivo Qualitative Data Analysis package. At the first stage a deductive coding framework was designed based on the project logic model and a small sample of interviews coded by two researchers. The researchers reviewed the coding for consistency and utility in organising the data to enable the research questions to be addressed and then refined the framework. At this stage, key themes which had arisen inductively across interviews were also incorporated into the framework (Appendix 6). All interviews were then coded using the revised framework. Where appropriate, sub-codes were created inductively within the main codes to support more in-depth analysis of key themes.

Exemplar school case studies

Individual school case-study reports were created for each school visited which summarised prior awareness of the EEF guidance, reasons for engagement in, experiences and perceptions of the Mobilise project, the implementation journey in school and the ways in which Mobilise supported this, perceived outcomes and uptake of interventions, and school-level enablers and barriers.

Open survey questions

Data from open questions in the survey were imported into NVivo and each question was subject to inductive thematic analysis (Appendix 6). Where comments fitted into more than one theme they were coded to each of those themes.

Triangulation of data

Table 1, presented in the overview of the research design at the beginning of this chapter, sets out the different quantitative and qualitative data that were drawn on to explore each of the evaluation criteria. Each data source was analysed separately as set out above and then findings were compared in relation to each of the evaluation criteria and to the causal theory and implementation steps set out in the scale-up logic model (Figure 2). In the Findings chapters we report findings from all data sources, highlighting where the findings from different data sources align and therefore support the claims being made. We also discuss areas where there appears to be a discrepancy between findings from different data sources and consider the possible reasons for the discrepancy. It is, however, important to note that although different data sources are providing data in relation to the same evaluation criteria or research question, they may be providing data that it is not appropriate to compare. For example, in some instances interview data have been collected to provide depth of

understanding of the nature of a change in practice, in contrast to the survey which is designed to measure the extent of change in practice across schools.

Presentation of findings

Analyses are presented in the following sections:

Findings 1: Reach and engagement

The first half of this chapter examines the characteristics of recruited schools, using DfE data. Recruitment strategies are then summarised and assessed. Attendance figures are also presented, and the reasons behind observed patterns are explored using qualitative data (RQ 7).

Findings 2: Evidence of promise: changes in school practices

This chapter reports survey findings on pre-campaign awareness of the EEF guidance, changes already made to TA deployment, and the extent to which schools attribute changes in practice to the advocacy provision. The alignment of school practices to the EEF recommendations is compared pre- and post-campaign for participating schools in Lincolnshire and the comparison area. These analyses are conducted using only responses from schools that took part in both surveys, and Lincolnshire respondents indicating that they did not participate in any of the Mobilise project activity are also excluded. Interview and case study data illustrate the nature of the changes in practice (RQ 2).

Findings 3: Evidence of promise: other outcomes

This chapter analyses interviewees' perceptions of other intermediate outcomes for TAs, teachers and pupils, as well as indicators of positive outcomes at the school level and across the county, including enhanced 'research readiness'. Outcomes for school-based leads and cluster leads are also reported (RQ 3).

Findings 4: Feasibility

This chapter illuminates the causal mechanisms inherent within the theory of change and presents findings on the feasibility and perceived effectiveness of the embedded model of scale-up, the Mobilise delivery model and schools' approaches to implementing Mobilise. Interview data is supplemented with survey responses from schools that participated in the programme. We present a summary table of key enabling attributes and mechanisms and barriers relating to EEF, Lincolnshire at a strategic level, Mobilise delivery and school level implementation. Findings on maintaining the fidelity to the evidence are also presented. (RQs 1, 4, 5, 6, 7, 8).

Findings 5: Scalability

Scalability is considered in relation to three aspects: sustainability, focussing mainly on Lincolnshire stakeholders' and school-based leads' perceptions, affordability, summarising costs data and perceptions of affordability; and replicability, presenting perceptions of Lincolnshire stakeholders and the EEF implementation team on whether the approach could work elsewhere (RQs 4, 8, 9, 10, 11).

- **Throughout** the report, the following codes are used to identify interviewees: KS(1-6): Key stakeholders including EEF delivery team, Lincolnshire strategic stakeholders and regional leads
- SBL(A-O): School based leads
- CL(A-C): Cluster leads
- CL(1-2): Cluster lead focus groups
- NP(A-C): Non-participating senior leaders
- Case study schools (A and B)

Please refer to Table 4 for full details of interviews and focus groups

Timeline

Table 5: Timeline overview

Date	Activity
Jan - Feb 16	EEF project initiation / scoping phase
Feb - Aug 16	Mobilise development, set-up and recruitment phase
Apr 16	Observation of LLP Mobilise Steering Group
Apr 16	LLP wrote to all head teachers and governors to introduce Mobilise
Apr 16	Launch of Mobilise to head teachers at an LLP conference
Apr - Sep 16	School recruitment
Jul - Sep 17	First round of EEF, Lincolnshire stakeholder and regional lead interviews
Sep 16 - Jul 17	Mobilise delivery
Sep 16	Mobilise roadshows and evaluator observation of launch events
Sep - Oct 16	Pre-campaign survey
Sep 16 - Jun 17	Cluster lead training days and base camps
Sep 16 - Jun 17	Cluster meetings for school-based leads
Sep 16 - Jul 17	Implementation in school
Feb - Mar 17	Second round of EEF, Lincolnshire stakeholder and regional lead interviews
Mar 17	EEF team strategic and operational stakeholder interviews
Mar - Apr 17	Cluster lead interviews
Jun 17	Observation of base camp and cluster lead focus group
Jun 17	Non-participating/ withdrawn school-leaders' interviews / email responses
Jul - Sep 17	School-based lead interviews
Jun 17	Observation of EEF-facilitated stakeholder event - learning from Mobilise
Jul 17	End of delivery
Jul - Sep 17	Exemplar case studies
Jul - Sep 17	Final set of EEF, Lincolnshire stakeholder and regional lead interviews
Sep - Oct 17	Post-campaign survey

Findings 1: Mobilise reach and engagement

In the first half of this findings section we analyse the characteristics of recruited schools. We then summarise recruitment strategies and review their effectiveness. In the second part we present an analysis of attendance data and draw on qualitative data to explore reasons for the observed attendance patterns.

Key findings

1. **In total, 283 schools were recruited to the Mobilise programme, 73% of all schools in Lincolnshire. Although the aim was to recruit all Lincolnshire schools, the achieved recruitment was recognised as a significant achievement.**
2. **Participating schools were more likely to be primary schools compared to the average for Lincolnshire or England.**
3. **Attainment in participating schools was similar to local averages.**
4. **A mixture of hard and soft, formal and informal approaches were employed to raise awareness and maximise recruitment of schools to the Mobilise campaign. These included:**
 - **Positioning Mobilise as a sector-led initiative.**
 - **Positive framing such as the high visibility of the EEF brand, giving the impression that participation was compulsory, aligning promotion of a project topic (TAs) that was relevant to most schools, and conveying a clear message that Mobilise was part of a wider vision to ensure all schools were 'evidence ready'.**
 - **Promotional events.**
 - **Use of multiple communication channels and promotion by a wide range of Lincolnshire stakeholders and by EEF.**
5. **Explanations for non-participation included: lead-in times were too tight; insufficient numbers of TAs to justify involvement; TA deployment not a school priority; historical lack of trust in how Lincolnshire school improvement had been organised.**
6. **Only 16 of 283 participating schools formally withdrew from the project. However there was a notable decline in attendance at cluster meetings over time, which appears to indicate a decline in engagement.**
7. **Attendance rates at cluster meetings were highest among primary schools.**
8. **Explanations for declining or withdrawing engagement in cluster meetings included the time commitment required (especially for small schools), the perceived administrative demands (e.g. volume of paperwork) of Mobilise and a perception that the standardised cluster meeting was overly prescriptive and limited scope to keep all schools engaged. Attendance also declined in schools that considered they had already implemented significant aspects of the EEF guidance or that lacked commitment to the project.**

Profile of schools recruited to the campaign

In all, 283 schools were recruited to the Mobilise programme, amounting to 73% of all schools in Lincolnshire. Participating schools, which were tallied using the proxy measure of school-based leads' attendance at cluster meetings, were numerically and proportionately more likely to be primary schools (see Table 6): 86% were primaries (N = 244), compared to 76% in Lincolnshire and 74% in England overall. Ten per cent of participating schools (N = 27) were secondaries, compared to 18% in Lincolnshire and 16% in England overall. Eight participating schools were classed as both primary and secondary in the DfE data, as they offered provision covering both phases. These are labelled

'through' schools. There are four participating schools for which no data are available. The 'N missing' column for the Lincs and England population includes all schools that are not classed as either primary, secondary or both (through schools) in the DfE data (see Table 6).

Table 6: School phase - participating schools

Type of school	No data		Primary		Secondary		Through		Total
	N	%	N	%	N	%	N	%	N
Participating schools	4	1.4	244	86.2	27	9.5	8	2.8	283
Lincs population	11	2.9	284	75.7	66	17.6	14	3.7	375
England	1014	4.4	17264	74.3	3716	16.0	1250	5.4	23260

Source: SHU survey and DfE Schools Comparison Service. Row percentages.

Of all the participating schools, 43% were comprehensive, compared to 34% in Lincolnshire, and 80% in England overall (see Table 7). Lincolnshire still operates a selective secondary schooling system. There are no selective primary schools in Lincolnshire, so only secondary schools are included in this table. Seventeen per cent of participating secondary schools (N = 6) were selective. This is consistent with the Lincolnshire average. However, four of these selective schools withdrew from the programme, of a total of five secondary schools that withdrew.

Table 7: Admissions policy of participating secondary schools compared with local and national averages

	No data %	Comprehensive %	Modern %	Non selective %	Not applicable %	Selective %	Unknown %	N
Participants	0.0	42.9	11.4	0.0	2.9	17.1	25.7	35
Withdrawn	0.0	0.0	0.0	0.0	20.0	80.0	0.0	5
Lincs population	0.0	33.7	15.7	5.6	10.1	16.9	18.0	89
England	0.0%	80.3%	3.1%	0.6%	4.1%	4.8%	7.1%	3716

Source: SHU survey and DfE Schools Comparison Service. Row percentages.

Table 8 reports on the type of schools recruited to the Mobilise project. These are again presented alongside local and national averages to illustrate the representativeness of the participating schools. For some schools, no information on school type is available from the DfE data source. These are listed here under the 'no info' column.

Table 8: Type of school - all participating schools

Type of school	No info %	Academy %	Maintained School %	Special School %	N
Participating schools	1.4	29.0	65.0	4.6	283
Lincs population	2.9	35.2	55.7	6.1	375
England	4.2	26.4	62.4	6.9	23244

Source: SHU survey and DfE Schools Comparison Service. Row percentages.

As Table 9 shows, participating primary schools have similar pupil numbers (mean = 203) to the Lincolnshire average (mean = 198), both of which are lower than the average for England (mean = 271). Participating secondary schools are also of similar size (mean = 647) to the Lincolnshire average (mean = 658), slightly lower than the overall mean for England (707).

Participating primary schools typically have a lower percentage of pupils with Special Educational Needs (SEN) (5%) than the population in Lincolnshire (6%) or England (7%). Secondary schools taking part in Mobilise had higher proportions of SEN pupils (30%) than the average for Lincolnshire (24%) and England (26%).

The percentage of pupils with English as an additional language (EAL) in participating primary schools (7%) was very similar to the average for Lincolnshire (8%) but far lower than overall mean for England (15%). For secondary schools, the pattern was replicated, with 6% of pupils in Mobilise schools and 6% in Lincolnshire classified as EAL, compared to 13% in England as a whole.

The mean percentage of pupils eligible for FSM in the past six years at primary schools that took part in Mobilise is 25%, almost equal to the mean value for Lincolnshire and the same as the figure for England (25%). Participating secondary schools also had similar levels of pupil deprivation (31%) to the Lincolnshire average (30%), both of which are lower than the mean for England overall (35%).

Table 9: Characteristics of participating schools

	Mean total number of pupils (including part-time pupils)	Mean % eligible pupils with SEN support	Mean % pupils English not as first language	Mean % pupils eligible for FSM past 6 years	Mean OFSTED rating
Primary					
Participating schools	203	4.9	7.4	24.5	1.89
Lincs population	198	5.8	7.7	24.3	1.88
England	271	6.8	14.9	24.8	1.91
Secondary					
Participating schools	647	29.9	5.9	31.1	1.88
Lincs population	658	23.3	6.2	29.8	1.97
England	707	25.8	13.3	34.5	1.97

Source: SHU survey and DfE Schools Comparison Service. Row percentages.

KS2 attainment, measured by percentage of pupils reaching the expected standard in reading, writing and maths, was less than one percentage point above Lincolnshire average (50%) in participating schools (51%), but two percentage points below the England mean (53%), as shown in Table 10. Please note that 2015/16 figures are used as this was the academic year during which recruitment to the programme took place.

KS4 attainment in participating secondary schools was slightly lower (50% of pupils achieving five A*-C GCSE grades including maths and English) than for Lincolnshire schools (51%) but above the England mean (49%). The pattern is similar for mean 'Attainment 8', a newer measure which takes into account scores from a total of eight GCSEs.

Table 10: School attainment - participating schools

	% pupils reaching expected standard in reading, writing and maths (KS2)	Mean Attainment 8 (KS4)	% pupils with 5+ A*-C incl. English and maths GCSEs (KS4)
Participating schools	50.6	44.8	50.4
Lincs population	49.8	45.6	51.4
England	52.5	43.9	49.1

Source: SHU survey and DfE Schools Comparison Service. Row percentages.

To summarise, participating schools were more likely to be comprehensive, and selective schools were more likely to withdraw once the programme was underway. Maintained schools were overrepresented compared to academies. Participating primary schools had similar levels of FSM, but in secondaries the proportion of FSM pupils was slightly lower than the national average. Attainment among participating schools was broadly in line with local and national averages.

Recruitment strategies

Key strategies deployed

Evaluation data revealed that a mixture of hard and soft, formal and informal approaches were employed to raise awareness and maximise recruitment of schools to the Mobilise campaign. These approaches are summarised below.

Positioning Mobilise as a sector-led and region-wide initiative through persuasive framing

- The **Mobilise steering group**, composed of senior leaders from across the county, was a **symbolically important feature that the campaign was genuinely sector-led**.
- A clear message was given that the cluster structures being configured as part of Mobilise were intended to be an important feature of a wider sector-led vision for Lincolnshire schools, where schools were expected to work collaboratively to become 'evidence-ready' and ensure school improvement. Involvement in Mobilise was further marketed as **helping schools avoid isolation, encourage connectedness and offering opportunities for participation in mutually beneficial school-led improvement activities** such as peer review. The offer and vision outlined was intended to draw in even those schools that did not consider TA deployment an existing school priority.
- The **ambition** throughout the recruitment phase was always officially **to get every Lincolnshire school to sign up**. Reflective of the highly ambitious recruitment target, there was an extremely persuasive tone to recruitment communications, bordering on an expectation that schools should sign up, and also a degree of challenge to any school that chose not to. One Lincolnshire stakeholder explained that the intention was to make Mobilise as 'compulsory as possible'. The telephone interviews with school-based leads picked up that there was some ambiguity reported from schools as to whether participation was compulsory or not, with one school-based lead commenting 'It was almost billed as a non-negotiable' (SBL K).
- A **project topic** was selected that could reasonably be expected to be **relevant to most schools** across Lincolnshire - focusing as it did upon TAs, typically a significant staff resource. Accordingly, the emphasis of the recruitment pitch focused primarily on the specific TA campaign, while at the same time **conveying a clear message that Mobilise was part of a wider vision to ensure all schools were 'evidence-ready'**.

- The **EEF brand** was kept very visible in marketing and awareness raising and it was emphasised that the Mobilise campaign would be based on the evidence informing the EEF's guidance document 'Making the best use of TAs' and the seven recommendations.
- Mobilise was funded through the contributions schools had made to the LLP alongside additional LA funding, so there was **no direct charge to schools**.

Events

- EEF representatives and the Lincolnshire LA Chief Commissioning Officer for Learning introduced the Mobilise initiative at the **LLP launch conference** in April 2016 to an audience of approximately 200 head teachers, where they outlined the benefits of engaging in Mobilise and their belief that doing so 'would keep Lincolnshire at the forefront of education developments'.
- Mobilise ran a series of **roadshow launch days** in September and October 2016, with substantive inputs from EEF staff across the county. Although these were primarily intended to ensure accurate delivery of the evidence and EEF recommendations to all participating schools, it also afforded an additional opportunity for undecided schools to formally sign up.
- Dedicated presentation slots for representatives of the **Mobilise project steering group to promote and encourage participation in Mobilise at meetings that were already scheduled** including school governor briefings.

Use of multiple communication channels and promotion by a wide range of stakeholders

- **Emails, telephone calls, letters and social media** were all used extensively to encourage participation and convey the expectation that every school should participate.
- **Members of the Mobilise steering group committed to personally following up any schools that did not sign up.** In some instances, these would be schools that steering group members had a natural link to and others they did not.
- Where Mobilise clusters formed on the basis of existing peer-review groups or known clusters, **local intelligence was used to make contact with a participating school to request them to get in touch with other schools that had not signed up yet.**
- **The Lincolnshire Learning Partnership Board wrote to all schools that had not signed up,** seeking an explanation and to clarify what was being implemented to ensure they were driving change and continuing to raise standards in their respective schools.
- A member of the **EEF team contacted the respective chief executives of two academy chains that had historically tended not to participate in Lincolnshire-wide initiatives,** to encourage participation.
- **The CFBT Education Trust advisor team,** the Lincolnshire school improvement service that ceased operating from September 2017, were said to be co-operative and **encouraged schools to sign up to Mobilise.**

Effectiveness of recruitment strategies

As has been outlined above, Lincolnshire's educational landscape offered some unique opportunities for the Mobilise project coinciding as it did with the reframing of school improvement services. However, at the same time, the Mobilise team had to address the challenge of putting across a vision

for sector-led school improvement that was compelling enough to convince schools to become involved, while also developing an infrastructure for delivery.

Although notionally the official target was for all Lincolnshire schools to be recruited, it was accepted by all strategic stakeholders interviewed that to sign up 73% of schools in such a short period of time, was a tremendous achievement.

'They're [The Mobilise team] trying to roll out on a massive scale... it's a hugely over-ambitious piece of work.' (KS5)

'I think that what the Mobilise team did has been really, really quite extraordinary in terms of the number of schools that they engaged with.' (KS6)

The level of uptake strongly indicates that the range of approaches employed to boost recruitment were, broadly speaking, fit for purpose and reflect the commitment and energy brought to the project. However, despite an overall sense of accomplishment for what had been achieved in terms of the scale of recruitment, there was also recognition that efforts in the future would need to be redoubled to ensure remaining schools did not remain isolated from others across Lincolnshire.

'We need to pay more attention to the 22% that aren't involved. We need to focus more strategically on reducing that year on year, so that there are fewer schools out of the system.' (KS3)

Reasons for non-participation

Table 11 displays the reasons why non-participating schools responding to the Lincolnshire post-campaign survey decided not to take up any of the support or attend any of the events on offer. Only 15 respondents indicated that they had not taken part in any of the programme activities. Six of these said they were not aware of this provision. Three did not see TA deployment as a school priority, while another three stated that their school already deployed TAs effectively. One reported that the school did not have capacity to release staff. Two respondents cited other reasons, both of which mentioned that the school employed only a single part-time TA, and referred to capacity issues.

Table 11: Reasons why schools did not participate in any events and/or support activity

Q24	Number of responses
Was not aware	6
Not a school priority	3
Already effectively deploy TAs	3
No capacity to release staff to take part	1
Other (Please specify)	2
Total	15

Source: SHU survey, post-campaign Lincolnshire only.

The qualitative data collected from senior leaders of withdrawn or non-participating schools and key strategic stakeholders involved in delivering Mobilise provide further insights into why some schools decided against signing up at all, or withdrew at an early stage of programme delivery. These rationales are summarised below:..

- There were **insufficient numbers** of TAs (or no TAs in certain cases) to justify involvement - this was disproportionately the case for secondary and grammar schools.

- **Development of the TA workforce was not viewed as a key school improvement priority.** This was particularly the case where the school was under notice to improve or was at risk of a poor Ofsted judgement.
- A **belief that the focus of Mobilise was overly primary-led** and that it did not cater sufficiently well for the requirements of special or secondary schools.
- **Lack of staff capacity to be able to commit to Mobilise** in terms of session attendance and leading the project back at school. This was particularly the case for small primary schools.
- **The very tight lead-in time for recruitment meant that for some schools the prospect of meaningfully incorporating a year-long, whole-school intensive project like Mobilise into their often full schedule of whole-school and professional development meetings was problematic.** There was evidence in some cases that even interested schools felt unable to commit to Mobilise because of this.

'... at a few other schools... there was a bit of a feeling that schools had already set their development targets for the year and the budgets were already planned and it wasn't the ideal time to be trying to see how this would fit in as well.' (CL A)

The **lack of lead-in time also limited the ability of the Mobilise team to work as intensively with undecided or sceptical schools as they might have liked.** One key stakeholder admitted there was 'wasn't enough time to galvanise [reluctant or undecided schools] and pull them in' (KS3)

- There were a limited number of examples where the most suitable member of staff to lead on Mobilise, for example the SENCO, was **unaware of the programme.** This tended to be due to staff turnover during the recruitment phase.
- A small minority felt that the LA should be **funding** schools more directly to be involved in the programme, if they viewed TAs as such a priority.
- There were some isolated references to a **historical lack of trust** as to how Lincolnshire school improvement had been organised, and historical competition in the secondary sector, which made certain schools sceptical about being involved in a sector-led movement.

As Table 6 indicates, Mobilise was more successful in recruiting primary schools than secondary schools. The rationales for non-participation or early withdrawal outlined above suggest that this may have been due, at least in part, to insufficient numbers of TAs, a perception that Mobilise was too focused on primary schools, and a historical lack of trust.

Programme attendance

Withdrawals from the programme

The Mobilise management information data show that 16 schools formally withdrew from the programme (see Table 12), including two special schools. As mentioned above, five of these were secondary schools (of which four were selective schools, see Table 7 above). As would be expected given the proportion of selective schools, KS4 attainment was higher among schools that had withdrawn (See Appendix 10). Eleven of the schools were primary schools. KS2 attainment in primary schools that withdrew was lower (41% of pupils reaching expected standard in reading, writing and maths) than for other participating schools (51%). This pattern is the opposite of that observed among secondary schools which left the programme.

Of the 16 schools that withdrew, five were rated as outstanding by Ofsted, a higher percentage (33%) than for the overall figure for other participating schools (18%), although this is based on small numbers. Two of the 11 participating special schools formally withdrew (one primary and one secondary, both counted among the total of 16 withdrawals).

One-quarter of schools (four out of 16) that withdrew were based in rural villages. As 25% of all participating schools were based in rural villages, this suggests that geographical remoteness was not an important factor behind the decision of a school to withdraw. Indeed, none of the 20 participating schools in locations characterised as 'rural hamlets and isolated dwellings' pulled out of the project. Eleven of the 16 schools (69%) that withdrew were classified as urban, a far higher proportion than for participating schools that did not withdraw (40%). Therefore, urban schools appeared more likely to pull out, although the small number of withdrawn schools means this finding should be treated with caution.

Table 12: Withdrawal from the programme

	N	%
Not formally withdrawn	267	94.3
Withdrawn	16	5.7
Total	283	100.0

Source: Mobilise monitoring data. All participating schools

Although only 16 schools formally withdrew from the Mobilise programme, attendance patterns at cluster meetings suggest that a higher number of schools may have ceased to participate in the Mobilise programme or reduced their commitment to the programme. Since detailed records of in-school activity were not kept, it is not possible to ascertain if the decline in participation in cluster meetings is an accurate indicator of a decline in implementing the Mobilise project in school.

Cluster meeting attendance

Table 13 shows that over 27% of participating schools attended all six cluster meetings (N=77), with a further 24% attending five of the six (N=70). A large majority of schools (79%) went to at least half of the meetings. Only 5% (N=16) attended none. However, the marked variation in attendance between primary and secondary schools should be acknowledged, as the prevalence of primary schools in the sample skews the overall figures. **Attendance was higher among primaries**, of which 29% attended all six cluster meetings, compared to only 14% of secondary schools. Twenty per cent of secondary schools attended no cluster meetings, compared to 4% of primary schools. There is no evidence of any relationship between the percentage of disadvantaged pupils within a school and the number of cluster meetings attended.

Table 13: Total number of cluster meetings attended (from management information data)

Number of cluster meetings attended	Primary		Secondary		Combined	
	N	%	N	%	N	%
0	9	3.6%	7	20.0%	16	5.6%
1	14	5.6%	6	17.1%	20	7.0%
2	19	7.5%	5	14.3%	24	8.4%
3	29	11.5%	3	8.6%	32	11.1%
4	42	16.7%	6	17.1%	48	16.7%
5	67	26.6%	3	8.6%	70	24.4%
6	72	28.6%	5	14.3%	77	26.8%
Total	252	100%	35	100%	287	100.0%

Source: Mobilise monitoring data. All participating schools

A common theme in the interview data was a strong belief that the programme overly focused on mainstream primary contexts making it less relevant to others - for example, secondary, reception, and special schools with very small intakes. Phase-specific groups for secondary and special schools were established by the regional leads to improve the engagement of these schools. However, it is worth noting that some secondary and special schools really valued being involved in cross-phase clusters and declined the invitation to attend newly formed, phase-specific clusters.

'I as a secondary school wanted not to opt into [secondary specific cluster] that actually because I think I've gained a lot from working cross-phase. I think that's one of the things that kind of mixing up that dynamic in a cluster group may be problematic at the onset but actually it pays dividends if you keep going with it.' (CL Focus group 1)

Attendance was higher at earlier cluster meetings. A member of staff from 86% of schools (N=242) went to the first meeting, and a representative from 82% of schools was at the second (N=231). Attendance fell to 47% (N=133) for the sixth meeting (Table 14). One school-based lead observed that the later cluster meetings were not of the same very high standards as the earlier ones and suggested that summer term school pressures for both cluster leads and school-based leads were largely responsible for this, a theme echoed in some responses to open questions in the survey:

'Initially very, very good [quality of cluster meetings], but...by the end it became a bit more fraught. So when pressures of school got to everybody, it became a bit more disengaged, or a bit disjointed ... the very last one seemed like it was just the ticking of a box really. ... it petered out and lost its momentum as such.' (SBL J)

Table 14: Attendance at each cluster meeting

Cluster meeting	Number of schools attended	% of schools
1	242	85.5
2	231	81.6
3	208	73.5
4	165	58.3
5	176	62.2
6	133	47.0

Source: Mobilise monitoring data. All participating schools

Many of the reasons for non-participation and early drop-out listed in the section above continued to apply and were linked by interviewees to declining participation and mentioned by respondents to open questions in the survey. Further explanations given for limited or declining participation were:

- The **administrative and time demands of the Mobilise programme** - some schools were unable to keep up with the demands of the Mobilise project, particularly in the earlier stages and within small schools.
- Finding the content of **cluster meetings too restrictive** and not sufficiently flexible to take account of school priorities, other work being undertaken in the school or to maintain the interest of schools that had already engaged in implementing the EEF recommendations .

The perception that **the programme was not relevant enough to their profile of TAs** - an issue that occurred more frequently in secondary, grammar and special schools where numbers tended to be lower and/or their function more limited than the guidance was proposing.

- **Lack of commitment** - as alluded to previously, there was some confusion as to how senior leaders interpreted the Mobilise offer. Some schools saw involvement as compulsory and there was a sense among certain stakeholders that their school only became involved because it was 'politically' expedient to do so. These schools were more likely to withdraw at an early stage or engage in a less meaningful manner.

Attendance at other Mobilise events

Table 15 shows that 446 individuals from 241 schools (68% of all Lincolnshire schools) attended the first roadshow and 351 individuals from 237 schools (66% of all Lincolnshire schools) attended the second roadshow. More schools were represented at the main events for roadshow 2 than roadshow 1, suggesting that those that originally attended had decided to commit to the project and that additional efforts to engage schools between roadshows may have persuaded more to actively participate.

Table 15: Attendance at Roadshows

	Lincoln main event	Boston main event	Grantham main event	Horncastle main event	Total	Lincoln additional date	Boston additional date	Combined total
Roadshow 1								
Schools represented	78	30	58	46	212	16	13	241
Delegates attended	166	47	106	82	401	25	20	446
Roadshow 2*								
Schools represented	77	31	74	55	237			
Delegates attended	119	51	105	76	351			

* An additional event was offered at Boston but attendance data were not provided

Table 16 shows that the 'Managing change' HR workshop was attended by only 18% of schools (N=50) for whom monitoring data were provided. The Intervention Fair saw staff from 35% of schools attend (N=100).

While the Maximising the Practice of Teaching Assistants (MPTA) training offered to Lincolnshire schools by one of the regional leads during the year that Mobilise was implemented was not formally part of the Mobilise offer, it was an option promoted to schools participating in Mobilise. Table 16 also shows that 25% of schools (N=72) had at least one teacher or TA who attended the MPTA training. MPTA training has two distinct courses, with schools able to opt in to just one or both. One course is aimed at developing TAs' skills to scaffold learning and help pupils become confident, independent learners. The other is focused on teachers, providing them with essential information on how to plan for and deploy TAs in the classroom. The regional leads undertook **training run by the Institute of Education** in order to be licensed to provide this CPD to Mobilise schools.

Table 16: Attendance at events other than cluster meetings, from monitoring data

	HR		Intervention Fair		MPTA	
	%	N	%	N	%	N
Did not attend	82.3	233	64.7	183	74.6	211
Did attend	17.7	50	35.3	100	25.4	72
Total	100	283	100	283	100	283

Source: Mobilise monitoring data. All participating schools.

Other indicators of engagement with Mobilise

An intended indicator of engagement with Mobilise set out in the protocol was the production of action plans. In the early stages of the programme, schools were provided with a pro-forma which linked the Bridge Change Model (Bridges, 1999) to the EEF recommendations on the best use of TAs and they were asked to populate this with the relevant extracts from their school improvement plan, to support school-based leads in taking ownership of the plan. The production of these plans was initially monitored, but the regional leads ceased to ask for these plans in response to feedback from schools, who found the activity too burdensome. In total, 146 schools had completed an action plan by the time monitoring ceased in December 2016.

School-based leads were still encouraged to produce actions plans at the end of each cluster meeting to record how they were planning to implement their learning from the meeting. These plans were then reviewed at the next meeting. Formal records of the completion of these plans were not kept. Interview findings indicate that some school-based leads were less committed than others to

engaging with action planning. These findings, together with other data on motivation, are presented in the Findings 4 chapter (Feasibility).

While interview data indicate that many school-based leads sought and valued the support offered by cluster leads, support was predominantly informal, for example an email or telephone response, and 'on demand' so it is not possible to quantify the extent of engagement with support.

Findings 2: Evidence of promise - Changes in school practices

This section reports survey findings on pre-campaign awareness of the EEF guidance, changes already made to TA deployment, and the extent to which schools attribute changes in practice to the advocacy provision. The alignment of school practices to the EEF recommendations is compared pre- and post-campaign for participating schools in Lincolnshire and the comparison area. These analyses are conducted using only responses from schools that took part in both surveys. Lincolnshire respondents indicating that they did not participate in any of the Mobilise project activity are also excluded. The relatively low achieved sample of schools completing both surveys limits the confidence that can be placed in these findings, which are likely to be based on responses from schools that were more engaged with the programme and therefore biased to some extent. Findings should also be treated cautiously as multiple significance tests are reported together for groups of related survey items. The nature of the changes in practice are illustrated using interview and case study data.

Key Findings

1. **SUMMARY FINDING:** There was evidence that alignment of certain TA-related practices with the EEF recommendations increased in schools participating in Mobilise with available data more than in the comparison area over the evaluation period.. For many recommended practices, no difference in the rate of alignment was detected. There were no indicators that the comparison area saw greater improvement than Mobilise schools in their use of TAs. In all, 85% of Lincolnshire schools with available data and 98% of comparison schools who responded to the survey had read the EEF guidance pre-campaign. A further 5% of Lincolnshire schools with available data had read the guidance by the end of campaign.
2. The proportion of schools with a written policy or guidance on TA deployment in Lincolnshire rose from 33% to 67% over the campaign period in those schools with available data. The proportion in comparison schools remained static at 62%. Mobilise appears to have had very limited impact on change to TAs' contracts.
3. **TA deployment and classroom practice (related to the EEF recommendations 1, 2 and 3)**
 - There are many areas of TA deployment and classroom practice in which no statistically significant change is associated with the programme.
 - Statistically significant positive effects were found in relation to: TAs ensuring that pupils retain ownership over their learning and responsibility for their work; teachers deploying TAs during lessons to respond to 'real time' needs of pupils; and teachers and TAs having a precise and shared understanding of their respective roles.
 - Qualitative data indicate that the most frequent change was TAs working with pupils across a wider spectrum of attainment. Other changes included: TAs, and the pupils they support, remaining within the classroom as much as possible; TAs responding to pupil needs as they arose in real time; promoting independent learning by pupils (particularly using the scaffolding framework); and TAs' increasing skills in differentiated questioning.
4. Mobilise is statistically associated with positive change in several indicators of TA/teacher communication (related to EEF recommendations 4 and 7). There was qualitative evidence of TAs becoming more actively involved in lesson planning and preparation, and of more regular and effective TA/teacher communication.
5. Survey data provide little evidence of changes in the use of evidence-based structured TA-led interventions (related to EEF recommendations 5 and 6) that can be associated with the programme. The qualitative evidence indicates divergent

practices, which appear to reflect differing understandings of the term 'intervention'. Mobilise is associated with positive change in several indicators related to the training of TAs and teachers (related to EEF recommendations 4, 5 and 6). The finding is supported by the qualitative analysis which found an upsurge in the amount of TAs' training, and to a lesser extent training for teachers. These effects may, in part, be related to the promotion and provision of MPTA training in Lincolnshire by the Mobilise regional lead as an optional support that was not formally part of the Mobilise programme, which although not formally part of the Mobilise project, was offered to participating schools by a regional lead.

6. There were substantial variations between schools and individual TAs and teachers within schools in starting points in relation to the EEF recommendations and the extent of change reported.
7. Across most areas of practice change, the modal response in the survey was that change was partly due to Mobilise, although the distribution of responses varied. Scheduling time for teacher and TA communication was most strongly attributed to Mobilise.
8. There was no statistical association between participation in Mobilise as measured by attendance at cluster meetings and practice change.

Awareness of the EEF guidance and changes in the use of TAs prior to the Mobilise campaign

Table 17 shows that before the start of the TA campaign, 85% of schools in Lincolnshire responding to both the pre-campaign and post-campaign surveys had read the EEF report, with a further 6% aware of it. Only 9% had not heard of it at that stage. Of the Kent and Medway schools surveyed pre-campaign, 98% had read the EEF report; the one respondent who had not read it was aware of it. The percentage of Kent and Medway respondents reporting reading the guidance was higher than expected, but it was beyond the scope of the evaluation to investigate this finding. No Kent and Medway schools were unaware of the guidance, but in Lincolnshire some respondents remained unaware (9%). Nevertheless, the percentage of schools in Lincolnshire where survey respondents had read the report increased to 90% in the post-campaign survey, an increase of five percentage points. There is a strong possibility that these results are affected by response bias, as previous research indicates much lower levels of awareness of EEF guidance. It is plausible that schools outside of the campaign area were more likely to respond to the survey if they already had some knowledge of EEF activity.

Table 17: Awareness of EEF report

Q16. Have you read the Education Endowment Foundation report	Lincs Pre %	KM Pre %	Lincs Post %	KM Post %
Yes, read the guidance	84.6	97.8	89.9	97.8
Aware of the guidance but have not read it	6.4	2.2	2.5	2.2
Not aware of the guidance	9.0	0.0	7.6	0.0
Total N	78	46	79	46

Source: SHU pre- and post-surveys

Practice change overview and attribution to Mobilise

Table 18 displays the extent to which survey respondents from schools in Lincolnshire attributed changes in TA deployment and practice to their participation in the Mobilise programme. For each of the eight items included in the questionnaire, the modal response was that change was partly due to the project, although the exact distribution of responses varied. The questionnaire items are now

discussed in turn, focussing on the extent to which respondents attributed change to the Mobilise project, if they perceived change had occurred. Across all aspects of practice with the exception of TA contracts, at least two-thirds of respondents attributed at least some change to the project.

For 'Increased senior leader understanding of how to use TAs effectively', 17% of respondents reported that change was fully or mostly due to the project, while 60% saw change as partly due to the project. For 17% of respondents, such changes were not at all due to Mobilise. Only 8% of respondents said that no change had been made on this item.

In relation to 'Changes to the timetabling of TAs', 19% of respondents attributed these fully or mostly to the project, while 48% concurred that such change was partly due to the project, and 18% reported that TA timetabling change was not at all affected by their participation. A further 16% saw no change.

With regard to 'Teachers using TAs more effectively', 22% of respondents believed this was fully or mostly because of the project, with 65% stating that the project was partly responsible for this change. Only 9% of respondents saw change in this area as not at all due to participation in Mobilise, the lowest figure across the nine areas examined here. Only 4% made no changes on this aspect, again the lowest of all the items covered.

For 'TAs working with a wider range of pupils', 21% of respondents answered that this was fully or mostly due to the project, and exactly half agreed that this was partly the case. A total of 18% viewed this as not at all related to Mobilise, and 11% made no changes in this area.

Changes in 'TAs supporting learning more effectively' were viewed as fully or mostly due to the project by 20% of respondents, and 63% believed that Mobilise was partly responsible for changes observed. Thirteen per cent did not attribute any changes to the project, and only 5% witnessed no change of this type in their school.

Changes in 'Scheduling time for teacher and TA communication' were seen as fully or mostly a result of participation by 33% of respondents. This figure is the highest of the eight items discussed here. A further 39% saw changes as partly due to the project. Ten per cent stated that any changes were not related to Mobilise, and 18% noted no such change.

'Increased use of structured evidence-based interventions' was reported as fully or mostly due to the project by 23% of respondents, and 33% attributed this partly to the project. A further 17% saw any such increases as unrelated to Mobilise, and 28% of respondents said that no changes had been made on this front.

Finally, 64% of schools saw no 'Changes to TA contracts' during the study period. This is by far the largest figure emerging from the nine items considered here and suggests limited impact of the programme on this specific area. A further 19% believed that any changes were not at all due to the project. Only 18% stated that Mobilise had an effect on TA contracts. These responses were split evenly between those attributing changes fully/mostly and partly to the project.

Table 18: Attribution of changes in TA deployment to participation in the Mobilise project on 'Making Best Use of Teaching Assistants'

Area of change	Fully/mostly due to the project %	Partly due to the project %	Not at all due to the project %	No changes made in this area %	N
Increased senior leader understanding of how to use TAs effectively	16.5	59.5	16.5	7.6	79
Changes to the timetabling of TAs	18.8	47.5	17.5	16.3	80
Teachers' using TAs more effectively	22.2	65.4	8.6	3.7	81
TAs working with a wider range of pupils	21.3	50.0	17.5	11.3	80
TAs supporting learning more effectively	20.0	62.5	12.5	5.0	80
Scheduling time for teacher and TA communication	32.5	38.8	10.0	18.8	80
Increased use of structured evidence-based interventions	22.8	32.9	16.5	27.8	79
Changes to TA contracts	8.8	8.8	18.8	63.8	80

Source: SHU survey, row percentages. Base: all Lincolnshire post-campaign survey respondents indicating that someone from their school attended Mobilise events during 2016/7

To summarise the findings presented in this subsection, respondents reported that change in TA deployment was partly due to the project each of the eight items included in the questionnaire although the exact distribution of responses across the multiple choice categories varied. Across all aspects of practice, with the exception of TA contracts, at least two-thirds of respondents attributed at least some change to the project. However, it is important to note that schools responding to the follow up survey may be more likely to have engaged with the intervention, which increases the risk of response bias.

In the following sections, the changes summarised above are explored in depth.

Changes in whole-school policy, structures and processes

This section presents findings from survey items relating to the deployment and management of TAs. Further detail on this data is available in Appendix 11.

Table 19 shows that before the TA campaign, the percentage of schools with written and up-to-date guidance or a policy on TA deployment was higher in Kent and Medway (38%) than in Lincolnshire (33%). Following the TA campaign, the Lincolnshire figure rose to 62%, although these responses are likely to be from schools that are more engaged with the programme and supportive of its aims. There was no change post-campaign in Kent and Medway.

Table 19: Does your school have written and up-to-date guidance or a policy on TA deployment?

Q3	Lincs Pre %	KM Pre %	Lincs Post %	KM Post %
Yes	33.3	38.3	62.3	38.3
No	66.7	61.7	37.7	61.7
Total	78	47	77	47

Source: SHU survey (column percentages). All respondents completing both baseline and follow-up surveys.

Additional tables relating to the deployment and management of TAs can be found in Appendix 11. To summarise:

- At baseline, head teachers in 62% of Lincolnshire school were responsible for TA deployment strategy.
- This fell to 50% in the post-campaign survey, with an increase in other senior leaders taking on this duty.
- In Kent and Medway at baseline, the number of schools in which the SENCO covered TA deployment was the same as the number in which this was handled by the head teacher. In the post-campaign survey, fewer head teachers were responsible for TA deployment, with this role being assumed by more SENCOs and other senior leaders.

Table 20 presents figures on whether or not TAs received appraisal or review as part of the annual performance management cycle. The vast majority (85%) of Lincolnshire schools at baseline reported that this was the case for all TAs, increasing to 90% in the post-campaign survey. However, this practice is more widely reported among respondents from schools in Kent and Medway (98% at baseline and post-campaign). A key point here is that TAs receive appraisals or reviews in most schools across both study areas.

Table 20: Do TAs receive appraisal or review as part of the annual performance management cycle?

Q6	Lincs Pre %	KM Pre %	Lincs Post %	KM Post %
Yes for all	84.6	97.8	89.9	97.8
Yes for some	6.4	2.2	2.5	2.2
No	9.0	0.0	7.6	0.0
Total	78	46	79	46

Source: SHU survey (column percentages). All respondents completing both baseline and follow-up surveys.

Practice outcomes related to EEF recommendations

All analyses presented in this section are on practice outcomes related to the seven EEF recommendations. The main aim is to compare responses between the pre- and post-campaign phases. To produce these results, linear regression models have been estimated using an ANCOVA approach, where the outcome variable is a given measure as observed in the follow-up survey, and the two predictors are the observed value on the same survey item at baseline, and a dichotomous indicator denoting location (Lincolnshire or Kent/Medway).

The outcome variables are treated as continuous in linear regression models. The coefficients displayed are for the location predictor, controlling for pre-campaign scores on the outcome. Interpretation is straightforward in that the Beta (marked as 'B' on the tables) value simply refers to the mean difference between Lincolnshire and Kent/Medway schools on the given outcome, once baseline mean is taken into account. Negative values represent practice that is more consistent with EEF recommendations. For any items where the original question wording led to higher values being more in line with EEF recommendations, the scale has been reversed to aid interpretation and

comparison of results across the different measures. These items are indicated with (R) on the relevant tables.

To ensure meaningful comparisons between baseline and follow-up observations, only respondents with valid data for both time points are included in the analyses that follow. As we include for each analysis all respondents providing data on that particular item in both surveys, it could be argued that this deviates slightly from a true complete cases approach as different individuals can contribute to the results on each item, due to item non-response. We therefore cite the number of respondents in each separate regression so that the working sample is clearly defined.

The presentation of findings related to the EEF recommendations are grouped into four categories: TA deployment and classroom practices; TA/teacher communication; the use of structured interventions; and TA and teacher training. In summary, the survey data provide no evidence for changes in the use of interventions, limited evidence for changes in TA deployment and classroom practice, and stronger evidence of change in TA/teacher communication and training. Survey findings presented in each section are supplemented by qualitative findings that illuminate the nature of change of and/or provide explanations for the survey findings. There is some discrepancy between the survey findings which overall show limited change in practice and the qualitative findings that indicate greater engagement in aligning practices more closely with the EEF recommendations. This may be due to bias in the interview sample and/or reflect the different perspectives of school-based leads who were implementing the EEF recommendations and head teachers who completed the survey (although in some schools head teachers did undertake the school-based lead role).

TA deployment and classroom practices

The findings presented in this section relate to the EEF recommendations 1, 2 and 3. Table 21 shows the results from a series of linear regression analyses on outcome variables pertaining to TA deployment and classroom practice. Some of these questions take the format 'how frequently do TAs work in the following activity?' The specific items are: 'Leading the teaching of the whole class', 'Supporting the teacher in their whole class delivery', 'Teaching specific pupils or small groups of pupils', 'Working with SEND pupils', 'Working with lower attaining pupils', 'Working with higher attaining pupils', 'Working with average attaining pupils', and 'Working with pupils eligible for Free School Meals'. On each of these items, the difference discovered between the pre-campaign survey and the post-campaign survey was not statistically significant at the $p < .05$ level.

The remaining items in Table 21 relate to questions phrased as 'To what extent do you agree with the following statement?' Again, on some of these items, the observed difference is not statistically significant. These are: 'TAs are aware of the learning needs of all pupils in the class', 'TAs often teach specific pupils different content from the rest of the class', 'TAs interactions tend to focus on completing a task', 'TAs understand how to scaffold learning', and 'Teachers spend at least as much time working with lower-attaining pupils as others'. To reiterate, lower values indicate practice more closely aligned with EEF guidance.

However, there are also items on which statistically significant, positive change has been observed over the study period. In Lincolnshire schools that responded to the survey, practice became more aligned with EEF recommendations than in Kent/Medway schools with regard to 'TAs ensure that pupils retain ownership over their learning and responsibilities' ($B = -0.32$, $p < .05$), 'Teachers deploy TAs during lessons to respond to 'real-time' needs of pupils' ($B = -0.34$, $p < .05$), and 'Teachers and TAs have a precise and shared understanding of their respective roles' ($B = -0.32$, $p < .05$). These results are evidence for a positive effect of the Mobilise programme on these specific elements of TA deployment and classroom practice, although to reiterate this is based on a sample of participating schools that may be biased toward those displaying greater engagement, and should be treated with caution given that corrections for multiple significance tests have not been applied..

Table 21: ANCOVA regression using variables on TA deployment and classroom practice

TA deployment and classroom practice	B	SE	N
Q8 - Leading the teaching of the whole class	-0.19	0.14	119
Q8 - Supporting the teacher in their whole class delivery	-0.12	0.14	122
Q8 - Teaching specific pupils or small groups of pupils (R)	0.13	0.10	122
Q9 - Working with SEND pupils (R)	-0.15	0.11	122
Q9 - Working with lower attaining pupils (R)	-0.09	0.12	120
Q9 - Working with higher attaining pupils (R)	0.20	0.12	118
Q9 - Working with average attaining pupils (R)	0.14	0.12	115
Q9 - Working with pupils eligible for Free School Meals (R)	-0.08	0.12	113
Q10 - TAs are aware of the learning needs of all pupils in the class	-0.09	0.12	122
Q10 - TAs often teach specific pupils different content from the rest of the class (R)	0.32	0.19	123
Q10 - TAs ensure that pupils retain ownership over their learning and responsibility for their work	-0.32*	0.13	122
Q10 - TAs interactions tend to focus on completing a task (R)	-0.33	0.17	123
Q10 - TAs understand how to scaffold learning	-0.20	0.11	121
Q10 - Teachers deploy TAs during lessons to respond to 'real-time' needs of pupils	-0.34*	0.14	122
Q10 - Teachers spend at least as much time working with lower-attaining pupils as others (R)	-0.16	0.15	123
Q10 - Teachers and TAs have a precise and shared understanding of their respective roles	-0.32*	0.13	123

Source: SHU baseline and follow-up surveys in Lincolnshire and Kent/Medway. Significance: * p<.05

Analysis of the qualitative data offers additional insights and possible explanations for some of the pre- to post-campaign changes to TA deployment and classroom practice experienced across Lincolnshire schools with survey data outlined in Table 21.

At the school level, TAs tended to be deployed in one of the following key ways.

- **Specific TA(s) allocated to a designated class (SBL A, G, J, K, L, M).** Where staff working patterns and school funding permitted, this model appeared to be the most commonly favoured and was usually a continuation of how TAs operated prior to Mobilise. The classroom teacher of the nominated class would normally be expected to work closely with the TA to decide which pupils were worked with throughout each day. Any interventions would usually be delivered by the same TA.
- **Pooling of TAs deployed across a key stage or year group (SBL B, C, D, E, I).** This deployment practice was more likely in small primary schools or where there was a large proportion of part-time TAs. However, the following school-based lead spoke about how their school had purposefully moved away from dogmatically assigning TAs to a particular class, preferring instead to target their deployment more precisely in terms of pupil need.

'They don't now work with one particular classroom. It's down to the Key Stage leader to look at the timetables and see where the support is needed.' (SBL C)

- **TA(s) allocated to particular pupil(s) due to a specific medical or SEN requirement (SBL D, G, L, N).** A limited number of children with an Educational Health and Care plan (EHC) were assigned one-to-one TA support for a certain number of hours. Overall this type of deployment accounted for a far higher proportion of TAs at special and secondary schools. One secondary SENCO (SBL N) reported that they only employed TAs 'funded by the EHCP top up'.
- **Specialist TAs leading on particular interventions or subjects across classes (CL A):** Here TAs would be expected to work across classes to make fullest use of either a pre-existing specialism (e.g. ability to teach Spanish or offer social and emotional support) or to deliver a particular intervention they had been trained in.

'We're looking now at having specialist intervention TAs. One TA that will lead maths interventions across the whole school and one that will lead writing interventions and one that will lead reading interventions as well. Not the typical model of there being a TA in class all the time and just working with groups and such.' (CL A)

It should be noted that schools often employed a combination of these four forms of deployment across their whole TA staffing group - for example, allocating the majority of TAs to a particular class but also having a small number of additional TAs deployed for more bespoke tasks, such as one-to-one support for a pupil with a medical need.

TAs working with a broader pupil attainment profile

By some distance the most significant and frequently reported (CL A, SBL A, SBL B, SBL C, SBL E, SBL F, SBL H, SBL I, SBL J, SBL K, SBL M and SBL O) change was that **TAs were at least to some extent working with pupils across a far wider spectrum of attainment than prior to Mobilise.**

This trend contrasts with the scenario before Mobilise, where TA deployment was said to be more limited to working with a narrower range of predominantly lower-attaining pupils or those with a specific medical or SEN requirement. The quotations below are illustrative of the majority of school-based lead responses describing a trend towards TAs working with a more diverse set of pupils. Typically, this meant moving away from one-to-one or 'velcro' approaches, towards more balanced deployment of teachers and TAs driven by pupil need. School-based leads' descriptions of this shift were frequently couched in language describing it as a fairer and more equitable use of teaching staff resource.

'Now we've ensured that everybody in the room – teachers, TAs, anybody in that room – is working with all groups of children. So that's been the biggest thing for us that we've made a change for... Basically it's done on a rotation system now, so all of our teaching assistants have a good understanding of all the children in the class, right from our one-to-ones to our higher attaining children.' (SBL J)

Nevertheless, there remained acknowledgement that pockets of resistance still existed and that certain teachers and TAs remained reluctant or lacked the confidence to routinely work with different types of pupil.

'We still have some teachers who may do it when somebody enters the room, but actually the vast majority of the time the TA is still working with that group [lower attaining pupils] of children. We know where they are and we know what we need to do.' (SBL I)

Some interviewees spoke about **individual staff (TAs and teachers) being at different stages of a journey in relation to implementing changes in their practice** more broadly. It was certainly the case that the extent to which schools fully embraced Mobilise and the EEF recommendations was

variable, ranging from schools whose existing practice very closely matched the recommendations already, through to those far more cautious about the appropriateness or feasibility of rolling out wholesale changes within their own context. This is discussed further in the Findings 4 chapter (Feasibility). Other changes in practice attributed by school-based leads to inputs from Mobilise are identified and briefly discussed below.

Greater effort to ensure TAs and the pupils they work with remain within the classroom as much as possible (SBL F, H, J, M). Various advantages were posited for this alteration in practice, including: helping to reduce the potential stigma felt by pupils being routinely taken out of their normal classroom environment; facilitating greater TA and teacher awareness of all pupils' learning needs; and for the TAs' own personal development there were benefits to having more consistent exposure to the full range of a qualified teacher's skill-set.

'So they don't just take the lowest achieving children out into the corridor now to work with them, so they might have a targeted group. More often than not they stay in the classroom now rather than, because again it was talking about children becoming disaffected by being taken out all of the time, so more often than not they work within the classroom alongside the teacher, not sending the children out.' (SBL M)

Throughout the course of the Mobilise project, many TAs were said to have developed a greater confidence in their ability to **respond to pupil needs as they arose in real time**. Respondents also frequently referred to TAs being more likely to take on a more judicious roaming role within the class:

'They've got the confidence to be able to leave that group, go off and support somebody that might need more of their help. So that roaming around the classroom has become more evident.' (SBL A)

This differed from previous practice where it was felt that TAs were constrained to assist only a limited number of pupils previously identified by a teacher, irrespective of whether there was a genuine need to assist within a given lesson:

'That's always been something that the teaching assistant, not through any fault of their own, will just stand there and wait to be directed by the teacher. I see less of that happening now, certainly within my own organisation.' (CL C)

This shift opened up greater opportunities for more dynamic and responsive ways of working. School-based leads sometimes described a greater tendency for the TA and teacher to work more interchangeably throughout the course of a lesson. For example, the TA might lead whole-class delivery (or at least segments of it) while the teacher intervened to work with a small group of pupils who may not have grasped a particular concept, or vice versa.

These new ways of working were often associated with **a greater sense of teacher and TA shared responsibility for all pupils' learning and progress**. This in turn was underpinned by enhanced trust and a stronger sense of autonomy for TAs. Data on these aspects are presented in the Findings 3 chapter (Other outcomes).

Interviewees consistently referred to **adapting TA (and teacher) classroom practices in order to promote enhanced pupil independent learning skills** (CLA, SBL A, C, F, G, I, J, K, O, KS2A).

'Some [TAs] now have made that shift to, you know, they really took on board the information that we had around clueing and prompting to facilitate learning and really develop that independence.' (SBL I)

Numerous resources and strategies were referred to by participants that helped support pupils to be independent learners, these were sourced in a variety of ways, including:

- By Mobilise Leads and Regional Leads for the specific purpose of the Mobilise project

- Through Mobilise Leads and Regional Leads signposting participants to other reputable, evidence based sources such as EEF or the MITA study
- By participants themselves sharing resources that had been useful within their own school. Regional Leads helped to disseminate these more widely by uploading onto a freely accessible Google Drive.

However, the scaffolding pyramid (see also the section below on TA and teacher training) was consistently singled out as being the most effective ongoing aid to assist making appropriate judgements about the level of support offered to pupils across learning tasks. There was strong evidence that use of the self-scaffolding resource had become an embedded part of TAs' day-to-day classroom practice.

'There's a scaffolding pyramid around questioning and that was greeted almost universally across the system with huge enthusiasm. There will be very few schools now who aren't using that tool in terms of discussion and their TAs being aware of their questioning with pupils. I think especially when there's a distinct tool, it has really made a difference within schools in terms of what's happening in terms of classroom practice.' (KS2)

As TAs became more familiar with the principles underlying the pyramid, in conjunction with wider whole-school changes relating to TAs (such as better communication protocols to include TAs and more CPD opportunities), they were often reported to gain **greater confidence and competency at differentiating questioning** according to the needs of different pupils. There was said to be fewer instances of 'spoon feeding' or overly directing pupils towards task completion. In the quotation below, one school-based lead provides a rich account of just how fully the self-scaffolding and associated terminology were being understood and practised by all throughout the school including pupils.

'That's the bit that the children understand as well. We've got the self-scaffolding, prompting, clueing, modelling, correcting, we went through all of those things as staff, TAs included, and also the children. So if you ask the children, they can in their speak tell you what each of those mean and when they need this, you know, did I just need a hint? Did I actually need to know? Was I able to just get on with it on my own? So we have those charts up in every classroom and the children and the TAs follow that. That is a huge shift, definitely, as opposed to just correcting or giving the right answer, actually giving them what that child needs at that particular time, based on where they're at with their learning on that skill that we were teaching. That is very much at the heart of every classroom and when you go around the school that's what you see.' (SBL O)

A different school-based lead also highlighted the extent to which the pupils had become familiar and conversant in the terminology associated with the self-scaffolding pyramid, something that was attributed at least in part to the visibility of materials within the classroom.

'Interestingly they also highlight how the pupils themselves were also conversant in the terminology used within the self-scaffolding pyramid; something that was encouraged through the materials being visible to all within the classroom.' (SBL K)

A further feature of changed TA practice highlighted by the school-based lead quoted below was an alteration in marking policy. TAs were now expected to give detailed feedback in pupils' books to make clear the level of support they had offered to pupils, again using the self-scaffolding terminology.

'TAs are marking whether they've given that child a prompt for that questions, whether they've cued them, whether that child has ended up at the end of a lesson being a self-scaffolded learner. So independent skills were really high on our agenda, to be able to increase across the school.' (SBL A)

Finally, one school-based lead pointed out that the work being undertaken at the school through Mobilise to promote greater pupil independence had not taken place in isolation, but instead built directly upon previous efforts to encourage a growth mindset approach to pupils' learning.

'I think, you know we've done a lot of work alongside that around things like growth mindset as well, so encouraging children – actually no it's not that you can't do it, you can't do it yet, and working them through that as well.' (SBL F)

TA/teacher communication

The findings in this section relate to the EEF recommendations 4 and 7. Table 22 reports results from linear regression models on Mobilise programme outcomes related to communication between TAs and teachers. The findings suggest that the Mobilise programme is associated with statistically significant improvements in two areas. Firstly, survey respondents in Lincolnshire were more likely to increase their level of agreement with the statement 'TAs are informed of the concepts, information and skills being taught by the teacher in lessons' than their counterparts in the comparison region ($B = -0.24$, $p < .05$). Positive change was also more pronounced in Lincolnshire on the item 'There is regular feedback from TAs to teachers after lessons' ($B = -0.36$, $p < .01$). However, on the items 'There are sufficient opportunities for teachers to brief TAs prior to lessons' and 'There is always scheduled time each week for teachers and TAs to communicate', although responses became more aligned with EEF guidance in Lincolnshire compared to Kent/Medway over the study period, the differences were not statistically significant.

Table 22: ANCOVA regression using variables on TA/teacher communication

TA/Teacher communication	B	SE	N
Q10_2 - TAs are informed of the concepts, information and skills being taught by the teacher in lessons	-0.24*	0.10	123
Q10_4 - There are sufficient opportunities for teachers to brief TAs prior to lessons	-0.31	0.16	123
Q10_5 - There is regular feedback from TAs to teachers after lessons	-0.36**	0.13	123
Q14_1 - There is always scheduled time each week for teachers and TAs to communicate	-0.28	0.19	109

Source: SHU baseline and follow-up surveys in Lincolnshire and Kent/Medway. Significance: ** $p < .01$, * $p < .05$

Analysis of interviews with school-based leads support the positive survey findings on changes in TA/teacher communication. There was recognition across the school-based leads interviewed that regular communication between teachers and TAs was important and something in most instances that had increased during the course of the Mobilise programme.

Underlying this shift in practice was a heightened commitment by schools to involve TAs more routinely in key whole-school meetings, twilights and inset days, as well as providing more tailored and specific training and CPD (see the section below on TA and teacher training for more detail).

'They all now join our staff meetings, which is great, because then if you're armed with information that helps you with your job, doesn't it? So they all join that, so therefore there's more training going on, which is really useful.' (SBL G)

At a more class-specific level, there was evidence of greater opportunities for TAs to become more actively involved with class teachers in lesson planning and preparation. This assumed various forms. At one end of the scale, it might involve an allocation of time to permit co-construction of lesson plans. At the other end, there was reference to how non-verbal forms of communication between teachers and TAs had been reviewed to ensure more timely exchange of information, such as lesson plans. During the course of the Mobilise programme, one school had created a more 'consistent' approach by ensuring that lesson planning from teachers was written directly into Google Docs meaning that

any TA associated with that particular teacher's class could access lesson planning immediately from the time it was devised.

'The TAs and the teachers have actually got that time, that really crucial time together, to be able to do some planning. For me, teaching assistants are being more involved in planning and preparation. They've got that clear understanding of what's happening during the day – which children to target.' (CL C)

Involving TAs in these kinds of ways sent a powerful message about their status and increased the likelihood of them having sufficient awareness, knowledge and confidence to perform their role well and to feel able to communicate with, and even challenge teachers and senior leaders.

'I think they're more willing to come and talk to us [Teachers or SLs] if they feel things aren't right or they're worried about something, rather than thinking oh that's just the way it's got to be. I think they're more willing to come and say now actually we're unhappy or it's not working or we're a bit bothered about this. Perhaps they feel they've got a bit more of a voice.' (SBL F)

Formally extending the contractual hours of TAs was a further approach employed to help safeguard sufficient space for dialogue between teachers and TAs. Typically, this amounted to a relatively modest increase in hours over a week. However, it did allow TAs to attend important school meetings scheduled outside of core hours and permit consistent exchange of information between teachers and TAs. A number of school-based leads spoke about how they valued this additional time to be able to clarify learning objectives and expectations at the start of a lesson and share information on pupil progress at the end, particularly if TAs were leading on interventions.

'We made it so all TA contracts started at 08:40, to allow for 10 minutes in the morning where they had that time to be able to be able to speak to the teachers. We also made the contracts finish later at 3:45 so then they had time after school to discuss with the teacher the following day any interventions that had happened in the afternoon, and to give them that little bit of extra time.' (SBL A)

'We have about five or ten minutes quiet reading at the beginning whilst we're doing the register and that's when I then will speak to the TA and say based on what happened this morning, this is what I would really like you to do. I have to say, we did it on Friday and the TA came back to me and said, 'I really think he's got it now'.' (SBL O)

Although extending TA hours was often portrayed as the ideal and most secure way to protect time for communication between teachers and TAs, this was regularly reported as being unfeasible due to tight financial budgets or because certain TAs did not wish to extend their hours because of other commitments. Schools most frequently addressed these issues in two ways. The first was to pay TAs on an ad-hoc basis for any additional hours to cover attendance at key events such as specific inset days or twilights as and when deemed relevant.

'It's a little bit of both. It's not a change of contract, but it might be additional hours, which obviously is a cost to the school, but ultimately it pays off in the end, doesn't it?' (SBL G)

Alternatively, schools reviewed timetabling carefully to free up space to ensure that TAs had a minimum allocation of time to converse with the teacher(s) of the pupils they were supporting.

'We have now ensured that every class has an allocated time a week to have a conversation about planning and children and assessment and all the things they need to be talking about...We haven't had to extend any hours. We didn't have the budget to be able to extend any hours, but yes, we've just been creative with our timetabling and organisation to make sure that everybody gets a period of time together.' (SBL J)

Although the general trend was that TAs and teachers were now communicating more regularly and effectively, there remained substantial variations across and within schools.

'I would say unfortunately for us it is still opportunistic and it is still a bit ad hoc. It depends on the PSAs. Some of our PSAs will come in earlier than their allocated hours, but it is goodwill, or they will stay a bit longer at the end of the day to support the teachers or to have those conversations, but it's not consistent across the school.' (SBL I)

There remained quite a few instances of schools continuing to rely on TAs' goodwill in order to ensure the necessary exchange of routine communication between themselves and teachers. This raises questions not only about the fairness of such a system that depends on its lowest-paid members of staff routinely giving up their time for free but also how effective and sustainable it is for ensuring the regular exchange of information between TAs and teachers required to promote an effective learning environment for pupils.

'But also within that whole-class teaching role, one of the recommendations was about being prepared and being able to feed back after a lesson. That is not in the contract. It does rely on our LSAs' goodwill, but they all do that very willingly. There aren't any who won't find out or are not willing to receive an email about planning at the beginning of the week, or who are not willing to spend 10 minutes at the end of the day to feed-back on something that's happened.' (SBL B)

Vignette 1 provides an insight to the changes made to improve TA/teacher communication in case study school and the perceived effects:

Vignette 1: Perspectives on improved TA/teacher communication in case study school A

The MITA survey was completed by TAs and teachers and the results highlighted the issue of teacher/TA communication. Both teachers and TAs interviewed as part of the case study agreed there was a need to improve lines of communication to avoid working in isolation. As one teacher observed: the beginning of last year I got a sense from my TAs that they did feel like they were out of the loop quite often' and had to wait to be 'fed information'. (Case Study A, Teacher focus group).

One school level response to this was to create a new school-based TA guidance policy that stated that teachers and TAs needed to agree times to communicate between themselves because of the wide variation in contractual hours between TAs.

Classroom observations revealed increases in communication between some TAs and teachers - moving in certain cases from the teacher just handing over a plan and the TA getting on with it - to communication within the lesson about how the children are progressing and the appropriateness of the task for the child. This has resulted in children being shifted more appropriately within a lesson and in more effective support.

A further approach to improving communication was TAs now being asked to make written assessment notes in whole class teaching to feed back to the teacher. This has been successful in some instances but not all and is an area for further work.

Finally, an intervention evaluation form completed by the teacher and TA, has been put in place for out of class interventions to measure effectiveness. This has been useful in supporting conversations to happen - particularly where the TA doing the intervention is not the class TA.

'The other thing that we've done is .. the teacher and the TA have to work together to fill in the intervention form to see how effective it's been. Because that was one of the issues that we've found - the interventions that were taking place outside the classroom, perhaps with TAs from other classes, it was then not really being followed up... Having that form has formalised that process, particularly when the TA doesn't usually work in the classroom.' (Case Study A, SBL)

Overall, the SBL reflected that 'in most cases, they (TAs/Teachers) have certainly found more time, even if it is just a few minutes here and there' but discussion among the TA focus group in particular suggested that consistently finding time to communicate with teachers was more difficult for TAs that did not start their contractual hours prior to lessons starting.

Types of interventions used

The findings in this section relate to the EEF recommendations 5 and 6. Table 23 displays the results from regression analyses on outcomes relevant to the use of interventions. In Lincolnshire, respondents were more likely to agree that 'Interventions are always supported by structured lesson plans and resources' after the campaign. The degree of change was significantly greater than in the comparison group ($B = -0.47$, $p < .01$). For the other two items, no statistically significant change was observed.

Table 23: ANCOVA regression using variables on use of interventions

Use of interventions	B	SE	N
Q14_3 - Interventions are always supported by structured lesson plans and resources	-0.47**	0.15	109
Q14_5 - Interventions occur regularly (around 3-5 times per week)	0.17	0.13	108
Q14_6 - Interventions are sustained over time (around 8 to 20 weeks)	-0.13	0.17	108

Source: SHU baseline and follow-up surveys in Lincolnshire and Kent/Medway. Significance: ** $p < .01$, * $p < .05$

The qualitative data revealed quite divergent practices in relation to 'intervention' use which appear to reflect differing understandings of the term 'intervention'. School-based leads tended to refer to 'interventions' in three distinctly different ways, namely;

- **Structured evidence-based interventions.** These are often commercially designed and available only for a fee (but not always) and proven to be effective for certain types of pupil under particular circumstances. Emphasis is placed on close adherence to intervention instructions in terms of delivery and frequency of input. Direct training from the provider is often a requirement. This is the type of 'intervention' referred to in Table 24.
- **Bespoke tailored interventions.** Typically, these are custom-designed by staff within a school to address gaps in learning. Ordinarily these would be delivered for relatively small groups of pupils strategically identified and run over an extended block of time.
- **Same-day intervention.** This type of intervention is quite different to the aforementioned interventions. It is heavily influenced by the principles of mastery learning where pupils with gaps in understanding or misconceptions from a particular lesson are promptly identified and given additional input. The pupils involved are determined on a lesson-by-lesson basis, based on their level of understanding.

Structured evidence-based interventions

Although the survey outcomes indicate that interventions were more likely to be supported by structured lesson plans and resources following the campaign, there was little reported change in the use of structured evidence-based interventions in the qualitative data. Only a few school-based leads spoke about how the Mobilise project and the Intervention Fair in particular had been beneficial for raising awareness of evidence-based interventions and had convinced senior leaders to introduce new accredited schemes for TAs to deliver.

'The main thing that Mobilise has changed is just some of the interventions [evidence based] we're using, due to finding out about them through Mobilise.' (SBL C)

The quotation below describes how one school shifted away from putting the responsibility on their TAs to reactively design their own interventions, towards a policy where school leaders sought out existing evidence-based interventions for TAs to follow instead.

'For things like intervention... sometimes it was just TAs coming up with their own thing or finding things that had been around for a long time. We've bought some more sort of focused interventions so that the TAs are delivering a given programme rather than trying to find/cobble bits together or use the time... it was sort of firefighting.'

In a different example, a school-based lead welcomed their school utilising more evidence-based interventions because the accompanying training and resources gave them greater confidence in their credibility.

'The interventions are more rigorous and more formalised, which is great, more evidence-backed and more backed around more accurate initial assessments, and that comes down to the Catch-Up training basically.' (SBL G)

Bespoke tailored interventions

Other schools expressed reservations about signing up to evidence-based interventions, or at least too many of them. A central concern was that these could be overly prescriptive in design, which could act against ensuring the specific needs of individual pupils were always addressed.

'That was the one thing that out of the whole project we didn't find as useful. There was a lot of talk around prescribed intervention programmes. At the school we base our intervention

around the needs of our children, so we don't use a huge amount of off-the-shelf intervention schemes.' (SBL J)

Of course, it is important to point out that for most schools it was not a case of one or the other. Instead, tailored and evidence-based structured interventions regularly operated in combination to fulfil different purposes for different pupils. The following quotation provides a good illustration of this:

'If we find a pupil coming up with some needs that aren't met by one of the structured intervention programmes, that's where things like their SEN targets will come into play, or we will look at a more tailored programme. For example, when it was coming up to the Year 2 SATs, there were some children in Year 2 who were struggling with sentence structure in their writing, but the teacher and TA worked together to design a short programme to look at over - I think it was four weeks - three times a week, just to boost them in that area. That was what we call a bespoke intervention. And that's where the teacher will usually provide the learning outcomes for the TA to use.' (SBL C)

Same-day intervention

Despite no evidence that same-day intervention has been directly advocated through either the Mobilise programme or the EEF guidance, there were several references to schools choosing to adopt same-day interventions - a key characteristic of mastery approaches being adopted more widely across schools in England. Mathematics mastery currently has a high profile in the English educational policy landscape, has been incorporated into recent Department for Education (DfE) curriculum changes and is promoted and supported by influential organisations such as the National Centre for Excellence in Teaching Mathematics (NCETM). The school-based lead account below outlines a deliberate departure from structured evidence-based interventions towards more same-day interventions.

'There were a lot fewer children going out of that classroom for set interventions. The interventions that tend to have gone on now are interventions again, as I was saying before, on a day-to-day basis. So okay, they didn't understand this multiplication, we'll hit them with a 20 minute session on that, rather than following a set programme. That's been quite a big shift... Yes it's gone that way really. We've not bought anything in. We've thrown most of the things out to be honest.' (SBL K)

One of the most appealing aspects of same-day interventions was said to be the greater flexibility it afforded to target different pupils based on the realities of how much understanding had been derived from a specific lesson, as opposed to assuming that the same pupils would require extra support throughout an extended block of time. The account below is fairly representative of how same-day interventions were arranged across different schools.

'...same-day intervention. So work that's been carried out in the morning I then make sure I've had feedback with the TA in the morning that's been in the classroom and I also look at the children's work over lunchtime and then I pick out those children that need that particular intervention in the afternoon based on something that perhaps they haven't grasped as well as others have in the morning. That's what the TA does in the afternoon. That's what we try and do across the school. That same-day intervention has come from this year and that feedback from TAs has come from that project particularly.' (SBL O)

Participation in structured evidence-based interventions

Table 24 shows the number of Lincolnshire schools and the number of comparison schools in Kent and Medway that took part in the eight TA-led interventions that were promoted at the Mobilise Intervention Fair; however, there was a high level of missing information. Where information is missing this was either due to intervention providers not keeping records of these data, or the

intervention not being available to schools within Lincolnshire and/or the Kent and Medway area. Due to the paucity of data and the associated problems arising from this, the data collected were collated and only summaries are provided. From these figures it is evident that the sign-up rate for Catch Up programmes (for both literacy and maths) was higher in 2016-17 than 2015-16. Furthermore, in 2015-16 more of the comparison schools were undertaking the training than Lincolnshire schools, but in 2016-17 the number of Lincolnshire schools was higher. This could be interpreted as an indicator of an effect of Mobilise, but there are no data to evidence a causal link.

Table 24: Lincolnshire and Kent and Medway school participation in structured TA-led interventions

	Switch-on Reading	Switch-on Writing	Catch Up Maths	Catch Up Literacy	Catch Up Maths & Literacy	ABRA	NELI	Digital Feedback
Using intervention 2015-16								
Lincolnshire	1	0	5	0	0	N/A	Not available	Not available
Kent and Medway	0	0	16	6	3	N/A	Not available	N/A
Signed up between 2016-17								
Lincolnshire	1	0	13	23	7	N/A	Not available	Not available
Kent and Medway	0	0	5	2	2	N/A	Not available	N/A
Expressed an interest but did not sign up								
Lincolnshire	0	0	Not available	Not available	Not available	Interest expressed exact number not available	Interest expressed exact number not available	Not available
Kent and Medway	0	0	Not available	Not available	Not available	N/A	Not available	N/A

Source: Intervention providers, N/A=not applicable

Table 25 shows, at the level of individual interventions, some of the factors that may have influenced the uptake of interventions. Training type and location may have prevented some schools from being able to commit to undertaking the intervention and prevented providers from being able to deliver the intervention training. For example, Catch Up training could either be delivered in schools or at training centres throughout the UK, increasing the likelihood that schools could facilitate staff attendance. For some intervention providers (such as ABRA), geographical constraints can be seen as a limitation. The size of the intervention provider and the number of staff/trainers were limitations that may have affected uptake. For example, if training was given to schools outside of a certain geographical location, it would have been difficult for providers to then follow up and support those schools. The commercial availability (or lack of it) may also have impacted uptake. Both ABRA and Digital Feedback were not commercially available. This fact, alongside the lack of trainers (for ABRA), may explain the low or lack of available uptake figures from those providers. Furthermore, although information was available about schools employing Catch Up interventions, it is important to note that these numbers only represent schools signing up and taking part and do not necessarily reflect schools delivering the intervention at the suggested 'dosage'. For example, some schools may have only one teacher trained, whereas Catch Up recommends that two TAs and a senior member of staff are trained. For a meaningful effect to be observed, TAs are prescribed to deliver the intervention in 15-minute intervals twice a week.

Table 25: Variables potentially impacting uptake of interventions

	Switch-on Reading	Switch-on Writing	Catch Up Maths	Catch Up Literacy	Catch Up Maths and Literacy	ABRA	NELI	Digital feedback
Training type	Attend a training course	Attend a training course	Training centres or school based	Training centres or school based	Training centres or school based	Trainers go to trainee	Attend a training course	Training event + 8 follow-up events travel from trainees required
Ability to use resources without training	No	No	No	No	No	Yes	No	No
Commercially available	Yes	Yes	Yes	Yes	Yes	No	Partial	No
Attended mobilise roadshow	Yes	Yes	No	No	No	Yes	Yes	Yes
Limitations	None stated	None stated	School level dosage	School level dosage	School level dosage	Location and limited number of staff/trainers	Limited number of staff/trainers	Only available in a limited number of locations

Source: Intervention providers

Table 26 shows results from a set of survey questions on awareness and use of specific interventions. In most cases the modal response indicates that the respondent is aware of the intervention but has not used it. Eleven per cent of respondents claimed to be using Catch Up Numeracy as a result of Mobilise, and 10% attributed their use of Catch Up Literacy to the programme. For each of the other listed interventions, fewer than 5% of respondents reporting using it as a result of Mobilise. Before the campaign, Catch Up Literacy was used by 22% of respondents making it the second most popular behind Power of 2, with 27% of respondents indicating that they were using this before taking part in Mobilise.

Table 26: Schools participating in interventions

	Not aware	Aware but never used	Was using prior to Mobilise	Now using as result of Mobilise	Now using, but not as result of Mobilise	N
1) Catch Up Literacy %	6.8	56.8	21.6	9.5	5.4	74
2) Catch Up Numeracy %	9.5	56.8	17.6	10.8	5.4	74
3) Switch-on Reading %	22.9	62.9	10.0	2.9	1.4	70
4) Switch-on Writing %	22.9	67.1	5.7	2.9	1.4	70
5) Nuffield Early Language Intervention %	30.4	60.9	5.8	1.4	1.4	69
6) Power of 2 %	18.3	39.4	26.8	4.2	11.3	71
7) ABRACADABRA %	45.6	50.0	1.5	1.5	1.5	68
8) Digital Feedback in Primary Maths %	34.3	52.9	4.3	4.3	4.3	70

Source: SHU survey. Base: all Lincolnshire respondents indicating that they participated in Mobilise. Row percentages

TA and teacher training

The findings in this section relate to the EEF recommendations 4, 5 and 6. Table 27 reports results from linear regression models on campaign outcomes related to the training of TAs. We find statistically significant, positive change associated with the campaign on three of the five items examined: 'TAs usually receive in the region of 5-30 hours training/development per intervention' ($B = -0.42$, $p < .05$); 'Teachers receive appropriate and comprehensive training on how to use TAs to supplement their work' ($B = -0.67$, $p < .001$); 'TAs receive little training on how to work effectively with teachers' ($B = -0.60$, $p < .01$). Positive effects of the programme are also found for the other two items covered here, but these changes are not statistically significant at the $p < .05$ level.

Table 27: ANCOVA regression using variables on TA and teacher training

Training	B	SE	N
Q14 - TAs usually receive in the region of 5-30 hours training/ development per intervention	-0.42*	0.19	108
Q15 - Teachers receive appropriate and comprehensive training on how to use TAs to supplement their work	-0.67***	0.17	124
Q15 - TAs receive little training on how to work effectively with teachers (R)	-0.60**	0.18	124
Q15 - TAs are well trained to support the pupils they spend most time with	-0.03	0.11	124
Q15 - Staff who manage TAs rarely receive training on how to deploy TAs effectively (R)	-0.20	0.21	123

Source: SHU baseline and follow-up surveys in Lincolnshire and Kent/Medway. Significance: *** $p < .001$, ** $p < .01$, * $p < .05$

The general trend detected through the qualitative data was aligned with the survey findings. There was an upsurge in the amount of training being undertaken by TAs and to a lesser extent training by teachers specifically related to working with TAs. The following quotation from a key stakeholder reflects on findings from their own internal evaluation of Mobilise. It broadly arrives at a similar headline conclusion to the finding emerging from school-based lead qualitative interviews: that opportunities for training TAs have increased and become more tailored to their overall needs, as opposed to being limited to a narrowly defined population of pupils or a specific learning need - which is arguably reflective of the broader range of pupils most TAs are now working with.

'There's a lot more training. Our Survey Monkey revealed that that's happening far more now – bespoke training for TAs is taking place, whereas in some schools they were receiving no training whatsoever, or the training they were receiving was special needs. It might have been something on autism or dyslexia but nothing to do with just being a general TA and curriculum-based or pedagogy, so that's a big shift.' (KS 4)

The main types of training that were reported by interviewees are discussed in more detail below.

Maximising the practice of TAs (MPTA) training

Participation at the MPTA training delivered by one of the Mobilise regional leads, but not directly part of the Mobilise programme itself, was frequently mentioned by interviewees and monitoring data indicates was taken up by 25% of all participating schools (see Table 16 in the Findings 1 chapter (Mobilise reach and engagement)). The training was generally very well received but most schools were far more likely to send TAs as opposed to teachers.

'The TAs actually went on some separate training to something run around [regional lead]. She did something for the TAs from all schools. Our school went – all the TAs. They did something particularly with self-scaffolding.' (SBL E)

'So all my TAs attended a face-to-face training session on questioning and effective questioning. That was really powerful. They came away from that with lots of ideas. Some of them go along thinking, 'Oh I know this,' but actually they all had something they could bring back, which was great.' (SBL K)

Structured intervention training

In instances where schools ran structured interventions, interviewees tended to make passing reference also to undertaking the accompanying training in some form. Additional detail was rare so there was little sense of the duration of training but it was clear that the proportions of the TA staff base receiving training were varied. In some cases it would be all TAs and in others just one TA who would be expected to cascade the training to the others in school also using the intervention.

School-level training

Most schools represented in the qualitative interviews had put in place more in-school training of TAs. This reflects both an input of the Mobilise programme through the work of school-based leads and an outcome in terms of aligning practice more closely with the EEF recommendations (See the Findings 4 chapter (Feasibility) for more detail on implementation processes).

TAs increasingly attended whole-school training sessions delivered through insets and twilights. However, financial limitations meant that most schools had to be discerning about which training events they could fund TAs to attend, or rely on their goodwill.

'For teaching assistants the training has tended to be independent of staff meetings, because they don't come to staff meetings generally, they only come to specific ones. So they came to one on maths, which is an area we were looking at and we did a lot on, so I think we had two that they came to for maths. Then we had individual ones specifically linked to the Mobilise project and about supporting in class. They were run in the afternoon when they were paid in addition to come in and I ran them.' (SBL H)

In other examples, the responsibility to train TAs was more devolved towards the teachers themselves. This often became linked into performance management processes. The rationale was that classroom teachers were best placed to work with specific TAs to identify areas that required attention and to deliver appropriate training.

'So through the Mobilise project we very much gave again the ownership to the year teachers of what they felt they needed to develop, so whether it was that actually I need to make sure that my PSA has planning for the lesson in good time so that they're prepared for their role in the lesson; whether it was setting up good modes of communication; whether it was upskilling their PSA in terms of their subject knowledge. So, for example, if your PSA was in Year 5, but they had not previously worked in Year 5, how are you going to very quickly support their understanding of the curriculum expectations so that they know how to support the children with that? It might have been around feedback, so one year group would be focused on feedback to upskill their PSAs in terms of feedback. So there was almost that more bespoke approach depending on need.' (SBL I)

This model obviously became most effective if there was protected time and space for teachers and TAs to work closely together. However, there was acknowledgement that there were often limited opportunities to do so. As a result, in the school described in the above quotation, staff were consulted to identify key themes and then the school initiated a weekly run meeting dedicated to TAs and their CPD. This amounted to a significant change for TAs who prior to Mobilise had never experienced such a focus on their own CPD needs.

'The teachers don't have much time before school or after school to have discussions with their PSAs or for us to meet with them. So we implemented a weekly meeting and we very much gave that a CPD focus. So we talked to the class teachers, talked to the PSAs, identified common threads and then used that as a vehicle for CPD for PSAs as well, so they feel that they're getting development and they're getting the opportunity to have those experiences of meeting together and getting a bit of training, going away, giving it a go, all of that. We'll continue that this year.' (SBL I)

Impact of attendance at cluster meetings on practice outcomes

Data on attendance by school-based leads at cluster meetings were supplied to the evaluators by the Mobilise team. This indicator was taken as the best available quantitative measure of engagement with the programme and is summarised in the Findings 1 chapter (Mobilise reach and engagement). Treating the number of cluster meetings attended as a scale variable, linear regression models were estimated using the same set of outcome variables as analysed earlier in this section of the report. No statistically significant relationships were found between indicators representing practice aligned with EEF recommendations on TA deployment and the number of cluster meetings attended. The results from the analyses are tabulated in Appendix 97.

This is a surprising finding, given that the cluster meetings prepare school-based leads to implement the EEF recommendations and also in light of the data presented in the Findings 4 (Feasibility) chapter which provides evidence that school-based leads were generally positive about the usefulness of the cluster meetings. A further exploration of the qualitative data was unable to provide any explanation for this finding.

Findings 3: Evidence of promise – Other outcomes

The previous section has presented evidence on practice change. This section presents interviewees' perceptions of other intermediate outcomes for TAs, teachers and pupils, as well as indicators of positive outcomes at the school level and across the county, including enhanced 'research readiness'. Outcomes for school-based leads and cluster leads are also reported.

This section draws on the qualitative analysis. While we indicate which outcomes were mentioned frequently by interviewees, it was beyond the scope of this evaluation to assess the extent that these outcomes were evident across all schools. As with the practice outcomes discussed in the previous section, caution is needed in attributing the outcomes solely to the scale-up campaign in Lincolnshire.

Key findings

1. **The main 'other' perceived outcomes for TAs were: feeling valued and empowered; taking the initiative and greater responsibility; and increased knowledge; understanding, confidence and self-efficacy. These outcomes were highly interrelated. Some caution is needed in interpreting these findings as there was limited data gathering from TAs so they are heavily reliant on the perceptions of other stakeholders.**
2. **There were fewer reports of 'other' perceived outcomes for teachers, and where these were mentioned they focused on: increased knowledge and understanding; and better, and more trusting, relationships with TAs. Reported outcomes for pupils were improved independence and resilience and enhanced progress and attainment.**
3. **Survey data indicate that schools participating in Mobilise became better equipped to use research for informing practice. The qualitative data indicate increases in a number of indicators of 'research readiness' including: increased commitment to using research; engaging a wider range of staff in research use; the development of criticality in engaging with research; and the establishment of school structures and processes to support research use.**
4. **Other reported school-level outcomes were: increased cohesion and better staff relationships; shared responsibility for pupils' learning; incorporating the work of TAs into school policy and priorities; and financial benefit.**
5. **The majority of school-based leads reported positive professional development outcomes, particularly the development of leadership skills and increased confidence in their abilities as leaders and to manage change. Some cluster leads also reported professional development outcomes.**
6. **A range of positive outcomes were perceived to have occurred at the county level. These spanned the establishment of an infrastructure to support research use across all Lincolnshire schools; the establishment and strengthening of networks across the county; embedding the use of research evidence in strategic decisions and funding mechanisms; leveraging in further funding for implementing research-informed practices; improved leadership capacity; and enhanced profile and pride. Some caution is required in interpreting these findings as they were primarily drawn from stakeholders responsible for implementing the campaign in Lincolnshire so they do not include independent perspectives.**

TA outcomes

The other outcomes for TAs mentioned by interviewees were about feeling valued and empowered, taking the initiative and greater responsibility, and increased knowledge, understanding, confidence and self-efficacy. The interview narratives indicate that all of these outcomes were highly interrelated. It is important to note that the only TAs interviewed were in the two case study schools, so the

findings are primarily drawn from school-based leads', cluster leads' and key stakeholders' perceptions of TA outcomes, so caution is needed in reading this findings..

When asked directly about other outcomes for TAs, school-based leads most frequently mentioned **feeling valued** (SBLs - A, B, C, G, I, K). The regional lead (KS4) and one cluster lead (CL B) also reported that feedback they had received directly from TAs and from school-based leads had also emphasised this outcome. Some school-based leads attributed TAs' sense of feeling valued to the focus being placed on their work and the investment in their development, particularly given the negative press coverage of the value of TAs:

'I think at the beginning they were quite suspicious of why we were targeting TAs... They were thinking, 'Oh crikey, he's going to get rid of us. What's this all about?' I quickly managed to turn that round and say, 'Look, we're investing time into you.' Just the thought that we were investing time into them raised their status within school straight away. They're certainly walking with a bit broader shoulders around school than they were.' (SBL K)

Feeling valued was also often associated by interviewees with another TA outcome - **taking the initiative and greater responsibility** (mentioned by SBL B, F, J and KS4A). As one school-based lead explained:

'[the TAs] feel a lot more valued, because we do actually put a lot more emphasis on them being able to make, and trust them to make, certain decisions, and also settle in their interventions. ... So the TAs do say they feel a lot more valued as staff members of the school.' (SBL C)

However, in one instance the opposite effect was described, where TAs who had previously been expected to progress the learning of particular groups of pupils [typically lower attainers] in relative isolation from the more qualified class teacher:

'I think before there's probably been an over-reliance on them (TA) to move that learning forward in certain aspects, so I guess it's that realisation that they aren't necessarily the qualified expert that's there. That's probably the biggest change.' (SBL K)

A further TA outcome that interviewees often linked with feeling valued and taking the initiative and greater responsibility was **feeling empowered** (mentioned by CL B and SBLs B, C, F and J):

'I was having teaching assistants across the whole of school coming to me regularly saying, 'I've tried so-and-so, it was fantastic today. Have you thought about...?' I even had teaching assistants going off doing their own research. We've had teaching assistants that were very quiet in school that are taking initiatives to run clubs and all sorts of things. They just feel empowered. .. now they feel even more so that they've got an important role within the classroom and school. ... That was probably the biggest thing that we took on board, looking at how to empower our teaching assistants a little bit more with using their own initiative.' (SBL J)

Elaborating on what led to feelings of empowerment, school-based leads also mentioned TAs having ownership over what they were doing in school, being involved in whole-staff meetings, increasing teacher and TA trust and understanding, and a further outcome for TAs was increased knowledge and understanding. As one school-based lead explained:

'the training we did with the TAs on questioning – they feel quite empowered by that and knew then what's the best thing to ask to try to bring children's learning on.' (SBL C)

Reports of increased knowledge and understanding (mentioned by SBL B, C, H) often related, as in the quotation above, to questioning. One school-based lead drew attention to improvements in TAs'

subject knowledge which they attributed to the combination of training and working alongside an experienced teacher:

'I think their understanding of the curriculum [is much better], ... it's often things they wouldn't have learnt in school, certainly things like terminology for English that needs to be taught and the grammatical aspects... I think both [training and working alongside an experienced teacher] have helped, because I think one has reinforced the other,one by seeing it in action and one by the discussion and reading the documents that we gave out and looking at that side of it and talking about what they do in their own experiences. So I think it's a combination.' (SBL H)

Engagement with research is covered more fully in school readiness for research later in this section with specific reference to self-reported research readiness. However, it is important to note that in two schools the school-based leads (SBL J, O) reported that TAs had been motivated to engage directly with research through the Mobilise project:

'It's got [TAs] to see research isn't for academics, ... because Mobilise has been able to direct us to peer research that actually has had an impact, we're not wasting our time on research that's not good research.... that has enabled us to encourage everybody to see how positive that can be and ..., when we've put stuff up in the staff room on things that have come out, we can go up and find that staff have actually picked that up and they're actually skimming through it now and looking at what's being said. So I think as far as that's concerned it has changed people's perception of it, that research isn't universities, it's to do with real life, and what we can do with that kind of research in the classroom.' (SBL O)

TA's perspectives on outcomes are illustrated in Vignette 2.

Vignette 2: TA perspectives on outcomes in case study school B

Greater investment in the role

Becoming involved in Mobilise was regarded as the catalyst to a number school based changes, positively received by TAs. These included extended contractual hours (used for dedicated, daily, communication slots with teachers), access to more training (including MPTA) and involvement in whole school meetings (with additional payment if appropriate).

'I think it's being given that time in the mornings, the briefings, and then that time when we speak to the teachers.' (Teaching Assistant A)

'But we did do some [training] now and then but it was not as often, and of course you have to be updated all the time in education because of changes aren't there, all the time, especially when there's a big change in the curriculum. And often TAs before - they were quite upset because we had to step up, and we knew not much about it. ' (Teaching Assistant B)

'We now have a little bit more training about things. Before it was just teachers, wasn't it, going to training. Now we've been told at briefing that we are welcome to any teachers' training and we can sign up for things' (Teaching Assistant B)

Feeling valued

These changes helped to promote greater consultation and dialogue between TAs and teachers; as well as ensuring crucial messages about key curriculum changes and the strategic direction of the school were received from senior leaders. There was evidence of a resultant boost in their confidence and sense of self-worth which led to a cultural shifting in how invested they felt within the school.

'I think it makes everyone feel more valued anyway as a person and more important and 'part of'. You know, anyone who is part of something rather than just being told to do things.' (Teaching Assistant B)

'I definitely feel more confident and valued.' (Teaching Assistant A)

An empowered TA workforce enabled to work more effectively with teachers

TAs frequently described enhanced team working with teachers. The investment in training and involvement in whole-school meetings, in combination with the daily opportunities for communication greatly facilitated this and enabled TAs to feel a more equal part of that team.

'It does feel more like a team between teacher and teaching assistant.' (Teaching Assistant B)

There was a more collaborative approach taken to identifying which pupils needed to receive interventions, based on more frequent pooling of knowledge between teachers and TAs.

'I think with that communication, you kind of both decide now. Before it was the teacher, wasn't it, because they were doing all the assessments and because now we've got that time for discussions and communications, we both very often decide on... because you tell the teacher how your group got on...It's a very regular thing.' (Teaching Assistant B)

TAs also reported being better placed to act more autonomously within lessons and to pro-actively support teachers as they saw fit, as opposed to necessarily, awaiting their instruction to do so.

'During... a lesson, even the other day, the teacher was doing the phonics lesson. She was sort of addressing the children, where I scribed for her on the board...Before, I think I'd have felt like oh I feel like I'm taking over too much – I won't.' (Teaching Assistant A).

Teacher outcomes

There were fewer references in the data to other outcomes for teachers. Outcomes attributed to Mobilise were to increased knowledge and understanding, and better and more trusting relationships with TAs. Again, teachers were interviewed only in the two case study schools, so the findings are mainly drawn from school-based leads', cluster leads' and key stakeholders' perceptions, so only provide limited first-hand perspectives.

Increased knowledge and understanding (SBL B, C, I, KS4) was reported in relation to questioning and approaches to supporting pupil independence:

'Certainly the teachers liked the session around supporting pupil independence. ... actually ... thinking about all those key steps that you could go through beforehand to really develop that independence. That's quite a big thing for us here.' (SBL I)

And in relation to planning, understanding the TA role and strategies to support pupils with SEND:

'You don't have that look of fear when you say you haven't got a TA for the morning, because they know how to plan differently and how to support the pupils... [and referring to pupils with SEND] when we have teachers putting referrals through for pupils with an initial concern, they're actually coming through now with having already put a lot of support in place ... I think a lot of that confidence has come through the process of looking at the different support

available for pupils. ... Part of that has been CPD ... they report that they've got a little bit more knowledge and understanding with that I.' (SBL C)

The development of **better and more trusting relationships** with TAs also reported (SBL A, G, F, O):

'Each class team is now working probably more effectively together, because they've been driven by a particular aim through the year which has been really good. We had an NQT in one of the classrooms last year ... so actually this was his first year, so he hadn't worked with those TAs before, so that supported that I think, and has made that a much more effective partnership... I think that's been a real positive outcome for the staff.' (SBL O)

This was attributed by one school-based lead to the common purpose and focus provided by the Mobilise project.

Pupil outcomes

Perceived pupil outcomes reported by school-based leads and key stakeholders focused on independence and resilience and progress and attainment. **Improved independence and resilience** were the most widely reported pupil outcomes (SBL A, B, C, F, O and KS1 and KS4):

'We've got a group [Year 5 during the campaign] that for whatever reason has become really disengaged with maths and have decided they couldn't do it. Their attitudes have been to have given up, almost, but through having daily, or at least three times weekly, intervention sessions and going back through this Power of Two... I would say a significant majority of them are actually having a go and are more willing to tackle maths in a whole class situation... they've changed the mindset a little bit about maths.' (SBL F)

For some children the increase in independence was considerable, as illustrated by an example given by a school-based lead of a pupil who had previously had a TA sitting beside them throughout all lessons:

'When I was in the classroom her hand would be up, she'd be asking the adult next to her to do things for her. We made a stance really that we weren't going to do that anymore... The change in that child was phenomenal. That independence just developed within five or six weeks, it was incredible.' (SBL K)

In some schools, related improvements in progress and attainment (mentioned by SBL B, C, KS4) were attributed to increasing independence:

'Some schools have come back and said that they wholeheartedly attribute a lot of their SATs success to the way the pupils have worked this year, because they're more independent. It's the old thing of TAs previously spoon feeding, so when it came to a sit down test, they didn't have the skills or confidence to do it without somebody telling them what to do, so that's improved,.' (KS4)

Improved progress and attainment was, in some schools, also related to ensuring the right evidence-based structured interventions were in place and ensuring that TAs were delivering them effectively, as well as to the changes in TA practices more generally:

'We've seen that any pupils that are put on just a catch-up programme ... seem to be making better progress within them now, and I think that's because we've got the right programmes in place. We're beginning to see more transfer of the skills and interventions back into class work. And I think that's come through, that communication between the teacher and the TA. And the planning between them of intervention.' (SBL C)

Research readiness within schools

Survey data indicate that schools participating in Mobilise became better equipped to use research for informing practice. Here, 13% of respondents strongly agreed with the statement 'Prior to Mobilise, the school was well equipped to use research to inform practice', while 41% agreed with the statement. When given the statement 'As a result of your participation in the Mobilise project, the school is well equipped to use research to inform practice', 26% strongly agreed and 56% agreed.

In response to the statement 'Prior to Mobilise, the school regularly used research to inform practice', 11% of respondents strongly agreed and 34% agreed. When asked about the extent of their agreement with the statement 'As a result of your participation in the Mobilise project, the school is well equipped to use research to inform practice', 23% strongly agreed and 47% agreed.

Table 28: Use of research prior to / as a result of participation in Mobilise project

	The school was well equipped to use research to inform practice	The school is well equipped to use research to inform practice	The school regularly used research to inform practice	The school regularly uses research to inform practice
Strongly agree	12.8	25.6	11.4	23.1
Agree	41.0	56.4	34.2	47.4
Unsure	20.5	9.0	16.5	14.1
Disagree	24.4	7.7	34.2	12.8
Strongly disagree	1.3	1.3	3.8	2.6
N	78	78	79	78

Source: SHU survey of Lincolnshire schools, post-campaign. Base: all schools indicating that they participated in the Mobilise project

The interview data provide further insight into the development of research readiness in Lincolnshire schools. The key themes emerging from this data were an increased school commitment to using research, engagement of a wider range of staff in research use, the development of greater criticality, and the establishment of school structures and processes to support research use.

Some cluster leads and school-based leads (CL C, CL Focus group 2, SBL C) pointed to examples of **increased school commitment to using research** and, as will be discussed in the next section, many schools were intending to participate in a further research-based programme as part of the second year of Mobilise, entitled Mobilise Choice.

'I do think the people and the schools I've worked with and continue to work with are taking that on board - that it's about the research now, it's looking at the research and the evidence. ... this whole project has actually highlighted the importance of research.' (CL C)

One cluster lead attributed increased commitment to the experience of engaging with high quality research in forms that were meaningful to implement in practice:

'All of [the SBLs at the final cluster meeting] were saying the quality of the research has been great, but particularly certain pieces that they could essentially take away and really run with in many ways quickly, because they could see the great benefit from that research. And they were just like, why haven't schools ever been sent it? Well .. this document was sent to every school but probably sat in an envelope on a head's desk somewhere! – as a lot of research might do,.. But now when something comes through the door with [the EEF] logo on it, I'm actually going to look at it.' (CL Focus group 2)

For schools that had already engaged more fully with the EEF guidance on TAs, or research-informed practice more generally, the impact on commitment to research use appears to be more limited, as might be expected. Despite this, one school-based lead did explain that they had become more committed to research use despite having engaged with the EEF guidance prior to Mobilise:

'This year we found it a little bit like almost... did we really need to do Mobilise? - because we'd kind of discovered it ourselves and started. But having been part of it ..., it's definitely shown that it is a useful thing to do. Having said that, even without the Mobilise project, we were using the initial research to kind of guide our practice in school anyway. So it's definitely something as a school we're more committed to using research-based information to improve our teaching and learning for pupils.' (SBL C)

As the earlier quotation in the section on outcomes for TAs illustrates, and is also encapsulated in the quotation below, Mobilise was attributed with **engaging a wider range of staff in research use** by some cluster leads and school-based leads (CL B, SBL O).

'It feels to me like we're actually using research to make a real difference in schools now, whereas I think previously we'd have read it, we'd have gone back into our own classrooms, we might have tried something out, but we wouldn't necessarily have a) shared it across the whole school, and b) you wouldn't necessarily have measured the impact of that. Whereas I think this has meant that that is now possible.' (SBL O)

The Mobilise website was credited with supporting wider engagement in one school

Alongside wider engagement, **greater criticality of research** (CL B, SBL O) was reported:

'Some of the pieces of research that we've read have been more interesting than others. All of the cluster leads, all of the school-based leads and within my school the staff have engaged with the research. I think what's been really good is that we're looking at the research and you take from it the things that are useful and pertinent to you, but also people are open to not just taking the research as "it's research, so it must be good", but it's a piece of research and it's not necessarily going to be applicable to all settings. And I think people are not afraid to be ... People are really taking it on board and can see the value of it at the meetings.' (CL B)

Two schools had put in place **structures and processes to support research use** (SBL K, O) as illustrated by the school-based lead from one of the schools:

'There was quite a lot in terms of people doing their own research and maybe that's where it will develop in the future. ... as a school-based lead, and because I'm a head teacher I'm able to put this into place, but we now have our own research lead within school who basically supports other staff in research. So now we've taken on that research model and we're doing our own research within school, so subject leaders now come to the staff meeting with a piece of research and they're all timetabled in to do that every so often and share that piece of research. That's supported then by the research lead, who will support them with finding that research and validating the research. So in our school that's had a huge effect.' (SBL K)

There were also examples of embedding the PLC structure that was used in schools for the Mobilise work, into other research engagement activity, as well as reports of dedicating time to share and implement research. These outcomes were attributed to Mobilise.

Other school-level outcomes

In addition to increased research readiness, three other types of school-level outcomes were mentioned by interviewees: increased cohesion and better staff relationships leading to shared

responsibility for pupils' learning; incorporating the work of TAs into school policy and priorities; and financial benefit.

Cohesion and better relationships among staff leading to shared responsibility for pupils' learning

As the sections on outcomes for TAs and teachers have already indicated, participating in Mobilise was perceived to have led to better relationships and more cohesion among staff (SBL A, F, G, J O):

'I think [Mobilise] has facilitated the fact that there is more cohesion in the teaching across the school. It's not teachers and TAs, it's one, which is very noticeable.' (SBL G, O)

Improved cohesion was linked variously to the Mobilise programme's focus on teachers and TAs working together to improve pupil outcomes, the initiation of meetings including teachers and TAs as part of Mobilise, and related to other outcomes such as TAs feeling more valued and taking the initiative.

In turn, improved cohesion and better relationships, together with enhanced trust between teachers and TAs and greater TA autonomy, led towards a greater sense of shared responsibility for all pupils' learning:

'I think there's more of a shared responsibility now, rather than it just being a teacher responsibility, so a shared responsibility that the children are everybody's responsibility.' (SBL M)

'I think there is a joint responsibility and a kind of understanding from the teachers and the children as well that there is a teaching team, so the children will equally go to LSAs for support as they will the teachers, or find information – there's that shared responsibility and shared role.' (SBL B)

Improved relationships between leaders and TAs were also reported (SBL J):

'I think my relationship with all members of staff now is probably far better than what it was before. It's always been very good, but yes, it's given me an opportunity to work alongside nearly every TA across the school.' (SBL J)

Incorporating the work of TAs into school policy and priorities

Some school-based leads (SBL A, B, E, K, M) reported that TAs had implemented a TA policy and/or had incorporated TAs within existing policies and/or processes, such as performance management, for the first time. This reflected the increasing priority that was being placed on the work of their TAs:

'We've now got our TA policy which we didn't have before. That's now .. a part of our school itself. Our marking and feedback policy – now that's a lot more centred around the TAs and their responses within the classroom and within the books as well. So yes definitely a shift in the importance that we feel, that we place on the TAs, which maybe was a little bit underlying before, but is now a lot more prominent.' (SBL A)

Financial

One school-based lead pointed to improvements in value-for-money of TAs as a result of Mobilise:

'I think for us it does come back to the funding as well. It's always a huge issue in school. ... What we're spending on our TAs but also for any support programmes is actually more value for money now because we know it's having a better outcome than what it was previously.' (SBL C)

Outcomes for school-based leads and cluster leads

The majority of **school-based leads** (SBL A, B, C, E, I, K, L, M, O) reported **positive professional development outcomes** as a result of undertaking their Mobilise role. Professional development outcomes focused predominantly on the development of leadership skills and increased confidence in their abilities as leaders. There was a particular focus on learning how to successfully implement whole-school change, as illustrated by one school-based lead:

'I was fairly new to the senior leadership team so I hadn't really had a lot of involvement in the whole-school improvement planning things. ...being part of the Mobilise project has given me more confidence in being able to instil wider whole-school changes and things like that. So it's definitely helped me with my management leadership level.' (SBL C)

Some school-based leads also reported increased knowledge and understanding of research on the use of TAs and the EEF recommendations, greater engagement or re-engagement with research more widely, and deeper understanding of how to embed research in school:

'It's certainly opened my eyes to the research. The structure of how to deliver a piece of research and how to talk round that was really useful. Obviously for the plans that we've got in place now that's going to drive it forward really and use that same model.' (SBL K)

One school-based lead valued being able to extend their professional network.

Some **cluster leads** also reported **professional development outcomes** (CL A, E) and one spoke of **career development outcomes** (CL A):

... it's been personally a huge development opportunity that has led me on to other things and other avenues as well. I think the confidence that I've gained as cluster lead and the organisational skills that I've developed in order to communicate between different schools and different leaders, and the coaching strategies that I've personally had to develop and use as a part of it and employ with other schools, has certainly built up my confidence a lot - to the point where I've got a secondment position as a head teacher at a school for the next term.' (CL A)

It was also credited by some cluster leads as **supporting them in undertaking other roles** they held:

'Absolutely, without a shadow of a doubt. Because I started this role with [xxx] Teaching School in September ... it's enabled me really to get into the other schools around me and to share that good practice. It's been absolutely wonderful for me and the other people within my group.' (CL C)

Outcomes at the county level

Lincolnshire stakeholders identified a range of positive outcomes at the county level, including an infrastructure to support research use across all schools in Lincolnshire, facilitating the establishment and strengthening of networks across the county, embedding the use of research evidence in strategic decisions and funding mechanisms, leveraging in further funding for implementing research-informed practices, improved leadership capacity, and enhanced profile and pride.

The **establishment of an infrastructure for research use across all Lincolnshire schools** is evidenced by the extension of Mobilise into a second year - Mobilise Choice - where schools can choose either to continue implementing the TA recommendations or to join new clusters to implement other research-informed practices. This is discussed further in the section on sustainability of change in the Findings 5 chapter. As with all change, it is difficult to attribute it solely to one programme, and

in Lincolnshire the designation of Kyra teaching school as an EEF research school during the period of this scale-up pilot undoubtedly will have given further impetus to the achievement of this outcome. Nonetheless, the speed of change from having almost no infrastructure for research use to having a county-wide structure in place is remarkable. As one Lincolnshire stakeholder observed:

'A year ago, not even that – by the end of the last academic year [i.e. before the start of Mobilise], we did not have a structure of nearly 300 schools working in a regular rhythm of professional development. It simply didn't exist. We've now got those structures in place... It's enabled a sector-led response and that mechanism for professional development moving forward. ... It's fascinating really to suddenly go from nothing in terms of these structures to having such a huge system there.' (KS 2)

It appears that the PLC model has also been adopted as a school improvement tool across a number of schools in the county:

'I couldn't tell you how many – but a number of schools have said to us that they found the PLC model so effective that they've now adopted that for other areas of school improvement, that regularly they run their staff meetings as PLCs because that model has been so effective for them as a school improvement tool as well. So we know that the impact of Mobilise has gone far beyond just the seven recommendations.' (KS 1)

More generally, Mobilise was credited with **facilitating the establishment and strengthening of networks across the county**, as responsibility for school improvement structures had recently been returned to the county authorities. The first quotation below from a Lincolnshire stakeholder highlights increased connectivity and explains that networks are becoming more effective through an increased focus on pupil outcomes:

'I think that the networks have been drawn closer. I think most importantly they've become more focused on outcomes for children, rather than having a chat and offloading, so to speak. I think it's connected very closely to our peer review groups. I think it's just drawn families of schools, it's given them another string to their bow of connectivity, so I think that's been really positive. I think the test of whether those clusters will last is yet to be undertaken.' (KS 3)

I think working together and just having the chance to talk to other teachers from special schools is really positive. We're continuing that this year with Mobilise 2.' (SBL L)

An appetite for working with other schools in Lincolnshire was apparent across a number of interviews, as one cluster lead observed:

'It kind of makes you feel quite hopeful for the future, the various networks that have been established and whether they remain the same or break apart or re-form in different ways, actually there's definitely an appetite for it. I would say. It's really positive ... more people are talking than before. I think it's more of 'let's come and see what we're doing' and this is what we're going to share, and that's great.' (CL Focus group 1)

In at least one cluster, the approach taken to locating cluster meetings in each school had led to an ongoing intention to work together to facilitate access to resources:

'We held each of our meetings at a different school ... we have visited every one of the schools. For the first 10 minutes of every session, we've gone and seen the school and what's happening. So show me something to do with TAs in your school. And actually we've all come away with a great EAL scheme of work from one school. We've all seen some brilliant interventions that we'd all like to now group-purchase potentially at another school. So it's led to other things as a result of this.' (CL Focus group 2)

The use of research evidence has also been embedded in strategic decision-making and funding mechanisms at the county level, as exemplified by a Lincolnshire stakeholder:

‘I think being part of Mobilise has impacted on LTT, LLP and the local authority. I think we’ve changed our approach to lots of activities, so for example we have an intervention fund [for schools needing improvement support] ... we’ve changed our approach to that. There’s a key question on there to say, ‘Is this intervention research-informed? Is it proven to have an impact? What’s the evidence base around this intervention?’ before we fund anything. At the LLP there’s a real drive around that as well... I think we talk about [evidence] a lot more at head teacher briefings. ... we talk about being robust in ensuring the interventions we’re using are effective and getting best value for public money, and I think we’re starting to operate in a different way around all of that. I think that’s been the wider work of Mobilise.’ (KS3)

It appears that Mobilise has also impacted on decision-making more widely in Children’s Services in the LA, bringing in a sharper focus on the evidence base for any proposed change:

‘As an add-on I think the local authority’s wider children’s services has now moved to that approach as well, so before we spend any public money we look at what does the evidence say about this, rather than what do we think we should be doing about it?’ (KS3)

Mobilise has also been successful in enabling the **leveraging in of funding for more research use** within the county. While it is not possible to evidence a causal link, some Lincolnshire stakeholders believe that Mobilise contributed to the successful designation of Kyra as an EEF research school. EEF contacts established through Mobilise also supported the development of two bids made by Lincolnshire Teaching Schools Together to the Schools Strategic Investment Fund administered by DfE. This has resulted in securing £500,000 to support 41 primary schools in using research to improve reading and writing, and £260,000 to support 20 schools to improve outcomes in Key Stage 2 mathematics.

The professional development outcomes for school-based leads and cluster leads outlined above also impacted at county level, **increasing leadership capacity across the county**:

‘We had feedback from headship interviews that rarely were panels ... shortlisting anybody who didn’t have experience of either a school-based or a cluster lead for Mobilise, because the skills that those roles had generated were absolutely fitting with what governing bodies were looking for in terms of recruiting head teachers.’ (KS1)

The championing of the Mobilise project by EEF colleagues was also attributed to **increasing the status of Lincolnshire education** leading to **pride** in their achievements, as exemplified by the regional lead:

‘Halfway through the year I went to the EEF’s fifth birthday event and Lincolnshire was mentioned on that national stage as being the only local authority where the schools were funding their scale-up. There was a real big sense of pride about that. I reported that back to head teachers and I think that helped build the momentum, the fact that the EEF was really interested in the scale-up of their research in Lincolnshire is something that head teachers in Lincolnshire are proud of.’ (KS3)

In summary a range of positive ‘other’ outcomes, beyond those reported on practice, were reported by key stakeholders. Within schools these included perceived outcomes for TAs, teachers and pupils, and perceptions that schools were becoming better equipped to use research. Positive professional development outcomes were reported by most school-based leads interviewed and some cluster leads. At the county level perceived outcomes included the establishment of a research-use infrastructure, strengthened networks, improved leadership capacity, embedding the use of research evidence in strategic and funding decisions and leveraging further funding for implementing research-

informed practices. Some caution is needed in reading the findings. In particular, the limited 'first-hand' data from TAs and teachers may mean their views are not adequately represented and the findings related to county-level outcomes are primarily drawn from stakeholders engaged in implementing the campaign in Lincolnshire so do not include more independent perspectives.

Findings 4: Feasibility

As set out in the Introduction, the scale-up of the use of the EEF guidance on TAs was implemented in three phases:

- A **scoping phase** initiated and led by EEF.
- A **development and set-up phase** led by key stakeholders in Lincolnshire with significant steering, influencing, negotiation, support and challenge from EEF.
- A **delivery phase** when a teaching school alliance that was part of Lincolnshire Teaching Schools Together was contracted and steered by the Lincolnshire Learning Partnership to lead delivery. EEF provided lighter touch steering, support and challenge during this phase.

This section presents data on the feasibility and perceived effectiveness of the embedded model of scale-up, the Mobilise delivery model and schools' approaches to implementing Mobilise. Finally, findings on maintaining the fidelity to the evidence are presented.

Key findings

The embedded model of scale-up

1. EEF acted as a catalyst by enthusing and influencing strategic leaders and head teachers, aligning scale-up with the needs and priorities of Lincolnshire schools and maintaining a focus on improving pupil outcomes.
2. Overall, the steering, support and challenge provided by EEF was very highly valued. There were a few instances when the degree of challenge was perceived to be too demanding or not appropriate.
3. Enabling attributes and mechanisms were EEF's: knowledge and expertise in relation to the TA evidence, research on scale-up and leading change across schools; focus, energy, motivation, momentum and passion for research use; brand and reputation; and ability to facilitate linkages to experts and resources.
4. The multi-layered brokerage activity, which is a key characteristic of this embedded model of scale-up, together with a lack of clarity from EEF, created confusion and duplication in relation to governance.
5. Contextual conditions in Lincolnshire, spanning changes in the governance of school improvement, county education structures, and the capability and commitment of key stakeholders, supported development and implementation of the embedded model of scale-up.

The Mobilise delivery model

6. Overall, Mobilise activities and support were rated highly by most participating schools.
7. Cluster meetings were perceived as most effective when cluster leads: were able to facilitate participation of schools that were at different stages of the implementation journey; assumed the position of a non-expert; and were authentic in co-constructing learning with participants. Regular attendance by school-based leads and their willingness to share their experiences were also perceived as crucial.

The Intervention Fair was less well received. Regional leads were very highly regarded, particularly for their commitment and organisational skills, and provided very effective training and support to cluster leads. Most school-based leads also appreciated the

commitment and support of cluster leads.**Scale-up in schools**

8. Although there was notable variation in the amount of time school-based leads spent on implementation, most school-based leads sought to implement the EEF guidance across the whole school.
9. School-based leads adapted the PLC format of the cluster meetings to fit the time available for meetings and appropriateness to their school. Other activities to support implementation included the use of the MITA surveys, use of action plans with staff, observations by leaders and peer TA observations, and setting expectations through performance management, creating policy or collaborative activity.
10. The commitment and enthusiasm of school-based leads supported implementation. Implementation was perceived to be more effective in schools where teachers and TAs were responsive to change and where a senior leader was the school-based lead or, in those cases where the role was undertaken by another member of staff, there was senior leader 'buy-in' and a clear process for implementation following cluster meetings.
11. Implementation was perceived to be impeded where: there was a lack of commitment to improving TA deployment, and/or a failure to understand that Mobilise is about whole-school change; the school-based lead did not have the authority to drive change; and/or the school meetings calendar could not accommodate the late scheduling of Mobilise.

Fidelity to evidence

12. Fidelity to the evidence was maintained as it was delivered by the regional leads to the cluster leads and then to school-based leads. However, school-based leads were selective in deciding what to share in school. Their decisions were influenced by their perceptions of: i) the importance of a particular piece of evidence; ii) what is realistic in terms of teachers and/or TAs engaging with evidence; iii) the fit to existing school practices; and iv) practicalities. School readiness to engage with research and senior leadership support was crucial to enabling school-based leads to maintain fidelity to the evidence.

The embedded model of scale-up**Overview**

Recruitment data presented in Findings 1 show that adopting an embedded approach to scale-up led to the recruitment of a large proportion (73%) of all schools in Lincolnshire. As noted earlier, this was recognised as a remarkable achievement in the time-scale. Although the survey findings presented in Findings 2 indicate fairly limited impact on practice change in alignment with the EEF recommendations, self-reported findings on research readiness reported in Findings 3 indicate positive outcomes in relation to 'research evidence readiness' both within schools and at a county level.

The enabling attributes, mechanisms and barriers related to the embedded model of scale up are summarised in Table 29. The findings that underpin this summary are reported in the following two sections, the first of which relates to EEF's role and the second to the Lincolnshire strategic context.

Table 29: Embedded model of scale-up: enabling attributes, mechanisms and barriers

Related to EEF	
Attributes of the EEF team	Passion, energy and motivation for using evidence and improving outcomes for pupils.
	Complementary knowledge and skills spanning academic understanding of the best use of TAs and scale-up, and extensive experience of implementing change in and across schools.
Attributes of EEF as an organisation	Brand and reputation.
	Capability, and positioning within the school-led system that enables EEF to act as a catalyst for change.
Enabling mechanisms	Engaging directly with key strategic leaders, gaining 'buy-in' and ensuring all key stakeholders were kept on board during the development phase.
	Identifying and aligning scale-up with the needs and priorities of Lincolnshire schools.
	Ensuring focus and continuous momentum, particularly during the development phase.
	Relentless focus on improving outcomes for pupils.
	Acting as guardians of the evidence through direct engagement in the roadshows and shaping delivery design to ensure fidelity to the evidence.
	Providing support and challenge.
	Facilitating linkages with other experts.
	Motivating key stakeholders and deliverers e.g. through promoting the work of Mobilise nationally and internationally and visits to cluster meetings and motivating head teachers to participate.
	Focus on learning about scale-up, which also acted as a motivator.
Barriers	The nature and/or degree of challenge (in some instances) being perceived as unrealistic and/or not appropriate in a school-led system
	EEF's lack of clarity about its role in governance.
Related to Lincolnshire	
Attributes of key stakeholders	Commitment, enthusiasm and capability of strategic and operational stakeholders and a significant cadre of head teachers.
Context	The return of governance of school improvement to the county which necessitated developing a new approach to school improvement.
Enabling mechanisms	Embedding scale-up fully within the new school improvement processes and structures.
	Commitment to collaboration in developing Mobilise and engaging all schools.
	Structures in place that enabled expertise and resource to be marshalled during the development phase.
Barriers	The volume and intensity of change in school improvement in Lincolnshire which placed multiple demands on key stakeholders.

EEF - enabling attributes and mechanisms and barriers

The EEF consultant summarised **the overarching EEF approach as acting as a catalyst** a view echoed by Lincolnshire stakeholders: 'the let's do it in partnership, the instilling of excitement, which is all part of the catalysing of it' (KS 6)

Engaging directly with key strategic leaders, identifying and aligning scale-up with the needs and priorities of Lincolnshire schools, and maintaining focus on improving outcomes for pupils was fundamental to EEF's approach to initiating and developing the embedded model of scale-up:

'I think the approach was right, they went to the [Director of Children's Services] and I think that was the right approach, so it went right to the top, it started with a teleconference, it started with passion about the research, passion about the difference it could make to young people and acknowledgement of the challenges in Lincolnshire and the geography.' (KS3)

From the outset, the EEF team put significant effort into understanding the Lincolnshire context and the motivations and incentives for key stakeholders. The scoping phase activities of identifying, mapping and talking to the key strategic leads and influencers in Lincolnshire were crucial to gain 'buy-in' and motivate key influencers to engage in developing the scale-up campaign in Lincolnshire, as well as enabling contextual intelligence to be gathered:

'I think that the difficulty is I genuinely believe the world of school improvement is a bit of a swamp and I think you have to understand the swamp you're working in. The only way to understand that is to talk to people who are living in the swamp. So I think understanding who are the people who can influence change is really important and then working with them to understand the levers and barriers to change in that local area is really key. I think understanding the structures at play is really important.' (KS3)

EEF used this intelligence in a number of ways including influencing and building support and enthusiasm for implementing the TA scale-up campaign in Lincolnshire:

'They understood our context and they understood what barriers there would be to that context. They'd also done research in terms of the learning partnership. They knew what strengths there were that we could build on, so I think that was a really good hook for us ... because it kind of said to us if there's great stuff and actually you've already done this, then this would be the next step.' (KS3)

A good understanding of the context and the barriers within the context was crucial to EEF's effectiveness in steering, supporting, challenging and offering potential solutions to address issues that arose at all three stages of scale-up in Lincolnshire, and supported further enabling activities that we discuss below. An in-depth understanding of Lincolnshire also facilitated the use of existing structures for development and delivery.

The EEF's knowledge and expertise relating to research on TAs and implementing research use in schools was highly valued by Lincolnshire stakeholders as a key enabler. The complementary knowledge and skills of the EEF team members was important, spanning academic understanding of the best use of TAs and scale-up and extensive experience of implementing change across schools. This included bringing in data to support local understanding and shaping of implementation approaches:

'I brought them data that they didn't know about their teacher and teaching assistant ratio and how interesting it was, about how much they spent on teaching assistants. This wasn't all data that they had. The stuff that they were all worrying about was around exclusions and various things and I think I was able to support them in how you tied that in.' (EEF consultant)

The impact of support and challenge from the EEF team was pivotal in the earlier stages in two respects. Firstly, it was important in relation to initiating and driving forward the establishment of a group that could steer the development of the Mobilise project and oversee the implementation of the scale-up plan, while maintaining focus on the three intended outcomes set by EEF, namely: securing the use of the EEF recommendations at scale to improve pupil outcomes; learning about effective scale-up; and Lincolnshire becoming 'evidence-ready'. Secondly, EEF deployed support and challenge to influence the development of the Mobilise delivery model to ensure fidelity to the evidence on best use of TAs and approaches to implementation that research indicates are likely to be effective in stimulating research use in schools. The intensity of support and challenge diminished during the delivery phase.

Overall, Lincolnshire stakeholders were very positive about the support and challenge provided by EEF:

'The encouragement and support that we had from EEF, and challenge and pushback as well on why we did things the way we did, that was really significant, very, very valuable. Having the ongoing questioning, reflection and evaluation all the way through, was really tremendous in terms of how we were then evaluating our ongoing work, making adjustments, making changes, feeling that we were on the right track, or being questioned and challenged and having to rationalise our decision making and either change track or stick to what we were deciding, but yes, valuable support.' (KS1)

The regional lead likened EEF's support to an advisory body, explaining:

'If there were things that we needed to ask them, they were always there and very supportive, but they were also there to monitor that we were keeping the fidelity to the evidence and not going off on a tangent and getting carried away with it. Also they were there, because they were interested in the scale-up ... It was also that they were wanting to keep an eye on were we keeping fidelity, but also how is this model? So I felt that they were there as an advisory body, but also to be kept informed about whether scale-up is working, and if it's not working let's look at it and talk about it and that sort of thing.' (KS4)

Support and challenge were both formal (for example, through EEF's contribution to meetings and reviews) **and informal** (for example, ensuring that all key stakeholder groups were kept on board):

'I often had the opportunity to meet with them. [the EEF consultant] would copy me in on emails as well, so sometimes I responded on email, so there was written communication as well. Also, just to say, in terms of the opportunities for communication, I felt there was an open door of communication ... At times [we would get in touch for support] ... so I think that was really valued. There was definitely a feeling, and I suppose that's the word I'd use, of commitment to Lincolnshire.' (KS3)

While EEF challenge was generally valued, some concerns were raised. As the EEF team noted in their record of activity:

'[There were] very difficult issues around how to judge when to be present to steer, how hard to steer/support/challenge, when to leave the region to take forward, how to follow up to keep momentum strong and when that becomes intrusive and either counter-productive or presses for actions or thinking for which the region is not yet ready.' (EEF team notes)

There were some concerns from Lincolnshire stakeholders that the degree of challenge to some stakeholders and head teachers, in the earlier stages of the scale-up, was not entirely appropriate in the current climate of a sector-led approach to school improvement. Alongside this there were also concerns that EEF was unrealistically trying to push for a set-up time-scale that was not feasible given the changes taking place in Lincolnshire.

Cluster lead focus group data indicate that some cluster leads, particularly those who were less secure about their role as a cluster lead and/or found it difficult to find sufficient time for the role, felt the degree of challenge was too great. Describing an EEF visit to a base camp, participants in a cluster focus group recounted:

'...it was almost a 'you lot need to work a bit harder' conversation ... Outcomes aren't good enough ... And it was up to us ... We work in some really challenging schools with some incredibly deprived areas, and it felt like a personal attack.' (CL Focus group 1)

Some tensions also arose in relation to established ways of doing things that Lincolnshire stakeholders were not prepared to give up:

'I think occasionally there have been certain things ... so, we used to have a certain planning format that was going to disappear on a whim, and that wasn't very helpful.' (KS2)

Lincolnshire stakeholders reported that **EEF brought focus, energy, motivation and momentum to the scale-up, although at times this created demands that it was difficult for stakeholders to respond to:**

'I think [the relationship with EEF] was productive because it provided a lot of energy in terms of keeping us engaged, keeping the Board engaged, and moving things forward. At the time it was happening, there was an awful lot of energy having to be spent on the LLP - [as the previous school improvement service was being decommissioned]. And I think sometimes the energy from the EEF could feel quite ... that they were really focused on that one thing and I was struggling with a thousand other things over here. That was very good because it kept bringing it back into focus ... I think it would have taken us longer without the energy and the capacity of [the EEF team].' (KS3)

The EEF team's passion for using evidence and improving outcomes for pupils was also acknowledged as an important motivator and a 'massive hook for head teachers'. EEF were also recognised as playing a key role in keeping the project on track, both in relation to the implementation process and in maintaining fidelity to the evidence. This appeared to be supported by a clear vision and the relentless focus on the three EEF aims.

The power of the EEF brand and reputation was a further enabler, providing credibility and stimulating engagement of stakeholders and recruitment of schools:

'I certainly think of the EEF's involvement as a galvaniser – that people were happy to come under the banner of the EEF.' (KS2)

The EEF's reputation was also a positive motivator for cluster leads:

'We had [the EEF consultant] come and join some of the base-camps. Seeing her and seeing the value that added to the project. For her to take time out and come and join us, just gave us that little bit more motivation.' (CL A)

As well as the EEF brand generally providing credibility and engagement, **the EEF guidance was a more specific enabler in gaining buy-in as well as providing the framework for the content of the base camps and cluster meetings:**

'The power of the recommendations – that's been a big driver. ... things just haven't fallen out of thin air, this is something that's relevant to all schools. All schools have TAs, even those schools that say they've only got a handful and they're dealing with children with very specific needs. They can still recognise that there is value in the work. So all of those have been enablers.' (KS1)

EEF's ability to facilitate linkages with other experts, including those engaged in leading the scale-up campaign in South and West Yorkshire as well as other experts and schools identified by EEF, was highly valued. This provided a source of ideas, best practice, resource and learning about implementation to support the development and implementation of Mobilise.

'Putting us in touch with people in Rotherham, those schools, and Doncaster, putting us in touch with people who had already done something on another scale was invaluable. It meant that we had some resources and a starting point, rather than just a completely blank canvas, so that was really useful.' (KS4)

EEF's ability to facilitate linkages was also perceived to be pivotal in getting providers of evidence-based structured interventions to participate in the Mobilise Intervention Fair, as well as supporting the leveraging of additional funds for other research-informed practice interventions as detailed in the section on Outcomes at the county level in Findings 3.

The valuing of Mobilise by EEF, demonstrated through the national and international promotion of the ambition and successes of the Mobilise project, and EEF's attention to learning about scale-up, were further motivators for Lincolnshire stakeholders and head teachers - which in turn added momentum to the project.

A barrier which created difficulties for Lincolnshire stakeholders was a lack of clarity about EEF's role in governance, as one stakeholder explained:

'...You were having to work out who it was we actually should be reporting to. We were clearly reporting to LCC through the contract management and then we were doing different levels of reporting for both the steering group, the promote committee and LLP. At times we were also reporting to, not necessarily in a formalised way, but there was an expectation of reporting to and feeding back to and communicating regularly with EEF as well, which didn't all tally. ... it felt sometimes that we were reporting to many masters and really we could have just done with one. So there's something about the management of those lines of reporting and stakeholder communication which perhaps just needed greater clarity at the start.' (KS1)

In part, this lack of clarity arose because the Mobilise project was being implemented at the same time as significant county-wide change as Lincolnshire moved to new governance arrangements for school improvement. However, in addition, it appears that following the designation of the teaching school leading Mobilise as an EEF research school, there was a period when there was a lack of clarity from EEF in relation to the remit and accountability of the research school and how that related to Mobilise, and conflicting messages about where EEF expected Lincolnshire to focus its efforts. The EEF consultant reported acting as an intermediary to address this issue:

'I had a very difficult time, long conversations with [Lincolnshire stakeholders and EEF stakeholders]. I found that quite muddled and quite difficult. I didn't expect the muddles to be of the EEF's making and some of that was, particularly when people kept going on about confused accountability. ... I just thought those conversations were entirely unhelpful, and if you were just ignoring all these labels and doing it and talking about the work in Lincolnshire it would be much more helpful.' (KS5)

As the EEF campaign lead pointed out, the multiple levels of brokerage activity evident within the Lincolnshire scale-up project inevitably brought about complexity that requires careful orchestration - an issue that is likely to affect other attempts to implement an embedded model of scale-up. The experience in Lincolnshire indicates that EEF could helpfully give greater consideration to their role in this orchestration in future scale-up projects and communicate this at an early stage.

A further concern raised by Lincolnshire stakeholders and the EEF team was the lack of capacity within EEF to give support to shaping the next stage of research-use scale-up during

the transition from the Mobilise project to the second year Mobilise Choice, to ensure the activities offered remained firmly grounded in evidence.

The Lincolnshire strategic context: enabling attributes and mechanisms and barriers

The timing of EEF's approach to Lincolnshire to suggest setting up an embedded model of scale-up fortuitously coincided with the return of governance of school improvement to the county. This facilitated **a good strategic fit whereby the EEF's aims and intentions were perceived by Lincolnshire stakeholders as a useful mechanism for establishing effective school improvement networks and practices across the county**. However, as noted above, working with EEF did place additional demands on Lincolnshire stakeholders at a time of significant change.

The commitment, enthusiasm and capability of, and collaboration between, strategic and operational stakeholders and a significant cadre of head teachers was also crucial, particularly during the scoping and development phase and to a slightly lesser extent in the delivery phase. The extent of commitment was illustrated by high number of stakeholders and head teachers who joined the Mobilise steering group, and head teachers personally telephoning schools in their locality who had not signed up to Mobilise.

Lincolnshire also had structures in place enabled expertise and resource to be dedicated to setting up an embedded model, particularly the Lincolnshire Learning Partnership (LLP) and Lincolnshire Teaching Schools Together, and within that the Kyra Teaching School Alliance that took responsibility for delivery, as well as within the Local Authority. The head of the teaching school was ultimately accountable for ensuring that the programme was effectively delivered at scale. Although this head was involved throughout the course of Mobilise, their most critical involvement was front-loaded. During the autumn term of 2016 they assumed a 'very very hands-on' approach to the initial setting up of Mobilise. They led the recruitment of individuals to the core team - most notably the regional leads whom they subsequently line-managed throughout. They worked closely with administrative staff at the teaching school and with other leaders across the authority, and they worked with LLP and EEF to recruit schools to the project. They contributed to writing the cluster meeting materials, and delivered some content when one of the regional leads was not available. In addition, throughout the course of Mobilise, the head of the teaching school maintained 'a strategic oversight of the project' and would periodically attend meetings with other Lincolnshire stakeholders and EEF. Finally, the head of the teaching school was responsible for contract management, meeting key performance indicators and reporting to the LLP. The centrality of the head of the teaching school's role to overall project success was also widely acknowledged by EEF and fellow Mobilise strategic leads ('really pivotal' and 'very important') and their personal commitment emphasised ('working tirelessly').

The Mobilise delivery model

Overview

Overall, the quality and effectiveness of the Mobilise activities and support was highly rated by schools responding to the survey, a finding mirrored in the analysis of school-based lead interviews, as illustrated by a respondent to the survey open questions: 'This was an informative project which has impacted significantly on the practice in our school.' (Participating school, survey respondent).

There were also a few examples from respondents to the open questions in the survey which implied that involvement in Mobilise had had a profound, even transformative impact on their school's practice and how they intended to engage with school improvement in the future, as one respondent noted:

'The Mobilise project was one of the best programs of school support that we have received in my 10 years of headship at this school. I firmly believe that if long term gains are to be

made in school support it will be from programmes such as these.' (Participating school, survey respondent)

Table 30 shows the perceived quality of activities according to survey respondents from schools that participated in the Mobilise programme. These findings are discussed, together with qualitative findings from the interviews and the open survey questions, in the following two sections. It is important to note that in most instances there is an alignment between the findings from the three data sources in relation to Mobilise activities. The open survey questions that are reported are:

- Which aspects of the programme did you find most helpful and why?
- Which aspects of the programme did you find least helpful and why?
- Do you have any final comments?

Table 30: Quality of Mobilise activities and support as rated by participating schools

Q16	Very high	High	Unsure	Low	Very low	N
Roadshow: Making the case for change (Sept 2016) %	7.4	70.6	8.8	13.2	0	68
Roadshow: Acting on the evidence (Oct 2016) %	8.1	66.1	12.9	12.9	0	62
'Managing Change' HR workshop (Nov 2016) %	2.4	57.1	31	9.5	0	42
Intervention Fair (Jan 2017) %	2.4	36.6	39	17.1	4.9	41
Cluster/PLC meetings %	11	65.8	12.3	9.6	1.4	73
Ongoing support from your cluster/PLC lead %	13	65.2	15.9	4.3	1.4	69
Support from other Mobilise staff, such as regional leads %	14.5	48.4	29	8.1	0	62
Resources to support implementation (such as audit tools, scaffolding framework) %	14.5	69.6	11.6	4.3	0	69

Source: SHU survey, row percentages. Base: all schools indicating that they participated in the Mobilise project

The enabling attributes, mechanisms and barriers related to the Mobilise delivery model are summarised in Table 31. The findings that underpin this summary are also reported in the following two sections, the first of which relates to Mobilise activities and the second to the roles of the regional and cluster leads.

Table 31: Mobilise delivery: enabling attributes, mechanisms and barriers

Mobilise delivery	
Attributes of key staff	Capability and high level of experience brought by regional leads and the head of teaching school, and their initiative, adaptability, drive and organisational skills.
	Competency, dedication, humility, approachability, and facilitation and organisational skills of the cluster leads.
Enabling mechanisms	Detailed preparation and training of cluster leads and the provision of supporting resources which enabled them to deliver cluster meetings where the fidelity to the evidence was maintained.
	Very high levels of support given by regional leads to cluster leads - including providing constructive feedback, intervening directly with disengaged schools and reducing administrative burdens.
	A facilitation rather than training approach in cluster meetings, where cluster leads deliberately cast themselves as non-experts.
	Co-constructed authenticity, whereby cluster leads shared their experiences of implementing the changes advocated by Mobilise in their own schools.
	Cluster meetings with the following characteristics: <ul style="list-style-type: none"> • a group size of about eight school-based leads • time for school-based leads to work on action plans • school-based leads willing to complete tasks and share their own learning.
	High level of support given by cluster leads to school-based leads and the provision of supporting resources.
	Responsiveness of the regional leads to issues as they occur e.g. the establishment of phase-specific clusters.
	Detailed monitoring and follow-up of schools not attending cluster meetings.
	Regional leads' attendance at cluster meetings to share knowledge, support cluster leads and gather intelligence.
	The provision of MITA training alongside the Mobilise programme.
Barriers	Cluster meetings with the following features: <ul style="list-style-type: none"> • an overly fixed and prescriptive approach that does not take account of the different starting points of the schools involved • aims are not clarified at an early stage • low or sporadic attendance by school-based leads • participants not undertaking tasks or being unwilling to share learning.
	Competing pressures on cluster leads and school-based leads, particularly during the summer term.
	The limited availability of some structured evidence-based interventions.

Mobilise activities: enabling attributes and mechanisms and barriers*Roadshows*

The first EEF roadshow 'Making the case for change', delivered in September 2016, was rated either very highly or highly by 78% of survey respondents. The second EEF roadshow 'Acting on the evidence', in October 2016, was considered either very high or high quality by 74% of those who answered the question (Table 30). The qualitative data from interviewees and respondent set the open questions in the survey showed a more marked variation in perceptions of the quality of the two roadshows. The first roadshow was valued for conveying a clear evidence base on which Mobilise was being founded and as such positively galvanised buy-in from schools:

'The first roadshow was great. It got everybody whipped up and excited about it. Having the EEF represented obviously gives it credibility, so that was really important.' (KS4)

In comparison the second roadshow drew criticism that it repeated too much ground previously covered in the first roadshow and did not allow sufficient space to explore and discuss the tasks attendees were encouraged to undertake from the first roadshow, for example the MITA survey and RAG rating.

'The only unhelpful thing [from EEF across the whole project], and this is taking on feedback from head teachers, cluster leads and school-based leads, was the second roadshow... the feedback we got, and I can see again where they're all coming from, was there was a lot of repetition and actually it wasn't what we thought, because we thought it was going to be more time to sit and talk with our clusters and our leaders and sit and work through our visioning plan.' (KS4)

Such was the depth of feeling from some respondents, Mobilise leads reported having to do quite a lot of repair work to 'smooth things over' which was not ideal when relationships were often at the very early stages of development. The EEF's and Lincolnshire leads' differing opinions of the second roadshow were in some ways a manifestation of more fundamental differences of opinion about the early direction of the Mobilise project. EEF interviewees felt that Mobilise leads were pushing schools towards action planning at too early a stage.

'Managing change' HR workshop

The 'Managing change' HR workshop received a positive response from 60% of those who completed this survey question, although only 42 respondents did so (Table 30). Only one school-based lead interviewed referred to the 'Managing change' HR workshop, suggesting that it was not a particularly significant feature of the overall Mobilise programme. However, in that one case, it did result in positive changes being implemented in relation to teaching assistants' contracted hours.

Intervention fair

The Mobilise Intervention Fair was less well received than either of the roadshows and the managing change HR workshop. It was rated very highly or highly by only 39% of respondents, 39% were unsure as to the quality of this event and 22% offered negative responses. Only 41 respondents answered this question (Table 30).

Respondents to the open question in the survey reported that **the intervention fair lacked sufficient different interventions and representation from different companies**. Relatively low numbers of school-based lead interviewees indicated that their school was interested in running more evidence-based interventions - in most instances the focus was on reducing them. However, some schools did send representatives to the Mobilise Intervention Fair.; Those who attended tended to report that **it fulfilled a purpose, to showcase certain interventions albeit in quite a 'sales-based' manner, but that it was not a particularly memorable even**, which may explain the lower satisfaction rates from survey respondents. One school-based lead purchased Catch Up training as a result of attending but expressed disappointment at the relatively narrow range of interventions on offer.

'One of the best things we've got out of [Mobilise] is the Catch Up training, the Catch Up literacy and the Catch Up numeracy, which came about from one of the fairs that were organised. I have to say I think we'd like a market sale with all the different sort of interventions that were on offer. ... there weren't as many interventions on offer as I was expecting.' (SBL G)

Some respondents to the open survey question suggested that case studies of how interventions practically worked in schools would have been helpful.

Cluster meetings

Data from all sources indicates that cluster meetings were generally well received. Views on cluster meetings were provided by 73% of respondents and 77% of these gave positive ratings (Table 30). However, as data presented in Findings 1 indicates there was a perception from some interviewees that the quality of cluster meetings declined towards the end of the programme, which they attributed to summer term school pressures for both cluster leads and school-based leads.

Opportunities for sharing practice, collaborating and networking with colleagues outside of school, which was facilitated through cluster meetings, was by far the most frequently identified component of the programme by respondents to an open survey question 'Which aspects of the programme were the most helpful components of the programme and why? This theme was also evident in the interviews:

'Everybody was really open and willing to contribute, to listen and also to share resources that had been made, and share ideas, which was really lovely. So a really really positive thing.' (SBL B):.

School-based lead interviewees appreciated the tight and focused format of the PLCs because it maximised the use of their limited time. They also particularly appreciated the time factored into the cluster meeting structure that allowed them to work on action plans when ideas were being generated. This minimised the risk that thinking would get lost and that core actions were not progressed due to the hectic realities of day-to-day school life.

'People that have been sat round the table at the PLC have talked about the fact that they've got very used to the format now and they kind of like the fact that it's timed and it's a bit rigid, because you know there's no down-time in it, there's no wasted time in it..' (CL Focus group 1)

Similarly, respondents to the open survey questions valued the amount of time earmarked for discussion and progressing action plans. However, **a minority of school-based lead interviewees resented what they perceived to be an overly fixed and prescriptive model to the cluster meetings,** which left some questioning their relevancy. This was also highlighted by respondents to the open survey questions, some of whom suggested that cluster leads needed to be given greater licence to 'adapt to their audience' - particularly in instances where schools had already implemented a number of the recommendations.

Respondents to the open survey questions **appreciated the regularity of cluster meetings** (half termly) throughout the year. **Attendance at cluster meetings was very important to group cohesion and therefore a key predictor of cluster meeting satisfaction** because the group dimension was central to the PLC model:.

'It would have just been nice to have had maybe a bit more commitment from everybody, but then that's down to individual schools. there were only three or four schools attending towards the end, ... But obviously the whole point of these cluster meetings is that you're going to have a group of people to talk about best practice.' (SBL J)

Equity issues were raised about some schools not keeping pace with Mobilise tasks and therefore not being able to give back to the group as much as they were receiving from it. There was also a suggestion in a minority of cases that some historical tensions between schools, a legacy of previous school improvement arrangements, which led to a few school-based leads being guarded about sharing their practices. However, this was definitely a rarity, with the clear majority of school-based leads reporting a **very healthy and upbeat atmosphere at cluster meetings that was conducive to meaningful, co-constructed learning.**

One further criticism articulated by two school-based lead interviewees was that the aims of Mobilise could have been more clearly conveyed at an earlier stage.

'It could have been far clearer in its aims. I think part of the problem was because it wasn't clear, people were then going back to school and they weren't able to pass on the message and that's when I think you ended up with mixed messages to some TAs.' (SBL N)

Clusters ranged in size from four to 14 schools, with a mean of 10 schools per cluster. **The general consensus from the interview data was that a group of around eight school-based leads was optimal.** Significantly higher numbers caused practical problems such as having sufficient time to give everyone a voice, whereas lower numbers reduced the diversity of views and impinged on the learning group dynamic.

Facilitation of cluster meetings is discussed below in the section reviewing the cluster-lead role.

Resources

Resources to support implementation were regarded particularly highly, with 84% of survey respondents rating these as very high or high quality. Resources were the second most frequently mentioned as helpful component of Mobilise by respondent to the open survey questions (after opportunities for sharing practice, collaborating and networking with colleagues outside of school). These respondents referenced a wide range of materials ranging from the EEF toolkit, MITA-related documentation and more practical project-specific resources intended to help facilitate change, such as the scaffolding framework, audit/questionnaire tools and the TA-Teacher agreement document. In contrast the interviews with school-based leads showed limited evidence that the audit tools were regarded as important in supporting change, although the scaffolding framework was frequently mentioned as particularly useful.

Other issues

Other issues that relate to the Mobilise programme as a whole found in responses to the open questions in the survey, and supported to some extent in the interview data were:

- **Scheduling issues and overly ambitious aims:** A small number of respondents felt that the ambition of the Mobilise aims was unrealistic and/or that too much was being compressed into one year.

'There is lots of good stuff in the project - but it was too rushed to properly deliver and embed.' (Participating school, survey respondent)

'Remit too large e.g. raising the impact of teaching assistants/becoming ready to work in an evidence base way/research.' (Participating school, survey respondent)

- **The time commitment required:** for some, the amount of time required out of school was not sustainable and led to issues with attendance, particularly in the summer term. Some respondents believed that aspects of the programme could have been sharpened to make time commitment more manageable.

- **Onerous amount of paperwork and monitoring required:** Complaints tended to focus on the use of action plans in the early stages of programme (this was an issue picked up by Mobilise leads and the requirement was simplified as a result).

Regional and cluster lead roles: enabling attributes, mechanisms and barriers

Regional leads

Regional leads were well-respected, and their accessibility especially welcomed:

'They [regional leads] are always at the end of an email for the odd question. One or two times when I've had a little bit of difficulty engaging a school and I've tried a few different times myself, if I've ever needed to refer it on to those regional leads, they've very quickly dealt with that situation.' (CL A)

The high level of skill, personal drive and enthusiasm of the full-time regional lead was recognised by interviewees as a major contribution to the efficient functioning of the Mobilise project. As was noted by an EEF interviewee, the regional lead's 'organisation skills are extraordinary' - something that helped ensure the various stakeholders remained connected throughout.

There was also appreciation for the high number of cluster meetings that regional leads attended. Regional leads were very aware not to encroach on cluster lead territory and their role at meetings was to support as opposed to lead. **From the perspective of regional leads, attendance at cluster events greatly increased their awareness of good practice across the region and by extension aided their ability to signpost schools towards each other as appropriate - a significant dimension of Lincolnshire's wider goal of achieving a self-improving school-led system.**

'We're able to gather all this intelligence of what's now 283 schools and share that around the county. That's what's been a real strength of us attending.' (KS 4)

For the most part, **cluster leads welcomed the 'additional knowledge and expertise' that regional leads brought to 'the discussions' but in a minority of instances there was some 'suspicion amongst participants' that they were being 'checked-up on'.**

Regional leads were sensitive to the voluntary status of the cluster lead role and were mindful that most cluster leads had very limited time and had to combine the role with other wider school-related roles and responsibilities. **Cluster leads appreciated regional leads taking the time to explicitly recognise their efforts or to offer constructive feedback - identifying this as a real motivator.**

'[The regional lead]'s been really positive as well, so sometimes emailed me to say 'great feedback today, you're doing an amazing job, thank you so much'. And that's so uplifting, because you don't always know that you are doing a good job.' (CL Focus group 1)

Regional leads provided a high level of support to enable cluster leads to do their role as effectively as possible. Central to this was assuming much of the administrative responsibility - for instance, ensuring that quality research and associated materials were sourced and disseminated in an easily accessible form for cluster leads to make use of.

'The last two or three times we've raised questions from the research and then [the teaching schools lead] and [P/T regional lead] have compiled a document that is sent out with those

questions that we can then raise with our cluster groups and in school when we're looking at the research. So that's been really useful.' (CL B)

Regional leads were also active in supporting cluster leads by chasing persistent non-attendees.

[The regional lead's] got that real overview and has been able to make those links if we've struggled with them.' (CL Focus group 1)

In addition, **regional leads were praised for their initiative and adaptability** when scenarios emerged that required flexibility. This was an important dimension to their role, given that the chosen PLC model of delivery was deliberately quite prescriptive. An example of adaptability was establishing a dedicated special school cluster in response to feedback from special school participants that the clusters lacked specificity to their context.

Cluster leads

Context

Cluster leads had quite diverse profiles in terms of their existing school-based roles, number of years in teaching, and levels of experience delivering CPD, as is outlined below.

- Concurrent school-based roles included directors of teaching school alliances, principals, assistant and deputy head teachers, year group leads, SENCOs and classroom teachers (many having multiple roles).
- Prior experience of delivering training or CPD: Six had 'some', four 'quite a lot' and four 'lots' of prior experience.
- Number of years worked within schools ranged from two to 28 years with a mean of 13 years.

(Data based on background characteristics sheets completed by 14 cluster leads prior to undertaking focus groups)

Mobilise strategic leads were split on whether it was preferable to insist on the cluster lead role being performed by a head teacher or broadening the criteria to include class teachers. The argument for insisting on a high level of seniority was that being a class teacher created a power imbalance that made it more difficult for them to hold more senior colleagues to account.

'Particularly if you're a cluster lead who is perhaps just a classroom teacher... There is a hierarchy in teaching. And it is very difficult for a classroom teacher to be chasing a head up, saying hang on a minute, where's that paperwork?' (CL Focus group 2).

The counter-argument was that head teachers and other very senior members of staff had too many competing priorities and that this left them vulnerable to not being able to fully commit to the role.

Cluster leads were the conduit through which the evidence-informed PLCs were filtered down to school-based leads and ultimately to schools, and as such assumed an integral role in ensuring that the fidelity to the original evidence was maintained. Maintaining fidelity to the evidence is considered in the final section of this chapter, but in considering the quality and effectiveness of the cluster lead role it is important to note here that cluster leads were required to balance the tension between maintaining the fidelity to the evidence at the same time as adopting a facilitation rather than training role. The dual, and potentially conflicting, aspects of the role were clearly set out by one Mobilise leader:

[The cluster lead] role is to maintain the fidelity of the evidence. Any conversation that they're having with the schools has got to be rooted in the evidence; they have to come back to that. It's about making schools accountable for the actions they're taking, based around the evidence.They're not training the school-based leads. It's not a case of we train them and they train school-based leads. It's a case of them being there as a facilitator.' (KS4)

Ongoing support from cluster leads was seen as being of high quality, with 13% of survey respondents rating the quality as very high and a further 62% rating quality as high (Table 30). A similar positive perception was found in the school-based lead interview data: where the vast majority of interviewees were extremely positive school-based leads were extremely positive about the competency of cluster leads. Cluster leads were seen by strategic leaders as central to the success of Mobilise:

'I think one of the main factors in its success [Mobilise overall] is because the role of the cluster leads has been pivotal. The quality of the cluster leads cannot be and should not be underestimated in all this. When we held the base camps, when we were training, regional leads, cluster leads really worked together to develop and steer the project for the year.' (KS 4)

Cluster leads reported feeling well prepared for their role through the initial two days of training and the base camps through the year: 'They've armed us very well with the research and with the coaching strategies and such.' (CL A).

Cluster lead attributes, skills and actions

The most consistently cited positive attributes, skills and actions of cluster leads that were perceived to predict their ability to be effective were:

- **Humility and approachability:** Many cluster leads deliberately cast themselves as non-experts; doing so at an early stage helped to set an expectation that clusters were not intended to cement hierarchies but were instead aimed at encouraging every member to share experiences and make active contributions throughout. The very open and approachable manner in which cluster leads operated greatly assisted with this.

'what I'm doing as cluster lead,... I'm not sitting there as the expert. I'm sitting there as someone who has had a little bit of extra training and somebody that's willing to take the time to work with all of my schools.' (CL B)

'She was very down-to-earth. If she wasn't sure about something, she would openly say I'm not sure; I need to find this out.' (SBL E)

- **Co-constructed authenticity:** Connected to the above trait, **school-based leads very much appreciated that cluster leads were undertaking the same journey back at their own schools** and were not treating the experience as a hypothetical exercise. . For cluster leads to be able to offer their candid, first-hand experiences when they attempted to implement Mobilise-related changes within their own contexts, was an invaluable learning tool in itself. It also assisted with the authenticity of Mobilise and helped to create an ethos in most cluster groups that the developmental journey being undertaken was being genuinely co-constructed, as opposed to one based on unquestioned adherence to a defined blueprint for success passed down from above:

'As cluster leads, we all then are school-based leads as well. So we have to obviously come to the base camp, get the information, run it through the PLC of the cluster, but then we're all then doing a PLC in our own schools as well, so that's kind of informed those two different roles.' (CL Focus group 1)

'What was really useful was that she was also a school-based lead so she could talk about not only what she had been told to talk about but also her experience of doing it in her school, which was really valuable.' (SBL B)

- **Organised and dedicated approach:** On a more practical level, **cluster leads were generally praised for the level of organisation and responsiveness to queries or issues that were raised.** A number of school-based leads specifically highlighted how their cluster lead skilfully managed the dynamics of their cluster group to ensure a multiplicity of voice was heard - while at the same time doing guarding against any key milestones and/or actions being missed.

'Really good. Not overly dominant at all, .. going back to that facilitator role in terms of making sure that everybody was heard; everybody had their opportunities, and then driving the discussion if necessary, making sure that we knew when the next meetings were.' (SBL I)

'if I was stuck on something when I was about to do my PLC, I would email her just for clarity and she would ping me back any resources or any information or just reiterating what I had to do. Oh no I couldn't fault her, she was perfect.' (SBL E)

- **Facilitation skills:** There was some evidence to suggest that some cluster leads were better able than others to respond to the more challenging scenarios that arose within their clusters. Or, put differently, it appeared that certain cluster leads were able to draw upon greater facilitation skills than others. This might conceivably make the difference between retaining members within a cluster and losing them. For instance, a senior leader interviewed from a high-performing school, with a strong externally-recognised track-record relating to their TA workforce, reported having reluctantly withdrawn from Mobilise n. Despite wanting to be involved in a sector-led school improvement cluster, ultimately they grew frustrated with what they perceived to be an overly-formulaic delivery model, as they explained:

'I think it also needs to be not a one-size-fits-all approach really... To then go back and re-visit those [EEF recommendations] we didn't feel would be of value really, because actually we've covered a lot of ground with that and we've moved a long way in supporting our settings... I understand why it was very prescribed because some schools really need that level of prescription. If I'm given that level of freedom, yes, I'd like to go forward with it.' (NP)

It seems a missed opportunity that a high-performing school wanting to engage in a new sector-led model for school improvement felt unable to continue.

The qualitative data suggest that **there was some variation in the quality of practice in terms of the wider dimensions of the cluster lead role and the 'above and beyond' tasks that individuals took upon themselves to do.** It was this additionality that distinguished between cluster leads who effectively fulfilled the remit of the role and those excelled beyond it and was attributed to both personal traits and the extent to which their job role enabled or constrained them in undertaking additional activity.

Some of them are perhaps not teaching full-time – they are going above and beyond what was expected. It's just that some, because of their own situation, have the capacity to do perhaps a bit more Some particularly are those sorts of people that just throw absolutely everything into something, whereas for others it's just one of many things they're involved in. Nobody is not doing what's been asked of them; it's just that some have the capacity to do above and beyond.' (KS4)

Effecting scale-up in schools

In this section we report findings on the time spent by school-based leads implementing Mobilise, the approaches they took to implementation, and the enabling attributes and mechanisms and barriers related to successful implementation at the school level.

Time spent by school-based leads on implementation

There was notable variation in the amount of time that school-based leads reported spending on implementing Mobilise within their school. Forty per cent of respondents indicated that their school-based lead spent at least two days per half-term on implementing change (see Table 32). Twenty per cent of respondents reported that school-based leads spent half a day or less.

Table 32: Time spent per half term by school-based lead on implementing change

	N	%
Less than half a day	4	5.1
Half a day	12	15.2
One day	14	17.7
One and a half days	15	19.0
Two days	9	11.4
More than two days	23	29.1
Total	79	100.0

Source: SHU survey. Base: all schools indicating that they participated in the Mobilise project

Replication and adaptation of cluster meetings in school – cascading through school-based leads

A key premise of the Mobilise model was that school-based leads would cascade the content and resources of the cluster meetings in their school via PLCs with staff. Interview data indicate that there was variation in the extent to which this happened and the ways in which it was done.

The limitations of TA and teacher time and the need to fit Mobilise within existing school schedules meant that **less time was spent in meetings with staff in school than had been possible in cluster meetings**. A maximum of one hour of delivery to staff, and often less, was reported by most school-based lead interviewees and a few of the school-based leads did not hold meetings after every cluster meeting. One school-based lead interviewee did not hold any meetings as they believed that their school had already implemented the EEF recommendations.

School-based leads adapted the mode of delivery depending on the circumstances in their schools. For example, some schools dedicated meetings to Mobilise, whereas in others school-based leads integrated delivery into existing staff meetings. There was variation in who received training from the school-based lead following cluster meetings. Interview data indicate that training was most frequently delivered to TAs as a discrete group, some training was delivered to TAs and teachers together, and in fewer instances training was delivered to teachers as a discrete group. The variation, at least to some extent, appeared to be a consequence of logistics - for example, in schools where TAs were not paid to attend after-school meetings, a separate meeting might be arranged during the day for TAs. There was also variation in who was targeted for dissemination depending on the content of a particular cluster meeting:

'I have found it very difficult to have a post-cluster full meeting just because of the timings and things in the school. What would usually happen is that I fed back to SLT and then we decided who's going to need to access it as a sit-down meeting and what we can disseminate

through the team leaders. ... Again, with some of the ideas we've come back and as an SLT almost come up with the action plan ... and said this is the next action you are going to do. Whereas other times we have come back and said this is our idea – ... what changes would you like to make. So we haven't really had the set structure.... It's been a little bit different after each cluster meeting depending on what the priorities were.' (SBL C)

School-based leads adapted the content of cluster meetings to focus on those aspects that they perceived were most relevant to their school, for example omitting practices or EEF recommendations that they felt were already in place, as illustrated by the first quotation below, or focusing on particular aspects of the recommendations that they felt were most important for their school, as illustrated by the second quotation:

'So it was just taking bits that you thought actually I haven't seen that going on in class or I don't think I've heard people talk about that. It was trying to sort of cover new ground rather than things that were happening already.' (SBL F)

'...we kept coming back to the self-scaffolding PLC recommendation, just because that was the one that we really, really wanted to embed.' (SBL E)

There was some evidence from the school-based lead interviews that using the **MITA** survey shaped their priorities for action, in two of this was TA/teacher communication and in another it was TA enthusiasm and engagement.

There was also tailoring to the staff group that the school-based lead was working with:

'After my cluster meeting, ... I would share that new learning with [TAs], but obviously tailor it more to the TAs and how they would respond to that... Some things weren't really necessary to share with them ... when we got to the intervention section we had a group discussion about interventions, if they felt there were any problems, rather than bringing in a lot of the new learning.' (SBL A)

Practical issues such as photocopying costs and the fit with the models used in school also influenced school-based leads' decisions on what to select from cluster meetings:

'We really had to prioritise which bits were important. If a piece of evidence was really crucial to the message that we wanted to get across, then we would share it, but if it wasn't,... it could just be quoted... because we've got large numbers of staff and in terms of photocopying ... or to have given them an expectation that they needed to have read this, when actually the message could have really been made more concise... depending on the resources available, we would either use those or something which was equivalent or something that would fit in within our own model within the school.' (SBL B)

There was further **variation in the extent to which school staff were engaged in shaping implementation in their school**. In one school, engaging staff in planning the next steps to foster ownership was central to their implementation approach:

'It's been always really important we give [staff] ownership and actually they're leading it from what they know about their class and their children ... It's been very much what do you think will work, what will help develop our practice further.' (SBL B)

A few of the school-based leads had replicated from the cluster meetings the use of action plans for school staff to identify next steps, although this was dropped in one school as they were not being completed consistently and feedback was negative.

In contrast to school-based leads that engaged staff in shaping implementation, other school-based leads were more directive:

'I know the way the PLC meetings work, they have a very specific structure, and the idea is to bring it back to school in the same way so that the staff are able to take on their own learning each meeting, and then be part of the action planning process. We found that hard just because of the [time] constraints. ... Which is why I haven't been able to follow the same structure as the PLC meeting. And in all honesty I don't think every time that would have been useful ... because in the clusters, we've come up with the action plans, and .. really I'm just telling them 'this is the action plan'. I'm not sitting with staff saying, 'what would you like us to do next'.' (SBL C)

Other approaches to implementation

Observations by leaders and peer observations by TAs were used in some schools to aid implementation, as illustrated by one school-based lead:

'I obviously do my observations of teachers anyway. As part of that I took my deputy with me ... His focus was 100% on what that TA was doing. He followed some of the guidance in that book ... what they were doing every single minute, who they were with...g. ... and feeding back ... that information, which was really powerful. At the beginning you'd have the TA sat there for 20 minutes watching the lesson and not being involved .., so that then got the discussion around what can we do to be more productive for 20 minutes than be sitting and listening...? That got their mindset changed. From that we also got the TAs to .. observe each other and do a similar type of exercise., just less informaland that was quite well received as well.' (SBL K)

Setting expectations through performance management, creating policy or collaborative activity were also tools deployed by some school-based leads to implement the EEF recommendations:

'We've set up these agreed expectations, so, for example ... one of our agreed expectations is that PSAs will be provided with planning before the lesson and then we look at whose responsibility is that? That's the teacher's responsibility, so we are agreeing as a staff team that that is something that we're going to ensure happens, and if it doesn't happen then you will be held to account for it because what we're saying is that we're all agreeing to do that. .' (SBL I)

Sequencing change

There was **variation across the schools in the sequencing of change**. Some schools followed the sequence laid out in the cluster meetings:

'We were given – an agenda type sheet – and we scribbled on that what was relevant to our school, and what we needed to work on, relevant to our schools. Then that's the format we followed.' (SBL E)

In schools, particularly those that had already implemented aspects of the EEF guidance, the sequencing of implementation was determined more directly by the school:

'I think our order was pretty much pre-determined by the school, because we had already started on the journey. We had our longer plan in place of what we wanted to achieve and our vision for the support for pupils, but as something came up on the cluster meeting, if that was useful, we actually fed it in.' (SBL C)

This perhaps could be seen as a later stage of maturity in implementation where the focus had moved away from 'how do we make changes to ensure we make the best use of TAs?' to 'how does the work of TAs integrate into our plans for improving pupil outcomes?'.

Scale of implementation

Most of the school-based leads interviewed had sought to implement change across their school rather than piloting, for example, in particular year groups. Variation in the scale of implementation arose from whether school-based leads chose to implement all or most of the EEF recommendations or focus on one or two recommendations:

'Right at the very beginning, [our cluster] were probably all very much on the same level, but as we've gone through the year, different schools went at different paces ... I think now I've reflected on the whole project, there were lots of things that we could have implemented across the seven recommendations, but obviously we only worked on one recommendation because it would be too much to implement them all at once ... you need the time to be able to do it, and I think if you try to do it all at once, it's too much to take.' (SBL A)

Case study examples of implementing change in school

Vignettes 3 and 4 provide insights into how school change was effected in the two case study schools.

Vignette 3 - Effecting change in case study school A

Following the first cluster meeting the SBL ran a two hour PLC where teachers and TAs together reviewed their practices and how they work together. The SBL perceived to be an important motivator:

'It was really encouraging because we felt that the TAs were very vocal and actually were really ready for a change and ready to be evaluative and get involved more with the whole-school approach to this. So that was really useful.' (Case Study A, School-based lead)

Following this staff completed the MITA surveys and a further meeting was held to review the results and agreeing priorities. The SBL then ran PLCs with TAs during school time approximately monthly throughout the year. The content was a mix of information from the cluster meetings, supplemented by some other inputs based on the needs that the school had identified, for example a session on SEND resources. The TA meeting was run using the PLC format but had to be a shortened version of the cluster meeting to fit a one hour slot. The PLC format was perceived to be an important support for change:

'I think the professional learning community and engaging with teaching assistants in a way that allows them to voice their... whether it be concerns or points of view or opinions, in a format where they knew that they were going to be listened to, and that information was going to be acted upon (Case study A, head teacher)

TA were similarly positive about the PLCs:

'it's really pulled us together actually, having the regular meetings, hasn't it. .. it's made me feel more valued. It was a chance to express our TA woes and our opinions to each other and to a teacher as well' (Case study A, TA focus group).

A TA policy was developed, read and agreed by all staff. About halfway through the year the SBL worked with the TAs to review the TA guidance policy, evaluate progress and identify what they needed to reprioritise.

TA peer observations were also introduced, looking particularly at independence and types of questioning and later in the year TAs were trained in how to coach by the SBL and peer coaching was

established with the intention of stronger TAs supporting those who needed more support. This was perceived to be a more effective model than senior leader observations:

'In the past we've had individual senior leaders observing teaching assistants.... in terms of supported improvement, it probably isn't the right model, ... because we've had situations where it's kind of destroyed a person's confidence where they feel they're doing the job to the best of their ability.' (Case study A, head teacher)

TAs were generally positive about peer observation and coaching, although teachers reported that they needed more support to establish a clear focus.

The SBL also used staff meetings to ensure that teachers understood that they needed to do to.

Vignette 4: Effecting change in case study school B

Following attendance at the cluster meetings, the SBL made judgements about how they would utilise the PLC within their school. In general the format was modified into a more 'practical training session' as opposed to 'just an information session'. The duration of the PLC was also shortened to enable it be delivered at twilight staff meetings.

'So we weren't just regurgitating what we'd been given in ours' (SBL B).

In total, **4 whole-school staff meetings were dedicated solely to Mobilise**. TAs were paid to attend them. This followed on from **baseline surveys** undertaken at the beginning of the project by all teachers and TAs. Following analysis of the key findings, a **consultation phase** ensued which included a brainstorming activity, to determine the parameters of the TA role. This resulted in the creation of a **set of 'non-negotiables' for what TAs should and should not be expected** to do within their role. So the foci of training and input delivered back at school was a combination of the key issues identified during the consultation phase and what had been highlighted during the cluster meetings. It was clear that **certain features from the Mobilise programme were prioritised more than others**. For example, the scaffolding framework was consistently referred to during the interviews with teachers and TAs.

The agreed 'non-negotiables' and principles were collated along with other key resources (e.g. the scaffolding pyramid) obtained through the Mobilise project to form a **document that was disseminated to all teachers and TAs**; copies and posters were also put up in each classroom.

The senior leadership team reinforced the importance of staff adherence to these key agreed principles from an early stage. One effective way of doing this was to set very high standards early on, more or less compelling staff to work in the new ways agreed (particularly the recommendations relating to pupil independence). By doing so, most teachers and TAs did try new ways of working early on, which in some cases was an uneasy departure from previous practices but in the majority instances staff quickly bought into the changes, acknowledging the benefits they brought.

Initially I think that was something that we kind of stated must happen. I think it's more natural now that they do it but initially it was a "no you do not put your TA with the lower group every single session". We want to see that actually they are working with different groups of children and that you are working with different groups of children. I think forcing it to happen meant ... oh actually this works, and it's easy and the TA can do it and its fine. (SBL B)

In addition, **drop-ins were organised by senior staff with a dedicated focus on TA deployment and TAs were also invited to undertake paired peer observations.**

Enabling attributes and mechanisms and barriers to implementation in schools

The enabling attributes and mechanisms and barriers to implementation drawn from analysis of the qualitative data are summarised in Table 33 and illustrated below.

Table 33: Enabling attributes and mechanisms and barriers in schools

School level	
Attributes of staff	The commitment and enthusiasm of school-based leads.
	Teachers and TAs being open-minded and receptive to change.
Enabling mechanisms	A senior leader undertaking the school-based lead role or where the school-based lead is not a senior leader, senior leader 'buy-in' and a clear process in place following cluster meetings to progress actions in school.
	Prioritising whole-school Mobilise PLCs in scheduling school meeting times.
	Lack of commitment to improving TA deployment and use and/or other school priorities taking precedence.
	Putting in place a school-based lead who does not have the authority to drive change.
	Failure to understand that the Mobilise project was intended to change whole-school attitudes and practices not just focus on training TAs.
	A full whole-school meeting schedule that could not be revised to accommodate the late scheduling of Mobilise.
	Capacity to implement change in very small schools and engage all TAs in large schools.

Enablers

The **commitment and enthusiasm of school-based leads** was perceived as a crucial enabler to implementation of the EEF recommendations in schools. When a **head teacher or senior leader acted as school-based lead**, there was also evidence that such schools tended to progress furthest with Mobilise implementation. As the quotation below illustrates, being a head teacher or senior leader immediately cut the number of steps in the implementation chain, tending to lead to a more efficient process.

'When it's the head doing it, you sort of think actually I know and I haven't got to go back and OK this with anybody... I think it validated the action planning process.' (SBL F)

When other staff undertook the school-based lead role it was crucial that there was **senior leader buy-in** and a **clear process in place following cluster meetings to progress actions in school**.

'Yes, definitely [feel supported by the head teacher]. When I would come back, she would say what have we got to do? And I'd say right I need the next staff meeting...and she would slot me in a date, and then as we got the hang of it, she would then put others in ...so that they were spaced out throughout the year.' (SBL E)

Prioritising Mobilise-related whole-school inputs and ensuring slots were booked into diaries as early as possible to reproduce PLCs from cluster meetings was also regarded as an enabler.

'All the staff meetings, when I'm going to be on the agenda, when I'm meeting with the TAs, all of that is also now in place ..., and because we did it last year and they're all up on the wall ready for people to know what's going on.' (SBL O)

Implementation was more effective when staff were open-minded and receptive to change:

'Really willing staff – high-quality professional LSAs who are treated like professionals and their role being important is a really big enabler. And that kind of collaborative nature of everybody that works here. They see that they're all important, that every moment counts and that school vision of challenging ourselves..., have all enabled it to be driven forward.' (SBL B)

Barriers

Having **insufficient time to perform the role of school-based lead effectively or be able to prioritise Mobilise against other competing school pressures was the basis for most key barriers identified.**

One school-based lead who was also a cluster lead felt that **undertaking the cluster lead role impeded their capacity to do justice to the school-based lead role.**

'I think I would have been more effective if I wasn't a cluster lead as well, just because of the time it's taken really... I found myself putting more time into the cluster than I did actually into my own school.' (SBL K)

Where 'push' factors were the key motivators behind signing up to Mobilise, there was less commitment to implementing the EEF recommendations. Examples of push factors included a belief that there was not a 'choice', with some interpreting the original letter inviting participation as 'non-negotiable' or alternatively that it was something 'politically' they should be seen to be involved in.

'It did feel a little bit at the outset that headteachers all signed up to this because this is what the county is doing ... And then they weren't really committed to the principles of it.' (CL Focus group 2)

There was also less commitment where school leaders had an interest (or at least curiosity) in the idea of clusters as a conduit for school improvement but had **limited investment in the chosen focus on TAs**. In some schools, **other school priorities took precedence** and changes in the deployment and use of TAs did not feature in their school improvement plans. **Undertaking something as ambitious in scope as Mobilise without it being a genuine core priority was highly unlikely to succeed.**

Selecting a school-based lead with no authority to drive change was also perceived to impeded implementation:

'I haven't done anything like a working party or anything because it wasn't appropriate because the other lady is still in post.' (SBL D)

In a few schools, implementation was impeded by a **failure to understand that the Mobilise project was intended to change whole-school attitudes and practices not just focus on training TAs.**

'When I arranged it at first, the person who was sorting out the CPD just sent TAs to the training, just the TAs, no teachers. I said, 'No, I need the teachers. This isn't a TA project, ... the teachers have got joint responsibility'.' (SBL L)

The late scheduling of Mobilise meetings also created logistical problems for schools. Many school-based lead interviewees reported that whole-school meeting schedules were already full for the year and found it difficult to free up time for whole-school meetings to replicate the cluster meetings. As one explained 'We started the year pretty much with all our staff meetings plotted out on timetables and there was no actual time available.' (SBL C)

Very small schools with a limited number of senior staff able to take on additional responsibilities found implementation challenging:

'In a small school everybody has quite a lot of shared responsibilities. That's sort of exactly what happened to us. I found myself at October half-term with a member of staff whose workload and ability to cope was struggling, so I took over it. However, my workload is tricky, and that's why the attendance from us was quite intermittent. Ideally I would have liked somebody else to take that on board and have driven it more fully.' (SBL H)

Implementation in large schools, with a big TA workforce also brought challenges in ensuring that all TAs were engaged:

'I think the only barriers really again it's just making sure that everybody gets the message, because we have a huge amount of teaching assistants here and obviously the part-time assistants aren't available all the time for the feedback, the meetings etc. .' (SBL J)

Maintaining fidelity to the evidence

A central mission of the EEF team, which was communicated fervently and compellingly throughout the development phase and early stages of the delivery phase, was to ensure fidelity to the evidence. In this section we review the extent to which this was achieved. Fidelity to the evidence was by the EEF team. The inclusion of the two roadshows at the start of the Mobilise programme was intended to provide a forum where the evidence could be delivered directly by EEF to ensure fidelity. The Mobilise delivery model design was intended to ensure fidelity through a process whereby the regional leads compiled the evidence to be drawn on supporting resources and the PLC format through which they were to be used. These were then to be used without significant adaptation by cluster leads in cluster meetings and, in turn, by school-based leads within their schools. There was also monitoring of resources produced by schools before they were uploaded to the Mobilise website. Lincolnshire also had the benefit of resources which supported fidelity that had been produced for the South and West Yorkshire scale-up project.

The evaluation data indicate that the integrity of the individual EEF recommendations and the research evidence that underpins them was maintained as it was delivered by the regional leads to the cluster leads at cluster base camps and to school-based leads at cluster meetings:

'We stick to those (EEF recommendations). ... that's why the PLCs are structured very clearly in terms of what we do and the recommendations – absolutely.' (CL C)

'We were really firm with the PLC structure ... the PLC structure was the absolute core spine of activity, because it was about practitioners learning, reflecting, developing, but doing so in a highly structured, evidence-based [way].' (KS1A)

The original intention was to work through the recommendations progressively, with recommendations 1 to 4 being completed by the spring half-term in 2017, aligning with evidence that school-level structural change is a necessary precursor to ensure that training for TAs can be impactful. In response to feedback from the cluster leads and schools and also concerns about keeping schools on board, there was some re-ordering in the delivery of recommendations by the regional leads:

'The regional leads very early on realised from the discussions that we [the cluster leads] were having [problems] .. the problems that people were talking about from their schools ... we very quickly focused and .. switched on to a few of the recommendations that seemed a bit more poignant at the time. So they've [the regional leads] adopted what they call the 'tight but loose' model. Although we will get through that content in the end, the journey that we take to get through that content might differ depending on the context. I think that flexibility has been vital in keeping schools on board.' (CL A)

The training for cluster leads was reported to have been effective in enabling them to reproduce the delivery of core, standardised PLC presentations across all the clusters, remaining faithful to the original evidence on which they were based. The training, together with cluster leads' own professionalism and engagement, were perceived by strategic leaders to have been pivotal.

'I think that that was successful. I think some of those cluster-based leads were as good guardians of the evidence as you could possibly wish to have.' (KS 6)

As has been detailed earlier in the section on replication of cluster meetings in schools, most schools were unable to replicate the PLCs in full mainly due to the time not being available for such meetings. This was exacerbated in several schools because the annual schedule of meetings and in-school CPD had been set before they were informed of the detail of the Mobilise model. While some schools managed to run shortened PLCs in schools, there was inconsistency in whether these were for teachers, TAs or both. Some school-based leads had to be more creative, integrating implementation and sharing of resources within team meetings that were not dedicated to the Mobilise project.

The following quotation from a school-based lead who was able to run a one-hour session in school following each cluster meeting illustrates four factors taken into account by school-based leads more generally in deciding what to share in school from cluster meetings: i) how important they perceive a particular piece of evidence to be; ii) what they perceive is realistic in terms of teachers and/or TAs engaging directly with evidence; iii) the fit to existing school practices; and iv) practicalities (in this case, photocopying):

'We really had to prioritise which bits were important. If a piece of evidence was really crucial to the message that we wanted to get across, then we would share it, but if it wasn't, if it was just useful and it could just be quoted. Just because we've got large numbers of staff and in terms of photocopying ... or to have given them an expectation that they needed to have read this, when actually the message could have really have been made more concise. ... depending on the resources available [from Mobilise], we would either use those or something which was equivalent or something that would fit in within our own model within the school.' (SBL B)

As the earlier section on effecting scale-up in schools has evidenced, school readiness to engage in research and senior leaders' support are essential to enable school-based leads to effect change in ways that maintain that there is fidelity to the evidence.

In this section we draw from the discussion of findings on quality and effectiveness set out in this chapter to summarise the key enablers and barriers that supported or impeded the initiation, development and implementation of the embedded model of scale-up and the delivery of the Mobilise programme. Table 32 summarises the enabling attributes and mechanisms related to EEF, Lincolnshire at the strategic level, Mobilise at the operational level and at school level. Table 33 similarly summarises the barriers encountered. These profiles provide insight into how enablers and barriers have operated at different locations and levels within the school-led system during this scale-up campaign.

Findings 5: Scalability

This section draws on findings presented in previous sections and analyses of additional data to consider whether the approach taken to scale-up in Lincolnshire is scalable. Three aspects are discussed:

- **Sustainability** - this section focuses mainly on Lincolnshire stakeholders' and school-based leads' views on the extent to which change relating to making the best use of TAs and using research to inform practice more generally is sustainable. Conclusions drawn from this analysis are tentative, in light of the data being grounded in individuals' perceptions and given that very little time had elapsed since the end of the campaign when the data were collected.
- **Affordability** - this section provides summary data on the costs of the Mobilise programme and perceptions of affordability.
- **Replicability of the embedded approach to scale-up outside Lincolnshire** - this section presents the Lincolnshire stakeholders' and the EEF implementation team's perceptions on whether the approach could be adopted elsewhere.

Key findings

1. **There are a number of positive indicators of longer term sustainability, although it is too early to ascertain if these have led to sustainable change. Indicators span:**
 - **Schools' intentions to continue embedding the EEF recommendations on TAs.**
 - **Improved school-readiness for research use.**
 - **Infrastructure and strategy at the county level that fosters and supports research use, and strengthened school networks that facilitate schools' access to, engagement with and use of research.**
2. **The delivery of the Mobilise programme was funded by the contributions which all schools in Lincolnshire make to the Lincolnshire Learning Partnership and Local Authority Funding. If a direct charge had been made to participating schools to cover these costs, this would have been £665 per school. This sum relates only to delivery costs and does not include time provided by EEF and Lincolnshire stakeholders during the initiation and development phase.**
3. **The embedded model of scale-up is potentially replicable as it focuses on an area or region's context and priorities and engages key stakeholders. In Lincolnshire, strategic alignment with changes in school improvement governance may have heightened receptiveness to the model, and county structures were in place that could support implementation, and most schools were willing to work together. This may not always be the case in other areas or regions.**

Sustainability

There are three different but interrelated components of sustainability relevant to the Lincolnshire scale-up campaign, two at school level and one at county level:

- Sustainability of the implementation of the EEF recommendations on the best use of TAs in schools.
- Sustainability of research use in schools.
- Sustainability of the embedded model of scale-up of research evidence in county strategy, organisation and processes.

In relation to the sustainability of the implementation of the EEF recommendations on the best use of TAs, within the Lincolnshire scale-up campaign, most school-based leads interviewed indicated that their schools had plans to continue embedding the EEF recommendations in the 2017/18 academic year. These data convey intentions only, as data collection was completed very early in the academic year.

In relation to the sustainability of research use more broadly in schools, survey data presented in the section on research readiness within schools (in Findings 3) indicate that schools had become better equipped to use research to inform practice. This aligns with the evidence generated from interview data where the key themes were an increased school commitment to using research, engaging a wider range of staff in research use, the development of greater criticality, and the establishment of school structures and processes to support research use. Taken together, these indicate favourable conditions for sustaining research use, however it was beyond the scope of this evaluation to collect follow-up data to ascertain research use beyond the end of campaign.

In relation to the sustainability of the embedded model of scale-up of research evidence in county strategy, organisation and processes, the evidence presented in the section on outcomes at the county level (in Findings 3) indicates favourable conditions for sustaining research-informed practice across Lincolnshire schools, but again it was beyond the scope of this evaluation to examine if these factors supported sustainability in the longer term. The indicators of sustainability span the establishment of an infrastructure to support research use, the strengthening of networks and embedding of research use in decision-making and funding, and the leveraging in of funding for two new large evidence-based implementation projects. Sustainability of research use will also inevitably be further supported through the designation of Kyra teaching school as an EEF research school. This designation is, at least partly, attributed by key stakeholders to Lincolnshire's engagement in the scale-up campaign.

Mobilise Choice, a programme for the academic year 2017/18 that was intended to follow on from Mobilise and sustain and drive forward research use in Lincolnshire, was being established when final data were being collected from Lincolnshire stakeholders and school-based leads. To provide further insights into sustainability, we present early findings on schools' perceptions of Mobilise Choice and their intended engagement with the programme. Schools could elect to opt-in to the following six areas of focus, one of which was to continue embedding the EEF recommendations on making the best use of TAs:

- Digital Feedback
- Innovation
- Independence
- Cognitive Theory
- Feedback and Marking
- Teaching Assistant Embedding.

The areas of focus were identified through a survey of Lincolnshire schools, in which schools were asked for their school priorities, and with reference to the EEF Toolkit in terms of areas with the highest potential impact and lowest cost. EEF did not have the resource to support and challenge decision-making at this stage, but in stakeholder interviews they did convey some reservations about the topics chosen, particularly the absence of numeracy and/or literacy.

At the time of data collection from school-based leads and cluster leads (June to late September 2017), they had not received full details of Mobilise Choice. Nonetheless, most interviewees were keen or at the very least open to the possibility of being involved in Mobilise Choice and wanted to build on the positive progress made during the Mobilise programme.

'No I think it's all been extremely positive and I hope it continues to be so. It's not just about doing the research and then dropping it at the end of the year and that's that over and done with. It's about the longevity of it, isn't it, the sustainability and keeping it going. It's not just dropping it; it's keeping it going.' (CL C)

The data presented below illustrate the three factors that appeared to be influencing schools' decisions about participation in Mobilise Choice: i) relevance to school priorities; ii) ensuring the continuity of existing clusters where trust had already been established; and iii) geographical accessibility. This provides some insights into how decisions are made that impact on the sustainability of initiatives designed to support research use in schools, offering some challenge to the assumption sometimes made that research use is solely driven by school priorities.

In relation to matching school priorities, generally the data suggested that the 'Choices' put forward by Mobilise leads were viewed as appropriate:

'We've opted for Cognition & Learning... It was based on what the school needed at the time. I think the other options were good choices but weren't effective for the school, so we've found something for the school.' (SBL B)

However, one cluster had decided to opt-out of Mobilise Choice because the group consensus was that emotional wellbeing was a more relevant area of focus:

'We're doing an independent one within our cluster again. We're looking at emotional wellbeing... Our cluster lead was looking at that, and attended some workshops and then a couple of the other school-based leads are deputies or headteachers and between them they looked at it and they explained it to the rest of us. I fed back to our headteacher and she said yes she'd like to be involved as well. That's how it came about.' (SBL E)

The influence of a commitment to an existing cluster and the need for geographic proximity were reflected in interviewees' accounts of issues that were delaying schools' decision-making about whether and/or what to participate in. It was evident in some interviews that there was a tension between loyalty towards the needs of the clusters established in the original Mobilise programme and individual schools' needs. Many of the interviewees' responses indicated a strong connection to their original cluster and concerns were voiced about the format of Mobilise Choice and how it might compromise a lot of progress already made in creating trusted and dynamic clusters of schools - which was one of the broader aims of the Mobilise project.

'I think we found it slightly different in that a lot of our schools are actually heading off in different directions now and so when you ask schools which area they want to focus on next year, there is quite a variety, so we're a little concerned about how that's going to look in practice next year and whether we can maintain those links between us because if we're focusing on different areas I don't think we can.' (CL Focus group 2)

Some schools were delaying decisions, as they did not want to break up their cluster nor did they want to commit to a 'Choice' that might not be run locally:

'As an ideal, you'd want people to be choosing the Mobilise Choice that's most relevant for their context and their young people, but realistically, some schools are waiting to call it because they're waiting to see what the other schools in their cluster are doing.' (CL Focus group 1).

Affordability

The purpose of this section is to provide an indication of the delivery costs of the Mobilise campaign. The direct costs of delivering Mobilise from September 2016 to July 2017 are summarised in Table 34:

Table 34: Direct costs of Mobilise delivery

Item	Cost
Roadshows - venues, catering & refreshments	£6,905
Regional leads' salaries	£103,422
Release of cluster leads to carry out role	£45,000
Mobilise website	£2,000
Management costs	£20,322
Administration costs	£5,225
Travel	£3,048
Other non-pay costs e.g. IT and communication equipment, office space	£2,350
Total	£188,272

The costs in Table 34 exclude set-up costs and all EEF costs. Over a two-year period starting from making the first contact with Lincolnshire stakeholders, the EEF campaign lead estimated that they spent 25 days in total on the initiating and steering of Mobilise, and the EEF consultant recorded 32 days of activity on the campaign. Other EEF staff also contributed to the roadshows, as did the EEF's academic advisor on the best use of TAs. The head of the teaching school estimated that the teaching school's operations and administration team, along with other members of Lincolnshire Teaching Schools Together, spent in total approximately 35 days in the initiating and development phase. This time is not accounted for in the costs presented in Table 34. The sum of £5,200 was also incurred to enable the regional leads to engage in the development period. All steering group members gave time in kind for meetings and other set-up work, particularly promoting Mobilise.

Schools were not asked to pay directly for Mobilise. Funding that all schools in Lincolnshire had committed to the Lincolnshire Learning Partnership for the work of the partnership, together with some Local Authority funding, was dedicated to the project. There was no funding from EEF to support implementation. If the direct delivery costs were spread evenly across the 283 participating schools, the cost per school would be £665 or £2.60 per pupil. Using the usual EEF cost model of spreading the cost over three years this equates to an average of £222 per school or 87p per pupil. However, it is important to note that in an embedded model it may not be appropriate to focus on the cost per participating school, the way cost is usually represented in EEF evaluations, as an independent intervention such as one of the structured evidence-based TA interventions. Inherent within the embedded model is a range of wider school improvement aims which go beyond the immediate aim of embedding the EEF recommendations on TAs. A more complex value-for-money analysis that takes account of the full range of intended outcomes, while beyond the scope of this evaluation, would provide a more accurate assessment of affordability.

Interviews with school-based leads found considerable variation between schools in respect of other direct costs incurred as a result of participating in Mobilise. A few school-based leads reported that their schools had paid for cover for teachers and TAs, or payments for TAs to attend training outside their contracted hours, but all the school-based lead activity and much of other activity was undertaken as part of school roles.

Scalability of the embedded approach and Mobilise operational model

In considering the wider applicability of this pilot, it is helpful to distinguish between the embedded approach initiated by EEF and the resulting Mobilise delivery model. Considering first the embedded

model, the data presented in the section on the effectiveness of the embedded model (in Findings 4: Feasibility) indicate that a number of contextual factors were present in Lincolnshire that led to strategic stakeholders being receptive to working with EEF to develop an embedded model and also supported successful development and implementation. Stakeholder receptiveness was heightened through the strategic fit between the Lincolnshire leaders' aim to develop a new approach to engaging schools in school improvement, at a time of a major change in the governance of school improvement, and EEF's aims. The development and implementation of the embedded model was supported by the presence of organisations and structures that engaged all schools in the county and had the capacity to deliver the operational Mobilise model at scale, namely the Lincolnshire Learning Partnership and Lincolnshire Teaching Schools Together. The Lincolnshire Learning Partnership, importantly in terms of supporting the implementation of the embedded model, also provided a mechanism for key school stakeholders to work with the local authority. A further contextual factor that supported implementation in Lincolnshire was the capability and commitment of key stakeholders.

A core premise of the embedded model is aligning research scale-up with the needs, priorities and structures of an area or region. This premise implies that it should have wider applicability, as it takes account of differences in circumstances in different areas. However, in areas where the local authority has weaker relationships with schools, or where multi-academy trusts or other groupings of schools do not engage with other schools in their area or region, or there is a long history of schools being unwilling to work together, the process of building initial commitment may be difficult and there may be a lack of governance and structures to support implementation at scale.

Turning to the replicability of the Mobilise operational model, key stakeholders in Lincolnshire reported that they had been contacted by colleagues elsewhere in England and asked to share the Mobilise model. This provides an early indication that the model is attractive more widely. Within Lincolnshire the model was further refined as Mobilise Choice has been developed.

Conclusion

Formative findings

The key findings from the evaluation were:

Evidence of promise

A model of scale-up embedded within county-wide school improvement strategy, structures and activity was successfully established in Lincolnshire. A total of 283 schools, nearly three-quarters of all Lincolnshire schools, were recruited. Although the formal drop-out rate was fairly low (6%) there was a notable decline in attendance at cluster meetings over time which appears to indicate a decline in engagement over time. Attendance and recruitment rates were higher in the primary sector.

There was evidence that alignment of certain TA-related practices with the EEF recommendations increased in schools participating in Mobilise more than in the comparison area over the evaluation period. However, for many recommended practices, no difference in the rate of alignment was detected. There were no indicators that the comparison area saw greater improvement than Mobilise schools in their use of TAs. It is important to note here that changes in practice can take time and further change may have occurred after the evaluation and the active control condition of a high level of national and regional promotion of the EEF guidance may have stimulated change in the comparison schools.

Mobilise appears to have had the most impact on TA/teacher communication and the training of TAs and teachers. Based on self-reported survey data, Mobilise is statistically associated with positive change in several indicators of TA/teacher communication, which relates to the EEF recommendations 4 and 7, and several indicators associated with positive change in relation to the training of TAs and teachers, which relates to the EEF recommendations 4, 5 and 6. These findings are supported by the qualitative analysis which found that there was more regular and effective TA/teacher communication, increased involvement of TAs in lesson planning and preparation, and an upsurge in the amount of TAs' training, and to a lesser extent training for teachers. Mobilise also appears to have impacted positively on the proportion of schools with a written policy or guidance on TA deployment in Lincolnshire.

However, survey analyses found that there were many areas of practice related to TA deployment and classroom practices (which relate to the EEF recommendations 1, 2 and 3), where there were no statistically significant changes associated with Mobilise. Nevertheless, statistically significant positive effects were found in relation to: TAs ensuring that pupils retain ownership over their learning and responsibility for their work; teachers deploying TAs during lessons to respond to the 'real-time' needs of pupils and teachers; and TAs and teachers having a precise and shared understanding of their respective roles. These findings were supported by the qualitative analysis. Qualitative findings also indicate that the most frequent reported change in practice related to TAs working with pupils across a wider spectrum of attainment. This finding is not supported by the survey analysis, however this may be due to weaknesses in the design of survey questions related to this item. There was little evidence of changes in the use of structured evidence-based interventions (which relates to EEF recommendations 5 and 6) that can be associated with the programme. The qualitative evidence indicated divergent practices, which appeared to reflect differing understandings of the term 'intervention'. Mobilise also had very limited impact on changes to TA contracts.

As might be expected, there were substantial variations between schools and individual TAs and teachers within schools in starting points and the extent of change reported. It is important to note that the vast majority of schools in Lincolnshire had read the EEF guidance prior to commencement of the Mobilise programme, although this cannot be treated as an indicator that they had already implemented the EEF recommendations.

Across most areas of practice change, the modal response in the survey was that change was partly due to the project, although the distribution of responses varied. Scheduling time for teacher and TA communication was most strongly attributed to Mobilise.

Other outcomes for TAs which were identified in participating schools included: TAs feeling valued and empowered; taking the initiative and greater responsibility; and increased knowledge; understanding, confidence and self-efficacy. There were fewer reports of 'other' outcomes for teachers, and where they occurred they focused on: increased knowledge and understanding; and better, and more trusting, relationships with TAs. Related outcomes at the school level were increased cohesion and better staff relationships, shared responsibility for pupils' learning and incorporating the work of TAs into school policy and priorities. Reported outcomes for pupils were improved independence and resilience and enhanced progress and attainment.

Positive professional development outcomes were reported by the majority of school-based leads and some cluster leads.

Mobilise appears to be associated with positive change in 'research readiness' at school and county level. Schools reported an increased commitment to using research, feeling better equipped to use research, engaging a wider range of staff in research use, the development of criticality in engaging with research, and the establishment of structures and processes to support research use. At the county level, an infrastructure was established to support research use across schools, and the use of research evidence has become embedded in strategic decisions and funding mechanisms. Other positive outcomes within Lincolnshire associated by key stakeholders with Mobilise were a strengthening of networks across the county, improved leadership capacity, enhanced profile and pride, and the leveraging in of further funding for implementing research-informed practices.

Feasibility

EEF acted as a catalyst for implementing an embedded model of scale-up by enthusing and influencing strategic leaders and head teachers, aligning scale-up with the needs and priorities of Lincolnshire schools and maintaining a relentless focus on improving pupil outcomes and guardianship of the evidence. For the most part, the steering, support and challenge provided by EEF were very highly valued. Enabling attributes and mechanisms associated with EEF's involvement were: their knowledge and expertise in relation to the TA evidence, research on scale-up and leading change across schools; focus, energy, motivation, momentum and passion for research use; the EEF brand and reputation; and ability to facilitate linkages to experts and resources. However, the multi-layered brokerage activity inherent in the embedded model, together with a lack of clarity from EEF, created confusion and duplication in relation to governance. Contextual conditions in Lincolnshire, spanning changes in the governance of school improvement, structures and the capability and commitment of key stakeholders, supported the development and implementation of the embedded model.

The strategies perceived to underpin the high level of recruitment of schools to the Mobilise programme were: positioning Mobilise as a sector-led initiative; the use of multiple communication channels and promotion by a wide range of Lincolnshire stakeholders and EEF; and positive framing such as the high visibility of the EEF brand; giving the impression that participation was compulsory; emphasising the relevance of effective TA use to all schools; and that Mobilise was part of a wider vision to ensure all schools were 'evidence-ready'. Reasons given by head teachers for not participating in Mobilise spanned the lead-in times being too tight, insufficient numbers of TAs to justify involvement, TA deployment not being a school priority, and a historical lack of trust in how Lincolnshire school improvement had been organised.

The Mobilise delivery model was well received by schools. Most Mobilise activities were perceived to be of high quality, although the Intervention Fair was less well received. Cluster meetings were

perceived to be most effective when cluster leads were able to facilitate participation of schools that were at different stages of the implementation journey, assumed the position of non-experts, and were authentic in co-constructing learning with participants. Regular attendance by school-based leads and their willingness to share their experiences were also reported to be crucial. Regional leads were very highly regarded, particularly for their commitment and organisational skills, and they provided very effective training and support to cluster leads. Most school-based leads also appreciated the commitment and support of cluster leads. Mobilise resources, particularly the scaffolding framework, were perceived to be of high utility.

Fidelity to the evidence was maintained as it was delivered by the regional leads to the cluster leads and then to school-based leads. However, school-based leads were selective in deciding what to share in school. Their decisions were influenced by their perceptions of: i) the importance of a particular piece of evidence; ii) what is realistic in terms of teachers and/or TAs engaging with evidence; iii) the fit to existing school practices; and iv) practicalities.

School-based leads sought to implement the EEF guidance across their whole school. The main mechanism for this was adapting the PLC format of the cluster meetings to fit the time available for meetings and appropriateness to their school. Some schools also used the MITA surveys, observations by leaders and peer TA observations, and set expectations through performance management, creating policy or collaborative activity. The commitment and enthusiasm of school-based leads supported implementation.

School-level factors appeared to be highly influential in determining the extent to which fidelity to the evidence was maintained and whether school-based leads were able to bring about practice change. This may explain, at least in part, some of the variation found in the survey findings. However, it is beyond the scope of this evaluation to undertake a causal analysis of the impact of school-related factors. Implementation was more effective in schools where teachers and TAs were responsive to change and where the school-based lead was a senior leader or, if the role was undertaken by another member of staff, there was senior leader 'buy-in' and a clear process for implementation following cluster meetings. Implementation was impeded when there was a lack of commitment to improving TA deployment or a failure to understand that Mobilise is about whole-school change, where the school-based lead did not have the authority to drive change, and/or the school meetings calendar could not accommodate the late scheduling of Mobilise.

Scalability

There are a number of early indicators that the Lincolnshire scale-up campaign is likely to lead to sustainable change, but it is too early to make any definitive claims. Indicators span: schools' intentions to continue embedding the EEF recommendations; improved school-readiness for research use; county-level infrastructure and strategy which fosters and supports research use, and strengthened school networks which facilitate schools' access to, engagement with and use of research.

A full cost analysis is beyond the scope of this evaluation; however- there are indications that the embedded approach is affordable for schools. The delivery of Mobilise was funded by the contributions all schools in Lincolnshire make to the Lincolnshire Learning Partnership, supplemented by Local Authority funding. If a direct charge had been made to each participating school to cover delivery costs, this would have been £665, which spread over three years in line with EEF cost guidance equates to £222 per school.

The embedded model of scale-up is potentially replicable as it focuses on an area or region's context and priorities and engages key stakeholders. In Lincolnshire, strategic alignment with changes in school improvement governance may have heightened receptiveness to the model, and structures

were in place that could support implementation, and most schools were willing to work together. This may not always be the case in other areas or regions.

Limitations

The survey response rate was low among comparison schools as they were not involved in the programme and were offered no incentive to take part in the evaluation. The response rate also declined substantially in Lincolnshire between the pre- and post-campaign surveys. The decline may be due, to some extent, to the post-campaign survey being administered after Mobilise delivery had finished. Administering the post-campaign survey after delivery had ended was considered necessary to capture schools' actual practices in the year following Mobilise delivery, rather than ideas about what they thought they may implement.

Response bias may have occurred in the Lincolnshire survey, particularly at end point, when it is likely that responses were weighted in favour of schools that had been more highly engaged with Mobilise. There is also a strong likelihood of response bias in the comparison survey, exemplified by the very high levels of awareness of EEF guidance among comparison school respondents. Another limitation is reliance on self-reported data. Although collecting data from independent measures of change in practice can be difficult, more robust findings may have been produced. It is also important to note that the active control condition of a high level of national and regional promotion of the EEF guidance may have increased engagement with the EEF guidance in comparison schools.

For the regression analyses of programme outcomes, there are issues associated with multiple significance tests. It would be expected that at least one variable from a set of 28 would yield a significant result by chance, so findings should be treated with appropriate caution. However, there are several significant results in the analysis here and these are clustered around certain themes. This suggests that the findings are sufficiently robust.

There is some discrepancy between the survey findings which overall show limited change in practice and the qualitative findings which indicate greater engagement in aligning practices more closely with the EEF recommendations. This discrepancy may be due to bias in the interview sample and/or reflect the different perspectives of school-based leads and cluster leads who were interviewed and the head teachers who completed the survey (although in some schools head teachers did undertake the school-based lead role).

The evaluation design could not enable causality to be established, although survey respondents and interviewees did, at least in part, attribute change to Mobilise and evidence supports the plausibility of the scale-up theory of change. Establishing causality is further compromised as in an embedded-model it is difficult to place boundaries on the intervention. In this evaluation, MITA training which was not formally part of the Mobilise programme, but was led by a regional lead, both supported positive outcomes in the uptake of training and may have effected some of the other positive impacts that were captured during the period of the Mobilise programme.

Interpretation

The qualitative evaluation findings suggest that adopting an embedded approach to scale-up enables key stakeholders in a local area or region to develop a delivery model that is aligned with the context, needs and priorities of the local area or region. The reach and engagement findings indicate that such an approach is an effective way of engaging a large number of schools in the scale-up of research use.

The findings on evidence of promise indicate that the embedded approach, and specifically the Mobilise delivery model that resulted from the approach, are likely to lead to some changes in school practices so that they align more closely with the EEF recommendations, notably those related to

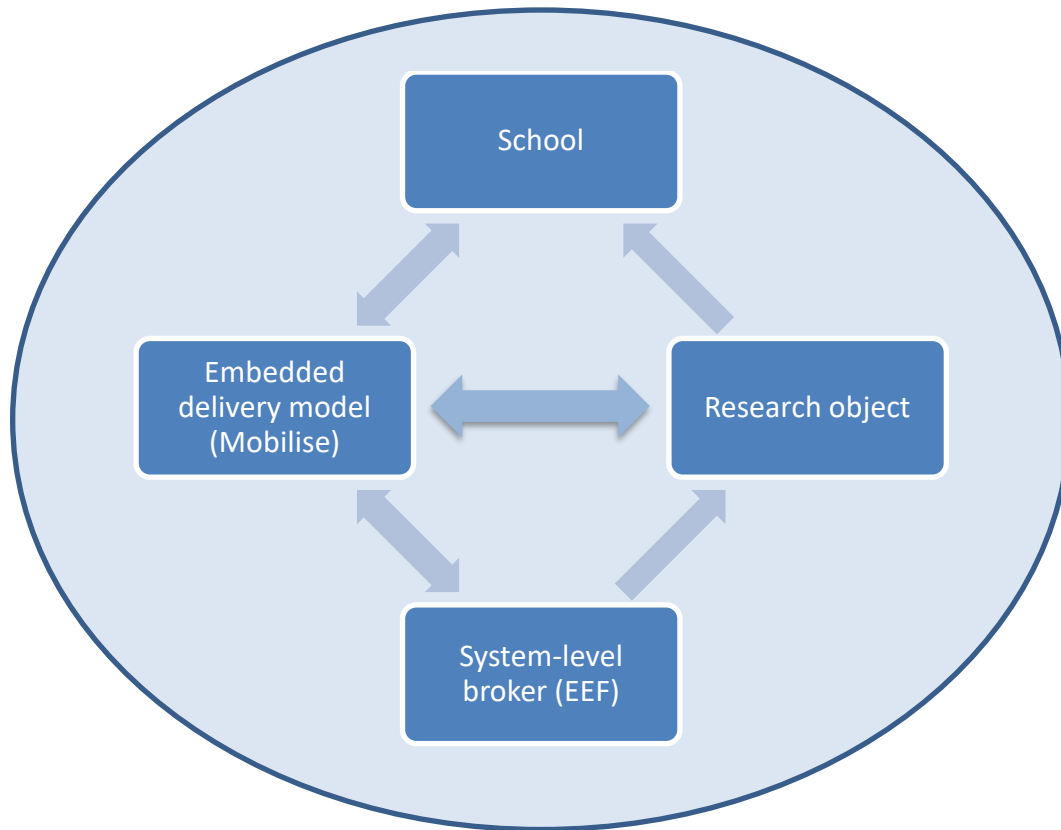
teacher/TA communication and to training of TAs and teachers. However, the findings indicate that change was limited in relation to some aspects of the recommendations and attribution of change was most frequently only partially attributed to Mobilise. Further research would be needed to make definitive claims of impact.

Evidence from this evaluation broadly supports the assumed causal chain set out in the initial scale-up logic model. The findings also provide deeper insights into the change processes, the enabling attributes, and the mechanisms and moderating factors associated with this causal chain. Implementation of the EEF recommendations in Lincolnshire schools occurred via a linear chain, whereby the recommendations and evidence were 'packaged' by the regional leads into a series of PLC meetings with accompanying resources. The facilitation of the PLCs was modelled by the regional leads to cluster leads in cluster base camps, and in turn the cluster leads modelled facilitation to school-based leads in cluster meetings. Although the intention was that school-based leads would then replicate the PLCs in school, they were usually adapted for use in school. Further research would be needed to confirm if this adaptation weakened the fidelity to the evidence and to assess the impact on intended practice change outcomes. It is important to note that this was not a 'train the trainer' type cascade model. The Mobilise model differed from many 'train the trainer' models by adopting a PLC format which engaged school-based leads in examining the research and facilitated discussion of plans for implementation and reflections on the activity the school-based leads had undertaken. Direct support was also offered by regional leads and cluster leads to schools. The success or otherwise of the implementation of the EEF recommendations at school level was found to be dependent on factors related to the school, the Mobilise delivery model, and EEF and importantly the interaction of factors operating at these different levels. In our report on the scale-up of research use in South and West Yorkshire (Maxwell et al., 2018) we identified three key and interrelated components that underpinned successful scale-up of research use:

- The research object being used – in this case, the EEF guidance and recommendations.
- The provision – in this evaluation, the Mobilise delivery model which is embedded with school improvement processes in Lincolnshire.
- Schools.

In this evaluation we identified a fourth key and interrelated component:

- The system-level broker - in this case EEF. System-level brokerage was a critical catalyst of, and support for, the initiation and development of an embedded model of the scale-up of research use, and also provided steering in maintaining fidelity to the evidence.

Figure 3: Key components of research scale-up in Lincolnshire

A key learning point from the South and West Yorkshire scale-up evaluation was that the key components have sets of enabling characteristics that need to be in place in order for scale-up of research use to proceed successfully via the commissioned approach. In this evaluation, we report the enabling characteristics that were found in the Lincolnshire embedded model of scale-up of research use.

This study indicates that the following characteristics are associated with effective scale-up of research use:

Characteristics of the research object

- Provided by a trusted provider - EEF's reputation and brand were highly influential.
- Presented in a way that is credible, convincing and accessible.
- 'Packaged' into a format (in this evaluation a set of PLCs with supporting resources) that can be replicated to secure wider engagement and is directly usable in schools.
- Supported by tools and resources - in this evaluation these were provided by EEF and Mobilise.

Characteristics of the system-level broker

Broker attributes

- Extensive knowledge and experience of managing change at scale across a large number of schools, and motivating, supporting and challenging key stakeholders.
- Energy, motivation and passion for driving forward research use, together with in-depth knowledge of the effective approaches to research use and the research underpinning the scale-up activity.
- Reputation and trusted brand.

Characteristics of the approach

- Alignment of scale-up with the needs, priorities and structures of the school system in the area or region.
- Securing 'buy-in' at senior strategic levels and keeping key influencers on board.
- Maintaining focus and momentum - with relentless attention to improving pupil outcomes and maintaining the fidelity to the evidence.
- Sharing knowledge of effective approaches to scale-up and of the research underpinning the campaign.
- Providing steering, support and challenge.
- Facilitating linkages to experts and resources.

Characteristics of the delivery model

Staff attributes:

- At a strategic level - commitment, enthusiasm, drive and capability and willingness to collaborate.
- At a regional level - staff who are respected, committed, able to challenge and support practice in schools and have excellent facilitation and organisational skills.
- At a local/cluster level - staff who are respected by schools in their cluster, committed and able to facilitate groups where participants have different starting points and/or school aims, and if appropriate are in more senior positions.

Characteristics of the delivery processes and structure:

- Steering at a regional level to ensure that the model was embedded in regional school improvement processes and day-to-day management, through a respected organisation in the region, and able to provide support to the regional leads.
- Key influencers promoting the programme and directly engaging in recruiting schools.
- Support and input from the system-level broker as appropriate, for example in the delivery of roadshows, direct contact with strategic leaders and regional leads, and visits to cluster meetings.
- PLCs scheduled over an academic year (for cluster-level staff and school-based leads) that provide the space to engage with new learning, reflect on implementation in school, share experiences and ideas, and plan the next stage of implementation.
- At cluster level, PLC facilitators adopting the position of a 'non-expert' and engaging in the co-construction of learning with participants.
- Ongoing support for cluster leads from regional leads.
- Direct support from cluster leads to schools, backed up by support from regional leads where necessary.

Characteristics of schools

Attributes of staff leading implementation:

- Committed and enthusiastic school-based leads.
- School-based leads are senior leaders or, where this is not the case, have senior leader support.

Characteristics of other staff and school processes and structures:

- There is senior leader 'buy-in' - which includes understanding that the project is about whole-school change.
- A clear process exists for implementation following PLCs.
- Teachers and TAs are open and responsive to change.

Implications

In considering the wider applicability and scalability of this pilot, it is helpful to distinguish between the embedded approach initiated by EEF and the delivery model: within an embedded approach, the delivery model developed may vary depending on the specific characteristics of the area or region.

The key enabling characteristics of effective research use set out above provide a helpful steer for future scale-up work. The EEF, as producer of the research object and system-level broker, needs to align their activity with the characteristics of the research object, and the system-level brokerage attributes and approach characteristics. The characteristics of the delivery model and of the research object can be used to steer the design and implementation of the operational model. Ensuring that the necessary enabling characteristics are consistently present in schools is likely to be a greater challenge. This challenge is amplified due to the competing demands placed on schools by the wider policy environment. This indicates the need for EEF to continue its national efforts to change attitudes towards research use and develop a stronger emphasis on raising awareness of the characteristics of schools which implement research-informed practices effectively. Staff developing the delivery model also need to consider how the support provided to schools can most effectively address school-level barriers.

The evaluation findings give rise to two important questions that need to be addressed through further research. The first relates to the relatively limited impact on practice change and the variability of change across schools. While the scope of this evaluation meant it was not possible to gather conclusive evidence, there are indications that these limitations may, at least in part, have arisen due to a loss in the fidelity to the evidence at school level and/or school conditions that did not support effective implementation. This conjecture, together with the very limited research base on the effectiveness of approaches to stimulating research use in schools, indicates the need for further research at the school level. Such research should also be conducted over a longer time-span to capture any changes to practice that may have taken longer to become established.

The second question relates to wider applicability of the embedded approach. Since a core premise of the embedded model is aligning research scale-up with the needs, priorities and structures of an area or region, this implies that the model should have wider applicability, given that it takes account of differences in circumstances. However, the findings indicate that there was a set of circumstances in Lincolnshire, particularly the changes in the governance of school improvement, that were particularly conducive to engaging with an embedded model of research scale-up. Further research is needed to ascertain the effectiveness of an embedded approach in other contexts, for example where the local authority has a more limited role in school improvement or where the schools belong to multi-academy trusts that choose not to engage with other local schools. Alternatively, the EEF may wish to consider working with a large multi-academy trust to pilot an embedded approach.

Future research and publications

Another report will be published alongside this report. It will provide a summary comparison of the embedded approach adopted in Lincolnshire and the commissioned model of scale-up implemented in South and West Yorkshire. Also, alongside these reports, EEF will publish the process and impact evaluations of the South and West Yorkshire campaign. All the reports can be found [here](#) on the EEF website.

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Appendix 1: Making the Best Use of Teaching Assistants: Seven recommendations summary

Making Best Use of Teaching Assistants – Recommendations Summary

RECOMMENDATIONS ON THE USE OF TEACHING ASSISTANTS IN EVERYDAY CLASSROOM CONTEXTS

I

TAs should not be used as an informal teaching resource for low-attaining pupils

The evidence on TA deployment suggests schools have drifted into a situation in which TAs are often used as an informal instructional resource for pupils in most need. Although this has happened with the best of intentions, this evidence suggests that the status quo is no longer an option. School leaders should systematically review the roles of both teachers and TAs and take a wider view of how TAs can support learning and improve attainment throughout the school.

II

Use TAs to add value to what teachers do, not replace them

If TAs have a direct instructional role it is important they supplement, rather than replace, the teacher – the expectation should be that the needs of all pupils are addressed, first and foremost, through high quality classroom teaching.

Schools should try and organise staff so that the pupils who struggle most have as much time with the teacher as others. Breaking away from a model of deployment where TAs are assigned to specific pupils for long periods requires more strategic approaches to classroom organisation.

Where TAs are working individually with low-attaining pupils the focus should be on retaining access to high-quality teaching, for example by delivering brief, but intensive, structured interventions.

III

Use TAs to help pupils develop independent learning skills and manage their own learning

New research has shown that improving the nature and quality of TAs' talk to pupils can support the development of independent learning skills, which are associated with improved learning outcomes. TAs should, for example, be trained to avoid prioritising task completion and instead concentrate on helping pupils develop ownership of tasks.

IV

Ensure TAs are fully prepared for their role in the classroom

Schools should provide sufficient time for TA training and for teachers and TAs to meet out of class to enable the necessary lesson preparation and feedback.

Creative ways of ensuring teachers and TAs have time to meet include adjusting TAs' working hours (start early, finish early), using assembly time and having TAs join teachers for (part of) Planning, Preparation and Assessment (PPA) time.

During lesson preparation time ensure TAs have the essential 'need to knows':

- Concepts, facts, information being taught
- Skills to be learned, applied, practised or extended
- Intended learning outcomes
- Expected/required feedback.

RECOMMENDATIONS ON THE USE OF TEACHING ASSISTANTS IN DELIVERING STRUCTURED INTERVENTIONS OUT OF CLASS

V

Use TAs to deliver high-quality one-to-one and small group support using structured interventions

Research on TAs delivering targeted interventions in one-to-one or small group settings shows a consistent impact on attainment of approximately three to four additional months' progress (effect size 0.2–0.3). Crucially, these positive effects are only observed when TAs work in structured settings with high-quality support and training. When TAs are deployed in more informal, unsupported instructional roles, they can impact negatively on pupils' learning outcomes.

VI

Adopt evidence-based interventions to support TAs in their small group and one-to-one instruction

Schools should use structured interventions with reliable evidence of effectiveness. There are presently only a handful of programmes in the UK for which there is a secure evidence base, so if schools are using programmes that are 'unproven', they should try and replicate some common elements of effective interventions:

- Sessions are often brief (20–50mins), occur regularly (3–5 times per week) and are maintained over a sustained period (8–20 weeks). Careful timetabling is in place to enable this consistent delivery
- TAs receive extensive training from experienced trainers and/or teachers (5–30 hours per intervention)
- The intervention has structured supporting resources and lesson plans, with clear objectives
- TAs closely follow the plan and structure of the intervention
- Assessments are used to identify appropriate pupils, guide areas for focus and track pupil progress. Effective interventions ensure the right support is being provided to the right child
- Connections are made between the out-of-class learning in the intervention and classroom teaching (see Recommendation vii).

RECOMMENDATIONS ON LINKING LEARNING FROM WORK LED BY TEACHERS AND TAs

VII

Ensure explicit connections are made between learning from everyday classroom teaching and structured interventions

Interventions are often quite separate from classroom activities. Lack of time for teachers and TAs to liaise allows relatively little connection between what pupils experience in, and away from, the classroom. The key is to ensure that learning in interventions is consistent with, and extends, work inside the classroom and that pupils understand the links between them. It should not be assumed that pupils can consistently identify and make sense of these links on their own.

Appendix 2: Additional EEF activity to promote the EEF guidance

The EEF guidance on making the best use of Teaching Assistants was widely promoted nationally during the launch in April 2015 and onwards, with continuing activity during the period of Mobilise delivery. Key activities and outcomes were:

Direct communications to schools and stakeholders

- Hard copies to all schools nationally (using Raise Online database). 3000 extra printed due to demand – June 15.
- An email from the Chief Executive of EEF to schools nationally – July 15.
- Letter from the Chief Executive of EEF to all Local Authorities – June 15.
- Letter from the Chief Executive of EEF to key EEF contacts and national stakeholders – June 15.
- Strategic lead - blog on TA-led interventions – March 16.
- A further email from the Chief Executive of EEF to schools nationally, in Jan 2017, emphasising a new set of implementation resources and the online course (see below).
- Training, events and resources.
- 75-100 presentations by the EEF campaign lead, academic consultant and other EEF colleagues at events for schools (e.g. EEF events, The Key, Optimus, Osiris, Derbyshire LA, Suffolk LA, MITA events) – ongoing.
- Campaign to disseminate and implement the *Making best use of Teaching Assistants* guidance across ~ 400 schools in eight LAs within S&W Yorkshire – Sept 15-16 (£5m funding, including four RCTs of TA-led interventions).
- *Making best use of Teaching Assistants* online course accessed >50,000 times – June 17.
- Six EEF Research Schools are currently delivering courses on the guidance to schools in their region (Stockport, Suffolk, Norfolk, Devon, York, Oldham) – Sept 17.
- Dedicated campaign web pages on EEF website: 95,000 unique page views of the guidance report up to November 17. A range of organisations publicised the EEF guidance to their schools and associates, including: Challenge Partners, Achievement for All, The Key, Unison, National Education Trust, Cornwall LA, Berkshire LA (hard copies to all SENCOs) – Summer/Autumn 15.
- International policy presentations - OECD, EU, What Works Global Summit, Australia federal and state.
- The NFER Omnibus Survey data suggested that approximately 70% of head teachers were aware of the guidance, 40% had read it, and 15% acted on it by November 15.

Press/media

Press release for the publication of the EEF guidance report – March 15.

Press releases for publication of evaluation reports for TA-led interventions (e.g. ABRA, Catch Up) – ongoing through 15/16.

Press releases for the new implementation resources - January 17.

Articles on the TA guidance, including: TES (twice – one article accessed 6000 times on first day), The Economist, Radio 4 Today Programme, Education Business, National Governors' Association magazine – ongoing through 15/16/17.

Policy

Full page update on the TA campaign in the OfSTED School Inspection Update (p12/13) – Nov 16.

Reference in Teaching School Council review 'Effective Primary Teaching' (Keeble review), section on TAs – Autumn 16.

Reference in DfE guidance on work force planning – 'School workforce planning - Guidance for schools' – Jan 17.

Reference in National Audit Office review on Pupil Premium spending – June 15.

Reference in policy briefings to No.10 and HM Treasury.

Reference in Unison materials – Summer 16.

New Zealand government using the EEF guidance in their support for schools.
<http://inclusive.tki.org.nz/guides/teacher-aide-practice/>

Maximising the impact of TAs (MITA) activity

Note: this is not officially part of the EEF scale-up campaign but is important in setting the context of business as usual.

Around 500 schools have accessed MITA since 2014.

About 3,000 TAs have been trained via the Maximising the Practice of TAs CPD programme, plus about 1,200 teachers.

MITA has 40 licensed MPTA trainers nationally and 25 reviewers. Reviewers can be commissioned to deliver the **TA Deployment Review** which was produced as part of the DfE's Whole School SEND programme. The Review supports peer-to-peer support and has a self-evaluation framework for schools to conduct internal audits. Over 2,000 copies have been downloaded since it was launched in Sept 2017.

Two online auditing tools: **Staff survey** and **TA Audit**.

maximisingtas.co.uk is probably the most comprehensive resource bank (in the UK at least) for TA-related materials.

Media and press <http://maximisingtas.co.uk/research/research-blogs-articles.php>

MITA is presently trying to establish a presence through the Research School network to increase roll-out.

Appendix 3: Regional and cluster lead roles

The main aspects of the regional leads roles were:

- Championing the integrity of the EEF research and ensuring roll-out to schools and acting as 'guardians' of the evidence. This included designing the cluster meeting formats and collating existing resources and creating new supporting resources - with the intention that these would, in turn, be used in schools by the school-based leads. EEF advised on the content and resources and it is important to note that the approaches, learning and resources from the South and West Yorkshire campaign were drawn on at the design stage.
- Motivating, training, informing and supporting cluster leads, including training on leading a PLC, mobilising the evidence, using evidence-based practice to drive school improvement and outcomes for children, and coaching and mentoring.
- Supporting management and facilitation of change in schools, and bringing expertise on school improvement, including support for undertaking audits.
- Supporting the cluster leads to facilitate project implementation in their cluster, including by visits to schools struggling with implementation and attendance at cluster meetings.
- Maintaining detailed management information data, monitoring school attendance and following up with cluster leads and school-based leads instances where schools were not participating or where school-based leads were encountering difficulties in securing 'buy-in' within their schools. These aspects of the regional lead's input sometimes included direct support to schools.
- Signposting to evidence-based programmes and interventions.
- Maintaining the Mobilise project website - which included links to all the resources.

The main aspects of the cluster leads roles were:

- Leading a PLC for their cluster, by facilitating half-termly cluster meetings.
- Providing school-based leads with coaching, advice and challenge on implementing the EEF recommendations in their school.
- Championing Mobilise and the EEF guidance, finding and sharing local examples of best practice in TA use and change implementation.
- Monitoring attendance at cluster meetings and in-school implementation and following-up to keep school-based leads on track.
- Ongoing email communication with school-based leads between cluster meetings.
- Holding school-based leads to account through PLCs.
- Liaising and co-ordinating between schools and the regional leads
- Brokering additional training, collaborative school-to-school working and support from cluster leads and regional leads where necessary.

Appendix4: Information sheet and consent forms



Information Sheet:

Lincolnshire Scale-up campaign: Improving the impact of teaching assistants (TAs)

Background

The EEF circulated a guidance document on 'Making the Best Use of Teaching Assistants' to all schools in the summer term, 2015 and launched a scale-up campaign to increase awareness of the guidance and support schools in implementing the guidance. Initially the scale-up campaign focused on South and West Yorkshire. EEF has now also begun working with the Lincolnshire Learning Partnership (LLP) to scale-up the use of the evidence on the most effective ways of deploying TAs across Lincolnshire. The campaign in Lincolnshire will begin with launch events at different locations within the county and support resources are available on the EEF website. Follow-up support for schools will primarily be embedded within the work of the school improvement cluster groups.

The evaluation

The Sheffield Institute of Education has been commissioned by EEF to conduct an evaluation of the Lincolnshire scale-up campaign. The evaluation will assess: whether there is evidence of promise that the approach to scaling-up evidence-use being piloted in Lincolnshire is effective in engaging schools in implementing the guidance; whether it is feasible to implement the approach and whether the approach is scalable so that it could be used more widely.

We will be collecting data through:

- **Telephone Interviews or focus groups with key Lincolnshire (e.g Regional leads, Cluster leads and local authority leads) and EEF stakeholders** to develop a theory of change model of how the campaign is intended to work in Lincolnshire, and their perceptions of the process and outcomes.
- **Pre- and post-campaign surveys** sent to a senior leader in all primary and secondary schools in Lincolnshire and two further counties (Kent and Medway) that have similar demographic and school characteristics to Lincolnshire to provide a comparison. The surveys will particularly focus on how schools are deploying and training TAs, so that any changes over the course of the campaign can be measured. Lincolnshire Schools that engaged with the offer will be asked about their experiences of engagement with the campaign in the post survey.
- **Telephone interviews with 5 senior leaders in non-participating schools:** These interviews aim to understand why they have not engaged with the campaign and any perceived barriers to participation.
- **Telephone interviews with 15 school-based leaders that have been highly engaged (60% or above attendance at cluster meetings) in the campaign.** School-based leads will

be randomly selected to ensure geographical representation with each interviewee from a different cluster. These interviews will explore the reasons why they engaged with the campaign; their experiences of engaging with the campaign; the ease and fidelity of implementation of the guidance and barriers and enablers to implementation: practice change within the school resulting from engagement with the campaign and their perceptions of the impact on teachers, TAs and pupil outcomes.

- **Two exemplar case studies** - with schools that have engaged significantly with the campaign and implemented the guidance. The case studies will include interviews with leaders, teachers and TAs within the schools. This is to understand in depth school perspectives on the campaign activity of the Lincolnshire Learning partnership and how this has been translated into change within the school. Fidelity of implementation, feasibility, and sustainability will also be examined.
- **Analysis of monitoring data** - we will be working with Lincolnshire Learning Partnership to identify and collect data on reach and engagement with the campaign.

Research outputs

The evaluation report will be published on the EEF website and the findings may also be disseminated at educational research conferences and in academic or professional journals. Individual names will be anonymised in any reports/publications but the name of advocacy delivery partners may be used in reporting. Despite safeguards to protect their anonymity key stakeholders should be aware that they may be still identifiable to readers by virtue of their role.

Right to withdraw

Research participants can withdraw any data by notifying the project manager within two weeks of the data collection activity. After that time we may not be able to identify individual contributions in our analysis.

Data protection

All data is held securely and in accordance with data protection legislation. Fully anonymised data sets may be made available to other researchers through secure data repositories.

The full research protocol can be found on the EEF website:

<https://educationendowmentfoundation.org.uk/>

For further information please contact:

Ben Willis Project Manager

Email: b.willis@shu.ac.uk

Tel: 0114 225 6060



Sheffield
Institute
of Education



Education
Endowment
Foundation

PARTICIPANT CONSENT FORM

Evaluation

Teaching Assistants Campaign: Lincolnshire Scale-up.

Improving the impact of teaching assistants

To be completed by the participant:

Have you received information on the study? **Yes/No**

Have you been able to ask questions about this study? **Yes/No**

Have you received answers to all your questions? **Yes/No**

I understand that individual names will be anonymised in any reports/publications but the name of advocacy delivery partners may be used in reporting. **Yes/No**

I understand that fully anonymised data may be shared with other researchers using secure data repositories. **Yes/No**

I understand that I can contact the project manager if I wish to withdraw my data up to two weeks after the data collection activity. **Yes/No**

Do you agree to take part in this study? **Yes/No**

Signed:

Date:

Name (Block Letters)	
Organisation	
Organisational role:	

Appendix 5: Post-campaign survey



Evaluation of the Education Endowment Foundation (EEF) Teaching Assistant campaign in Lincolnshire: /Senior Leader Survey

In September 2016 your school received a questionnaire on the deployment of Teaching Assistants. This follow up survey aims to understand if the deployment of TAs in your school has changed over the last year.

The data you provide will help us to assess the impact of the Mobilise project. The Lincolnshire Learning Partnership, supported by the Education Endowment Foundation, ran a campaign in the 2016/17 academic year to Lincolnshire schools make the best use of their TAs and improve attainment, particularly for disadvantaged pupils.

Please complete this survey even if you did not complete the first one and even if you did not take part in any Mobilise project activities. By doing so you will be giving us a valuable picture of how TAs are currently being deployed in schools across Lincolnshire.

In the questionnaire, we use the term Teaching Assistant (TA) to include any staff whose main role is to directly support students' learning in classroom settings and/or outside the classroom.

The study is being undertaken by the Sheffield Institute of Education at Sheffield Hallam University. By completing the survey, you are giving your consent for us to use the data for research purposes. All data will be treated confidentially and will be fully anonymised in any publication arising from the research. All data will be stored securely on a password protected server at Sheffield Hallam University. No individual or school will be identifiable in any publication.

The survey should take around 15 minutes to complete. We would be grateful if you could complete this by October 20th 2017. It is very important to note that the survey should be completed by the or designated Senior Leader (Deputy or Assistant) responsible for TA deployment in the school.

Alternatively you can complete the survey online via the following link:

https://shusls.eu.qualtrics.com/jfe/form/SV_40GqeZwRDG85LHn

If you have any questions about this survey, or about the wider project, please contact:

Ben Willis (Project Manager) Email: scaleupcampaign@shu.ac.uk

Many thanks for your help with this study

A. About you and your school

1. Please let us know the name and postcode of your school so that we can target any survey reminders. Responses will be analysed collectively and no individual or school will be identifiable in any publication.

1a. School name

1b. School
postcode

2. Your role in the school:

☐

☐ Other senior leader

☐ Other (please pass this on to the or Senior leader for completion)

B. Strategic leadership of TAs in your school

3. Does your school have written and up-to-date guidance or a policy on TA deployment?

☐ Yes

☐ No

4. Who leads the strategy for deployment of TAs in your school? (please tick one answer only)

☐

☐ SENCO

☐ Other senior leader

☐ Other (please specify)

5. Has the school reviewed its deployment of TAs within the last two years?
(please tick one answer only)

- ☐ Yes, being undertaken currently
- ☐ Yes, in the past 6 months
- ☐ Yes, between 6 months and 2 years ago
- ☐ No, but we intend to do so in the next academic year
- ☐ No, we have no immediate intentions to do so

6. Do TAs receive appraisal or review as part of the annual performance management cycle? (please tick one answer only)

- ☐ Yes for all
- ☐ Yes for some
- ☐ No

7. How many TAs do each of the following staff line manage in your school? (please place a tick in each row)

	All TAs	Some TAs	No TAs
	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other senior leader	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SENCO	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
HLTA	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (please state)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<div></div>			

C. TA deployment in the classroom

8. When TAs are providing direct teaching support in the classroom, how often, on average, do they work in the following roles:

	Very frequently	Frequently	Occasionally	Almost never	Never	Don't know
Leading the teaching of the whole class	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Supporting the teacher in their whole class delivery e.g. at whiteboard, demonstrating using equipment, roving round the class	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Teaching specific pupils or small groups of pupils	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

9. When your TAs are working in the classroom with pupils in a direct teaching role, how often, on average, do they work with the following pupil groups?

	Very frequently	Frequently	Occasionally	Almost never	Never	Don't know
Pupils with SEND	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lower attaining pupils	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Higher attaining pupils	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Average attaining pupils	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pupils eligible for Free School Meals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other pupils (i.e. those not in the groups above)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="text"/>						

10. For each of the areas below, please indicate to what extent you agree with the following statements about TAs and teachers in your school:

	Strongly agree	Agree	Unsure	Disagree	Strongly disagree
TAs are aware of the learning needs of all pupils in the class	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
TAs are informed of the concepts, information and skills being taught by the teacher in lessons	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
TAs often teach specific pupils different content from the rest of the class during lessons	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
There are sufficient opportunities for teachers to brief TAs prior to lessons	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
There is regular feedback from TAs to teachers after lessons	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
TAs ensure that pupils retain ownership over their learning and responsibility for their work	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Teachers deploy TAs during lessons to respond to 'real-time' needs of pupils	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Teachers spend at least as much time working with lower-attaining pupils as other pupils	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Teachers and TAs have a precise and shared understanding of their respective roles in achieving lesson objectives	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
TAs interactions tend to focus on completing a task with pupils rather than encouraging independent learning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
TAs understand how to scaffold learning, for example by allowing pupils time to ask questions before providing help	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

D. TAs delivering interventions in your school

By interventions we refer to targeted, structured interventions delivered by TAs outside of class lessons, with pupils in one to one or small group sessions (e.g. "First Class at Number", "Read It Write It").

11. Do TAs deliver such structured interventions in your school?

- ☐ Yes
- ☐ No (please go to Q14)

12. Tick which member of staff has overall responsibility for the following tasks in relation to interventions (please tick all that apply):

	/ Senior leader	SENCO	Middle leader	Teacher	TA	Someone else	Don't know
Who chooses the intervention programme?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Who plans and prepares the intervention sessions?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Who assesses the work completed in intervention sessions?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

13. Please indicate to what extent you agree with the following statements:

	Strongly agree	Agree	Unsure	Disagree	Strongly disagree
There is always scheduled time each week for teachers and TAs to communicate about interventions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Interventions are always supported by structured lesson plans and resources	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
TAs usually receive in the region of 5-30 hours training/ development per intervention	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Interventions occur regularly (around 3-5 times per week)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Interventions are sustained over time (around 8 to 20 weeks)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

E. Training

14. Please indicate to what extent you agree with the following statements:

	Strongly agree	Agree	Unsure	Disagree	Strongly disagree
Teachers receive appropriate and comprehensive training on how to use TAs to supplement their work	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
TAs receive little training on how to work effectively with teachers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
TAs are well trained to support the pupils they spend most time with	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Staff who manage TAs rarely receive training on how to deploy TAs effectively	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

F. The Mobilise Project

15. Did you or anyone from your school attend any Mobilise events in 2016/7? For example, Roadshows, Cluster/PLC meetings, Intervention Fair?

- ☐ Yes (please go to Q16)
- ☐ No (please go to Q24)

16. Overall how would you rate the quality of:

	Very high	High	Unsure	Low	Very low	NA
EEF Roadshow: Making the Case for Change (Sept 2016)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
EEF Roadshow: Acting on the Evidence (Oct 2016)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
HR Consultant "Managing Change" (Nov 2016)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Intervention Fair (Jan 2017)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cluster /PLC meetings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ongoing support from your Cluster/PLC lead	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Resources to support implementation (such as audit tools, scaffolding framework)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Support from other Mobilise staff, such as Regional Leads	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

17a. Which aspects of the Mobilise project did you find most helpful and why?

17b. Which aspects of the Mobilise project did you find least helpful and why?

18. Please select the option that most closely matches your school's use of each of the following structured TA-led interventions:

	Not aware	Aware but never used	Was using prior to Mobilise	Now using as result of Mobilise	Now using, but not as result of Mobilise
1) Catch up Literacy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2) Catch up Numeracy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3) Switch on Reading	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4) Switch on Writing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5) NELI Nuffield Early Language Intervention	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6) Power of 2	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7) ABRACADABRA (ABRA)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8) Digital Feedback in Primary Maths	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

19. What were the three most important ways in which your school-based lead facilitated change as a result of their participation in the Mobilise project?

20. Which of the following options most closely matches how long per half-term your school-based lead spent implementing change as a result of the Mobilise project? This should include any time spent on planning, attending meetings and delivering training.

Less than half a day ☐

Half a day ☐

One day ☐

One and a half days ☐

Two days ☐

More than two days ☐

21. To what extent have any changes in the following areas resulted from your school being involved in the Mobilise project on 'Making Best Use of Teaching Assistants'?

	Fully/mostly due to the project	Partly due to the project	Not at all due to the project	No changes made in this area
Increased senior leader understanding of how to use TAs effectively	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Changes to the timetabling of TAs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Teachers' using TAs more effectively	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
TAs working with a wider range of pupils	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
TAs supporting learning more effectively	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Scheduling time for teacher and TA communication	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Increased use of structured evidence-based interventions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Scheduling time for teacher and TA communication	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Changes to TA contracts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

22. Prior to your participation in the Mobilise project, to what extent do you agree with the following?

	Strongly agree	Agree	Unsure	Disagree	Strongly disagree
The school was well equipped to use research to inform practice	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The school regularly used research to inform practice	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

23. As a result of your participation in the Mobilise project, to what extent do you agree with the following?

	Strongly agree	Agree	Unsure	Disagree	Strongly disagree
The school is well equipped to use research to inform practice	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The school regularly uses research to inform practice	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Now please go to Q25.

G. Section for non-participants

24. For what reasons did your school not participate in the Mobilise project? Please tick all that apply:

Was not aware	<input type="radio"/>
Not a school priority	<input type="radio"/>
Already effectively deploy TAs	<input type="radio"/>
No capacity to release staff to take part	<input type="radio"/>
Other (Please specify)	<input type="radio"/>

H. Finally...

25. Have you read the Education Endowment Foundation report 'Making the Best Use of Teaching Assistants'?

- ☐ Yes, read the guidance (please go to q26)
- ☐ Aware of the guidance but have not read it (please go to q28)
- ☐ Not aware of the guidance (please go to q28)

26. Has the guidance report led you to make changes in the way you deploy TAs?

- ☐ Yes
- ☐ No

27. If yes, what changes did you make?

28. Do you have any final comments?

Many thanks for completing the survey

Appendix 6: Thematic coding frame (qualitative analysis)

1. EEF activities, enabling mechanisms and barriers
2. Lincolnshire leads
 - 2.1. Motivation
 - 2.2. Purpose and activity
 - 2.3. Regional lead effectiveness
3. Mobilise delivery model
 - 3.1. Governance
 - 3.2. Key features
 - 3.3. Cluster-leads (Characteristics, role, motivation, activity and effectiveness and perceptions of support)
 - 3.4. Cluster characteristics
 - 3.5. Cluster meetings (experience, quality and effectiveness)
 - 3.6. Other model effectiveness (including components other than cluster meetings)
 - 3.7. Internal evaluation and monitoring
4. Implementation in schools
 - 4.1. Current deployment of TAs
 - 4.2. Overview of change post 2016
 - 4.3. Other influences on change -i.e. outside EEF guidance
 - 4.4. Implementation processes
 - 4.5. School-based leads (Characteristics, role, motivation, activity, effectiveness and perceptions of support)
 - 4.6. Schools attribution of change to Mobilise
5. Recruitment, retention and engagement
6. Outcomes at school level
 - 6.1. Directly related to the EEF recommendations
 - 6.1.1. Classroom deployment and practices
 - 6.1.2. TA / teacher communication
 - 6.1.3. Interventions
 - 6.1.4. Training
 - 6.2. Other related to TAs
 - 6.3. Other related to teachers
 - 6.4. Other related to pupils
 - 6.5. Other whole school outcomes
 - 6.6. Research readiness at school level
7. Outcomes at county-level
8. Enablers and barriers
 - 8.1. Enablers (Mobilise programme and in school)
 - 8.2. Barriers (Mobilise programme and in school)
9. Fidelity to the evidence

10. Lessons learned and advice

11. Sustainability

- 11.1. Related to TA guidance and recommendations
- 11.2. Research networks including Mobilise Choice
- 11.3. Other networks

12. Replicability

Appendix 7: Data tables on profile of survey sample

Table 36 shows that for both Lincolnshire and the comparison area, primary schools were overrepresented among the respondents compared to local and national averages. There are three schools in the survey sample that provide education to pupils of both primary and secondary age. These are listed here as 'through' schools, and each is also classified as a special school. The remainder of schools that participated in the survey are either primary or secondary. Table 35 details these. The number of secondary schools in the sample is far lower than the number of primaries. This is to be expected given the higher number of primary schools, but the proportion of secondary schools in the achieved sample is also lower than in England overall.

Table 35: School phase

Type of school	No data		Primary		Secondary		Through	
	N	%	N	%	N	%	N	%
Lincs	1	1.3%	73	91.3%	5	6.3%	1	1.3%
Lincs Population	11	2.9%	284	75.7%	66	17.6%	14	3.7%
KM	0	0.0%	40	85.1%	5	10.6%	2	4.3%
KM Population	24	3.2%	542	72.2%	130	17.3%	55	7.3%
England	1014	4.4%	17264	74.3%	3716	16.0%	1250	5.4%

Source: SHU survey and DfE Schools Comparison Service. Row percentages.

Table 37 reports on the school type of the survey respondents for both Lincolnshire and the comparison areas. These are again presented alongside local and national averages to illustrate the representativeness of the achieved sample. For some schools, no information on school type is available from the DfE data source. These are listed here under the 'no data' column. In both the Lincolnshire and comparison survey samples, maintained schools are overrepresented, while academies and special schools are both underrepresented compared to the local population.

Table 36: Type of school

Type of school	No data	Academy	Maintained School	Special School	N
Lincs sample	1.3%	22.5%	73.8%	2.5%	80
Lincs Population	2.9%	35.2%	55.7%	6.1%	375
KM sample	0.0%	23.4%	72.3%	4.3%	47
KM Population	3.2%	35.2%	52.9%	8.8%	751
England	4.2%	26.4%	62.4%	6.9%	23244

Source: SHU survey and DfE Schools Comparison Service. Row percentages.

Table 38 shows that Kent and Medway primary schools are larger than Lincolnshire schools in terms of pupil numbers. Primary schools responding to the survey had higher pupil numbers than the local average in both study areas. Secondary schools in the two study areas have similar numbers of pupils (Lincolnshire mean = 658, Kent and Medway mean = 688). In both locations, survey respondents from secondary schools tended to be from schools with higher pupil numbers.

Lincolnshire schools typically have a lower percentage of pupils with special educational needs (SEN) than Kent and Medway schools. This applies at both primary and secondary level. In both areas, primary and secondary schools responding to the survey have lower percentages of pupils with SEN than the local mean.

The Lincolnshire sample also has a lower percentage of primary pupils with English as an additional language (EAL) than the Kent and Medway schools, but in both areas this is lower than the value for the local population. At secondary level, the Lincolnshire sample also has fewer EAL pupils, although there is no difference between the respective local populations. Both are considerably lower than the average for England overall at primary and secondary.

The mean percentage of primary pupils eligible for Free School Meals (FSM) in the past six years is 24% in Lincolnshire and 23% in Kent and Medway. In schools responding to the survey, the figure for Lincolnshire is 22% and for Kent/Medway 25% (England mean = 25%). In general, more pupils at secondary schools have been eligible for FSM in the past six years (England mean = 36%). In Lincolnshire secondary schools responding to the survey, the mean (24%) is slightly lower than the Lincolnshire average (30%). While the population average for Kent and Medway is also 30%, the mean is higher among schools taking part in the survey (32%).

Table 37: School characteristics

	Mean total number of pupils (including part-time pupils)	Mean % eligible pupils with SEN support	Mean % pupils English not as first language	Mean % pupils eligible for FSM past 6 years	Mean OFSTED rating
Primary					
Lincs Sample	229	4	5	22	1.92
Lincs Population	198	5.8	7.7	24.3	1.88
KM Sample	292	6	9	25	1.88
KM Population	268	8.5	9.7	22.7	1.92
England	271	6.8	14.9	24.8	1.91
Secondary					
Lincs Sample	765	17	3	23	1.60
Lincs Population	658	23.3	6.2	29.8	1.97
KM Sample	1008	29	5	32	1.86
KM Population	688	29.5	6.4	29.2	1.85
England	633	34.2	12.1	35.8	1.90

Source: SHU survey and DfE Schools Comparison Service. Row percentages.

Table 39 shows attainment figures for schools in the complete cases sample, compared with local and national averages. For primary schools these are based on KS2 test results. The measure used is the percentage of pupils reaching the expected standard in reading, writing and maths. For secondary schools, the chosen metrics are the percentage of pupils achieving five or more GCSEs at grades A*-C including English and maths, along with Attainment 8, a newer measure which takes into account scores from a total of eight GCSEs. Please note that 2015/16 figures are used as this was the academic year during which recruitment to the programme took place.

On KS2 reading, writing and maths, pupils in Lincolnshire schools perform worse than the national average, with only 50% reaching this level at KS2, compared to 53% for England overall. In Kent and Medway schools, 56% of pupils reach the required standard in these three areas. There is some variation between the specific subjects, but the main point is that attainment in Lincolnshire is slightly

lower than the England average in all areas, while for Kent and Medway attainment is higher than England overall in some areas, and lower in others.

These figures provide important information about the context in which the project operated, and also the conditions in the comparison area. In terms of the achieved sample, Lincolnshire schools that took part in the survey had higher attainment than the local average. The percentage of pupils reaching the expected standard in reading, writing and maths (52%) equals the mean for England overall. Although some schools participated in only the baseline or follow-up survey, the difference in attainment between the two samples is less than half a percentage point. For the Kent and Medway sample, the average attainment (54%) is slightly below the combined average, making it nearer to the value for the achieved Lincolnshire sample and also nearer to the national average. It therefore appears that the attainment of KS2 pupils in sampled schools is well aligned with national expectations.

KS4 attainment in Lincolnshire schools that responded to the survey was higher than the Lincolnshire average with 74% of pupils gaining at least five GCSEs at grade A*-C including English and maths (Lincolnshire mean = 51.4%). GCSE attainment in Kent and Medway is lower than in Lincolnshire, with 49% of pupils gaining five A*-C grades including English and maths, which is equal to the overall figure for England. Schools from Kent and Medway responding to the evaluation surveys had lower attainment (41% with five A*-C grades including English and maths) than the local or national figure.

Table 38: School attainment

	% pupils reaching expected standard in reading, writing and maths	Mean Attainment 8	% pupils achieving 5+ A*-C with English and maths GCSEs -2016
Lincs Sample	52.7	57.9	74
Lincs Population	49.8	45.6	51.4
KM Sample	53.5	37.5	41.4
KM Population	55.8	42.4	48.6
England	52.5	43.9	49.1

Source: SHU survey and DfE Schools Comparison Service. Row percentages.

Appendix 8: Interview foci

Table 4 outlines the scale of data collection undertaken across a wide range of different stakeholders connected to Mobilise. It is not possible to provide full interview schedules for all, as each was tailored to the stakeholder and the phase of the project they were undertaken. However, below we outline the key foci from one illustrative example of an interview schedule representing each of the key stakeholders.

EEF team: EEF role and involvement so far / Lincolnshire background to the Mobilise project / Intentions and rationale moving forwards / Mobilise project structure / Intended outcomes / Perceptions of actual enablers and barriers to Mobilise / Perceptions of future enablers and barriers to Mobilise / Anything else.

Strategic Mobilise stakeholders: Personal orientation to the project / Lincolnshire background to the Mobilise project / EEF involvement / Mobilise project structure / Mobilise project model - process of creation / Recruitment of schools / Intended outcomes / Rationale for Mobilise model and how this will lead to school change / Monitoring and evaluation / Perceptions of actual and future enablers and barriers / Anything else.

Regional leads: Implementation of the Mobilise project since September / Your role / Cluster leads and meetings / Relationship with cluster leads & views on support and effectiveness / Effectiveness of different parts of the Mobilise programme / Recruitment and engagement / Outcomes / Enablers and barriers / Future plans / Anything else.

Cluster leads: Orientation to the project / Cluster lead role / Support & training for the cluster lead role / The role of cluster lead and purpose of the cluster lead meetings / cluster of schools' characteristics / Effectiveness and outcomes / Enablers and barriers / Future / Anything else.

School-based leads: Experience of the cluster meetings / School-based lead role / TA workforce and deployment / Implementation of change / Effectiveness of school-based lead role / Enablers and barriers / Future plans / Anything else.

Senior leaders of non-participating schools: School background characteristics and TA workforce / Recall of what the Mobilise project entailed / Awareness of the Mobilise project and wider EEF guidance around TA deployment / Reasons for not becoming involved (key) / Anything else.

Full interview schedules for any interview or focus group are available on request.

Appendix 9: Attendance data by outcomes

Table 39: TA deployment and practice, by campaign activity attendance

TA deployment and classroom practice	B	SE	N
Q8 - Leading the teaching of the whole class	-0.02	0.06	71
Q8 - Supporting the teacher in their whole class delivery	0.05	0.06	75
Q8 - Teaching specific pupils or small groups of pupils (R)	0.02	0.04	74
Q9 - Working with SEND pupils (R)	-0.08	0.05	74
Q9 - Working with lower attaining pupils (R)	-0.08	0.05	74
Q9 - Working with higher attaining pupils (R)	-0.09	0.05	73
Q9 - Working with average attaining pupils (R)	-0.04	0.05	71
Q9 - Working with pupils eligible for Free School Meals (R)	-0.07	0.05	68
Q10 - TAs are aware of the learning needs of all pupils in the class	-0.03	0.04	75
Q10 - TAs often teach specific pupils different content from the rest of the class (R)	0.10	0.07	75
Q10 - TAs ensure that pupils retain ownership over their learning and responsibilities	0.01	0.04	73
Q10 - TAs interactions tend to focus on completing a task (R)	-0.05	0.06	75
Q10 - TAs understand how to scaffold learning	-0.06	0.04	75
Q10 - Teachers deploy TAs during lessons to respond to 'real-time' needs of pupils	-0.10	0.05	74
Q10 - Teachers spend at least as much time working with lower-attaining pupils as others (R)	0.02	0.06	75
Q10 - Teachers and TAs have a precise and shared understanding of their respective roles	-0.02	0.04	74

Source: SHU survey and Mobilise monitoring data

Table 40: TA/teacher communication, by campaign activity attendance

TA/Teacher communication	B	SE	N
Q10_2 - TAs are informed of the concepts, information and skills being taught by the teacher in lessons	-0.03	0.04	75
Q10_4 - There are sufficient opportunities for teachers to brief TAs prior to lessons	-0.08	0.06	75
Q10_5 - There is regular feedback from TAs to teachers after lessons	0.01	0.04	75
Q14_1 - There is always scheduled time each week for teachers and TAs to communicate	-0.13	0.07	65

Source: SHU survey and Mobilise monitoring data

Table 41: Interventions, by campaign activity attendance

Use of interventions	B	SE	N
Q14_3 - Interventions are always supported by structured lesson plans and resources	0.00	0.06	64
Q14_5 - Interventions occur regularly (around 3-5 times per week)	-0.09	0.06	64
Q14_6 - Interventions are sustained over time (around 8 to 20 weeks)	-0.01	0.07	65

Source: SHU survey and Mobilise monitoring data

Table 42: Training, by campaign activity attendance

Training	B	SE	N
Q14 - TAs usually receive in the region of 5-30 hours training/ development per intervention	-0.01	0.07	65
Q15 - Teachers receive appropriate and comprehensive training on how to use TAs to supplement their work	-0.02	0.06	77
Q15 - TAs receive little training on how to work effectively with teachers (R)	-0.01	0.06	77
Q15 - TAs are well trained to support the pupils they spend most time with	-0.01	0.04	77
Q15 - Staff who manage TAs rarely receive training on how to deploy TAs effectively (R)	0.05	0.08	76

Source: SHU survey/ advocacy provider attendance data

Appendix 10: Characteristics of schools formally withdrawing from Mobilise

Table 43: OFSTED rating of schools that withdrew from Mobilise

Overall effectiveness	Not withdrawn	Withdrawn	Total
No data	7	1	8
1	46	5	51
2	195	9	204
3	17	1	18
4	2	0	2
Total	267	16	283

Source: Mobilise MI data/DfE data

Table 44: attainment of schools that withdrew from Mobilise

		% pupils reaching expected standard in reading, writing and maths (KS2)	Mean Attainment 8 (KS4)	% pupils with 5+ A*-C incl. English and maths GCSEs (KS4)
Not	Mean	51.0	43.1	45%
	N	212	24	24
Withdrawn	Mean	40.6	53.0	77%
	N	9	5	5
Total	Mean	50.6	44.8	50%
	N	221	29	29

Source: Mobilise MI data/DfE data

Table 45: Rural/urban location of schools that withdrew from Mobilise

	Not	Withdrawn	Total
Rural hamlet and isolated dwellings	6.9%	0.0%	18
Rural hamlet and isolated dwellings in a sparse setting	0.8%	0.0%	2
Rural town and fringe	21.4%	6.3%	57
Rural town and fringe in a sparse setting	1.9%	0.0%	5
Rural village	24.8%	25.0%	69
Rural village in a sparse setting	3.8%	0.0%	10
Urban city and town	39.7%	68.8%	115
Urban city and town in a sparse setting	0.8%	0.0%	2
Total	262	16	278

Source: Mobilise MI data/DfE data

Appendix11: Data tables on management of TAs

Table 46: Member of staff responsible for TA deployment strategy

Q4	Lincs Pre %	KM Pre %	Lincs Post %	KM Post %
Head teacher	61.5	38.3	49.4	30.4
SENCO	16.7	38.3	16.5	37.0
Other senior leader	11.5	14.9	29.1	19.6
Other (please specify)	10.3	8.5	5.1	13.0
N	78	47	79	46

Source: SHU survey, pre- and post-campaign. Column percentages

Table 47: Number of TAs managed by head teacher

Q7_1	Lincs Pre %	KM Pre %	Lincs Post %	KM Post %
All TAs	43.8	17.9	39.0	22.2
Some TAs	31.3	17.9	30.5	25.9
No TAs	25.0	64.3	30.5	51.9
N	64	28	59	27

Source: SHU survey, pre- and post-campaign. Column percentages

Table 48: Number of TAs managed by other senior leader

Q7_2	Lincs Pre %	KM Pre %	Lincs Post %	KM Post %
All TAs	19.7	25.0	31.0	33.3
Some TAs	70.5	55.6	60.3	45.5
No TAs	9.8	19.4	8.6	21.2
N	61	36	58	33

Source: SHU survey, pre- and post-campaign. Column percentages

Table 49: Number of TAs managed by SENCO

Q7_3	Lincs Pre %	KM Pre %	Lincs Post %	KM Post %
All TAs	23.3	44.7	25.5	42.1
Some TAs	58.3	47.4	62.7	50.0
No TAs	18.3	7.9	11.8	7.9
N	60	38	51	38

Source: SHU survey, pre- and post-campaign. Column percentages

Table 50: Number of TAs managed by HLTA

Q7_4	Lincs Pre %	KM Pre %	Lincs Post %	KM Post %
All TAs	3.7	0.0	0.0	5.3
Some TAs	18.5	9.5	20.0	15.8
No TAs	77.8	90.5	80.0	78.9
Total	27	21	30	19

Source: SHU survey, pre- and post-campaign. Column percentages

Table 51: Number of TAs managed by other member of staff

Q7_5	Lincs Pre %	KM Pre %	Lincs Post %	KM Post %
All TAs	5.3	13.3	16.7	9.1
Some TAs	52.6	73.3	33.3	45.5
No TAs	42.1	13.3	50.0	45.5
Total	19	15	18	11

Source: SHU survey, pre- and post-campaign. Column percentages

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Formative evaluation of the Lincolnshire teaching assistants scale-up campaign

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