

# INVESTIGATION OF THE ROLE OF 'FRIEND OF THE SCHOOL' IN AN ERO REVIEW

Report of sabbatical study in Term 3 2008 by Kevin Win, Principal of Papakowhai School

## Thanks and Acknowledgements

Thank you to NZEI for the inclusion of sabbatical leave as part of our collective agreement. The leave has refreshed and renewed me.

Thanks to the 55 Wellington Regional Primary Principals Association (WRPPA) principals who made the time to respond to my questionnaire on the net.

Thanks to ERO National Office for the data provided from surveys of schools. See Appendix 2.

Special thanks to the principals who gave up time in their busy working week to meet with me for in-depth interviews.

## Purpose

I proposed to investigate the role played by the 'friend of school' during an ERO review. Particularly to look at:

- what is effective practice for those supporting schools in this role
- the perceived and actual role taken through the eyes of both the principal and the 'friend of school'
- what the 'friend of school' actually does during the review that is effective
- if there are barriers to schools finding a suitable person to act for them
- the extent that a 'friend of school' helps make the review a positive process for the school
- ERO review team members view of the 'friend of school' role in practice.

I proposed that the investigation would inform a supposition that there is a need for a support network of suitable 'friend's of school' provided by the profession.

## Rationale

I chose this investigation as my understanding was that nationally only 30% of schools used a 'friend of school' in an ERO review. It is a role I have performed for a good friend twice. My experience of using that same friend in the role in our school ERO reviews was that it increased and improved communication with the ERO team. I hoped that by investigating the way a 'friend of school' supported an ERO review I would be able to encourage more schools to take advantage of the opportunities using one provides.

While ERO support the use of 'friends of school' in a review little information is available about the role and the way that it can be of support to the school and to a principal.

See Appendix 1: ERO documentation on the role of the 'friend of school'.

## Activities undertaken

I surveyed WRPPA schools using the email tree. I sent a link to a web based survey that I constructed using Survey Monkey. Fifty five principals responded to the survey within a week.

I also carried out in depth surveys with people who had been:

- principals in ERO reviews where the school had used a 'friend of school'
- a 'friend of school'.

I did not pursue interviews with ERO reviewers on their perceptions of the role of 'friends of school' as they could not talk as individuals and referred me to their management. I did contact ERO's national office and received information collated from school surveys about the percentage of schools who used 'friends of school' in their review nationally as well as feedback on the value of the role.

## Findings

### THE SURVEY OF WRPPA SCHOOLS

Grades of principals who responded:

U1	U2	U3	U4	U5	U6	U7 and above
1	2	10	23	14	4	1

Did the school use a 'friend of school' in its last ERO review?

Yes	No
44%	55.6%

The thirty people who answered no were then asked reasons for not using a 'friend of school'.

A. They were asked if it was because no one suitable was available.

Responses were:

Yes	No
4	25

B. They were asked to list other reasons that they had not used a 'friend of school'.

17 people responded. No other reasons were listed. They merely added comments to explain why they did not have a 'friend of school':

- 9 people said that they did not think it was necessary to have a 'friend of school':
  - 6 said that they were confident in the process and their ability to communicate with ERO
  - 2 felt that it might look like you needed support in the process when they did not
- 3 people had used them in the past though did not see a need in their latest review
- 4 people gave reasons why they had not found someone either because the person they wanted was not available or they did not know who to ask
- 1 person said that if they felt they needed someone during the process or after it they would have asked someone at that point.

C. People who used a 'friend of the school' were asked what the relationship of the 'friend of the school' was with the principal or the school. 26 people responded:

- 2 used previous principals of the school
- 5 used colleagues and friends, 3 of them said that it was a role that carried out for each other
- 3 used their appraiser
- 5 used consultants/facilitators who had worked in the school
- 2 used an ex board chair
- 1 used their DP (ERO no longer allows you to do this)
- 2 used neighbouring principals
- 1 used a parent who had heavy involvement in the school including consulting parents on the school's behalf
- 1 used a regular reliever who had worked in the school a lot in the last 10 years
- 1 used the principal advisor from their appointment process
- 2 used previous staff members.

D. People who used a 'friend of the school' were asked if they thought it was beneficial to the school. 30 people responded:

- Nearly all were extremely positive and could list many positive reasons
- Most talked about improved communication from the ERO team back to the school or the ability of the 'friend of the school' to inform the ERO team of where the school was at and correct any erroneous impressions ERO had
- A few talked about the extra support they felt individually from having a 'friend of the school'
- A number talked about the value of having someone who was not a stakeholder in the process who could sit outside discussions to ensure that they stayed on track and were highlighting what the school was doing.

**Some comments of note:**

- Definitely, having a 'friend of the school' enabled the board, principal and teachers to be assured that the review process was fair and transparent. The 'friend' was able to help us get maximum value from reviewer's feedback. We saw our ERO visit as free outside consultancy and the 'friend' added value to the feedback we received. He was able to be very specific in the feedback he gave whereas the reviewers were more general
- Extremely - he sat in on various discussions that ERO had on site, they walked him through the process and highlighted some things that he wanted to feed back to the school informally. He was invited (and went) in to the ERO office when they were putting together their verbal report back. He found this very interesting and informative
- Yes, very definitely at a time when we needed it. The FOS helped in adding a perspective not observable during a 3 day review
- Yes. Prior meetings with the FOS helped us establish what we were doing well in relation to the focus for the ERO visit and what we would need to prepare. Having the friend available to attend meetings with the ERO team and visit classrooms during the ERO visit to verify what was happening and what was being seen was useful. Using the friend to critique, clarify and question before, during and after the ERO visit was very useful
- Absolutely - more schools should 'do' it! They are a balance and foil for ERO if you have a 'friend' who knows what they are doing! That person ensures that ERO captures the truth about your school and they know the staff well so are able to argue what they know about the staff member if the one-off lesson for ERO does not go well
- Absolutely! It is great to have someone who is not stressed to help point out all the things that you forget about or don't know about because you are new to the job

E. All principals were asked if they thought there were barriers to appointing a 'friend of school'. There were 42 responses. Some responses talk about conditions that may mean that the 'friend of school' may be less effective rather than barriers to appointment.

Barriers were thought to be:

- Time, being able to make the time to take on the role, (8 people)
- Knowledge of the role, (7 people)
- Lack of knowledge of the ERO process or lacking credibility with ERO (4 people)
- Not knowing the school well enough (15 people)
- Wanting to use a staff member in the role (4 people). ERO will no longer allow schools to use a staff member but this was possible with earlier reviews
- The 'friend of school' being defensive (2 people)
- Some people thought there were no barriers.

**Some comments of note:**

- They need to have the time - We have done it twice now (had a FOS) and it works best when that person is available for the duration of the ERO visit rather than just at certain times
- Finding someone who you could trust to keep what he/she observes confidential and someone who's professional opinion is valued by your staff. In this sense the friend needs to be known and respected so that his/her feedback is valued. We also needed to know that the 'friend' was confident enough to be able to argue our case if needed. We were very fortunate to find someone available who met these criteria.
- We didn't see a barrier but ERO did as they said having a staff member could be somewhat of a conflict of interest, as (especially with the DP), that person could be the very person ERO want to be critical of! (This didn't eventuate). I believe they no longer permit a staff member to be in this role-which I believe is a pity.
- I feel it is dependent on there being someone available who has a long-term and in-depth view of the school, but also slightly removed (e.g. ex board member, principal or SMT). Also need some intelligence and people skills! This can be a matter of timing and good fortune.

## THE IN-DEPTH SURVEY OF THOSE WITH EXPERIENCE OF THE ROLE

I have summarised the points made in the interviews rather than try to list all or quantify the points made.

Qualities that were looked for in the person appointed as the 'friend of school':

- Was trusted by the staff and the Board
- Would stand up for the school
- Able to feedback honestly to the school
- Had knowledge of current developments in the school
- An advocate
- Someone who would speak their mind.

The process of appointing the 'friend of school':

The process varied:

- A number of appointments were discussed with the management team and staff before consulting the school board
- In a few cases the principal and the board chair agreed on a suitable person and made the appointment knowing that the person would be well regarded by the staff
- In a number of cases the management team and principal agreed and then discussed the appointment with the board
- In a few cases the principal decided who they wanted, approached the person and then informed others of who they wanted to use.

The relationship between ERO and the 'friend of school':

Everyone talked about this as being positive. The ERO teams welcomed the 'friend of school' and were open and communicative.

What the 'friend of school' did that was effective:

It seemed the school got better support and improved communication when the 'friend of school' was involved in the whole process. The 'friend of school' was better informed when involved in the ERO synthesis of information at the end of the process if they had taken a full part in visits to rooms, ERO interviews with staff, management team, principal, students and the Board.

How the 'friend of school' improved the process:

- They improved feedback to individual teachers in rooms that they visited. They could act as a support to teachers when they visited, the friendly face, not that the ERO members are not friendly faces rather it is the way they are viewed by the staff
- They gave more specific feedback to the principal about the progress of the review
- As an independent participant they could keep staff members on track in discussions and resolve misunderstanding or defensiveness
- They could provide another point of view at the ERO synthesising sessions as well as providing feedback on the process of synthesising and the views held by the ERO team which is not stated in the report
- There were examples given of views expressed by ERO team members that the 'friend of school' could provide evidence to counter
- Having someone take a complete part in the process and provide good feedback to the principal provided a transparency that reassured the school that it was getting a fair review.

Was the 'friend of school' paid?

They were often given a small gift or a payment of some expenses. The gift was given as an expression of gratitude for the effective role they performed.

## Implications

The Board appoints the 'friend of school' and it is up to them to tell ERO the role they want them to take. A 'friend of school' will be more effective if they are involved in the whole process, i.e.:

- Meet with the school before the review and know what the school's focus is
- Attend all meetings that ERO has with
  - Board
  - management team
  - curriculum teams
  - principal
  - pupils
- visits rooms with each member of the team
- spends time reading the documentation provided for ERO
- attends synthesising meetings with the ERO team at the end of the review.

## Conclusions

There are very positive reasons to involve a 'friend of school' in an ERO review. The management team and the staff may be the best advocates for the school and know it better than anyone else, however having an independent person as part of the process will ensure that it is fair and will increase feedback to the school from the review.

It seemed that for some schools who responded to my survey, finding the right person was a barrier to appointing a 'friend of school'. This was less common than I thought it would be. The greatest barrier is for a 'friend of school' to be able to make the time to undertake the role. It seems that there needed to be a relationship between the 'friend of school' and the school for the person to make the time needed to carry out the role effectively.

I had thought there could be a need to provide a support network of suitable 'friends of school' provided by the profession. There may be some people who could find this useful though it was obvious that this was not a real barrier to most schools surveyed.

I consider that a 'friend of school' does not need to know the school well. They do need to understand the process of an ERO review. They need to be trusted by the staff and the school to be objective, discrete and supportive of the school. They need to be able to form effective relations with others so that they communicate well with the ERO team. There were certainly instances where deep knowledge of the school meant that the 'friend of school' could inform discussions with the ERO team but this was not critical to the review process.

The key to a 'friend of school' increasing communication and learning from an ERO review is the same thing that is essential for learning in classrooms, it is all about effective relationships and good communication.

The main benefit to schools using a 'friend of school' during an ERO review is to increase and improve communication between the ERO team and school management.



## Appendix 1

- **Resource D: The Role of the Friend**

Before the review starts the school has the opportunity to nominate a Friend of the School to take part in the review.

The Friend can be anybody except the principal, a trustee or a member of the staff of the school. It is the responsibility of the board of trustees to determine the parameters within which the Friend of the School will be involved in the review.

The Friend is not a designated Review Officer.

### *Skills Required*

The school selects the Friend based on its own criteria. The school may wish to ensure that the Friend has:

- a good knowledge of the school and the contextual factors affecting its performance;
- the ability to reflect the interests of a particular group or groups within the school such as the students, parents, or the wider community;
- the ability to maintain a constructive relationship with members of the school community and ERO; and/or
- expertise in a specific area of importance to the school.

### *Parameters Related to the Friend of the School*

- The decision to include a Friend of the School in a review is made by the board of trustees.
- The school may select only one person as the Friend.
- The school meets all costs related to the Friend of the School.
- The Friend is responsible to the board of trustees during the time they are involved in the review.
- The board of trustees is responsible for the Friend's access to information during and following the review.
- ERO may provide opportunities for individuals to give Review Officers information in confidence, without the Friend being present.

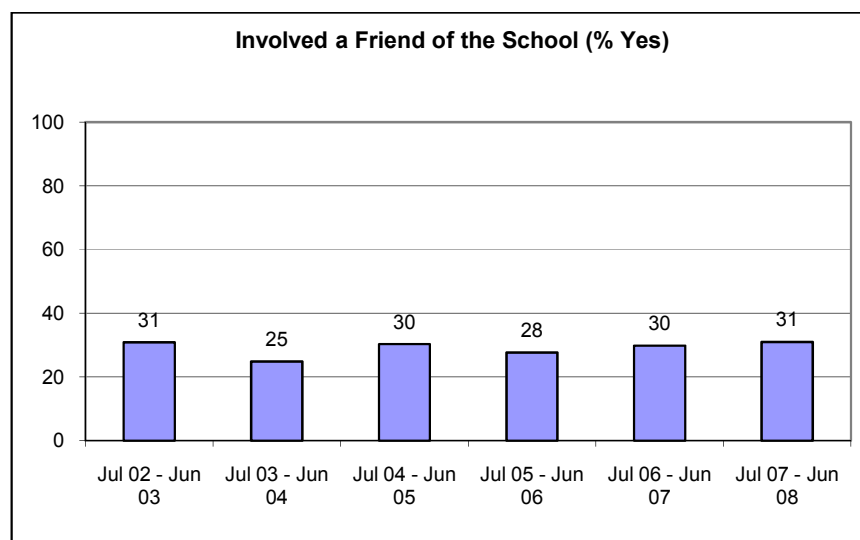
### *Relationships and processes*

<b>What ERO will do</b>	<b>What the school will do</b>	<b>What the Friend will do</b>
<p>Provide the board with guidelines to assist in their choice and management of the Friend.</p> <p>With the agreement of the school, provide the Friend with the opportunity to:</p> <ul style="list-style-type: none"> <li>• attend meetings and interviews carried out as part of the review;</li> <li>• see all documents the board wishes to make available;</li> <li>• participate in review team discussions.</li> </ul> <p>Consider information provided by the Friend when drafting the report.</p>	<p>Decide whether the school wishes to have a Friend involved in reviews.</p> <p>Select the Friend.</p> <p>Provide any necessary briefing to the Friend on the role he/she is to fulfil.</p> <p>Notify ERO of the decision to have a Friend and of the guidelines and parameters the school has provided for the Friend.</p>	<p>Agree to work within ERO's timelines and procedures for carrying out the review.</p> <p>Participate in those aspects of the review procedures the school wishes.</p> <p>Participate in meetings and review team discussions.</p> <p>The Friend will be able to comment on ERO's unconfirmed report through the board of trustees.</p>

## Appendix 2

DATA PROVIDED BY ERO NATIONAL OFFICE

### *Did you involve a Friend of the School in your review?*



### *Ways in which the Friend helped in the review*

A pre-coded question was included from January 03 – June 04 that asked about the extent to which the Friend helped in these ways:

- Provide background information about the school
- Provide another perspective
- Advocate for the school
- Provide Maori view
- Liaise between school and ERO
- Provide support for staff

### *Role of the Friend 2005*

In 2005, a more in-depth analysis of the open responses presented the following information about Friends of the school.

The choice of whether to use friends and how to use them appears to relate to the circumstances at the time of the review. This includes the availability of a particular person to fill the role, or the level of knowledge and experience of the people currently in trustee and management roles at the time of the review, and their perceived ability to 'positively put forward the school's case'. Circumstances such as when the school has a new principal or senior staff for instance, or when most trustees are relatively new were given as examples of when a friend was used. Alternatively, they were often used when they had 'true

knowledge about the school and its history'. One school also suggested that it would use the friend in a different capacity next time as a link to the community.

Of the schools that involved a friend, most found the role taken by this person to be very positive and useful. They are described as helping to ease initial tensions between ERO and the school, providing positive feedback to the school, and supporting a relationship that was beneficial to all parties. They were seen to give the school added confidence in the review process. Where the process broke down it was because the Friend could not participate as planned. In one case, a school believed it couldn't comment because ERO had not given it any feedback on the work of the Friend.

For the most part, however, boards and managers state they feel that 'no-one knows the school better than themselves' and they could not see how a friend would improve on what was already happening [in terms of information sharing].