Teaching assistants regional scale-up campaigns: Lessons learned

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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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The context

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 national campaign comprised promotion of the guidance via an extensive programme of presentations, social, print and broadcast media, direct communications to schools, and meetings with policy stakeholders. In addition to the national campaign, EEF piloted two regional campaigns. The first, in South & West Yorkshire, involved commissioning advocacy providers to deliver training and support for schools during the 2015/16 academic year. For the second, in Lincolnshire, EEF initiated a model of scale-up that was embedded within school improvement processes and led to the development of the Mobilise programme that provided training and support for schools during the 2016/17 academic year. The EEF guidance and recommendations were central in developing the programmes for schools in both regional campaigns. The findings of the evaluation of these pilots are available on the **EEF website** (Maxwell et al., 2019a, Sibieta et al., 2019, and Maxwell et al., 2019b).

The purpose of this report is to draw out lessons learned from these evaluations about effective scale-up of research use.

Headline impact and outcomes findings

The impact evaluation in South & West Yorkshire indicates that the pilot had a positive impact on pupil attainment in English at Key Stage 2 (KS2) but did not impact on attainment in mathematics. Impact was not measured in Lincolnshire. There is some, fairly limited, evidence from the implementation and process evaluations that the schools participating in both pilots changed their practices to align more closely with the EEF recommendations.

What lessons were learned about effective scale-up?

1. Components underpinning effective scale-up

Factors operating within and across four inter-related components appear to underpin effective scale-up of research evidence. The components are: the research object (the EEF guidance and recommendations); system-level brokerage (by EEF); regional/local brokerage and schools as users of research.

2. The research object

Key features of a research object that appear to enable scale-up activity are: being produced by a trusted provider, such as EEF, and a credible and convincing; accessible and user-friendly presentation of information that can be easily 'packaged' into training activities.

3. System-level brokerage

System-level brokerage is likely to be most effective when brokers have a trusted brand and reputation, high-levels of expertise related to the research, scale-up and the school system, and relentless energy and commitment.

Activities that are perceived to be effective include: providing a 'hands-on' steer to ensure fidelity to the evidence and advice on scale-up approaches; a balance of responsive support and challenge; facilitating linkages to professionals and academics; and building a bank of resources.

Clarity of expectations and governance, regular communication, and efficient administrative processes appear to support effective working with regional/ local brokers.

4. Regional/local brokerage

Regional/local brokerage is likely to be most effective when brokers:

- are professionally credible and skilled adult learning facilitators
- share their own school experiences
- provide challenge as well as support
- have strong communication, interpersonal and organisational skills
- understand and have existing engagement with, the regional/local school system.

Activities and approaches that are perceived to be effective span:

- developing and delivering training and resources that have a clear purpose and focus on the research object (the EEF guidance and recommendations)
- taking account of participants' prior knowledge and changes already implemented in their schools
- enabling schools to contextualise the guidance, share ideas, consider issues, reflect, plan for implementation and evaluate practice in discussion with other schools
- enabling schools to implement change in manageable steps by sequencing training over time, and including a focus in the programme on how to implement change
- the provision of informal advice and support between main activities.

Both a commissioned model of advocacy provision and a model of scale-up embedded in regional school improvement processes appear to have the potential to recruit and engage schools in scale-up activity. The embedded model appears to have stronger potential to sustain wider research-use as it provides an infrastructure and processes that can support future scale-up activity.

In addition to the enabling factors set out in 6 and 7, implementing an embedded model of scale-up also requires:

- commitment, capability and willingness to collaborate at a regional level
- alignment with regional priorities
- 'buy-in' from a cadre of well-respected head teachers and structures that enable expertise and resource to be marshalled and regional decision-making.

Initiation and early support by a system-level broker appears to be effective in fostering motivation, bringing together key stakeholders and maintaining a focus on the research evidence.

5. Schools

The context and characteristics of a school and the attributes of staff leading implementation appear to have a considerable effect on the effectiveness of implementation of the research object. Fidelity to the evidence can be significantly undermined at the school level.

Implementation in schools appears to be more effective when there is senior leader understanding and commitment to change, change agents that are capable, enthusiastic and enabled to effect change, and a clear process for implementation with time allocated for associated activity.

School cultures that are perceived to support effective implementation are characterised by a commitment to enabling all staff to support the outcomes for all children, a 'no fear of failure' ethos, staff who are motivated, open and responsive to change, trust each other and communicate effectively, low staff absence and a relatively stable leadership team.

6. Recruitment

Recruitment of schools to scale-up campaigns appears to be enhanced when it is undertaken by well-regarded national and regional/local organisations, including local authorities, and there is sufficient lead-in time to allow schools to integrate activity into the school calendar. Recruitment is also enhanced through the use of multiple channels of communication, which includes direct contact by headteachers.

Such strategies still lead to under-recruitment of schools that have pressing accountability issues or have isolated themselves from working with other schools. Alternative strategies will need to be developed to engage with these schools.

What lessons were learned about effective scale-up

Question	Finding	Comment
Is there evidence to support the theory of change?	Evidence of some impact on attainment in South & West Yorkshire. Impact not measured in Lincolnshire. Some, fairly limited, evidence of practice - change in both pilots.	There is evidence in South and West Yorkshire that KS2 English test scores showed an improvement of 0.03 standard deviations compared to a synthetic control group. There was no evidence of impact on maths scores. Changes in KS2 tests and curriculum may be biasing the results, but the size and direction of any bias is uncertain. No similar impact measurement was undertaken in Lincolnshire. There was some evidence in both regional pilots that reported practices in participating schools were more closely aligned with the EEF recommendations at the end of the pilot than the beginning. In Lincolnshire there was also evidence that some, but not the majority of, practices aligned with the EEF recommendations increased in participating schools more than in the comparison group over the evaluation period. In S&W Yorkshire, where a comparison survey was only administered post-campaign, very limited evidence was found of reported practices in participating schools being more aligned with the EEF recommendations than in comparison schools. Concerns over low response rates, reliance on self-reported data and multiple significance testing mean that these findings should be treated with caution. It is important to note that for the impact and outcomes evaluations the control or comparison groups were active as they were subject promotion of the EEF guidance through the national campaign.
Were the approaches feasible?	Yes for both pilots	Both the commissioned and embedded models of scale-up were successful at recruiting at scale and overall were received positively by schools.
Scalability	Yes	Findings indicate that both models have the potential to be used more widely. The embedded model appears to be more effective in fostering sustainability of research-use beyond the immediate campaign focus. The cost of the embedded model per pupil is higher than for the commissioned model, it is potentially more affordable for policy-makers and funders as it can leverage funding for delivery as well as appearing more likely to sustain future scale-up activity.

Context

Report purpose

The purpose of this report is to draw out lessons learned about effective scale-up of research use from evaluations of two different approaches to scaling-up evidence on making the best use of teaching assistants (TAs).

This section sets out the key components of the EEF national scale-up campaign, the commissioned model to scale-up that was piloted in South and West (S&W) Yorkshire and the embedded model piloted in Lincolnshire, where scale-up was embedded in county-wide school improvement processes. Full details of the pilots and evaluation findings can be found in the following reports:

- **South & West Yorkshire: Implementation and process evaluation - Maxwell et al. (2019a) and impact evaluation - Sibieta et al. (2019)**.
- **Lincolnshire: Implementation and process evaluation Maxwell et al. (2019b). An impact evaluation was not undertaken.**

A brief summary of existing research that illuminates effective scale-up, and was used to support the design of the theories of change and interpretation of findings from both evaluations, is also set-out.

The EEF Teaching Assistant (TA) national scale-up campaign

The Education Endowment Foundation (EEF) national 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 and **set out seven recommendations for the best use of teaching assistants** (the EEF recommendations - summarised in Figure 1 and detailed in Appendix 1).

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 a wide range of other educational organisations. EEF-led activity has included: the provision of hard copies of the EEF guidance and promotional emails to all schools in England; over 100 presentations by EEF staff; extensive social, print and broadcast media promotion; presentation at policy and international

conferences; and endorsement from policy stakeholders. From summer 2016 onwards an online course was made available through the Times Education Supplement (TES) and EEF's Research Schools have provided training courses in using the EEF guidance.

In addition to the national campaign, EEF initiated two regional campaigns. The first in South Yorkshire involved commissioning advocacy providers to deliver training and support for schools during the 2015/16 academic year. In the second regional campaign in Lincolnshire, EEF initiated a model of scale-up that was embedded within school improvement processes and led to the development of the Mobilise programme, which provided training and support for schools during the 2016/17 academic year using a cascade model of delivery. The EEF guidance and recommendations were central in developing the programmes for schools in both regional campaigns.

The commissioned model of scale-up (South & West Yorkshire)

In addition to the EEF guidance and recommendations, the commissioned model of scale-up comprised three further core components: EEF inputs, advocacy provision and the opportunity for schools to participate in trials of structured TA-led interventions.

EEF inputs

The EEF implementation team commissioned and funded advocacy providers in seven of the nine local authority (LA) areas in S&W Yorkshire. EEF provided ongoing guidance and support, including:

- Guidance on programme development, particularly to maintain fidelity to the EEF guidance and recommendations
- Presentations at advocacy provider launch events and workshops
- Ongoing informal support
- Provision of resources (developed over the course of the academic year) and including access to the Maximising the Impact of TAs (MITA)[1] audit tools
- Brokerage to support recruitment and/or to share expertise amongst advocacy providers
- Facilitation of meeting of advocacy providers.

Advocacy provision

Advocacy provider teams mostly comprised senior leaders who were highly experienced in school improvement, but had more limited experience of research brokerage. Advocacy provision was led by different organisations in each of the local authority areas, these included Teaching School Alliances (TSAs), local authorities (LAs), schools and a university. In some of the local authority areas the advocacy provision was set up as a partnership involving different organisations.

The main activities undertaken by advocacy providers were the recruitment of schools and delivery of a launch event and a set of core workshops (usually delivered over three half days and often repeated in different geographic locations within the LA area). These activities generally targeted senior leaders and were designed to engage schools with the EEF recommendations for making the best use of teaching assistants and action planning to implement the recommendations in their school. There was significant variation in other support provided by advocacy providers. Some advocacy providers ran additional optional workshops, facilitated peer learning through school visits, provided additional support for implementation between

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[1] MITA is a separate programme from the EEF scale-up campaign. However, one of the lead academics from the MITA programme was funded by EEF to act as an academic consultant to both regional scale-up campaigns. EEF is currently undertaking a separate randomised controlled efficacy trial of the MITA programme.

workshops, delivered training (free or paid for) for TAs, and/or ran end-of-campaign celebration and sharing events. In two instances financial incentives were paid to participating schools.

Structured evidence-based TA intervention trials

The intention was to provide the opportunity for schools to participate in EEF trials of structured TA-led interventions: 1stClass@Number, Catch Up Numeracy, Switch-on Reading and Switch-on Reading and Writing, and Improving Working Memory. However, there was variation between the trials in terms of the degree to which they were able to offer places to schools in S&W Yorkshire.

The embedded model of scale-up (Lincolnshire)

EEF's approach to scale-up in Lincolnshire aimed to embed research use within county-wide school improvement processes. In this model of scale-up, EEF committed resources to initiating the campaign and providing ongoing steer, support and challenge. Funding for delivery of the campaign was leveraged within the county.

It is important to note that EEF's aims for working in Lincolnshire were broader than the S&W Yorkshire campaign, extending beyond the focus of securing the use of the EEF recommendations to encompass creating a sustainable network of schools that were '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: scoping; development set-up and recruitment; and delivery, using a cascade model, of the Mobilise programme.

Phase 1: Scoping

During the scoping phase the EEF team built on initial contacts, mapping and networking to establish trust, credibility and a high level of motivation for the campaign amongst key influencers in the county, as well as to develop a deeper understanding of Lincolnshire's priorities. This activity together with ongoing communication to solve problems and sustain progress resulted in strategic approval of the project by the Lincolnshire Learning Partnership (LLP) Board, a body led by schools and supported by the LA and the establishment of an embryonic project steering group.

Phase 2: Development, set-up and recruitment

The development, set-up and recruitment phase 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 steering group established by, and accountable to, the LLP oversaw the design of the delivery model (called Mobilise): secured resourcing for the project through the LLP and from the LA; commissioned a local TSA to deliver the programme and recruited two regional leads. The steering group took a very active role in promoting Mobilise through multiple channels, and together with the EEF launched Mobilise at an LLP conference.

Phase 3: Mobilise delivery

Mobilise was operationalised using a 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. The main activities were during the delivery phase were:

- Two EEF-led roadshow events in September and October/November 2016 in four separate geographical locations, the first, for senior leaders, a high-level overview of the EEF guidance, 'Making the Best Use of Teaching Assistants', and the second for school-based leads to offer more practical insights for implementation.
- Base camps (two initial days and then three hours every six weeks) where regional leads facilitated training for cluster leads that was structured using the EEF recommendations and delivered using a professional learning community (PLC) approach. Regional leads provided resources to support the PLCs.
- Cluster meetings (three hours every six weeks) where cluster leads replicated the PLC from the base camp with school-based leads and supported school-based leads to plan, and reflected on implementation of the EEF recommendations in their own school.
- Additional support for cluster leads from the regional leads, including responding to specific queries by email or telephone and administrative support.
- Additional support for school-based leads from cluster leads, for example responding to queries from by email or telephone, and in some instances, visits to schools.
- Direct intervention by regional leads where attendance at cluster meetings was poor and visits to schools struggling to implement the recommendations.
- An optional workshop on 'Managing change' facilitated by an HR consultant and focused on changing TA contracts.
- An optional Intervention Fair in January 2017 where seven evidence-based structured TA-led interventions were showcased.
- The Mobilise website that hosted EEF resources, resources produced during the S&W Yorkshire campaign, further resources sourced or developed by the Mobilise team, and, as the project continued, resources produced by participating schools.

Existing evidence

The development of the theories of change, set out in the individual evaluation reports, evaluation design and interpretation of findings drew on the growing body of evidence on knowledge mobilisation processes, particularly from medicine and health-related fields, which provides a frame of reference for developing understanding of how research knowledge can be presented and deployed to change practice in schools, and evidence on research brokerage. Detailed discussions of the literature and full citations and references of the research sources are presented in the **implementation and process evaluation reports for both pilots**. Key points from these reviews that are important in considering lessons learned from the pilots are summarised below.

Knowledge flows

Knowledge flows are complex and rarely linear and 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; Powell et al., 2007).

Evidence on the research use in schools

While there is some evidence of increasing use of research in schools, it remains highly variable across the school system. Research use in schools is strongly influenced by the organisational context, particularly leadership capacity and commitment, and the impact of the educational policy context (Coldwell et al., 2017; Nelson et al., 2017).

To date there is insufficient evidence to substantiate a claim that research-use impacts positively on pupil attainment (Coldwell et al., 2017, Nelson and O'Beirne, 2014). Possible explanations for this lack of impact include failure to generate sufficient opportunity and/or motivation to engage with the research and the interventions being too 'light touch' and lacking multiple strategies to support research use (Sharples, 2017).

Evidence on effective approaches to knowledge mobilisation

There is limited evidence on the relative effectiveness of different approaches to knowledge mobilisation in general (Langer, Tripney and Gough (2016) and the evidence base on effective approaches in schools is particularly limited (Brown and Greany, 2017). Developing understandings indicate that active knowledge mobilisation strategies are required that take into account differing definitions of knowledge, the context within and beyond organisations including the political context, and the stakeholders involved (Powell et al., 2017).

There is some evidence that a 'campaign' approach, including awareness-raising, a core feature of the EEF national campaign, and advocacy, the main strategy deployed in the S&W Yorkshire pilot, supports behavioural change (Langer, Tripney and Gough, 2016).

There is also is some, mainly self-reported, evidence that research summaries, such as the EEF guidance, can be effective, if they have academic integrity, are written in an accessible manner, are communicated effectively, address issues that are relevant to a practitioner audience, and support is provided for implementation (Mukohara and Schwartz, 2005).

Evidence on research brokerage

EEF acted as a system-level research broker in the national campaign and both regional pilots. Advocacy providers acted as research brokers in the South and West Yorkshire pilot, and in Lincolnshire regional leads, cluster leads and school-based leads acted as brokers at different levels within the school system. While the potential of intermediaries in facilitating research use is being increasingly recognised, very few studies have examined the ways in which intermediary organisations enable research use or measure their effectiveness (Cooper & Shewchuk, 2015; Sharples, 2013). However, there are some indications that brokerage has the potential to positively influence research-use if it:

- Facilitates opportunity, capability and motivation to use research evidence.
- Engenders leadership commitment.
- Deploys effective communication strategies which take account of variations in school contexts and the impact of the wider educational policy context.
- Facilitates the contextualisation and transformation of research by combining it with practice-based knowledge.
- Enables informal peer-to-peer flows of knowledge, which are more likely to be believed and acted upon.
- Fosters 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.
- Provides support for implementation that takes account of organisational barriers.

(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).

Emerging evidence, that has not been robustly tested, suggests that brokers are more likely to be effective if trusted and credible, with strong communication and interpersonal skills, and have a good understanding of research methodology, the specific research field and principles of adult learning. More specifically, the ability to find and assess relevant research, present research in ways applicable to different contexts, and translate complex information into meaningful resources as well design interactive workshops are perceived as important. Established linkages with organisations the intermediary is seeking to influence as well as entrepreneurial skills such as networking, problem-

solving, innovating and negotiating are also perceived as important (Cooper, 2010 & 2014; Lavis et al., 2006; Lomas, 2007; Sin, 2008).

Methods

Full details of the pilot evaluation aims, research questions and methods are provided in the **separate evaluation reports** and are summarised below.

Scope, aims and research questions

The overarching aim of both evaluations was to examine the effectiveness of the approach to scale-up of research use on the making the best use of TAs being piloted, that is the commissioned model in South & West Yorkshire and the embedded model in Lincolnshire. The evaluations also explored the factors and mechanisms that brought about or impeded the implementation of the EEF recommendations in participating schools and considered whether the approach had potential for use at a larger scale.

The overarching research questions in both evaluations relate to evidence of promise, feasibility and scalability, with more detailed questions depending on the model and the regional context. There are two important differences in the scope of the research questions. Firstly, in relation to evidence of promise, the S&W Yorkshire evaluation included measuring the impact of the campaign on pupil attainment (see Sibieta et al., 2019), which was not undertaken in the Lincolnshire evaluation. However, the implementation and process evaluations for both pilots gathered perceptions of the impact of the campaigns on practices in schools (see Maxwell et al., 2018a and 2018b). Secondly, the Lincolnshire evaluation had a broader scope in exploring the wider aim of the embedded approach of creating of a network of schools which were ready to seek out and engage effectively with research evidence in the future.

Methods

Impact evaluation (South & West Yorkshire only)

The impact of the offer of advocacy provision in South and West Yorkshire was measured using a synthetic control, non-experimental design (Abadie et al., 2010). A synthetic control group was used to provide a counterfactual of what would have happened in the absence of the regional campaign activity. The difference in pupil outcomes at Key Stage 2 (KS2) between the pre-regional campaign period (2002-3 to 2014-15) and the post-regional campaign period (2015-16 to 2016-17) in South and West Yorkshire was compared to the difference in outcomes of a synthetic control group. The synthetic control group was constructed as the weighted average of local authorities not involved in the pilots that best resembled the local authorities in South and West Yorkshire in terms of pre-regional campaign characteristics and outcomes.

The primary outcomes measured were the Key Stage (KS)2 English Fine Points Score 2016-17 and the KS2 Maths Fine Points Score 2016-17. The primary outcome for the treatment group is the (pupil-weighted) average across all 9 local authorities in South and West Yorkshire and the control outcome is the weighted average across the synthetic control group. The following secondary outcomes were also analysed:

- Proportion of pupils achieving at least the expected level in KS2 English in 2016-17
- Proportion of pupils achieving at least the expected level in KS2 Maths in 2016-17
- KS2 English Fine Points Score 2015-16
- KS2 Maths Fine Points Score 2015-16

The first two secondary outcomes seek to test whether there is a greater impact lower down the KS2 distribution as struggling pupils have traditionally been the main focus for TA support. The second set test for early impact one year, rather than two years, after the start of the intervention.

Table 1: Summary of impact evaluation design (South & West Yorkshire)

Design	Synthetic Control (non-experimental)
Treatment area	South and West Yorkshire (Sheffield, Rotherham, Doncaster, Barnsley, Leeds, Wakefield, Calderdale, Kirklees, Bradford)
Control area	Weighted average across other local authorities in England
Pre-treatment period	2002–03 to 2014–15
Post-treatment period	2015–16 to 2016–17
Primary outcome	variable	Key Stage 2 Fine Points Score in Maths and English in 2017
	measure (instrument, scale)	Both standardised at the national level
Secondary outcome(s)	variable(s)	% of pupils meeting expected levels in Key Stage 2 Maths and English in 2017, Key Stage 2 Fine Points Score in Maths and English in 2016
	measure(s) (instrument, scale)	% of pupils meeting expected levels measured in raw terms, Key Stage 2 fine points scores standardised at the national level

Analysis was conducted using Stata 14. The primary Intention to Treat (ITT) analysis comprised the raw difference between the standardised primary aggregate outcomes for South and West Yorkshire and the weighted synthetic control group. The primary ITT analysis was compared to a number of different approaches, detailed in the **impact evaluation report** (Sibieta et al., 2019), to check the sensitivity of the results and show the effect of the synthetic control approach. The secondary ITT analysis comprised the raw difference between the standardised secondary aggregate outcomes for South and West Yorkshire and the weighted synthetic control group. Sub-group analyses were conducted for pupils eligible for free school meals and those with English as an Additional Language.

Limitations

There were substantial reforms to Key Stage 2 assessments taking place from 2016 onwards, the first post-treatment period. These included reforms to the curriculum, assessments and the way tests are scored. Although the synthetic control group was chosen to best approximate the treatment group in the pre-treatment, the treatment and synthetic control could each react differently to the new Key Stage assessments. It is impossible to predict with any degree of certainty the plausible effects of changes to the tests. The effect could be small or large, and any bias could be positive or negative.

Implementation and process evaluations (South and West Yorkshire and Lincolnshire)

Mixed methods designs including pre- and post-campaign surveys and a range of qualitative data collection methods were deployed in both evaluations. The rationale for the designs are included in the evaluation reports. It is important to note that caution is required when comparing the findings of the two evaluations due to differences in methods. The data collection methods for each evaluation are summarised in Table 2.

Table 2: Implementation and process evaluation methods

	South & West Yorkshire	Lincolnshire
Pre- and post- campaign survey.*	Pre-campaign survey of all S&W Yorkshire schools. Post-survey of all S&W Yorkshire schools and a comparison sample identified through propensity-score matching.	Pre- and post-campaign surveys of all Lincolnshire schools and all schools in a matched comparison area of Kent and Medway.
Case studies and interview	Longitudinal interviews with EEF strategic lead and advocacy provider teams (17 in total). 14 post-campaign case studies of participating schools including interviews with leaders, teachers and TAs.	Longitudinal interviews with EEF implementation team, Lincolnshire strategic stakeholders and regional leads (14 in total). Mid-point and end of campaign interviews or focus groups with cluster leads (13 participants in total). Fifteen post-campaign telephone interviews with school-based leads at the end of the campaign. Two post-campaign case studies of two participating schools that had made significant changes as a result of the scale-up campaign. Telephone interviews (and email responses) with senior leaders from non-participating and withdrawn schools (14 in total).
Observations	Three EEF convened advocacy provider meetings	An LLP steering group set-up meeting, roadshows, a base camp and an end-of-campaign meeting of stakeholders facilitated by EEF to explore what had been learned.
Management information data analysis	Analysis of recruitment and attendance data and participation in trials of structured TA-led interventions.	Analysis of recruitment and attendance data and data on participation in structured TA-led interventions that were promoted by the Mobilise project.

* Note: A few questions related to changes in practices related to the EEF recommendations were adapted after administration of the pre-campaign survey in S&W Yorkshire. Questions were asked consistently in the post-campaign S&W Yorkshire survey and the pre- and post-campaign Lincolnshire surveys.

Data collection activity, the analysis of individual data sources and the combination of findings across data sources in both implementation and process evaluations were structured using the individual project logic model and underpinning theory of change. This enabled the plausibility of the theory of

change to be examined and to draw out how, and in what circumstances, the scale-up model led to schools adopting practices that aligned with the EEF recommendations.

Qualitative data was analysed thematically using NVivo analysis software. Management information and survey data were analysed using Excel and SPSS. Different approaches to survey were used in the two projects as there was no baseline comparison group in the S&W Yorkshire evaluation. Mann Whitney tests were used to generate separate effect sizes comparing means between, a) the South & West Yorkshire post-intervention sample and b) the comparison group. For Lincolnshire, pre- and post-intervention surveys were carried out for both participating schools and the comparison sample, and ANCOVA regression was used to determine differences in practice over the intervention period.

Limitations

As noted above differences in the methods limit the comparisons of findings that can be made across the implementation and process evaluations. It is also important to note that the Lincolnshire scale-up campaign ran in the year after the S&W Yorkshire campaign, when there had already been significant national activity to promote the EEF guidance, so schools were more likely to be familiar with it before the campaign began.

Survey response rates place a further limitation on the findings. In the S&W Yorkshire evaluation 196 of 432 (45%) participating schools completed both the pre-and post-campaign surveys and [131 of 2,295 (6%) of the comparison sample completed the post-campaign survey. In the Lincolnshire evaluation 80 of 283 (22%) participating schools completed both the pre-and post-campaign surveys and 47 of 733 (6%) of the comparison sample completed both the pre-and post-campaign survey. Survey bias, whereby schools more committed to the scale-up campaigns were more inclined to complete the surveys, is also likely. Furthermore, findings should be treated with caution given the reliance on self-reported data and concerns over multiple significance testing.

It is also important to note that the active comparison group conditions for both pilots included a high level of activity led by EEF and other education stakeholders to promote the EEF guidance.

Ethics

The implementation and process evaluation was given ethical approval by the Faculty of Development and Society Ethics Committee at Sheffield Hallam University prior to commencement of the studies.

Key findings

Findings and supporting evidence are presented in the **individual evaluation reports**. These findings are briefly summarised in this section to support the 'lessons learned' presented in the next section.

Evidence of promise

Reach and recruitment

Headline findings
- Both the commissioned model of scale-up in South & West Yorkshire and the embedded model of scale-up in Lincolnshire were successful in recruiting at scale within their region.
- The highest proportion of eligible schools was recruited in Lincolnshire, supported by promotion by a wide range of stakeholders.
- There was variation in achieved recruitment across advocacy providers in South & West Yorkshire which appears to reflect the adoption of different recruitment strategies, the degree of LA support and different perceptions of the providers by schools.

In South & West Yorkshire advocacy providers targeted primary schools. In total 480 schools (42% of all primary schools) with a total of around 153,000 pupils, were recruited, and of these 432 (38% of primary schools), attended at least one of the core advocacy activities. In considering the total recruitment figures in South & West Yorkshire it is important to note that advocacy providers operated in only seven of the nine LA areas. If advocacy providers had been commissioned to deliver the campaign in the other two LA areas the percentage of South & West Yorkshire schools recruited is likely to have been higher. There was substantial variation in the effectiveness of recruitment between advocacy providers. The proportion of schools recruited in each LA area by the designated advocacy provider varied from 29% to 100%. Recruitment was perceived to be significantly aided by LA support and impeded by negative perceptions of an advocacy provider's brand or a lack of local credibility. The 'opt-out' recruitment strategy implemented by one advocacy provider secured 100% recruitment.

In Lincolnshire, both primary and secondary schools were targeted, and the proportion of schools recruited was higher than in South & West Yorkshire. In total 283 schools were recruited, 73% of all schools in Lincolnshire. A total of approximately 72,500 pupils attend these schools. A range of strategies were used to recruit schools, including promotion by a wide range of stakeholders, positive framing and positioning of Mobilise as a sector-led initiative that was part of a wider vision to ensure all schools were 'evidence ready', and giving the impression that participation was compulsory.

In both South & West Yorkshire and Lincolnshire the EEF brand was perceived to be a significant enabler for recruitment. The most frequent reasons non-participating schools gave for not signing up were a lack of awareness of the campaign and the perception that their TAs were already effectively deployed. Advocacy providers also noted that schools were less likely to sign up when they had low numbers of TAs, pressing accountability issues or had isolated themselves from working with local schools. Similar findings were evident in Lincolnshire, where non-participants and key stakeholder identified reported that the main reasons for non-participation were; lead-in times being too tight; insufficient numbers of TAs to justify involvement; TA deployment not a school priority; and a historical lack of trust in how Lincolnshire school improvement had been organised.

Engagement and retention

Headline finding
- Retention of schools and attendance at events was generally high in both South & West Yorkshire and Lincolnshire, with some variation by advocacy provider in S&W Yorkshire.
- Attendance declined over time in both pilots.

In South and West Yorkshire attendance at advocacy events was generally high but varied between providers. There are indications of an association between attendance and participants' perceptions of quality of the provision. Attendance was lower for advocacy provision that used an opt-out recruitment strategy - this may have brought in schools that placed less priority on improving the use of TAs than those recruited by other advocacy providers, and in turn these schools may have been less amenable to releasing staff to attend events. Attendance was also reported by survey participants to be lower when the mode of delivery was through existing meetings rather than activities solely focused on the scale-up of the EEF guidance.

In Lincolnshire only 16 of 283 (6%) 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. 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 cluster meetings were overly prescriptive with limited scope to keep all schools engaged. Attendance was also reported to have declined in schools that considered they had already implemented significant aspects of the EEF guidance or that lacked commitment to the project.

Impact on pupil attainment

Impact on pupil attainment was only measured in South & West Yorkshire.

Headline findings

- The effect size for KS2 English scores of pupils in South and West Yorkshire was 0.03. This represents a sizeable impact, as it covers 43,000[2] pupils, is outside normal year-to-year variation in differences and occurred in a period when the control group was 'active' - that is they were subject to a high level of national campaign activities with the same objectives of improving TA deployment as the advocacy.
- There was little evidence of impact on KS2 maths scores and on any differential outcomes for pupils with EAL or eligible for FSM.

The average KS2 English test scores of pupils in South and West Yorkshire showed an improvement of 0.03 standard deviations (p=0.07) between the pre-regional campaign period and the post-regional campaign period as compared with the average scores of pupils in the synthetic control group. The extent of this change is outside the normal year-to-year variation in differences across local authorities, and represents a relatively sizeable impact given that it covers 43,000 pupils taking Key Stage 2 tests in South and West Yorkshire. There was little evidence of any improvement in Maths test scores (an improvement of 0.015 standard deviations, p=0.56).

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[2] The impact evaluation analysis is based on pupils in Y6 taking KS2 tests. The campaign was intended to impact 0on pupils in all year groups

Table 3: Summary of impact on primary outcomes (South & West Yorkshire)

Outcome/ Group	Effect size (95% confidence Interval)	EEF security rating	P value
KS2 English Points	0.03	🔒🔒🔓🔓🔓	0.07
KS2 Maths Points	0.015	🔒🔒🔓🔓🔓	0.56

The analysis of secondary outcomes provided little evidence to suggest that there were any differential effects for pupils with EAL or FSM. For both English and maths, there was almost no difference in the post-regional campaign phase for pupils eligible for FSM and a small uptick of about 0.02 standard deviations for pupils with EAL, which was very slightly larger than the main results for maths and smaller than the main results for English.

There was no evidence that impact was higher in schools that had participated in the advocacy provision or TA-led intervention trials than other schools in South & West Yorkshire. However, these results are not definitive evidence that the advocacy or participation in the trials had no effect as these are not causal estimates and there could still be unobservable factors driving both outcomes and participation.

More generally, previously noted changes to the new KS2 tests and curriculum in 2016 could be biasing these results, and the size and direction of any bias is uncertain.

Changes in school practices

Headline findings

- There was some evidence in both South & West Yorkshire and in Lincolnshire that reported practices in participating schools were more closely aligned with the EEF recommendations at the end of the pilot than the beginning. There was some variation between South & West Yorkshire and Lincolnshire in the extent of change in relation to different aspects of the EEF recommendations.
- In South & West Yorkshire, where a comparison survey was only administered post-campaign, there was very limited evidence of reported practices post-campaign in participating schools being more aligned with the EEF recommendations that in comparison schools.
- In Lincolnshire, where pre-and post-campaign survey data were collected for both the participating schools and a comparison sample, there was evidence that alignment of a few TA-related practices with the EEF recommendations increased in participating schools more than in the comparison group over the evaluation period.
- Perceived changes in both pilots were partly attributed, by participating schools, to the campaigns in their area.

Given the methodological differences in survey administration (see Methods chapter), and consequently different analyses that could be conducted, it is not appropriate to compare detailed findings on changes in practice between the pilots. Instead findings are summarised separately below.

South & West Yorkshire

TA deployment and classroom practices (EEF recommendations 1, 2 and 3)

There is some evidence that reported practices in participating schools were more closely aligned with EEF guidance after the campaign than beforehand. The survey items which suggest that practice is less well-aligned seem to be concentrated around working with small groups of pupils, particularly those with SEND, eligible for FSM, or lower-attaining pupils.

Communication (EEF recommendation 7 and aspects of recommendation 4)

In participating schools there is statistically significant evidence on each of the three relevant survey items that reported communication between TAs and teachers improved over the pilot period.

Training for teachers and TAs (Components in recommendations 4, 5 and 6 that relate specifically to training)

Training for teachers and TAs was reported to be more consistent with EEF guidance at the post-campaign stage than at baseline. The change on all five related survey items was statistically significant.

Use of structured TA-led interventions (EEF recommendations 5 and 6)

Participating schools reported making greater use of structured lesson plans and resources in interventions by the end of the campaign. The difference was statistically significant. There was no evidence of change in interventions being undertaken regularly or sustained over time.

Post-campaign comparison

There is evidence of a statistically significant difference between participating South & West Yorkshire schools and the matched comparison sample post-campaign on only three of the 27 items analysed. These items each relate to different areas of EEF recommendations (TA deployment and classroom practice, interventions, and training) and show practice which is more aligned with EEF recommendations in participating schools in each case, although findings should be treated cautiously owing to the number of significance tests conducted.

Variation across advocacy providers

There was some variation between advocacy providers on the measures examined but generally reported practice change in participating schools was fairly similar across the seven providers.

Lincolnshire

TA deployment and classroom practices (EEF recommendations 1, 2 and 3)

When comparing participating schools and comparison schools pre- and post- campaign there were many areas of reported TA deployment and classroom practice in which no statistically significant change can be 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.

Communication (EEF recommendation 7 and aspects of recommendation 4)

Participation in the pilot is statistically associated with positive change in several indicators of TA/teacher communication.

Training for teachers and TAs (Components in recommendations 4, 5 and 6 that relate specifically to training)

Participation in the pilot is associated with positive change in several indicators related to the training of TAs and teachers. This may, in part, be related to the promotion and provision of MPTA training in Lincolnshire, which although not formally part of the Mobilise programme, was offered to participating schools by a regional lead.

Use of structured TA-led interventions (EEF recommendations 5 and 6)

Survey data provide little evidence of changes in the use of evidence-based structured TA-led interventions that can be associated with the programme.

In both pilots the schools responding to the survey reported high levels of awareness of the EEF guidance prior to the campaigns.

Other outcomes

Headline findings

- A range of positive outcomes for TAs, pupils, schools and to a lesser extent teachers were reported in both pilots.
- The Lincolnshire pilot appears to have been successful in increasing 'research readiness' in schools. There was very limited evidence for this outcome in South & West Yorkshire.
- A range of positive county-wide outcomes, particularly in relation to research-use readiness were reported in Lincolnshire. There were no similar effects beyond participating schools reported in S&W Yorkshire.

TAs

Interviewees in both pilots reported a number of interrelated positive outcomes for TAs including enhanced confidence, self-efficacy, and pedagogic understanding; a better understanding of role, clearer sense of purpose and more flexible approaches: feeling trusted, valued and empowered; and taking greater responsibility and using initiative.

Teachers

There were fewer reports in both pilots of positive outcomes for teachers. Where these were mentioned they focused on: better understanding of the TA role; greater recognition of TA capabilities and more trusting relationships with TAs.

Pupils

Outcomes for pupils reported by interviewees where similar across the pilots and focused on: improved independence and resilience; enhanced engagement, self-esteem and confidence and improved progress and attainment.

Schools

At the school-level similar outcomes were reported by interviewees in both pilots including: increased cohesion, better staff relationships and effective team-working; shared responsibility for pupils' learning and financial benefit.

Research use in schools

There was a difference in the self-reported impact of the scale-up campaigns between the pilots. In South & West Yorkshire there was no direct evidence in the case study schools that engagement in the advocacy provision led to engagement with research evidence more widely, and only limited evidence that it had increased awareness of, and motivation to engage with, research evidence. This may in part be explained as some case study schools, but not all, were already proactive in using research to inform practice. In Lincolnshire a number of self-reported indicators of 'research readiness' were evident in the data. These included: 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.

Local area/county

In Lincolnshire 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.

No similar local area effects were reported in S&W Yorkshire.

Feasibility

Headline findings
- Generally interviewees in participating schools and survey respondents in both pilots were positive about the quality and usefulness of the support they received and perceived that it impacted positively on their school. There was some variation reported between advocacy providers in South & West Yorkshire.

- Enabling attributes and mechanisms and barriers were reported in both pilots in relation to EEF activity, regional/local delivery approaches and implementation in schools. In addition, enablers and barriers operated at the county-level in Lincolnshire. Maintaining fidelity to the evidence was reported to be compromised in some schools in both pilots as a result of adaptation to context and school constraints on implementation.

Findings on the enabling attributes and mechanism of EEF, the delivery partners and schools that supported the successful implementation of the EEF recommendations and the barriers that impeded implementation for each pilot are presented in Appendix 2 and summarised below.

In both pilots the EEF guidance, brand, brokerage, support and their facilitation of linkages with others were highly valued (see Tables 4 and 7). In addition, in Lincolnshire key stakeholders valued the role undertaken by EEF particularly during the scoping and the development, set-up and recruitment phases. Key enablers were perceived to be engaging and motivating key stakeholders, strategic steering, maintaining momentum and providing support and challenge. Key attributes of the EEF team perceived to enable implementation were their passion and enthusiasm for using evidence and improving outcomes for pupils and their academic understanding of the best use of TAs and scale-up approaches together with extensive experience of implementing change in and across schools.

Issues relating to EEF administrative processes and a perceived lack of clarity and transparency were reported by advocacy providers in South & West Yorkshire, and a lack of clarity from EEF in relation to governance, and concerns about challenge being too strong in a few instances, were raised as barriers in Lincolnshire.

In Lincolnshire a set of county-level enablers and barriers were identified (Table 8). Mechanisms perceived to be important enablers included embedding the pilot within county-wide school improvement structures, the commitment to collaboration and using structures that were in place which enabled expertise and resource to be marshalled during the development phase. The commitment, enthusiasm and capability of strategic and operational stakeholders and a significant cadre of head teachers was also perceived to be key to enabling implementation. The main barrier at

the county-level was the volume and intensity of change in school improvement in Lincolnshire, which placed multiple demands on key stakeholders.

The reported enablers and barriers that relate to the delivery of the advocacy provision in South & West Yorkshire and the Mobilise programme in Lincolnshire are presented in Tables 5 and 9 respectively. Enablers related to delivery in both pilots included: providing a structure and focus based around the EEF recommendations that schools could implement in manageable steps; opportunities for collaboration and sharing practice; time within sessions to develop action plans; input and support from professionals who were knowledgeable and had experience in schools; the provision of resources and optional additional training for TAs. In addition, in South & West Yorkshire direct input in workshops and support on change management were perceived to enable implementation. Key enablers reported that were specific to the cascade model in Lincolnshire included: the 'packaging' of resources in a professional learning format by regional leads; detailed training of cluster leads; cluster meetings of 8 to 10 schools delivered using a facilitation approach where cluster leads co-construct learning with school-based leads, high levels of support by both regional and cluster leads, and detailed monitoring of schools' engagement.

Barriers identified in both pilots included: aims that are not clear, activities that did not take sufficient account of participants' prior knowledge or changes that had already been made in their schools and where flexibility in delivery was missing; in some instances, sporadic attendance by school participants or their unwillingness to share practices; and distance and time to attend activities for some schools. In some instances, school visits associated with the advocacy provision in South & West Yorkshire were perceived to be unhelpful and difficult to arrange. Cascade 'train the trainer' type models, such as the Mobilise programme in Lincolnshire, have in previous research (for example, Dichaba and Mockhele, 2012) been discredited for failing to lead to change in schools. In the Lincolnshire evaluation, design features, in particular the professional learning community approach and training and support for cluster and school-based leads, were perceived to address some of the short-comings inherent in cascade models. In both models of scale-up, fidelity to the evidence appeared to weaken in some schools as those implementing the EFF recommendations adapted their learning to their school context and had to navigate the constraints of school activity. Where implementation and/or fidelity to the recommendations was more limited, both key stakeholders and school participants most frequently attributed this to school conditions rather than particular features of either model. These barriers are summarised below.

Similar enablers and barriers were evident at the school level in both pilots (Tables 6 and 10). A change agent in the school who has high status, is committed to the change, is either a senior leader or who is visibly supported by the senior leadership team and is given time to implement change was perceived as crucial. A school culture focused on pupil outcomes, motivated staff and a clear implementation process with time scheduled for all staff to participate were also perceived as enablers. Conversely, a lack of senior leadership support and/or a lack of staff trust and confidence were perceived to be barriers as were a range of practical issues such scheduling meetings into an already full school meeting calendar and staff time and availability.

Scalability

Headline findings
- Both the commissioned and embedded approaches to scale-up have the potential for replication more widely.
- It is too early to make claims relating to sustainability, however, many participating schools in both pilots intend to continue embedding the EEF recommendations. The embedding of scale-up in countywide school improvement processes in Lincolnshire appeared to offer greater potential for sustainability of research-use than the commissioned model in S&W Yorkshire as it provides an infrastructure for schools to continue their engagement with the TA scale-up and enables engagement in as well other future scale-up activity.
- A simple comparison of the cost of delivery of advocacy provision compared to the delivery of the Mobilise programme indicates that while the costs for both are very low, the cost per school and per pupil is lowest for the commissioned advocacy model. However, the embedded model is potentially more affordable model for policy-makers and funders as it can leverage funding for delivery and appears more likely to sustain future scale-up activity.

The findings on feasibility presented in the previous section indicate that both models of scale-up are potentially replicable in other areas. In Lincolnshire, strategic alignment with changes in school improvement governance may have heightened receptiveness to the model, county structures were in place that could support implementation, and most schools were willing to work together. This may not be the case in other areas, however key stakeholders perceived that the approach is potentially replicable as it focuses on an area's context and priorities and engages key stakeholders. Turning to the replicability of the Mobilise delivery model, key stakeholders in Lincolnshire reported that they had been contacted by colleagues elsewhere in England and asked to share the Mobilise model, providing an early indication that the model is attractive more widely.

It was too early, at the time of final data collection, to ascertain if the pilots have led to sustainable change, although there was some evidence in both pilots of an ongoing commitment by participating schools to continuing to implement changes in relation to the EEF recommendations on TAs. A few of the advocacy providers in South & West Yorkshire intended to run further programmes to support other schools to implement the EEF recommendations, but ongoing support for participating schools was, in most instances, limited to encouraging them to work together. Including an aim to develop 'research readiness', and embed scale-up in county-wide school improvement processes in Lincolnshire, appeared to offer greater potential for sustainability. By the end of the pilot, a county-level infrastructure and strategy that fosters and supports research use, together with strengthened school networks, were reported to be in place. Many schools were embarking on a further research use project, either with a continued focus on TA deployment, or implementing other research evidence through the follow-on 'Mobilise Choice' programme that was set up in the county.

A simple comparison of the cost of delivery of advocacy provision compared to the delivery of the Mobilise programme indicates that while the costs for both are low, the cost per school and pupil is lower for the commissioned advocacy model. The estimated cost per school involved in advocacy provision was about £392 or just over £1 per pupil. Spread over three years, this equates to £131 per school or about 38p per pupil. In Lincolnshire the estimated cost per participating school was approximately £665 per school which equates to £2.60 per pupil. Over three years this would be £222 per school or about 87p per pupil. While the cost per pupil of the embedded model in Lincolnshire is just over double that of the commissioned model in South and West Yorkshire, the costs for both models are at the low end of the 'very low' category of cost ratings used by EEF in the Teaching and Learning Toolkit.

Three further factors need to be considered in relation to the cost calculations. Firstly, they exclude costs incurred by EEF. EEF costs in South and West Yorkshire were not recorded but the EEF team reported that they would have been significant earlier initiation and development stages of the scale-up. The costs in Lincolnshire were estimated by the EEF team to be approximately £50,000 - in South & West Yorkshire funding was provided by EEF whereas in Lincolnshire funding was provided indirectly from schools through county-wide funds they contributed to for the purpose of supporting school improvement. Thirdly the extent to which the core funding leveraged in other sources of funding. During both pilots some local authority funding was leveraged in to support delivery. In Lincolnshire some stakeholders believed that engagement in the pilot had been an important factor in securing approximately £750,000 from Strategic School Investment Funding from the Department for Education (DfE) to scale-up other research-evidence across the county.

It is important to note that while the cost per pupil of the embedded model in Lincolnshire was higher, it potentially offers a more affordable model for policy-makers and funders as it was successful in leveraging all the funding required for delivery and supported the establishment of an infrastructure for future scale-up which makes it more likely to be sustainable.

Learning from the TA scale-up pilots

In this section key lessons learned from the pilots are presented. The data that has been used to draw out lessons learned is perceptual, relying on self-reports by key stakeholders and participants, so some caution is needed in drawing conclusions. There is broad alignment between the lessons learned that are presented here and the existing research evidence, which is presented in the context section, which adds confidence to the interpretations made in this study.

Key components underpinning effective scale-up

The plausibility of the theories of change were examined for both the commissioned and embedded models of scale up. This included exploration of the enabling attributes and mechanisms and barriers to successful implementation. From this, four key components of scale-up activity were identified, together with a set of factors related to each component that appear to influence the extent to which schools align their practices with the EEF recommendations.

The four key components identified are:

1. **The research object**

In both pilots this was the EEF guidance and recommendations.

2. **System-level brokerage**

System-level brokerage was provided in both pilots by the EFF. In South & West Yorkshire this was undertaken through a commissioned relationship with advocacy providers, which included on-going steering and support and some wider brokerage, particularly focused on supporting recruitment. In Lincolnshire, system-level brokerage involved acting as a catalyst of, and support for, the initiation and development of the regional model of the scale-up, and providing some on-going steering, particularly focused on maintaining fidelity to the evidence. In addition, in both pilots the EEF national campaign can also be considered as system brokerage of research evidence.

3. **Regional/local recruitment and brokerage**

In South & West Yorkshire, brokerage of research evidence was undertaken across LA areas by advocacy providers in the form of training and support to schools. Although the core offer to schools was similar, there was variation in additional support activity offered across advocacy providers. In Lincolnshire, brokerage of research-use was implemented through a cascade model initiated by regional leads, who trained and supported cluster leads who then trained and supported a group of school leads. The cascade model was embedded within the county-wide school improvement processes.

4. **Schools**

A key finding in both pilots was the importance of individual school characteristics in influencing the extent to which the EFF recommendations were implemented within the school. This is an important finding, as the emphasis in much of the existing knowledge mobilisation literature is on the three components above - the research object, system and regional/local brokerage. However, as demonstrated in the TA pilots, attention also needs to be paid to school characteristics and conditions if scale-up of research-use is to be successful.

The four key components of effective scale-up are highly inter-related. Figure 2 visually represents the main inter-relationships found in the pilots. Over the duration of the pilots the research object - the EEF guidance and recommendations - remained fixed and was used by both system and

regional/local level brokers to shape scale-up activity. There were a range of interactions between EEF, the system-level broker, and the regional and/or local brokers throughout the campaigns, with more interaction taking place in the recruitment and design phases than later in the campaigns. There was ongoing interaction between regional/local brokers and schools. Although this interaction was led and shaped by the regional/local brokers, over time, in most instances, the schools' responses influenced brokerage provision, at least to some extent. Most participating schools had engaged with the research object prior to the pilots and continued to engage directly with the guidance and recommendations alongside participating in local brokerage activities. It was beyond the scope of the pilot evaluations to examine the strength of the interactions between participating schools and activities associated with system-level brokerage through the national campaign. Although interviewees rarely mentioned national campaign activities being influential in changing practices in their school, this does not necessarily mean that the national campaign did not impact on participating schools, but more likely that the messages emanating from the campaign where not consciously distinguished from the local campaign activity or the plethora of other advice provided to schools.

Figure 2: Key components of research-use scale-up in the TA pilots
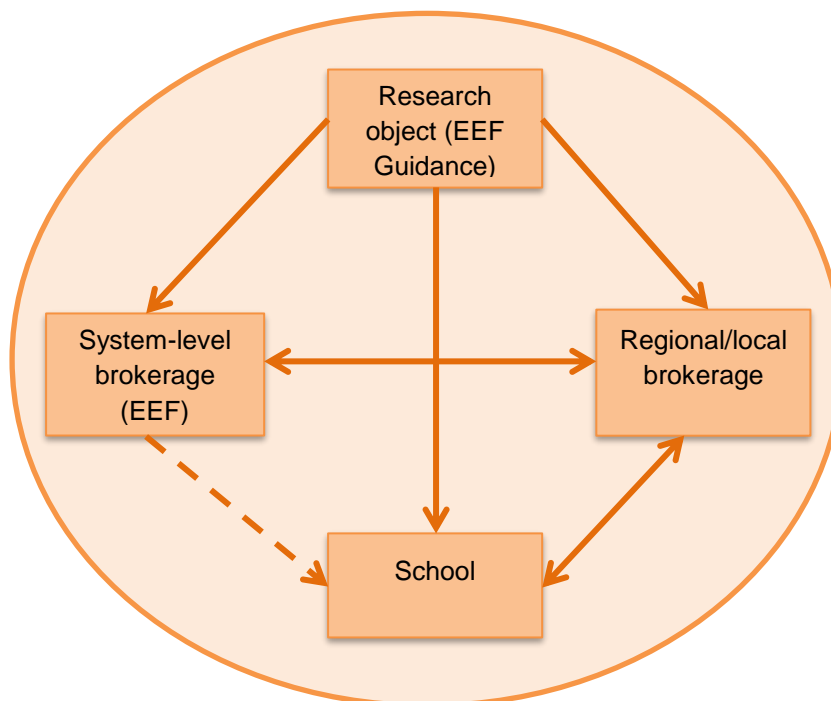
In the remainder of this section we draw on the findings about the attributes and characteristics associated with each of the four components of scale-up which support or impede effective scale-up of research-use to present lessons learned for future scale-up activity.

Essential characteristics of the research object/ EEF Guidance

In both South and West Yorkshire and Lincolnshire the EEF guidance was regarded positively by both the regional and/or local brokers and participating schools. Evidence from both pilots indicate that the following characteristics of the research object encourage schools to access the research object and engage in scale-up activity:

- Produced by a provider that is trusted by schools - in this respect EEF's reputation and brand are highly influential.

- Presented in a way that is credible, convincing, accessible and user-friendly and based on robust research.
- Able to 'packaged' into a format with other resources and/or into a 'ready-to deliver' training package to create a product that is easily replicable and directly usable by schools. This appears to support wider engagement.

However, the provision of EEF guidance alone may not be sufficient to engage schools or sustain effective engagement with implementation of the recommendations. The Lincolnshire pilot, in particular, demonstrates this as the EEF guidance had already been in the public domain for over a year before the start of the local campaign, yet many schools had not, or had only partly implemented the recommendations. This indicates that brokerage is also necessary to stimulate engagement and support implementation.

Effective system-level brokerage

System-level brokerage in both pilots was undertaken by the EEF, and similarities in findings across the pilots indicate that that there are generic system-level broker attributes and brokerage approaches that apply irrespective of the specific model of regional/local brokerage model adopted.

Attributes of system-level brokers that appear to underpin effective scale-up activity, irrespective of the model of delivery are:

- Trusted brand and reputation that is highly visibly at the stage of recruiting and/or gaining buy-in from regional/local brokers, during school recruitment and the early stages of delivery.
- High-level of expertise in the research that underpins the scale-up campaign, as well as knowledge and understanding of effective approaches to scale-up, combined with the energy, motivation, passion and capability to drive forward research-use.
- Knowledge and understanding of the school system and expertise in how to engage those organisations and individuals who are able to effect change regionally and locally. Although this was perceived to be particularly important in the successful initiation of the embedded model of scale-up in Lincolnshire, there was also a perception in South & West Yorkshire that it would have been helpful to have had a better understanding of the local context before set-up.

Approaches to system-level brokerage that appear to be effective across models of scale-up activity are:

- Providing support for regional and local brokers that is responsive, flexible and adaptable and includes 'hands-on' support in shaping regional/local scale-up activity and sharing effective approaches to scale-up.
- Facilitating access to other professional and academic experts who can support the regional/local activity, and where appropriate, bringing together regional/local advocates within their region to share approaches and experiences with the aim of further developing the regional/local brokerage.
- Facilitating the building of a resource bank of supporting materials by collating materials produced by regional/local brokers and others. In both pilots this included facilitating access to tools, such as the MITA audit tool, produced by academics involved in the underpinning research.
- Ensuring fidelity to the evidence through providing a steer on the content and resources developed by regional/local brokers, and presentation at events to deliver key messages directly to school leaders.

- Providing an appropriate balance of support and challenge to regional/local brokers, maintaining focus and momentum on the intended longer term impact of improving outcomes for children and young people, and willingness to relinquish control at an appropriate time.

- Clear and regular communication with regional/local brokers that continues throughout the scale-up campaign, which includes timely communication of any changing expectations.

- Transparent and efficient administrative, financial and governance processes, as appropriate to the model of scale-up, that is in place at an early stage.

The two pilots provide contrasting perspectives on whether or not system-brokers should directly fund scale-up support. In South & West Yorkshire, case study school leaders valued the free provision of training and support that was funded by the EEF but there is insufficient data to ascertain if schools would have paid to participate. In Lincolnshire, while schools did not pay directly for training and support, funding for delivery was leveraged from a range of non-EEF sources including the money that schools paid to the Lincolnshire Learning Partnership to generally support school improvement. This indicates that direct funding of delivery by system-brokers is not essential. However, where direct funding is not provided there is still a need for a substantial investment of time by the system-broker during the early stages of inception and development.

As the Lincolnshire pilot illustrates, in a model of system-brokerage that is aiming to initiate an embedded model of scale-up, the following approaches appear to be important:

- Aligning scale-up with the needs, priorities and structures of the school system in the region/local area.
- Securing 'buy-in' at senior strategic levels and keeping key influencers on board and during the initiation phase particularly, maintaining focus and momentum.

Effective regional/local brokerage

The attributes of effective regional/local brokers, and the characteristics of effective approaches at a regional and local level across both models of scale-up, are drawn out in this sub-section. Lessons can be learned by comparing the different models of brokerage in the pilots - the commissioned model in South & West Yorkshire and a model embedded in school improvement processes in Lincolnshire. Their associated delivery models are then considered.

Attributes of regional/local brokers that appear to underpin effective scale-up activity, irrespective of the model of delivery are set out below. Conversely, when these attributes are not present both the recruitment of schools and the perceived quality and effectiveness of delivery appear to be weakened:

- Professionally credible, knowledgeable and supportive, with real-world experience of schools and able to share their own experiences of using the research and school resources.
- Effective adult learning facilitators who are able to design and/or deliver engaging and interactive workshops and offer effective support.
- Depending on the context, the ability to adopt the position of a 'non-expert' and engaging in the co-construction of learning with participants appears to be a necessary skill. This was regarded as a particularly important attribute for cluster leads facilitating professional learning communities for school participants in Lincolnshire. This later point, together with the point made earlier about the need for advocacy providers to be able to share their own school experiences and resources, emphasises the importance that school participants in scale-up activity appear to place on learning from, and alongside, other practitioners.
- Able to provide challenge as well as support.
- Effective communication, interpersonal and organisational skills.
- A sound understanding of the regional/local school system and established links with local schools.

- Reputation as a trusted brand.

In addition, in the embedded model essential attributes of staff with a regional/local strategic role appear to include:

- Commitment, enthusiasm, drive, capability to effect change and willingness to collaborate.
- Trusted and respected by school leaders.

Approaches to regional/local brokerage that appear to be effective across models of scale-up activity appear to include:

- 'Packaging' the EEF guidance by designing training and support that has a clear focus on, and is structured around, the EEF guidance. Using and articulating the EEF recommendations in training sessions and providing activities and resources that support school participants to contextualise the research.
- Activities such as workshops, professional learning communities and school visits, that provide time to share ideas, discuss issues, action plan, reflect and evaluate practice in discussion with other schools.
- High quality activities that are designed taking into account participant's prior knowledge and changes already implemented in their schools, have a clear purpose that is perceived as relevant by participants, and are delivered at a good pace.
- Sequencing training and support over time. This is perceived by schools to enable them to plan and implement change in manageable steps. The one academic year delivery pattern in both South & West Yorkshire and Lincolnshire was well received by schools and therefore may be useful in future scale-up activity.
- Provision of informal advice and support between the main scheduled activities. In the pilots this was often provided by telephone or email and was usually tailored to specific issues encountered by school participants in implementing the EEF recommendations in their school.
- A focus in the programme on how to implement change as well as on the EEF recommendations. School participants across both pilots valued the time made available within sessions to plan and review implementation approaches and processes, enabling account to be taken of organisational barriers to evidence-informed change. One of the South and West Yorkshire advocacy providers placed particular emphasis on equipping schools to effect change, by, for example, using key principles from the Bridge Change Leadership model (Bridges, 2009) and other models of learning and change throughout the programme. This was well received by participants, however further research would be needed to ascertain the impact of this aspect of the advocacy activity.
- Producing additional resources, particularly resources that can be used by school participants to develop practice in their own schools, as well as sharing of resources that are participating produced by participating schools. In Lincolnshire, school-produced resources were subject to a quality assurance process before being shared on the project website. While it was beyond the scope of the evaluation to examine this process, such a process is likely to support fidelity to the EEF guidance.

In addition to the attributes and approaches that appear to be necessary for effective regional/local brokerage irrespective of the model of delivery, it appears that the following pre-requisites are necessary to implement an embedded model of scale-up that has the potential to sustain research-use in the longer term as well as support the immediate scale-up campaign:

- Alignment of research with regional priorities for the improvement of pupil outcomes.

- Capable, respected, committed and enthusiastic strategic and operational stakeholders and a significant cadre of well respected head teachers committed to collaboration - working together and with other schools across the region to improve schools through research-use.
- Structures that facilitate expertise and resource to be marshalled, regional decision-making and the ability to deploy resources to support implementation.

Variation in the evaluation methodology between the two pilots means that it is not appropriate to make simple comparisons of effectiveness across the commissioned and embedded models of regional/local brokerage. In terms of lessons learned through comparing the pilots it appears that both have strengths and limitations. Both have the potential to recruit and engage schools at scale in research-use activity, and where the effective attributes and approaches outlined above are present, effect change in schools' practices. The main difference between the two models appears to be in the potential for sustainability. In both pilots, most schools were planning to continue implementing the TA recommendations, however it was only in Lincolnshire, where there had been an explicit intention to set up an infrastructure for future research-use, that schools were articulating a strong commitment to further engagement in research-use.

In both models, maintaining fidelity to the evidence was comprised at least to some extent at the school level, as school participants had to applying their learning in the context of busy schools with multiple priorities. Lessons learned about effective implementation in schools are set out in the next section.

Effective implementation in schools

A key finding in both pilots was the considerable effect of the context and characteristics of the school and the attributes of staff leading implementation, on the extent to which the EEF recommendations were implemented. An important lesson here is the need to pay attention to school conditions and to consider ways in which EEF as a system-level broker and regional/local brokers can influence and support schools in creating the conditions that support research-use.

Findings from the pilots indicate that when schools adopt the following approaches implementation of practices based on research recommendations, are more likely to be effective when:

- Senior leaders are committed and understand the implications in terms whole-school changes as well as for more targeted change activity.
- Staff leading implementation are capable, committed and enthusiastic, and to ensure that they are able to effect change, either hold a senior position or have senior leader support to make the necessary changes.
- Time is allocated for the key change agent to implement change and for other school staff to engage in associated activity. This includes paying attention to contractual arrangements of support and part-time staff to ensure that they are able to participate in the activities.
- A clear process for implementation.

School culture appears to be crucial in setting the climate for effective implementation of research informed practices. Learning from the pilots indicates that schools cultures that enable implementation characterised are:
- Commitment to enabling all staff to support the outcomes for all children and a 'no fear of failure' ethos.
- Staff who are motivated, open and responsive to change.
- Teachers who trust TAs to support pupils and effective teacher/TAs communication.
- Low staff absence and relatively stable leadership team.

Some issues were reported related to school size in both pilots. Although the data is limited, it does suggest that national and regional/local brokers should consider how best to support small schools

that do not have sufficient staffing to enable attendance at activates and large schools that face the challenge of implementing change across a large staff group.

Effective recruitment of schools to scale-up campaigns

Lessons learned across the two pilot campaigns indicate that the following factors are likely to maximise the recruitment of schools to scale-up campaigns:

- Promotion of the campaign by a credible, well-regarded national and regional/local organisations and professionals using multiple communication channels.
- Engagement of the local authority in promotional activity and a direct contact between regional/local stakeholders, particularly school leaders, and target schools.
- Positive framing of the campaign, for example positioning it as part of a wider school improvement strategy.
- Sufficient lead-in time to allow schools to integrate activity into the school calendar. In both pilots the lead in time was short, and many of the schools had already filled their CPD calendars for the academic year of the campaign and/or committed to other priorities, which, in a number of schools, limited the opportunity for implementing the EEF recommendations.

Further important learning, that will need to be addressed in future scale-up campaign, is that traditional recruitment methods, even when they adhere to the best practices outlined above, do not appear to be successful in recruiting schools that have pressing accountability issues or have isolated themselves from working with other schools.

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Appendix 1: Making the best use of teaching assistants: Recommendations summary

Making Best Use of Teaching Assistants – Recommendations Summary

RECOMMENDATIONS ON THE USE OF TEACHING ASSISTANTS IN EVERYDAY CLASSROOM CONTEXTS				RECOMMENDATIONS ON THE USE OF TEACHING ASSISTANTS IN DELIVERING STRUCTURED INTERVENTIONS OUT OF CLASS		RECOMMENDATIONS ON LINKING LEARNING FROM WORK LED BY TEACHERS AND TAs
I	**II**	**III**	**IV**	**V**	**VI**	**VII**

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.

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).

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.

Education Endowment Foundation

Appendix 2: Enablers and barriers: findings

1. South & West Yorkshire

Table 4: Enablers and barriers related to EEF

Related to EEF	
Enablers	High quality, evidence-based and user-friendly EEF guidance document
	Trusted brand and reputation
	Responsiveness, flexibility and adaptability
	Other EEF resources (particularly the MITA survey)
	Brokerage activity including direct support to advocacy providers for the recruitment of schools
	Financial support for delivery of the campaign over a full academic year.
	EEF facilitated advocacy provider meetings
Barriers	Issues related to administrative processes including delays in contracting and making payments.
	Lack of transparency on recruitment requirements
	Lack of clarity on advocacy providers' budgets
	Changing expectations not communicated effectively to advocacy providers
	Some reluctance to relinquish control

Table 5: Enablers and barriers related to the advocacy provision

Related to the advocacy provision	
Enablers	Provision of focus and structure for the change in schools, including articulating the EEF recommendations and using them to structure workshops, input on change management processes and support for writing action plans (again using the EEF recommendations). Further supported by school visits.
	Practical workshops led by knowledgeable professionals with 'real-world' experience
	Provision of resources (EEF and advocacy provider created), particularly auditing tools and school case studies
	Advice and support between workshops
	Opportunity for sharing practice, collaboration and networking - in workshops and school visits -and the time the advocacy provision enabled for this
	Provision of additional (optional) training for TAs
	Pattern of provision over time that enabled schools to sequence change and implement manageable steps
Barriers	Workshops that: lack relevance or usefulness; are of poor quality; repeat the same content; and/or delivered at a slow pace
	Failure to tailor launch events and workshops to take account of participants prior knowledge
	School visits that were not helpful; did not lead to sharing of resources and were difficult to arrange

	Distance and time to travel and timing of workshops (for some schools)

Table 6: School-level enablers and barriers

School level	
Enablers	A change agent that has high status in the school, is committed to the change and is given dedicated time to work on implementation over an extended period of time
	Support from the whole senior leadership team, including the provision of resources commitment to future action to sustain change
	A school culture that is underpinned by a commitment to enabling <u>all</u> staff to support outcomes for <u>all</u> children
	Motivated teachers and TAs, effective communications between teachers and TAs and teachers trusting TAs to support pupils
	Support from other schools
Barriers	The availability of time and competing priorities, as well as the long time period required for effective implementation
	Funding issues imping on time
	Lack of senior leadership commitment and associated limits on the changes the change agent is allowed to make, and limited allocation of time and resources.
	TA related factors including: availability - due to working patterns or other school demands and lack of confidence*
	Teacher related factors: lack of trust and confidence in TAs*
	Pupil resistance to change*
	'Hurdle' of HR and contractual changes*
	Changes in school leadership and/or staff absence
	Lack of commitment to the advocacy provision by some schools impacting negatively on committed schools
*Note: these factors were a direct focus of the advocacy campaign and in most case study schools diminished, at least to some extent, over the campaign period	

2. Lincolnshire

Table 7: Enabling attributes, mechanisms and barriers related to EEF

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.

Table 8: Enabling attributes, context and mechanisms and barriers related to Lincolnshire

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.

Table 9: Enabling attributes and mechanisms and barriers related to Mobilise delivery

Related to 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: • 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: • 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.	

Table 10: Enabling attributes, mechanisms and barriers at the school level in Lincolnshire

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.
Barriers	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.