

Partnership self-assessment principles



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The aim of self-assessment

Undergoing a self-assessment is a recognised method of identifying strengths and areas for development in organisations, businesses, schools and other public bodies. The main aim of self-assessment is to promote continuous improvement in both strategic and operational delivery through identifying gaps and areas that require development.

Conducting a self-assessment

Principles

Self-assessment should be seen as a partnership process. The self-assessment should not be delegated to one member or leader of a partnership, or indeed one partner agency, but should be jointly undertaken in order to provide a shared view of the partnership as a whole.

In practice, the partnership may decide to establish a representative task group to undertake the preparatory work and to conduct a preliminary assessment of the partnership's working practices. However, the partnership as a whole should have an opportunity to discuss the self-assessment findings and to come to a shared view about the current position of the partnership, its achievements and where development is required. Discussion within a dedicated meeting remains the preferable approach. However, if it is not possible to convene such a meeting, different schools within the partnership should review the findings and comment on differences of view. These individual views should then be collated and a conclusion drawn as to the appropriate response.

Minimum standards of self-assessment

As a minimum standard, partnerships should ensure that:

- consultation within the partnership takes place to ensure the self-assessment is a 'partnership response' and not merely the views of an individual or task group of the partnership;
- both strategic and operational views are taken into consideration;
- opportunities for resolution of differences of opinion are facilitated;
- group work of some kind is conducted wherever appropriate;
- the partnership's assessment of its progress and performance against the following key areas of operation and management are evidenced:
 - shared vision
 - working arrangements
 - planning and delivery
 - evaluation

Practice

To maintain the integrity of the self-assessment process, partnerships should ensure that they are as honest, accurate and objective as possible. Partnerships must decide what level of consultation is appropriate and what resources and time should be devoted to the self-assessment process. In general terms, the broader the consultation, the more accurate the self-assessment is likely to be and the greater the feeling of ownership of the results. This in turn will facilitate ongoing development planning following the self-assessment. However, excessive consultation and detailed research may not be necessary or justifiable in terms of resource allocation and time.

Individual partnerships can establish their own methods of completing the self-assessment based on localised consultation and decision-making processes. Several methods are suggested below which have shown to be effective in undertaking a partnership self-assessment. They are not, however, intended to be prescriptive.

1. Self-assessment task group

- A small task group of the main partnership, including representatives of three or four schools, is convened to review relevant evidence for assessment against the key areas of operation and management
- This review could be conducted on an informal basis through discussions with representatives from the partnership rather than any extensive formal procedure.
- The task group circulates the first draft of the completed self-assessment framework to the whole partnership for discussion and comments.
- The task group will then produce a final version of the self-assessment framework which will include any changes that may have been agreed by the whole partnership.

2. Self-assessment meeting

- The lead partner school invites representatives from a range of partner schools to a self-assessment meeting.
- The self-assessment meeting is used as a basis to determine the partnership's view of its strengths and areas for improvement.
- A task group or delegated individual then identifies and collates appropriate evidence and completes the self-assessment framework.
- Further evidence is brought back to a subsequent meeting for confirmation of the assessment and school partnership members can then endorse the assessment.

3. Self-assessment survey

- Each school partner is asked to complete the self-assessment framework providing appropriate evidence of their views.
- These responses are then collated and discussed (possibly on an anonymous basis) and a shared agreement reached.
- Partner schools then collate and review the responses, agree any necessary changes, and endorse the final version of the self-assessment framework

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