**Peer Evaluation Toolkit**

**Welcome to the Peer Evaluation Toolkit.**

**Its purpose is to help you to develop peer-led approaches to improvement.**

***‘I found the experience very interesting and useful. It has changed the way I look at the challenge questions and how I may present my findings. I was already aware of the need for triangulation but it was useful to have the opportunity to look at this in the context of other areas projects. It is always useful to meet colleagues from other areas and see how they approach similar work.’***

Worker involved in the pilot

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**Background**

The Toolkit is based on work that Education Scotland undertook with two groups of local authority CLD staff and partners in 2018-19. Small groups of staff and partners from three or four authority areas and one national third sector organisation visited each other and observed youth work, adult learning and community capacity building practice

**The benefit of peer evaluation**

Peer evaluation is not inspection. It is designed to help you bring an outside eye to your practice and identify the learning from it. We suggest a good way to start is to identify one or two local authorities (or partnerships or organisations) that are geographically close to you.

The intended outcomes of the Peer Evaluation are as follows;

For organisations:

* Further embed self-evaluation for improvement
* Provide evaluation evidence of strengths and areas for improvement
* Build knowledge and trust between organisations, extending and deepening partnership working
* Increase capacity to address community and learners needs through high quality, experiential staff development
* Strengthen staff empowerment, leadership and confidence

For the peer evaluators:

* Develop and apply a range of skills to carry out their roles as peer evaluators effectively and consistently
* Increase levels of understanding and confidence to be more effective in undertaking and reporting self-evaluation
* Develop and apply knowledge of Quality Indicators
* Develop skills around effective evaluation practice
* Identify, share and record evidence in an evaluative (as opposed to descriptive) and consistent way based on evaluative activity
* Contributes to recommended 35 hour CLD practice professional development hours per year (Standards Council)

Quotes from practitioners involved in the pilots

***‘I feel more confident in the use of QIs and more confident in self-evaluation’***

***‘The process allowed us to reflect on the ‘golden thread’ linking to the policy context’***

***‘I met some passionate and enthusiastic CE workers who have inspired me to do more’***

**How to plan a Peer Evaluation**

The structure of the Peer Evaluation is as follows;

1. Agree a lead or a few leads for the peer evaluation. They will be the organisers and their role will include delivering the training sessions (more details below).
2. Organise a meeting of all those interested in undertaking a Peer Evaluation. You can do this with just one other authority (or organisation or partnership) or another two or three depending on how you want to manage it. **See agenda example**
3. Set up a Home Team and an Away Team for each authority/organisation/partnership. The role of the Home Team is to prepare a self-evaluation and organise the activities for the Peer Evaluation visit. The role of the Away Team member/s is to be part of the team visiting another authority/area as part of the Peer Evaluation.
4. Deliver home team training.
5. Set a date for the Peer Evaluation, this will include away team training. The visit ideally takes place over two consecutive days although you can change this to suit your own circumstances. **(see suggested programme for Peer Evaluation)**

**How it works** - for a Peer Evaluation involving three local authorities the following will apply - **Authority A will be visited by a team from Authority B &C; Authority B will be visited by a team from Authority A & C and Authority C will be visited by a team from Authority A & B.**

On the morning of day one the away teams (the peer evaluators) receive training. In the afternoon and evening they undertake the peer evaluation activity visits.

On the morning of day two each team meets and pulls together a few evaluative statements and a presentation that reflects what evidence they gathered on day 1. On the afternoon of day two each team presents their findings to a gathering of the Home and Way Teams.

At the end of the process send out evaluation forms to all participants

***‘We are intending to reflect and develop a practitioner peer learning session as part of our upskilling and supporting the CLD Plan’***

Worker involved in the pilot



**Flowchart of recommended timescale when delivering 2 Day Peer Evaluation\***

You may choose to vary the above. For example separating the away team training from the peer evaluation visits and feedback so that practitioners have time to reflect on the training prior to undertaking peer evaluation. However, the above suggested timescale give you a starting point for planning.

**Resources required**

The main resource is staff time. The leads will need time to become familiar with the pack and to organise the pre-meetings as well as to deliver the two days. Approximate time is four days per organiser. One and a half days to organise (including pre meetings) and two and a half days delivery (including delivering home team session).

Away teams – the two days of the training.

Home teams – time to attend the home team training, the feedback sessions, the activities AND to organise a suitable timetable and complete activity sheets. Each home team will benefit from 1-3 organisers and each will require about two and a half days spread over the weeks leading up to the two days training and to join the feedback session.

Non staffing resources include a venue for the training and travel costs. You may also wish to provide lunches for both days.

Numbers of participants

Ideally three or four teams each made up of 2-4 peer evaluators. So between six and 16. Peer evaluators should always go to activities in pairs or small groups. So if only two or three per team they would all go to every activity on the timetable. If there are four on the team there would be capacity to run two activities at the same time. This needs to be discussed and agreed at the initial meeting.

**Role of the lead/s**

The lead or leads are the main organisers for the peer evaluation. Their role is to ensure the peer evaluation is well planned and delivered. This includes;

* Agreeing which authorities/organisations/partnerships will be involved.
* Organising and chairing the initial meeting with these authorities/organisations/partnerships.
* Ensuring the toolkit materials are available to all those involved.
* Arranging venues for the home team and the two day training.
* Delivering the home team training and facilitating the two day training including supporting the peer evaluators on their visits.
* Answering queries as required.

Where available associate assessors would be well placed to either take on the lead role or support those doing so. As you rollout your peer evaluation you may also want to consider using those who undertook previous trainings as future leads.

***We are rolling out the use of Peer Evaluation with initially Service staff and then CLD partners. The Home and Away training will be delivered by the staff who participated within the training delivered by Education Scotland.***

CLD lead from an authority involved in one of the pilots.

**Appendix 1**

**Suggested agenda for initial peer evaluation meeting**

Welcome and introductions

Background to Peer Evaluation

Roles of the Home Team and Away Team

Us of Quality Indicators

Confirm dates for Peer Evaluation

Practical arrangements

**Appendix 2**

**Peer Evaluation Partnership Agreement**

The Peer Evaluation exercise will take place on -------------------. It will involve the following partners-----------------------------------------------------------------------

Participants representing the ------ partners will be involved in the following activities;

* Observations of practice
* Discussions with staff, service users and volunteers
* Reading materials

Partners will adhere to the principles of the PRAISE Framework

**Purpose**

* Being clear about the overall purpose of the peer evaluation and retaining this throughout.
* Creating a shared agenda with staff in the organisation and amongst members of the peer review team

**Relationships**

* Building and maintaining constructive relationships throughout the process, as the basis of a high quality peer evaluation

**Awareness**

* Maintaining a high level of awareness of the context in which staff are operating
* Maintaining a high level of awareness of staff feelings and reactions to the process

**Information Gathering**

* Careful inquiry to gather and analyse evidence.
* Retaining an objective stance
* Testing assumptions and assimilating data before evaluating

**Sharing Information**

* Communicating thoroughly throughout the process to prepare and inform staff
* Encouraging staff to be open in providing their perspective and sharing findings as the peer evaluation progresses

**Enabling**

* Treating people with respect
* Engaging them in professional dialogue
* Recognising their efforts
* Sharing findings in a constructive way to encourage ownership and learning to take place

**What happens at the end of the exercise?**

The evaluative evidence gathered as part of the Peer Evaluation will be retained by the partner being reviewed. This will not be retained by the other partners involved. There will be no grades awarded as part of the peer evaluation exercise; only statements of strength and areas for improvement.

All partners should ensure that they pay due regard to confidentiality. If any issue arises regarding child protection/safeguarding it should be reported immediately to lead person

-----------------------------------------------------------------

Signed -------------------------------------------------------------- (partner)

Signed ---------------------------------------------------------------

Date ------------------------------

##

## **Appendix 3**

## **Peer Review Template: activity briefing note**

Please complete and these short briefing notes for the peer review team to look at prior to going to the activity. These notes should also be at the top of any evidence file for the work being reviewed.

|  |  |
| --- | --- |
| The name of the activity |  |
| Main contact for the group |  |
| Type of activity |  |
| Time |  |
| Venue (including room) |  |
| Address |  |
| Postcode |  |
| Parking |  |
| (Mobile) number for main contact |  |
| Other telephone number for the group |  |

Map (if appropriate)

List of likely participants (\*when activity is a meeting or focus group)

|  |  |
| --- | --- |
| NameAdd more boxes as required | Learning opportunity they participate in Or organisation they represent |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

Summary information

|  |
| --- |
| Include a short background to the activity; the project/work it is part of, why it is included in the visit, any key strengths or outcomes from this group/work. |
|  |

Index of other evidence in evidence file (where relevant)

2.

3.

4.

5.

6.

## **Appendix 4 Peer Review Template: self-evaluation**

Please complete this form so that peer reviewers have it before visiting and activities.

|  |
| --- |
| **Name of organisation/partnership being reviewed** |
| **Context thematic work and/or of the local community under review** *(such as aims of work, rationale for priority areas of work / needs analysis/ relevant demographic data, workforce involved in delivering; staff, volunteers, partners, management/funding arrangements)*  |
| **Strengths and areas for development/next steps**For each quality indicator being used as part of this peer review please write a short summary or list of bullet points which show the key strengths and areas for development this piece of work has against each quality indicator |
| QI **Existing strengths** **Priorities for future development**  |
| QI **Existing strengths** **Priorities for future development**  |

**Appendix 5**

**Survey questionnaire to evaluate the Peer Evaluation**

Date -

This survey is designed to gather your views about the Peer Evaluation. The findings will be used to inform the development of Peer Evaluation moving forward. Once complete please return to

Name and contact details of person completing this form

|  |
| --- |
|  |

1. Please indicate if you were a member of the Home or Away team

|  |  |
| --- | --- |
| Home  |  |
| Away |  |

2. How well prepared did you feel in order to carry out your role?

|  |  |
| --- | --- |
| Very well prepared |  |
| Well prepared |  |
| Could have been better |  |
| Additional comments |

3. If you attended the training session in -------- for the Home Teams, please comment on how useful it was in helping you prepare for the Peer Evaluation;

|  |  |
| --- | --- |
| Very useful |  |
| Quite useful |  |
| No useful |  |
| Additional comments |

4. Please comment below on your learning overall from the Peer Evaluation

|  |
| --- |
|  |

5. Is there anything that could have been improved?

|  |
| --- |
|  |

6. How do you plan to use the learning that you gained from the Peer Evaluation?

|  |  |
| --- | --- |
|  |  |
|  |

7. Any other comments?

|  |
| --- |
|  |

Thanks for your help

**Appendix 6**

**Links to training presentation slides**

In addition to this toolkit there are two presentations to be used in delivering the home team and away team training sessions.

[PDF file: Peer evaluation home team training presentation](https://education.gov.scot/improvement/Documents/nih107-home-team-training-presentation.pdf)

[PDF file: Peer evaluation away team training presentation](https://education.gov.scot/improvement/Documents/nih107-away-team-training-presentation.pdf)

## **Appendix 7 Peer Evaluation- TIMETABLE TEMPLATE**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Day** | **Morning** |  | **Afternoon** | **Evening** |
|  | TRAINING FOR AWAY TEAM MEMBERS 10 AM | **LUNCH 12.30PM** | **ACTIVITIES****1.30PM- BEGIN WITH A 30 MINUTE DISCUSSION ABOUT THE SELF EVALUATION** | **ACTIVITIES** |
|  | **TRAVEL** | 10 AM-TEAMS MEET TO REVIEW THEIR EVIDENCE AND CREATE FEEDBACK PRESENTATION | **LUNCH 1PM** | **FEEDBACK PRESENTATION FROM EACH OF THE FOUR TEAMS****FINISH BY 3PM**  |