

Norway

ILE Monitoring Note 2

Submitted for Strand 3 of the Innovative Learning Environments Project (ILE)

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Spreading and sustaining innovative learning

Introduction

In 2006 the Norwegian government passed a school reform (The Knowledge Promotion Reform)ⁱ, with new curricula and increased local responsibility for primary education. In addition to the students' increased learning outcomes, the reform states in the basic principles for education that: *“The school and apprenticeship-training enterprise shall be learning organizations that make it possible for teachers to learn from each other through cooperation on planning, implementing and assessing their teaching.”*

Due to challenges related to the implementation of The Knowledge Promotion Reform and to changing the schools' practices, a number of large-scale national programs were started. One of the most controversial and innovative programs was the “Kunnskapsløftet – fra ord til handling” (Knowledge promotion – from words to action) (2006-2010) (KFOTH).

This program has been thoroughly evaluated and assessed by several different research groups. The Advisory Team, presently to be described, can largely be seen as a continuation of KFOTH.

An important source of inspiration has been the professional consulting and business world where it is common to ask for external help when an organization meets challenges. Building infrastructure and strengthening leadership can be very important step in improvement processes.

In Norway there are many small municipalities. The political issue was the big differences between schools and municipalities in Norway. It can be a matter of luck whether a child grows up in a good municipality, goes to a good school or gets a good teacher. The social democrat/socialist government in Norway wanted to try to compensate for the pupils' unequal social background and varying quality in schools.

This Monitoring Note 2 starts with the descriptions of the national program “Advisory Team” as in Monitoring Note 1, Sections 1.-9. It then refers to the summary of the evaluation of the program followed by reflections and analyses relevant to the evaluation and the basic questions from the ILE-secretariat in its Guidelines for Completing the ILE “Monitoring Notes”.

1. **Aims:** a) the learning to be changed; b) the learners targeted; c) the environments and sites to be brought in. Was there a particular source of inspiration behind the initiative?

a) The Norwegian national implementation program called The Advisory Team is grounded on parliamentary report 31 (2007-08)ⁱⁱ, «Quality in School», that states: The Advisory Team is to assist the school owners in improving their schools. A team of supervisors is established on a national level. Their task is to contribute to the development of schools and to supervise school owners and school leaders who are facing special challenges.

The program is aimed at school owners and schools that have special challenges in the core areas for quality:

- Students lacking in reading and math's skills
- Learning environments that don't promote learning
- Students and apprentices who do not complete upper secondary education or do not pass their exams in upper secondary education and training

b) The learners targeted in this program are pupils at level 1-13. To change their learning, the target audiences for the Advisory Teamⁱⁱⁱ are school owners and school management in municipalities with low scores or special challenges.

c) The Advisory Team is taking much of its inspiration, experience and ideals from the "Knowledge promotion – from words to action" program (KFOTH). Some of the measures introduced by the KFOTH and continued in the Advisory Team, are: Building organizational strength and effectiveness, using external counselors (competence environments) and thorough analyzes and evaluation of the schools' standpoint before commencing development work. The two Norwegian ILE (*Innovative Learning Environments*) cases are taken from KFOTH.

2. **Leadership and partners:** What is its main leadership? Who are the main partners involved (e.g. education authorities, networks of practitioners, foundations, community bodies, teacher or leadership organizations, business organizations, higher education institutions)?

The program is led by the Directorate of Education and Training, with a clear authority and in a clear structure. The Directorate has defined, in cooperation with experts, the framework and the strategy for school improvement and change. The ministry, minister and important stakeholders have been informed and consulted regularly. The main national partners are KS (The Norwegian Association of Local and Regional Authorities), County Governors (the national education offices at county level), some universities and colleges, consulting groups and practitioners.

The Advisory Team recruits school managers and municipal educational administrations from all over the country. In addition, the team can contact a group of highly competent resource persons for support during training or guidance. These resource persons are brought in from among the civil servants, from universities and colleges or public and private consulting firms. The County Governors are contributing by actions of recruiting school owners.

The school development work itself is to take place locally. Here, the political and administrative school owner is deeply involved, and headmasters and school personnel participate. Other local

support groups will also be involved, depending on the challenges and guidance topic in question. Different competence groups and the local PPT (pedagogical-psychological support group) can be important actors in the post-counsel continuing development.

The Directorate has, in cooperation with external expertise, defined the role of the supervisor, and what competence is expected and required. The supervisors are recruited based on the following criteria:

Supervisor 1: Experience as school owner

1. Experienced school or municipal administrators representing active and successful management of the school sector in his municipality (*City Manager, Municipal manager/Municipal School Administrator, County Counselor, County Education Administrator or equivalent*)
2. School or municipal administrators that can refer to good results of own development processes.

Supervisor 2: Experience as school manager

1. Experienced headmaster/managers representing sustained (*preferably more than 3 years of*) good management.
2. Headmaster/managers that can refer to good, even if recent, results of own development processes.

In both categories, formal qualifications or extensive experience in the counseling field is an advantage. Good management or relationship building skills can also be taken into account for certain well qualified candidates. Supervisor 1 bears, in addition to guiding the school owner, a special responsibility of coordinating the team and work as its contact. This implies continuing contact on the guidance process with the secretariat of the Directorate of Education and Training, contact with the media and a special responsibility of monitoring the contract with each school owner.

3. *Strategies and activities: What are the specific design, features, and activities of the strategy? What is the main rationale? How is communication and feedback assured?*

Some of the key elements in the strategy have been:

- Helping instead of controlling. Building capacity.
- Meeting the real and felt basic needs of the schools and municipalities
- To receive guidance is optional
- Focusing the positive elements and the possibilities before of the negative elements. Stimulating before criticizing. Promoting optimism and enthusiasm and build self-confidence.
- Building schools as organizations, communities and partnerships
- Strengthening the leadership, at all levels
- Helping schools and municipalities help themselves

The hypothesis is that many of the schools and municipalities need:

- Competence
- Energy and optimism
- Practical tools
- Help with analyses and forming of strategy
- Legitimacy, support and partners

The guidance is meant as a coach/mentor relationship, and focuses on the first phases of the municipalities' quality development programs. That's all that can be done in 1,5 years. This is why they also set the goal of building up the guided party's capacity of continuous quality development in his own organization. The phases the Advisory Team takes part in are:

1. Identify developmental needs: The supervisors participate actively in using the analytical tools. They take part in organizational analysis and standpoint analysis – planning, execution and result interpretation. Here the school's/municipality's student scores, student survey results and other local conditions are evaluated. Through this process, the school/school owner identifies what areas are in development, and at the same time the supervisors identify what are the school/school owner's counseling needs.
2. Planning the development project: This guidance is given according to the discovered counseling needs and taking the guided party's standpoint into account. Also complementary external assessments of the school's potential and developmental needs are offered here.
3. Execution: The supervision is based on the local need and on professional knowledge on learning organizations and change management, published on meetings and qualification seminars for the supervisors during the guidance program.

Analytically we can separate these phases. In reality we can see that they are three parallel processes.

The Team of supervisors is national and governmental, but has no formal authority. The authority is placed with the school owner on the municipal level. It is therefore up to the municipal authority whether it will accept support from the team of supervisors.

The aim for the team of supervisors is to provide a supervision that enables school owners and schools to implement national goals through local development strategies. The strategies are based on recognized needs uncovered through the use of national tests, student assessments and other municipality- and school assessment tools. The experiences until now show that the needs are numerous and complex. The supervision is, however, primarily aimed at leaders on municipal and school level attempting to strengthen the school as an organization, and is based on a solid organizational and managerial foundation, using tools and methods that have been tested and proven effective. The supervision focuses especially on the school owners and schools on a system level; how they function and how they can be developed further.

Tools for the team of supervisors for mapping, reflecting and analyzing the current situation are the Quality status tool and the Organizational analysis tool. One of the aims in Report to the Storting no. 31 (2007-2008) *Quality in School* is that all schools must have access to good self-mapping tools, like the quality status tool and the organizational analyses, and then receive guidance if needed in how to use these tools. We also use an External assessment methodology as proses for anchoring and starting development work at school level.

Guidance, practiced as national support for local development work through the Advisory Team, is a tool that the Directorate of Education and Training and public authorities in Norway have no tradition for using. In summary, the counseling given is characterized by:

- Its supportive, not authoritative role. The latter has been the traditional role of public authorities.
- The supervisors have no formal authority. Being guided is voluntary.

- The leaders are guided (not teachers nor students). Guidance is given on leadership, organization development, change management and systems development.
- The guidance has both an organizational perspective and a systemic perspective, and is to contribute to building the school as an organization, and the education sector as a whole system.
- The supervisors are operational and work close to the school and its owner.
- The supervisors' role is coach/mentor more than expert consultant. Direct advice is given mainly on change management.

Recruiting the supervisors happens by announcing the position, and through regional information meetings. During the process the qualified candidates are invited to a three-day training program with short individual interviews, before the supervisors are selected and the teams assembled. It has been very popular for school leaders to apply for these guidance positions. It has shown to be an attractive possible alternative career path for experienced school leaders. Therefore it has been possible for the Directorate to choose only well qualified supervisors. The supervisors are engaged for one and a half year supervision and will not get further engagements if the supervision is not functioning. Most of the supervisors work 20% for the Directorate and 80% in their ordinary job.

Further **training and competence development** of the supervisors takes place on meetings during the guidance process. These meetings comprise competence development, sharing of experiences and joint learning sessions in and across the team. The Resource Group participates in the meetings and contributes its expertise to the community and to each team. The supervisors are assembled in smaller teams responsible for 2-3 municipalities and their schools. The teams work with the schools and their owners on an individual basis during the process. School owners (political and administrative) are summited in the beginning and end of the guidance process for joint competence development, sharing of experiences and planning.

In addition to underway communication, feedback and learning from meetings and input from both guided municipalities and the supervisors' municipalities, quest back surveys involving all parties are conducted twice during the guidance process. The answers are taken as feedback for the supervisors and for central adjustments of methodology, teaching and sharing of experiences.

The guidance is supportive, to help schools and their owners start their local development work. Implementing changes in an organization is often challenging and difficult, and to manage a process producing good results, external competence is often needed. The Advisory Team gives no guarantees, but can contribute to schools' and their owners' successful development work. A prerequisite for success is the active and responsible participation from all parties. Acceptance of the offer of guidance is an indication of wish and will for development, a basic prerequisite for change.

The guidance's goal is enabling the schools and their owners to continue their quality development work on their own, based on their acknowledged needs. Development work is a continuous process, comprising identification of needs, option evaluation leading to solutions, the implementation of these measures and evaluating them. Guidance from the Advisory Team will support the local work in all these fields.

The guidance considers the school and its owner as an overall organization, and considers how it works and how it can be improved. The supervisors contribute with knowledge, experience and counseling enabling the school to better meet the challenges coming to the surface when it's time for implementation and pedagogical changes. Some schools may additionally need development of competence related to basic skills, evaluation or other core tasks. The Advisory Team can contribute to finding the relevant competence, but does not offer guidance on these fields. The Advisory Team is never to assume responsibility for the development processes.

4. Context: What are the particular contextual, local or political factors that have been influential in explaining why this initiative has emerged and/or has been sustained?

In Norway, most schools are public. The Norwegian education policy is formed and implemented centrally, by the Norwegian Parliament and the Ministry of Education/Directorate for Education and Training, while the operational and quality development responsibility is placed locally. This means that the municipalities are responsible for primary education (years 1-10), the counties are responsible for secondary education (years 11-13), and for vocational education. The state is responsible for certain special schools, for example for the native population.

The local ownership was strengthened and emphasized in 2006 when the school reform “Kunnskapsløftet” (Knowledge Promotion) was passed. The challenge is that in our small country (5 mill. people) we have 428 municipalities. Many of them are very small. School management is a local responsibility, leadership development is local, and the school owners often lack the competence and capacity to do this. For these reasons the government has started the Advisory Team to assist school owners in their needs for school development support.

The two Norwegian values local autonomy and equality, equal rights and equal opportunities, are difficult to combine. In addition we have no quality control of schools by the inspectorate, and we have a weak evaluation and feedback culture in Norway (TALIS). Given this context the central authorities wanted to do something to improve the weakest municipalities. Many of the low performing municipalities and schools are probably aware of the situation. They know that they under-perform, but they do not know how to deal with it. Where that is the case, the main challenge for the central authorities is how to motivate the municipalities to ask for help.

5. Resources: What levels of financial resourcing are involved and where do these come from? What supplementary resources, if any, are involved: e.g. facilities and buildings, technological resources, additional or specialist staffing?

For their operation, the Advisory Team is assigned 44 million NOK a year, covered by the national budget. The Directorate for Education and Training is the responsible and executive body. The municipalities must cover whatever supplemental competence they wish to use in the development work. For example, pedagogical or organizational development competence could be applied where these needs are discovered.

The Advisory Team is developed and administered by a secretariat in the Directorate of Education and Training's School development department, assigned approximately 4.5 man-labor years. Supervisors are recruited from the education sector throughout the country, experienced and development-oriented school leaders and municipal school administrators. Additionally, professional experts are contracted in qualification and development of the supervisors, and the Advisory Team has a Resource group with professional expertise supplementing the team' work.

Some resources have been used in the Directorate to build up a professional project organization to run the Advisory Team program. Some resources have been used to recruit the best advisors in the education sector. Some resources have been used to train the advisors. The service is offered free of charge to the municipalities.

6. Developments over time: How long has this initiative been going and how long did it take to get it started? Has it changed significantly since it began and how much has it grown or spread since then?

Based on the experiences with from KFOTH, it was in 2007 decided that an Advisory Team was to be developed. The Advisory Team was piloted in two counties 2009-2010^{iv}, and the first regular portfolio of the Advisory Team was started 2011. During the next three years the Advisory Team' activity will cover the whole country except from Oslo (18 counties and 429 municipalities). About 30 municipalities have 80-100 schools in each portfolio, and they receive guidance for 1,5 years. During this period the activity has been continually developed, and now has a good structure. The Distribution plan is being followed, new portfolios are started each beginning of the year, and by the end of 2013 all municipalities in the country has been offered guidance from the Advisory Team the first time.

Since Norway traditionally has had little control, access and evaluation of schools, the Advisory Team's targeting of low-score and challenged schools and their owners met much resistance. This resistance was handled through a deliberate focus on voluntariness, and staking out the point that school owners who sought counseling was not regarded as losers, but rather as brave and flexible. Also the organization for municipalities, KS, the University/College sector and the public administration resisted the measure. KS tried to stop the program, for the public administration the resistance was against the state interfering in local authority, while the University/College sector resisted the Advisory Team as a competitor and a professional challenger. This resistance is now turned to support, based on good results in terms of happy school owners and supervisors. Both the public administration and the high school sector has also been involved in the Advisory Team in such a way that the activity has become professionally and organizationally well anchored. In both sectors a change of attitude has taken place.

It has become more and more clear that there were big leadership challenges in the schools and municipalities. Therefore the role of the advisors has been more and more a leadership advisor role. In the beginning the Advisory Teams worked mostly with municipalities and schools with low performance. Now the Advisory Teams work more and more with all kinds of municipalities in Norway, because this way of working seems to be successful for all.

7. Evidence of effectiveness and efficiency: Is there evidence relating to success in terms of the aims referred in Question 1 – a) the learning to be changed; b) the learners targeted; c) the environments and sites to be brought in? Is there evidence relating to the more efficient use of educational resources?

It has been a research-based evaluation of the system of advisory team. First interim report published in March 2013, is a study in which supervisors and those who have been mentored have been asked. The second and final report was published in December 2013. This report evaluated results and impacts (Dyrkorn et al 2013) (see the evaluation section below).

A comparison between how the quality of the school is made in Scotland, Ontario and Norway has also been made. Where the Norwegian model differs most from the others, is the clear focus on organizational development and improvement of the interaction between the levels of education - primarily between school owners and school. Also, none of the other models uses guidance primarily at the local level's terms, like the Norwegian model is designed.

The uniqueness of the Norwegian model is:

- 1) how guidance is systematic and takes place in the interaction between actors at different levels

- 2) the way the expertise of seasoned school manager / owner-supervisors is used and developed
- 3) how guidance / monitoring is detached from the inspection / audit
- 4) how state goals are implicit – at the guided' s premises, but on the basis of a clear and theoretically grounded understanding of what creates change, and based on the results obtained through the national quality assessment system.

8. Success factors: What factors have, in your view, been most influential in the success of this strategy/initiative? How successfully have risks been managed?

Success factors:

- The Advisory Team has been an instrument for help and support, not for governance, management or inspection
- It has been voluntary as an offer to the school owners
- The Directorate has carefully informed the school owners and the schools of point 1 and 2, because the tradition is that the state's role has been a governance role. This type of help-role is relatively new for the Directorate and has caused legitimacy towards the sector
- The supervision is performed by experienced school people, who at the same time are professional supervisors. Professionalism is strongly emphasized in the supervision process. An important part of this is always to show respect for the school owners, the school leaders and the teachers
- An important success factor has been the centralized and tight management of the program. The Directorate has defined the competency requirements for the supervisors, especially picked out the supervisors, established an obligatory training program for them and removed supervisors who were not good enough. There are strong conditions for the participating school owners. For example are both political and administrative committed to active engagement
- The program has been managed through the usual structures in the Directorate, which have caused a simple, visible and strong management structure.
- An important success factor has been the development, anchoring and management on the national level, when at the same time the real school development has been locally justified and owned. The supervisors have no formal authority. The responsibility is local. So this is both a top down and a bottom up approach
- The focus for the Advisory Team is the school owner and the school as a unit. The school does not get any direct help. The school owners are responsible and make the formal deal with the Directorate. The focus for the Advisory Teams has been the school and the school as organization
- The Directorate created a strategy for change and development in cooperation with the ministry at an early stage (see section 3). The strategy was thoroughly worked through and was well known by the actors and stakeholders. Thereby it became easy to stay steady on track, also when resistance emerged. The ministry was well informed at all stages

Risk management:

It represents a big risk to leave the concrete work for the supervisors. The directorate has little or no control over what each individual supervisor do, as they travel across the country. Our quality control lies first and foremost in the definition of the supervisor role, the competency demands, and the selection and education of the supervisors. The supervisors are engaged for each and every case with one and a half year duration. If they do not function, they will not get a new mission.

We have wondered how the press would handle information about this program. Initially it was a kind of rescue program, where we wanted to get in touch with the schools and school owner with urgent needs for help. How these schools were handled by the press could easily have been crucial for their participation, for the future of the program and for the support from the minister.

We therefore made a communication strategy where we among other things invited the biggest paper to involve in processes that would fully inform the journalist, and preferably make them write constructively about the importance and impact. This was successful and the first publicity was just what we wanted.

Due to the resistance, it was important to evaluate every step of the process. Because all evaluations were positive the program received increasing support and legitimacy, while the resistance decreased.

“The evaluation indicates that the supervisors to a great extent have used the same methodology as they meet the guided part, and at the same time have emphasized local adjustments for the benefit of the guided part, with respect both to organization and content in supervision. This indicates that the Directorate for education and training has succeeded in their effort to secure the same methodology for the supervisors” (Rambøll 2013)

9. Tensions and impediments: What, if any, are the factors that have impeded the success and spread of the initiative? How open are they to being overcome?

Because the program was controversial, we had to count on resistance, had to prepare for withstanding resistance and to deal with resistance in a good way. After planning and establishing the program, ensuring that the most important conditions for success were thoroughly thought through and established, it was important to:

- Keep on track
- Think in long terms
- Be professional

Legitimacy and authority for intervening if necessary, was important. This was necessary only by a few occasions. But everybody knew that we actually were able to intervene, which probably was enough to keep discipline and focus. The main strategy connected to resistance was however to stimulate, motivate, build enthusiasm and ambitions rather than “fight” resistance. This turned out very efficient.

Extent: A critical issue is whether the politicians consider 30 guided municipalities per portfolio to be sufficiently sustainable for investment. In comparison, school-based competence development is scheduled for all the country's upper primary schools within 5 years in another national program.

Recruitment basis: In such a small country as Norway with only 5 million inhabitants and relatively small competence communities, the danger exists that recruitment to the Advisory Team empties the competent and cooperating sector. The Advisory Team relies on skilled and efficient supervisors. Held together with other parallel state initiatives, the recruitment basis for municipalities wanting guidance in their development work could also dry up. This would be negative if it happens because the supervisors are inadequate, or if their work is ousted by other measures. On the other hand, it would be positive if it happens because the needs are met, and we have managed to build up the

guided municipalities' competence for caring for its own continued quality development. The latter wouldn't be realistic in the short term, and the former does not yet seem to be a significant threat.

Political initiative: The Advisory Team is a political initiative in the way that the state enters in assistance where really the municipalities are the responsible level. With a more conservative, county- or autonomous-oriented government, there is a risk that the political will to letting the state help the municipalities vanishes or disappears completely. Such a case would probably mean the end of the Advisory Team.

The need for competence development in organizational learning of the sector could be met, leaving no need for a state run Advisory Team. This would be positive, and is one of the goals. However, it is not likely to be met the next few years. On the other hand, the local competence will increase considerably the next years. Municipalities having received counseling should have increased their local capacity, but also the municipalities that provided supervisors will benefit from the resulting competence development. Supervisors take a lot of new competence and experience back to their municipalities, and it will be crucial for the municipalities to maintain and utilize this competence for the good of school quality development.

Evaluation of the program Advisory Team

Two Quest back surveys has been conducted, both of them showing a progressive and optimistic work both among school owners, managers and the supervisors themselves.

The surveys shows that 94 percent of school owners and school leaders believe the supervision has contributed positively to the local development, while 93 percent believe it has been a good match between the supervisor and the guided part. The guided part considers by and large that the supervisors have had good skills, both academic and guiding skills. Overall, 89 percent considers that the supervisors in large or very large extent have had good supervisor qualifications, while 95 percent report that the supervisors in large or very large extent have had good academic expertise. The guided part also considers their' own skills as sufficient to make use of the supervision. 93 percent report that they to a great or very great extent had sufficient expertise.

The results of the survey indicate that both the guided part and the guidance counselors believe that the supervision has led to changes in the guided part's practice. 81 percent of school leaders, 76 percent of school owners and 73 percent of the supervisors believe the procedures to a large or very large extent has led to changes in school practices.

Compared with the proportion who thinks the supervision has led to organizational changes at the school level, there are fewer who think the supervision has led to organizational changes at the school owner level. 50 percent of the supervisors, 51 percent of school owners and 30 percent of school leaders say they believe the procedures to a large or very large extent contributed to organizational changes at school owner level. Findings from the case study visits indicate that it is more challenging to create change and development at school owner level.

Thus, the effect that we know of until now is very happy school owners having received counseling, as well as very happy supervisors, seeing the guided municipalities' progress and earning important experience and competence for development work in their own municipalities and schools.

We also see that the Advisory Team has been an effective founding and distribution measure for the Directorate of Education and Training's web-based quality development tools and for the external school evaluation methodology. We observe that those tools are very useful, especially for the schools and school owners that have no previous experience, nor competence within quality evaluation. Those who are more experienced ask for other and more complex tools, which may turn out to be equally useful.

An external group of researchers has also evaluated the Advisory Team. In this evaluation, the 2011-portfolio is central, since this guidance process has finished. Additionally, the researchers have been following the 2012-portfolio guidance closely. The following is a short summary of the evaluation of the program, made by Rambøll management and the University of Oslo, institute for teacher training and school research in December 2013 (Dyrkorn et al 2013):

The advisory team program started as a trial project in 2009. Based on previous trials and internal assessments, a proposal was developed for the establishment of a permanent arrangement. The goal of the program is to provide guidance to school owners and schools that wish to improve teaching processes within the schools. The program was organized with an administrative unit in the Norwegian Directorate for Education and Training, a resource group for supporting the guidance teams and several leader teams. The advisory teams were assembled based on an overall assessment of the advisors competence, experience, regional needs and cooperation between team members.

The program has existed in three periods so far, in 2009-2010 (trial period), 2011-2012 (2011-portfolio) and 2012-2013 (2012-portfolio), guided by a selection of school owners and school administrators. The advisory team program can be described as a Norwegian strategy for *soft governance*, where governmental authorities run local and regional authorities through information and guidance, rather than through laws and regulations. The Norwegian Directorate for Education and Training was assigned to develop an arrangement where an advisory team would provide municipalities and counties assistance through the initial phase of a development process.

Through the advisory team program the authorities wanted to provide an offer for schools and municipalities/county councils that wanted to strengthen their change and development work so that pupils would learn more and complete their education.

In an international context, the program shares several similarities with models from Canada and Scotland, where the main goal is increasing the pupils learning output. However, the Norwegian model differs from the others regarding how the guidance is systemized. The advisory team program stresses that the guidance will occur in close interaction with players on different levels. This relates to how the advisors' competence is utilized and further developed, and that the guidance is detached from inspection/supervision, meanwhile implicitly promoting governmental goals.

1 Point of departure for participation in the program

The evaluation shows that there are several different perceptions among the applicants regarding why they applied for advisory teams assistance. 42 percent of school owners and school administrators state the background for applying was due to weak pupil performances, 35 percent pointed towards a large proportion of pupils receiving special education, while 32 percent specify other reasons for participating. Applicants from the 2011 portfolio state to a larger degree than the 2012 portfolio that weak pupil performance was the main reason for applying. Findings from the qualitative studies show that there usually are several, and partly overlapping causes to why

applicants seek support from the advisory team program and that administrative level, school administrators and advisors emphasize different causes.

2 Content and methods in the guidance

The goal of guidance from the advisory team is stated in the agreements between the Norwegian Directorate for Education and Training and the participants: To “make school owners and schools better equipped to self-manage development work based on self-recognized needs, for instance as revealed through quality indicators such as results from national standardized tests, the Pupils Survey or other studies”.

The advisory teams’ main effort is tied to the initial phase of the development process. The teams are less involved in the implementation phase. In the initial phase, the advisors utilize different data analysis tools to identify the participants’ needs and challenges. The advisors support participants in interpreting the results of the analysis with the aim of creating a common understanding among various players and stakeholders. Further, they agree on goals, map strategies, identify possible solutions and plan out actions and measures. The evaluation shows that the majority of the participants are very satisfied with this approach. Using the tools in the initiating phase can be seen as a way of changing the participants’ orientation from goals - for instance improving learning results – to processes. Application of tools also involves a form of *soft governance*, since the tools by design contain guidelines for which areas of development the participants should work on. The evaluation indicates that the advisors to a small degree discuss and problematize which description of reality the tools produce, even though they are aware of that the stand point analysis [Ståstedsanalysen], for instance, only reflect part of the schools activities.

Participants who receive follow-up during the implementation phase express great satisfaction. During the implementation phase, the different schools’ progress or lack of progress is made transparent. The evaluation indicates that a continued involvement from the advisory team in the implementation phase can be decisive for whether or not the counselling effort will have long-term significance.

3 Guidance principles: Support and dialogue

The advisory teams’ guidance is based on to bearing principles; support and dialogue. The advisor’s role is to contribute to the participants finding solutions themselves. Dialogue and joint reflection is used to gain increased understanding for school development and will to take action. The evaluation indicates that the advisors have gained knowledge about, and training in, a common guidance methodology, and that there has been great emphasis on guidance rather than providing solutions. The evaluation shows that the advisors rather support than challenge the participants. There are few examples challenge as a guiding strategy and that there is a strong belief in dialogue as a tool. The evaluation indicates that the advisors regard initiating reflection as a central guidance strategy. There are, however, no examples that reflection is tied to theoretical understanding. On the other hand, the advisors’ own experiences form the central basis for knowledge.

4 Results of the guidance

An underlying principle of the advisory team program is that they will assist participants in their general development processes, with a strong emphasis on support and dialogue. The arrangement of advisory teams is thus a program that primarily has contributed to supporting school owners and school administrators in their development work.

The evaluation shows that both participants and advisors are very pleased with the program. 94 percent of the participants state that the guidance have contributed positively in their development work. Furthermore, the evaluation shows that both participants and advisors see the other party as a good *match*. The evaluation shows that the participants consider the advisor having experience from the school sector and having a high professional competence as an important premise. The program can thus be described as a peer arrangement.

The evaluation shows that the guidance has led to several results, such as changes in practice and organizational rearrangements. Furthermore, it indicates that the guidance has led to an increased awareness about and strengthened the competence in school development. In assessing the changes, the participants primarily state that the guidance has made the school administrators to have better predispositions for managing school development.

Results from case visits and open answers in surveys show that the guidance has led to changes in practice both regarding working with larger national initiatives that entail changes in leadership structure and work processes. For instance, several schools state that they have implemented measures involving national initiatives such as “assessment for learning” and “class leadership”. Further, several state to have altered local processes, for instance regarding and practice for meetings or designing annual status reports. The evaluation shows great variation in terms of what measures have been implemented in connection to the advisory team.

The evaluation shows that a majority of the participants think the guidance has led to changes in organization on both school owner level and school level, but prominently on the school level. The evaluation shows few differences between the participants in the different portfolios. School owners assess to a larger extent than school administrators that organizational changes have occurred on the school owner level. The organizational changes on the school level is primarily concerned a different use of time together, clearer objectives and changes in management and organization of leader groups. At the school owner level, the organizational changes are primarily related to time use regarding school development, strengthened cooperation and a closer dialogue between different levels. The administrative school owners also particularly emphasize that the guidance has led to a raised awareness about their role and accountability.

The participants’ emphasis on measures and changes of practice involving larger national initiatives may indicate that the advisory team has had little influence on the participants’ development work, and that the participants have worked on initiatives they would have pursued regardless of participating in the program. On the other hand, the evaluation shows that participants experience raised awareness and increased competence about development work because of the advisory team. They also state to have been given an extra push in the right direction, and that the guidance has sped up the development work. The guidance can thus be said to have been a facilitator for the development work. The evaluation shows that the guidance particularly has led to raised awareness and strengthened the competence about school development at the *administrative level* in the municipalities/county councils and among school administrators, but this effect is somewhat smaller among politicians and teachers.

5 Long-term changes

The evaluation shows that the participants believe the guidance has led to lasting changes, while the advisors are somewhat more reserved. School owners and school administrators think the changes are permanent since they entail changes in practices and work processes, such as remediation of

school plans and changes in the management. The evaluation also indicates that the participants have followed-up on the development areas that were identified during the guidance, by including these areas in strategies, plans and practices. Additionally, the participants state that they have improved their skills in meeting challenges in quality development, because of the guidance.

The changes the advisory teams have led on can on one side seem small. On the other side, the evaluation indicates that the guidance - through support and emphasizing dialogue - have contributed to changing structures and practices for the participants - on their terms. The participants' examples of changes indicate that the guidance has led to raised awareness and strengthened competence about development processes, as well as an increased emphasis of clear management, prioritizing and dialog between the levels. Hence, the guidance has strengthened the participants' qualifications to achieve school development.

6 Areas for further development

Even though the program overall is very well received, the evaluation sheds light on certain challenges. Firstly, the guidance period is perceived as relatively short, and both advisors and participants are uncertain of whether the guidance is sufficient to cause lasting changes. Secondly, the evaluation indicates that the municipalities succeed varyingly in distributing the competence and experiences from guidance within the municipalities. Third, it is uncertain whether the municipalities and schools that participate in the program are the ones that need it the most. Fourth, the evaluation shows that it is somewhat difficult to engage the political level in the municipalities. Fifth, it is questionable whether the balance between support and challenges in the guidance is ideal, if the intention is to facilitate change in the participants.

The evaluation shows that the program has generated a mass of positive feedback, experience and enthusiasm, and that both participants and advisors perceive the program as important. At the same time, the evaluation has identified areas that can be further improved. These areas mainly concern how advisors are trained to meet participants at the school and especially school owner level, and how participants can be more strongly involved in the process. The evaluation has thus identified the following areas for development:

- **Training of the advisors**

The training that is offered by the Directorate does in general receive much praise from the advisors and it facilitates fruitful dialogue between participants and advisors. At the same time, the evaluation indicates that advisors are in need of tools for coping with tensions, problems and challenges that arise in the guidance process, especially in their efforts towards the school owner level.

- **Dialogue with political leadership**

The evaluation shows that although school owners participate in the guidance process, and that this has been a focal point in the 2012 portfolio, there is still room for strengthening the involvement of political leadership. For the advisors this has to do with their ability to come into dialogue with the political level, through strengthening their own understanding of the municipal and political context and of tensions between the administrative and political level.

- **The contract between advisors and participants**

Participation in the program is regulated by a contract between the Directorate and the participants. It could be beneficial to further develop this contract by clarifying actual expectations, through for instance defining goals and commitments for the parties. Today the classroom perspective is

somewhat lacking, together with a perspective on how the school and school owner levels are to be brought together in the guidance process. A stronger commitment of the parties could also facilitate an even stronger involvement of the school owner level.

- Selection of participants

Today the program only involves a selection of schools in each municipality/county municipality. In light of both the positive experiences and the challenges that are brought forward in this report, a broader involvement of schools should be considered. This could lead to a more collective effort in local school development and more learning between schools and levels in each municipality/county municipality.

- Learning and sharing of experiences

The evaluation shows that the program has produced a mass of experiences and learning, but that this knowledge to a larger degree should be shared and spread outside the program through information, examples and web resources. Inspiration could be drawn from the website on “assessment for learning”.

- Following up on participants

Many of the participating municipalities have a need for follow up also after the initial phase is completed. It is in the implementation of change that most school leaders are in need of assistance. This seems especially relevant when teachers – according to findings in the evaluation – seldom are involved in the initial phase.

Reflections and analyses

On Changes in context

There has been a few significant changes over the years of the Advisory Team has been working.

We had a governmental shift in 2013, and went from a left wing to a right wing government. The new education minister has questioned the need for the Advisory Teams, and have so far concluded with reducing the activity and has stressed that the target group should be only the municipalities and schools who are performing low on pupil learning results, and therefore are in special need for guidance. The Advisory Team has been popular among municipalities and amount of schools and municipalities that have received guidance, has naturally increased. Consequently, we now reduce the activity somewhat.

The role of the Directorate for Education and Training has not changed, but the climate for change has improved. Both because of The Advisory Teams and other actions made by the education authorities and other stakeholders, now reflecting a positive attitude to and focus on school leadership, learning organizations and whole system change. (Hargreaves and Fullan 2012)

On success factors

Some reflections on the success factors for the Advisory Team. The evaluation report confirm the presumptions from the Directorate that success factors for the system have been a helping function opposite to a management system, and that it has been voluntary.

The evaluation has also confirmed that the use of competent and experienced people from the school system itself as advisor has been a success.

The researcher was not asked to consider the role of the Directorate or the internal organizing of the Advisory Team system in the directorate. Thus, this is not considered in the reports.

On the other hand, the researchers has focused on the contract made between the Advisory Team and the school owner. They wanted to investigate how the commitment for the school owners work. Here they found that the contracts seem too loose to secure the school owners commitment.

The researchers has also been engaged in the local autonomy and the bottom-up perspective in the Advisory Team as success factors.

Limitations relative to the evaluation reports

Rambøll concludes that the time span for guidance is too short if the expectations are that the participants are supposed to go through all three phases in the course of development, initiation, implementation and internalization. They have not experienced that the participants are going further than phase one during the guidance process.

The main informants for Rambøll are early portfolios from the Advisory Team. Moreover, because the Advisory Team is continuously improving based on assessment of the experiences along the way, changes has been initiated and implemented.

Because of accumulated experience, a much stronger focus on school ownership and an increasing amount of, and more accessible information on the student performance status etc, the participant improvements are getting further today. It is a shorter information-gathering phase. The accumulated experience leads to directions that are more distinct from the directorate on data retrieval and change management. Parallel to the Advisory Team, KS arranges school owner programs. Therefore, the school owners are more accustomed to talking about organizational change processes.

The question is therefore whether we need more information on the results from recent portfolios to prove effects. However, what we have is statistics of student performance in national tests in municipalities that was ranked as the 40 municipalities on weakest student performance in 2010. All of these municipalities have been offered and participated either in the Advisory Team or in a similar program aimed specifically against these schools, but with the same instruments. The application referred SKUP (School Development Program). The organization development program for school owners in the Advisory Team is the same as used in SKUP.

There are no significant differences between the municipalities participating in SKUP and those receiving guidance from the Advisory Team. All municipalities have had considerable progress in the period 2010-2013, and almost none of the schools are any longer on the list of the 40 weakest performing schools.

10. Source information: References to documents, websites, etc.

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