



# ENHANCING AND EXTENDING OUR PARTNERSHIP

A STRATEGY TO GROW CHALLENGE PARTNERS'  
REACH AND IMPACT 2023-27

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## **FOREWORD** BY CHALLENGE PARTNERS' CHAIR OF TRUSTEES, CHRIS DAVISON



**Chris Davison,  
Chair of Trustees**

**In the 15 months I have served as Challenge Partners' Chair of Trustees, I have witnessed first-hand the determination of the partnership and central team to adapt and grow, working together to thrive in what has felt like constantly shifting sands in the education sector and wider world.**

The events of recent years have only served to emphasise how crucial it is for schools, trusts and leaders to support and learn from each other in order to give their students the best education possible. Everything Challenge Partners does is focused on improving educational opportunities, and improving life chances for all children, paying particular attention to those facing socio-economic disadvantage.

It would be easy to keep on doing what we're doing, with a few minor tweaks. But Challenge Partners has never been about standing still.

**Our new strategy is about delivering enhancements and expansion in our partnership so that by 2027 we reach half a million pupils a year, giving them a better educational experience and boosted life chances.**

Everyone in and around the partnership is hardwired to keep moving forward and seek ways to drive improvement. This five-year strategy document, *Enhancing and Extending Our Partnership*, is proof of that. It embodies what Challenge Partners stands for and outlines the exciting journey we are on together.

**There is a confidence that comes from this proactive approach, in holding onto what works and identifying what can be improved on and expanded.**

A great deal of thought has gone into developing a clear path for the future, while looking at practical solutions to enhance the Challenge Partners' experience for partner schools and trusts.

I feel privileged to play a small part in this plan. We have a lot to do but we are in good health, with an outstanding team and dedicated partners, and a great platform to build on.

## **INTRODUCTION** FROM CEO, DR KATE CHHATWAL, OBE



**Dr Kate Chhatwal OBE,  
Chief Executive Officer**

**For more than a decade, Challenge Partners' schools and trusts have challenged each other, shared excellence, collaborated and innovated to reduce educational disadvantage and improve the life chances of all children.**

Participation in our programmes and networks has provided unique continuing professional development (CPD) for leaders at all levels in Challenge Partners' schools and trusts, from classroom teachers to CEOs.

**As a result, since 2011 well over a million pupils have benefited from excellent practice and the combined wisdom of exceptional teachers and leaders.**

Over the next five years, we will enhance and extend our partnership so that even more young people benefit. We will reach further into underserved areas by being more intentional about where and how our partnership grows, redoubling our focus on the pupils and communities who need our support the most.

Our goal is to increase our partnership to reach over half a million students each year by 2027, while deepening our impact through continuous improvement and innovation in our school and trust improvement programmes and networks.

In developing our ambitious strategy to achieve this goal, we have drawn on insight and expertise from across our partnership, our board, the education sector and beyond. Thanks to support from the Social Business Trust, we also worked, pro-bono, with a dedicated team at global consultancy Bain & Company. We are very grateful to them all.

As we implement our strategy, we will continue to be guided by the practitioners in our partnership, as well as expertise from our staff. We are committed to doing more to value, encourage and celebrate diversity in all its forms, and will seek ways to engage more practitioners from different backgrounds; to enhance the diversity in our partnership, board and central team; and to play our part in understanding and addressing the systemic challenges faced by different individuals and groups.

## OUR UNIQUE APPROACH TO MUTUAL IMPROVEMENT THROUGH CHALLENGE AND COLLABORATION

What makes Challenge Partners unique is the commitment of the diverse schools and trusts that form our partnership to mutual improvement through reciprocal challenge, collaboration, and the creation and sharing of excellence.

We are united by one mission and six values:

**Our mission is to reduce educational inequality and improve the life chances of all children. Through collaboration, challenge and leadership development, we are working to ensure every school community can benefit from the combined wisdom of the education system.**



**Excellence** We are always looking for ways to improve because we are determined to achieve the best for every child, teacher and leader



**Equity** We treat each other fairly, with trust, care and respect. We seek the best for every child and know that those who have the least need our combined expertise the most



**Collaboration** We listen to, share with and learn from each other, developing our practice together so that every child benefits from our combined wisdom and creativity



**Challenge** We expect the best of ourselves and each other, and value challenge which helps us improve



**Innovation** We use and generate research, we innovate with discipline and evaluate intelligently in pursuit of better outcomes for all children, especially the disadvantaged



**Courageous Leadership** We speak up and take responsibility for all children, making sure that we do not harm others in doing our best for our own schools

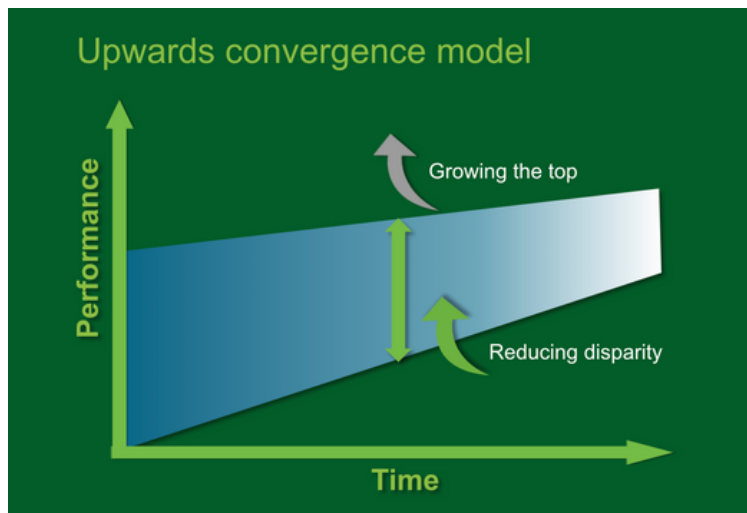
We were founded by practitioners and their leadership is built into our constitution. This keeps us at the cutting edge and enables us to meet the real needs and aspirations of schools and trusts, while keeping excellent practitioners where they should be – in classrooms, schools and trusts.

Education professionals lead our mission, strategy and activities at local, regional and national levels:

- **Board of Trustees** - more than half of our trustees are approved by the partnership with six being current or former leaders in Challenge Partners schools and trusts.
- **Educational Advisory Group** - our standing reference group of school and trust leaders.
- **Senior Partners and Hub Managers** - lead local collaboration and shape our national agenda.
- **Lead Practitioners and Advisory Groups** - support design and delivery of our programmes and networks.
- **Lead Reviewers and Facilitators** - current and former practitioners lead our Quality Assurance Reviews, programmes and networks.
- **Task and Finish Groups** - practitioners brought together to advise on ad hoc pieces of work.

Challenge Partners takes a **systemic approach**, with the aim of achieving upwards convergence in pupil, school and trust performance.

Devised by our founding CEO, Professor Sir George Berwick, our **upwards convergence model** describes how challenge and collaboration in our partnership enables every school and trust to improve. The best are stimulated to rise higher and lower performers improve at the fastest rate.



We're also **systematic**. Four capitals (also devised by our founding CEO) underpin our programmes, networks and knowledge-sharing activities, defining our approach to how excellence is identified and shared by:



- 1 Creating the **moral climate** for knowledge sharing through encouraging commitment to our mission, values and culture of collaboration and challenge.
- 2 Identifying those with **knowledge** of excellent practice and those who need it.
- 3 Equipping partners with the **social** skills to share their knowledge effectively by providing protocols and opportunities to establish credibility and connection.
- 4 Setting up the **organisational** systems to share excellent practice so that it becomes common practice, while reducing the organisational burden on trusts and schools.

We are inspired by learning from business and beyond. We know how important it is to look up and outside of our sector. Our partnership with the Social Business Trust provides us with unrivalled insights from global business leaders.

## OUR STRATEGIC AIM: GROW FOR GOOD

We aim to enhance and expand our partnership over the next five years so that by the end of 2027 over half a million children a year will benefit. We want to grow in underserved areas, redoubling our focus on securing the biggest impact for the disadvantaged pupils who need it most.

We will:

**Expand our reach** by welcoming more new schools and trusts into our partnership, with a particular focus on underserved areas



**Enhance the value** provided to schools and trusts through continuous improvement and innovation of our evidence-informed programmes, networks and knowledge exchange

**Enhance and expand our impact** on children and young people, especially those facing the greatest barriers to success

## OUR FIVE STRATEGIC INITIATIVES

We have identified five strategic initiatives that will help us achieve our strategic aim:

### 1 Improve our Quality Assurance Review (QAR) capacity, systems and processes to build operational resilience as we scale

Practitioner feedback and independent evaluation consistently confirms that our QAR is transformative for the schools reviewed and for the school leaders participating as peer reviewers. School leaders have welcomed recent enhancements to our QAR framework which have sharpened the focus on disadvantaged pupils and those with additional needs. Other changes have provided more opportunities for middle leaders, and raised the bar on what it means to be evaluated a 'leading' school.

The continued success of our QAR programme relies on our ability to schedule hundreds of reviews and thousands of reviewers each academic year. To meet growing demand we will improve and automate the scheduling process, and recruit more expert Lead Reviewers. Schools must also continue to meet their reciprocal commitment to sending leaders out on reviews, and we need to have effective systems to enable and monitor this.

### 2 Enhance our offer through ongoing innovation in our programmes, networks and subscription models

With input from practitioners, we have already identified the next set of innovations we will explore, from enhancing activity on SEND and leadership development, to evolving the way we partner with school trusts. We will continue to work with practitioners across the partnership as we develop and evaluate potential innovations in these areas and beyond.

### ③ Reach and retain more schools and trusts, especially in underserved areas

Challenge Partners has grown to encompass over 500 schools serving more than 300,000 pupils. Much of this growth has been organic, fuelled by recommendations and referrals from existing partners. Advocacy will continue to play an important role as we expand our partnership further, but to extend our impact into new and underserved areas we need to be more intentional in sharing the benefits and opportunities of joining our partnership. We also want to enhance our efforts to ensure that schools and trusts have an exceptional experience with Challenge Partners, including in their local hub, so that remaining in our partnership proves irresistible.

### ④ Build capacity and capability within our central team

In our enthusiasm for directing as much resource as possible to frontline delivery of our programmes and networks, we have historically underinvested in areas like finance, IT and HR. This is a trend within the charity sector, but benchmarking undertaken by Bain & Company in 2022 revealed that, compared to similar charities, we are lagging significantly behind. We will therefore invest in building capacity and capability in these core functions, as well as bringing in new skills in digital transformation. This will enable us to deliver consistently the excellence we strive for, and enhance the experience of Challenge Partners for schools, trusts and our central team.

### ⑤ Prepare for the future

You don't remain outstanding by standing still. This is our constant refrain to schools on our Growing the Top programme and it applies equally to Challenge Partners. We will scan the horizon, seek inspiration from business, and gather feedback from our practitioners to ensure that Challenge Partners continues to meet the needs and push the boundaries of an ever-changing sector.

## OUR FIVE STRATEGIC INITIATIVES: WHAT WE WILL DO

### Strategic Initiative 1: Improve our Quality Assurance Review (QAR) capacity, systems and processes to build operational resilience as we scale

<b>DESCRIPTION</b>	Enhance and expand our Quality Assurance Review (QAR) capacity, systems and processes so that we can smoothly deliver QARs to more schools
<b>DELIVERABLES</b>	<p>Bring new functionality to our subscription and scheduling process so schools can select their own QAR date</p> <p>Explore the feasibility of allowing school leaders to book themselves onto QARs as reviewers</p> <p>Improve communication around reviewer commitment and increase visibility of opportunities to engage with the QAR in different ways</p> <p>Grow the number, geographic spread and phase expertise of our Lead Reviewers so that we have a pool of at least 100 by 2027</p>

**Strategic Initiative 2: Enhance our offer through ongoing innovation in our programmes, networks and subscription models**

<b>DESCRIPTION</b>	Continue to develop and test an innovation pipeline of partnership enhancements to address evolving needs and opportunities
<b>DRIVERS</b>	Development of a process to gather and evaluate ideas to enhance our offer, accepting that we can't do everything  Forging strategic partnerships with others in education and business to enhance our offer and add value to our schools and trusts
<b>DELIVERABLES</b>	Development and management of an innovation pipeline, informed by practitioner insight and horizon-scanning  Robust evaluation of ideas in the pipeline, with a disciplined and efficient approach to experimentation that enables us to determine which innovations are worth pursuing  Identification and development of the key strategic partnerships that will enhance our offer to schools and trusts

**Strategic Initiative 3: Reach and retain more schools and trusts, especially in underserved areas**

<b>DESCRIPTION</b>	Grow the number of schools and trusts within the partnership through a more systematic approach to attracting new schools and trusts, and make it compelling for them to stay in the partnership
<b>DRIVERS</b>	Better identification of, and communication with, prospective partner schools and trusts, including targeted approaches, digital marketing, and advocacy by existing partners  Ensuring partner schools and trusts have an excellent experience of Challenge Partners including gold standard collaboration and support in all hubs; excellence in programme and network delivery; and tailored relationship management for schools and trusts
<b>DELIVERABLES</b>	Increase the number of schools and trusts remaining in and joining the partnership, especially in new and underserved areas

**Strategic Initiative 4: Build capacity and capability within our central team**

<b>DESCRIPTION</b>	Increase our central team capabilities to better serve the partnership and improve the employee experience by automating routine processes and building our operational centre. Bring our investment in HR, facilities and finance functions in line with similar organisations
<b>DRIVERS</b>	Growing central team capability and capacity in finance, facilities, HR and IT and investing in the infrastructure, systems and processes to do them well  Harnessing technology across the organisation to deliver a better experience to partner schools and trusts, reducing manual processing and potential for errors, while allowing staff to focus their time on high-value, impactful activities
<b>DELIVERABLES</b>	Stronger central services  Increased use of technology to support day-to-day operations and innovation

**Strategic Initiative 5: Preparing for the future**

<b>DESCRIPTION</b>	Remain at the cutting-edge of school and trust improvement, ensuring we are focusing on the challenges and opportunities on the horizon, as well as those we face right now
<b>DRIVERS</b>	Practitioner engagement and horizon scanning across education, business and beyond
<b>DELIVERABLES</b>	Disciplined innovation ensuring Challenge Partners remains a courageous leader in school and trust improvement

## ENABLERS

Underpinning our five strategic initiatives, these four enablers will be crucial to the successful delivery of our strategic initiatives:

- 1 **Renewed operating model**  
Ensuring our central team is structured and equipped for growth
- 2 **Digital transformation**  
Implementing technology solutions to enhance our programmes, networks and knowledge exchange, and make operational processes more efficient, such as:
  - Re-design of our online knowledge exchange platform to strengthen the connections between partners and build a trusted source of collective knowledge
  - Streamline QAR scheduling process to deliver a high quality service more efficiently
  - Further automation of financial processes
  - Keep our cyber security current to guarantee information management safety
- 3 **Additional capability**  
Identifying and securing the resources and new skills needed to deliver the strategy
- 4 **Further diversify revenue streams**  
Fundraise to support innovations and the development of new capabilities

## KEEPING ON TRACK: MONITORING, EVALUATION AND REPORTING

To monitor our progress, we will be measuring and reporting to our trustees and practitioner Education Advisory Group on our progress in four key areas:

- 1 **Breadth:** number of schools, trusts and pupils in our partnership, including the proportion of disadvantaged pupils reached
- 2 **Depth:** partnership level of schools in network and take-up of trust programmes
- 3 **Impact:** annual reporting against our existing partnership aims, aligned to our mission:
  - **Aim 1:** Maximise the life chances of all pupils and accelerate the progress of the disadvantaged
  - **Aim 2:** Support leaders at all levels to develop and grow capacity for sustained improvement in schools and trusts
  - **Aim 3:** Extend excellence, shaping a world-class system in which all pupils thrive
- 4 **Financial and internal:** key indicators of organisational sustainability

## WITH THANKS TO OUR PARTNERS AND SUPPORTERS



Artemis is a leading UK based fund manager, which each year gives a proportion of revenues to the Artemis Foundation to manage charitable activities and involvement in the wider world. Staff and the trustees choose which charities will benefit and the foundation supports 'core' charities in the UK and internationally involved in: health; poverty; education and the Environment.



The Fair Education Alliance is a coalition of over 200 organisations which aim to tackle inequality in the education system.



The Garfield Weston Foundation is a family founded charitable grant-making trust which gives money to a range of causes. A consistent theme of the Foundation is the importance placed on support for education and learning, both within formal school settings and lifelong learning projects.



ImpactEd is a not-for-profit organisation working in collaboration with Challenge Partners to support schools in understanding and evaluating the impact of the programmes they run.



Permira Foundation aims to: advance education of young people; prevent and relieve poverty; advance and preserve good health, and prevent and relieve sickness; promote social inclusion by preventing people from becoming socially excluded.



The David & Elaine Potter Foundation support projects promoting reason, accountability and education that will improve understanding, human rights, good governance and a stronger civil society.



Social Business Trust is a charity whose mission is to support high-potential social enterprises and charities to accelerate and sustainably grow their impact, using the high-calibre business expertise and grant funding of their corporate partners.

USEFUL INFORMATION



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