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National College for
School Leadership

Inspiring leaders;
improving children's lives

Leading challenge workshops

A process to support
leadership of local change

*"Never doubt that a small
group of committed citizens
can change the world –
indeed it is the only thing
that ever has."*

Margaret Mead,
local challenge event



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With thanks to:

The challenge workshop facilitation team:

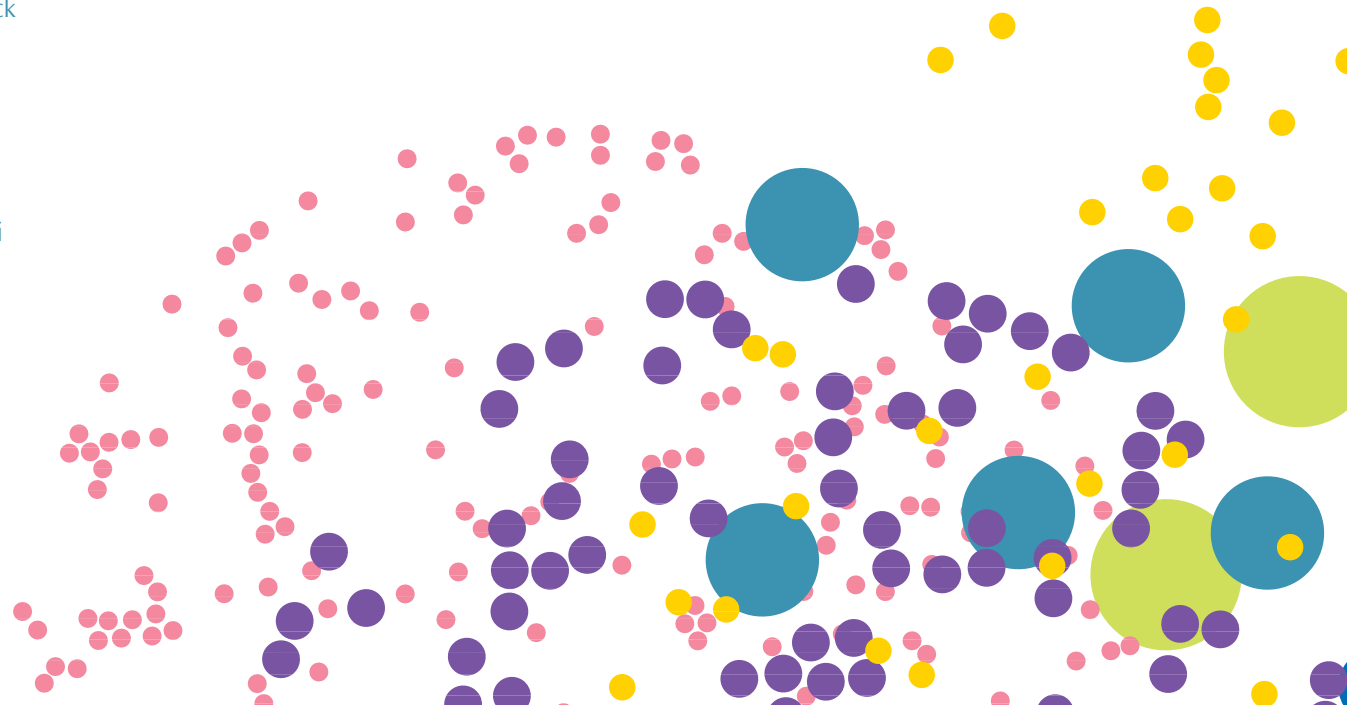
Lynne Walker
Christine Jude
Turkay Mahmoud
Enid Bibby
Mhairi Cameron
Nigel Gann

The challenge workshop participants:

Dave Dunkley
Paul Hanbury
Margaret Wilson
Rahma Samater
Mo Laycock
Diane Dewick
Maurice Hall
Jan Casson
Ian Mather
Nick Dobbs
Geoff Cowley

Kay Mitchell
Lesley Farmer
Richard Baldwin
Claire Atherton
Lisa Williams
Angela Edwards
Carole Birch
John Sailsbury
Kate Folkard
John Howells
Sue Preston
Colin Coleman
Linda Caven
Edwin de Middelaer
John Warren
Brian Odgers
Jeremy Andrew
Anne McCormick
Jo Burnett
David Brindley
Liz Coates
Linda Austin
Bodrul Islam
Kay Lindley
Ghulam Rabani
Lewis Walker
Anthony May
Tim Sheriff
Mark Stenton

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Introduction

This publication is designed to provide you with the tools and techniques needed to run your own challenge workshop. It will take you through the development and design of a workshop, giving you an insight into some of the national and local challenge workshops that took place during the challenge workshop year.

Why use challenge workshops?

Every Child Matters (ECM) offers a unique opportunity to school leaders to reach out beyond the boundaries of their schools to influence the life chances of children and young people and to enhance the impact of the education they offer.

ECM encourages new and more authentic relationships between schools and families, the wider community and other agencies involved in children and young people's lives. It allows schools to influence and address some of the more complex challenges affecting the learning and achievement of the young people they serve.

But this opportunity also offers a challenge. Making the most of ECM and linking it to achievement and attainment involves school leaders in different kinds of conversations and partnerships with individuals and organisations outside school. Conversations in which multiple perspectives and alternate views, sometimes complementary, sometimes opposed, all need to be heard, respected and responded to. All this will be happening in the context of a system of values and beliefs that may not be universally shared, and accountability frameworks that may not be widely understood.

The school leaders and their locality partners who came together to co-plan and develop the **NCSL challenge workshop** series, which forms the basis for this publication, knew that they faced complex challenges. They also knew that the solution to those challenges did not lie 'out there', but could be crafted by themselves and by the people who were most affected by the issue. They began to get behind the assumptions they held about themselves, other agencies and the communities

they serve. They used a challenge workshop approach to mobilise people's energy and commitment around a compelling issue, they explored a range of perspectives and potential interventions and they started to take action.

By creating powerful learning environments, challenge workshops encourage the best contributions from all participants and enable them to work and learn together to tackle a shared issue or challenge.

This publication will take you through the process and help you to set up and run similar challenge workshops


For more ideas and resources to support the leadership of ECM, visit ECM Leadership Direct, NCSL's online open access learning tool at:
www.ncsl.org.uk/ecmleadershipdirect

"Never doubt that a small group of committed citizens can change the world – indeed it is the only thing that ever has."

Margaret Mead, local challenge event – provocation

"Challenge workshops give us a way of working with multiple perspectives, and a range of partners, to address very complex local issues – it has really added depth and commitment to our local work."

Participant: national series, challenge workshops



"We wanted to be part of the challenge workshop series because we know that we can't help our children and families to thrive without 'doing differently', and doing 'it' with others. The challenge workshop methodology gave us a chance to collectively work out the 'it!'."

Participant: national series,
challenge workshops

What is a challenge workshop?

A challenge workshop is a forum for bringing together people with diverse perspectives on a shared issue or problem – **the challenge** – and supporting them through a series of activities and protocols – **the workshop** – to arrive at an outcome that moves their thinking and practice forward. A workshop can last for anything from a few hours to a whole day. Obviously the longer participants can spend together working on their challenge, the further they will go. The process is a formal one, with protocols to structure and support collaboration in new and different ways. Lose sight of the process and the discipline of the protocols and you run the risk of ending up with just another meeting or conference and missing the opportunity to move important issues forward in your locality.

Challenge workshops are:

- highly structured, with clear protocols
- designed to address complex and often unprecedented problems
- designed to engage everyone who can help generate the solution to a shared problem
- driven by the participants rather than by any one individual/organisation
- designed to use live issues, and stakeholder voices to produce realistic and achievable outcomes

The structure and conduct of challenge workshops is based on four key principles:

Experiential learning: challenge workshops support participants to engage with real-life issues and to learn about those issues, within a content-rich setting. Participants work and learn together to understand issues and to challenge behaviours and attitudes that stand in the way of progress.

Modelling learning: challenge workshops support participants to practice the enquiry-based and collaborative learning approaches needed to lead the ECM and Standards agenda, and to deal with complex challenges.

Resisting quick solutions: the challenge workshop process deliberately resists moving to solutions quickly, but provides time to interrogate the challenge and to look at it from a range of perspectives, in order to deepen collective knowledge and lead to better and more sustainable solutions.

Professional learning community: participants in challenge workshops become part of a shared culture, within which colleagues support one another in pursuit of explicit and shared goals. It builds the basis for a far stronger and more effective ongoing dialogue.

Each challenge workshop follows six phases:


- 1 Provocation:** launch the workshop with a contribution from a provocateur designed to open up the challenge, and be challenging and thought-provoking.
- 2 Frame the challenge:** understand its scope and scale, significance and impact. Agree the success criteria for the workshop.
- 3 Engage with the challenge:** gather information from within and beyond the room to deepen understanding.
- 4 Exhibit understanding and new knowledge:** use a range of thinking tools and processes to synthesise emerging understanding.
- 5 Review learning and output:** evaluate their fitness for purpose according to the agreed success criteria.
- 6 Agree actions**

“The challenge workshop methodology appears to be one which is appropriate to the learning of a group of professionals across multi-agency settings.”

Participant review: local challenge event

“As we practiced the stages in each challenge workshop, I began to see the importance of each one. Before I might have jumped the first few, I always have a desire to move quickly to solution and action – but now I know how important they are, particularly when you are bringing a range of people together.”

Participant: national series, challenge workshops

A photograph of a woman and two children working together on a project. The woman, wearing a striped shirt and a headlamp, is leaning over a table. Two children, a boy and a girl, are also leaning over the table, looking at something. The image is overlaid with a green tint. In the bottom right corner, there are several large, colorful dots in shades of blue, purple, yellow, and pink. A yellow circular graphic is positioned on the left side of the image, containing a quote.

“The challenge workshop is a great format but we need to stick to it and practice it, it’s a different and more effective way of dealing with some of our complex issues but we need to stick to the process – because it works.”

Participant: local challenge workshop

What happens at a challenge workshop? A quick step-by-step guide

Set-up phase

This early set-up stage is crucial as it builds and signifies ownership and involvement. Key stakeholders need to work together to frame the challenge, agree the venue for the workshop, agree who will facilitate the event, agree who will be invited and how.

Phase 1: Provocation

The role of the provocateur is to set the scene for the challenge. At the beginning of the event, before the provocateur has been introduced, the group will prepare some questions for him or her. In order to build the learning community it is important that the questions are asked on behalf of the group and not as individuals. The questions and who will ask them are agreed beforehand. This stops 'speech making' and 'soap boxing' from the group in response to the provocateur, and starts to build a sense of shared responsibility.

Phase 2: Frame the challenge

Before commencing their research, the group will spend time working out what the challenge means, the assumptions that underpin it and the questions that are implied by it. The outcome of the challenge will depend on the quality of the question asked. Time spent productively at this stage will enable the group to reap the benefits from the resources at their disposal. The group will then decide who will attend the various sessions that have been organised to help meet the challenge.

Phase 3: Engage with the challenge

This stage will be fast moving as participants move to workshop sessions, question witnesses, draw on the resources among the participants and bring in expertise via online tools. The facilitator's role is to make sure that participants' findings are recorded on a flip chart and to ensure that momentum is maintained. Participants will be encouraged to look at the findings as they begin to emerge so that they can begin to identify any patterns, themes or key points within the evidence.

Phase 4: Exhibit understanding and new knowledge

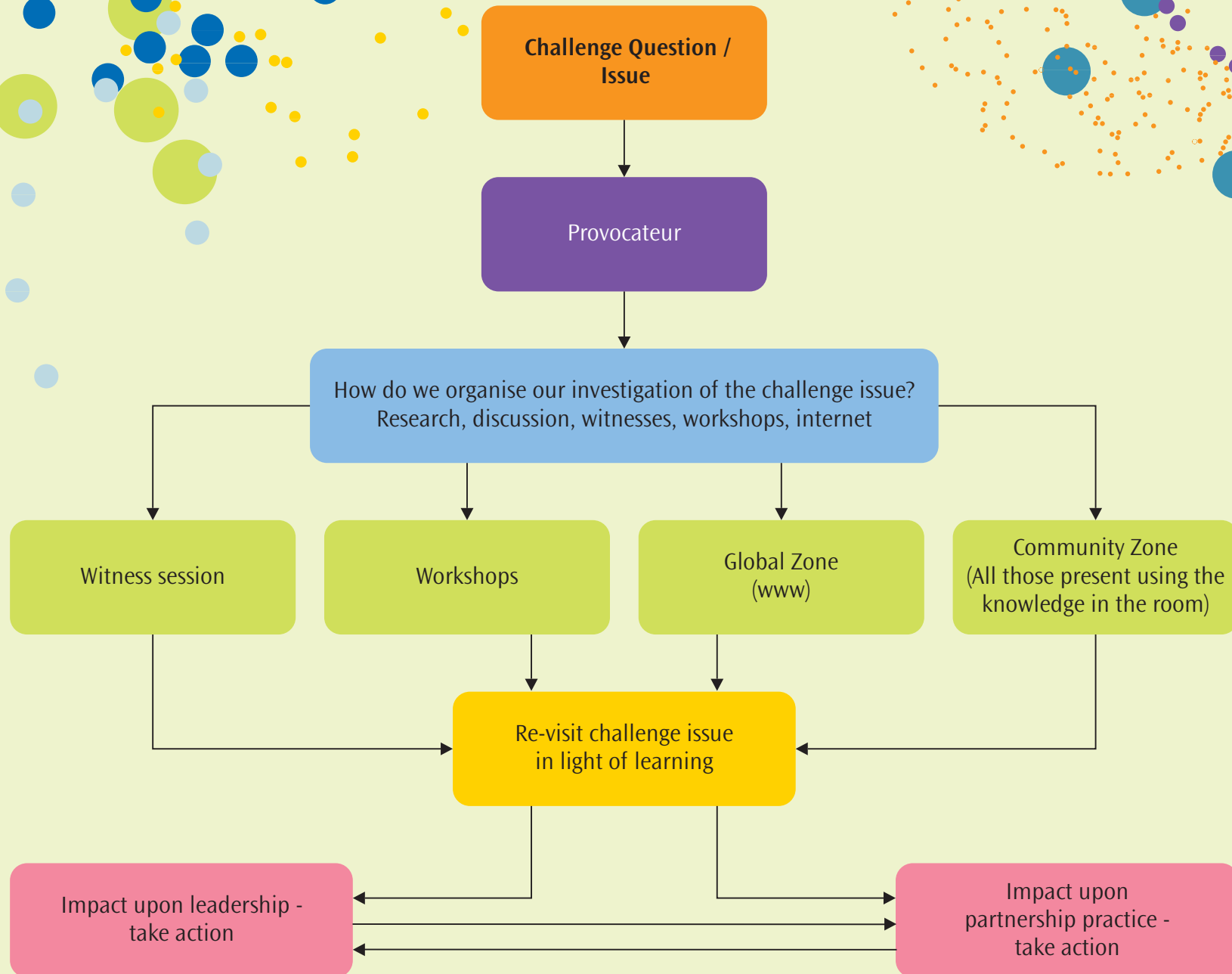
Each group will now re-assemble and will group their findings by identifying common patterns and themes in the evidence they have gathered. They will decide which of their findings are the most significant and summarise them using the following headings:

- Three recommendations
- Three points for action
- Three implications for leadership

Phase 5: Review learning and output and move to action

Each group will report back in plenary where the overall response to the challenge can be gauged and discussed. Actions will be recorded at this point.

The challenge workshop group will now decide 'what next'.



Exploring the phases in more detail

Get the challenge right

Identifying an appropriate challenge to be the focus of the workshop is critical to its success. This means dealing with difficult issues that are important and relevant to all the participants who attend. So the challenge is best identified by a group who is as representative of the participants as possible and not led by one sector or individual. If the challenge is collectively owned, then the workshop will work well. If it is not, participants will pay lip-service to the process.

Next you need to ensure that the challenge is carefully framed so that it can structure and sustain the workshop. Too tight and the challenge is not really a challenge; too loose and you run the risk of the group losing their way.

The challenges are deliberately provocative. They are likely to surface a range of responses. They raise an issue that identifies everyone as being part of the problem but more powerfully, contributing to the solution. There will be heated discussion, and there may well be conflict, but with skilled facilitation there will be a solution and a commitment to collective action.

Local challenges have included the following:

“Transition or trauma: do our transition arrangements serve the needs and well-being of learners, or simply reflect the structures of our organisations?”

“How do we work together to reduce teenage pregnancy in Sheffield?”


“How do we work collaboratively to keep children in school and prevent multiple, long-term and permanent exclusion?”

“It takes a whole community to raise a child – what needs to happen for us to regenerate Cornish community life?”

“Partnership working, a burden or an essential ingredient on the journey to high-quality collaboration for improved outcomes for young people.”

“How can our small learning community model enhance the life chances of families?”

“How do we work together to co-develop, lead and deliver a vision of children’s services for our area?”



“My way or the highway: is multi-agency collaboration a myth or a step on a journey to working differently in Queen’s Park and local schools?”

A local challenge

Invite the right participants

The ‘right participants’ are those who will recognise the challenge and will want to work together to address it. Good questions to ask yourself in planning the workshop are:

- Who are the people most concerned with/affected by the challenge?
- Who will be key to achieving and acting on the outcomes?
- How can I get a diverse range of voices in the room?

Try to strike a balance. You will want to create a community at the workshop that is as diverse as the wider community it seeks to represent. This will mean that the challenge is scrutinised and worked on by the fullest range of stakeholder perspectives and areas of expertise. On the other hand, trying to make the workshop actually representative may make it too big, too expensive and too difficult to get off the ground.

The minimum number of people at a workshop, from our experience, is 18. This allows for three groups of six participants to work together throughout the workshop. The maximum number of participants for group activities is eight. The total number you should therefore try to deal with is 80. With 80 people you would have 10 groups running, which is a significant investment in resources and facilitation.

When you send your invitation, make sure you let participants know why they have been chosen to attend and that this will be an interactive and energetic workshop, so they come prepared to contribute. Share with them the challenge and how and by whom it has been chosen. Be honest and optimistic about what you hope the workshop will achieve.

And on the day, think about the welcome: ‘meeters and greeters’, music and pastries all help!

“Workshop participants are being invited not simply to benefit from the day, but as a vitally important resource of colleagues able to make a significant contribution to the workshop.”

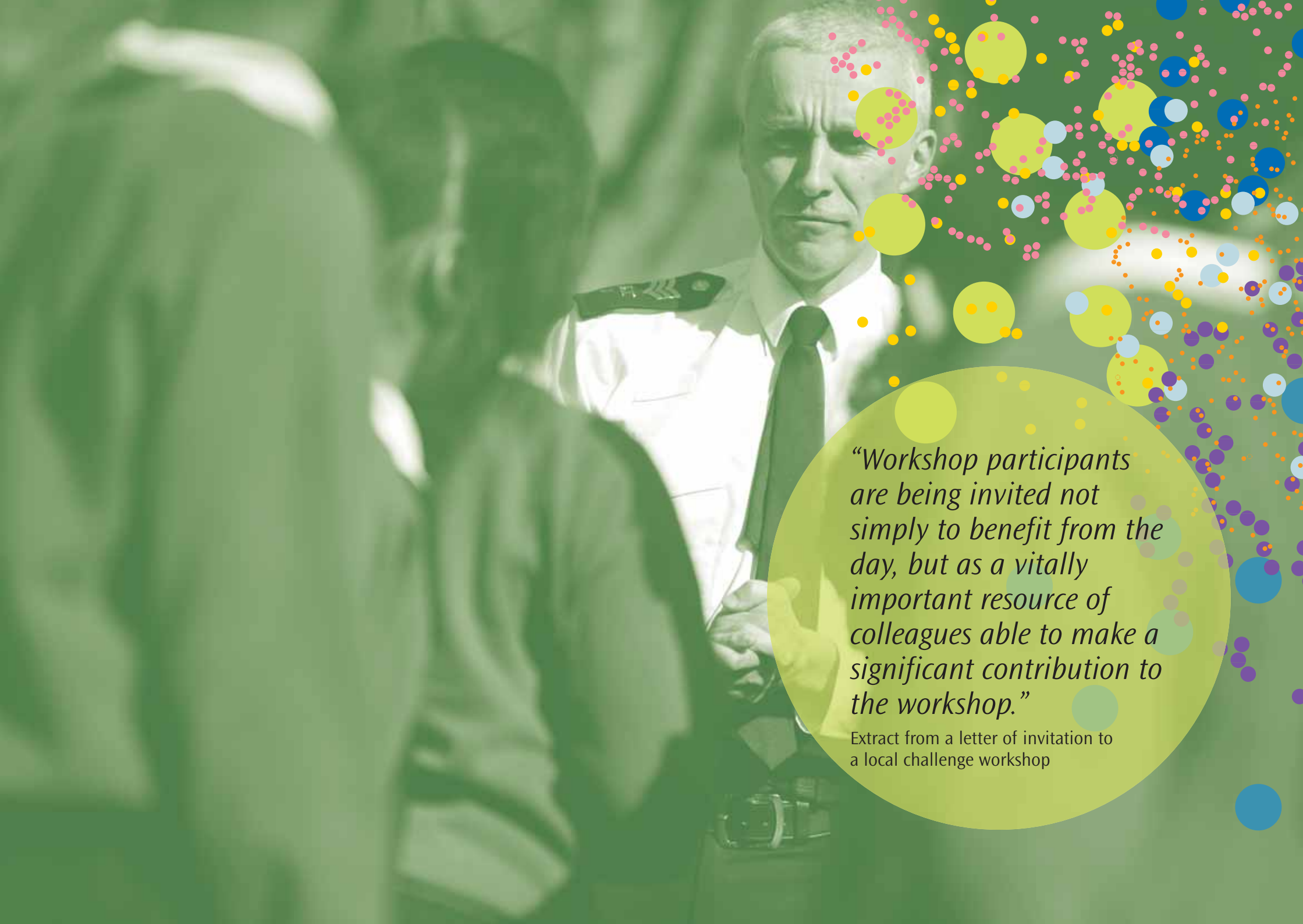
“This is a workshop that is different, and we believe can make a significant contribution to our understanding of the issue and to our professional practice.”

“We believe that a spin-off from this day will be that colleagues will make use of this methodology in their own institutions and teams in the future.”

Extracts from an invitation to a local challenge event

“The meeters and greeters were great – they made such a difference.”

Participant: local challenge workshop



“Workshop participants are being invited not simply to benefit from the day, but as a vitally important resource of colleagues able to make a significant contribution to the workshop.”

Extract from a letter of invitation to a local challenge workshop

Phase 1: Get the provocation right

Great provocation happens when the provocateur sets the tone for the event that challenges, inspires, disturbs and energises participants by exploring the challenge from new and unexpected viewpoints.

The role of the provocateur is not to offer solutions, but to open up the challenge and leave it bare and exposed for participants so they can move in and start to work with it. The facilitator needs to set this up carefully, and introduce the provocateur well, so that if participants react strongly to the provocation, they are prepared for how that makes them feel, and they understand and accept this as part of the process. Prior to the provocation groups are invited to think about questions they want to ask. The questions are then shared across the groups and the 'high leverage' questions decided on.

Whom you choose as your provocateur and how you brief them is an important ingredient in the overall direction that the workshop will take. A good provocateur will:

- offer an authentic perspective grown from knowledge and experience of issues raised by the challenge
- balance 'big picture' insights and understanding with engaging stories of local change
- be optimistic, ambitious and forward thinking
- be accommodating of and resilient to challenge from participants

Above all, your brief to the provocateur should emphasise the need to be provocative. Moderation and compromise come later – this is the moment to really push the boundaries of participants' thinking.

Here are some questions that have been successfully used by facilitators in a brief to help provocateurs think about their presentations, at a series of national seminars in 2006/07:

- What have you a burning desire to say?
- What is your take on the challenge from your perspective?
- What personal/professional experience do you have of this challenge?
- What drives you to change the system in relation to this challenge?
- What would you change in order to help you succeed?

And think about different ways of provoking...

Use evidence

'Why can't we do it better, quicker, together? Just look at the statistics. Many agencies are involved and the cost of failure is too high for everyone.'


Challenge the partnership

'Partnerships can be a crucible for learning, and offer a platform for professional development. Is this how we enter them or do we see them as merely masking competition in the area? What needs to change for them to be communities of professional practice?'

Expose unacceptable mind sets

'If we do not do this work carefully we will reinforce the view that "they are the victims".'

Provocation statements – local challenge workshops

A smiling man wearing a dark jacket with a white collar and a baseball cap with 'WORK' on it. He is gesturing with his right hand. The image has a green overlay and is decorated with a large yellow circle containing text, and a bottom section with many small, colorful dots in purple, blue, yellow, and pink.

“The Year 11 drama group were great as a provocation – can we ask them to roll out their performance to other audiences across the city?”

Participant: local challenge workshop

Phase 3: Engage with the challenge

Having considered the provocation and got to grips with the challenge, participants spend the majority of the challenge workshop moving between four 'zones' where a range of resources (people, information, tools and processes) are available to support them in meeting the challenge. As group members visit their agreed zone/s they will be learning and enquiring on behalf of the group, and using the group's questions to frame their engagement.

The witness zone

This is an opportunity to hear about the challenge from multiple perspectives. It is most powerful where those who use the service are given an opportunity to share their experience. It allows children, families and young people to have a voice in the event, for instance to talk about how it feels to be excluded or marginalised or unable to access services. The witness zone can work equally well as a face-to-face session or via speakerphone. It needs to be well facilitated so the questions asked are framed in a way that makes them clear and easy to understand.

The witness zone ends with the witness being thanked and leaving the session and the participants reviewing the insights and the learning.

The practice zone

The practice zone takes the form of mini workshops. This is an opportunity to showcase good practice or to explore a particular approach or methodology that will help address the challenge. The workshops are interactive with clear learning outcomes linked to the challenge.

The workshop presenter needs to begin the workshop by asking 'What questions about this workshop have you brought on behalf of your group?'.

The global zone

The global zone allows for web access to search out relevant policy documents, good practice and helpful research. NCSL talk2learn can be used to set up ongoing conversations on the challenge with a global audience. This is an open access zone for groups to visit on a drop-in basis.

The community zone

This is designed to honour the expertise in the room, and to give people a chance to share their skills and knowledge. Post-its on a display board 'advertising' individuals and what they bring to the challenge is a good way of demonstrating and building the community zone, as is asking people to complete a pen portrait beforehand that is then displayed at the workshop. Providing 30 minutes for participants to host a conversation at their table on an element of the challenge is another.

The community zone can be generated through an activity such as a 'human treasure hunt' that participants can do as an introductory activity. This can cover any area that gets people talking, such as:

Find someone who:

- has worked in the area for more than 10 years

- is a newcomer to the area
- grew up in the area and can tell you what it was like
- can offer some expertise on the challenge
- is optimistic for the future and can tell you why
- has a particular skill they want to share today

Zone 1: Barnardo's

Zone 2: New mums

Zone 3: Year 11 students

Three witness zones: local challenge workshop

"People like us find it hard to talk to people in authority."

Witness statement: local challenge workshop

The role of community groups in regeneration

Young people and their wider world

A locality approach to achieving the five outcomes

The theory of collaborative advantage – what is in it for us?

Practice zone workshops: local challenge workshop

Work together to 'design a child' – who is currently in reception class and will be leaving secondary school in 12/14 years time. What will they be thinking, feeling saying and doing?

A community zone activity: local challenge workshop

Example of a pen portrait used as an information source in a community zone:

A pen portrait for Jane Smith

Your job title and role:

Parent

Your interest in the topic of the challenge:

- *Planning requiring multi-agency involvement*
- *Features that distinguish effective transition from transfer*

What do you believe to be your role in transition planning and actions?

As a representative of a learner with specific needs I can relay an experience and story of transition and expectations

Is there anyone you are particularly looking forward to meeting with at the challenge workshop to exchange information and views?

As I do not know many people involved, I am keen to meet them as a group to hear what each has to say about their role and how it all comes together

How can people contact you?

Telephone:

Email:



Phase 4: Exhibit understanding and new knowledge

Each group will now re-assemble and will group their findings by identifying common patterns and themes in the evidence they have gathered. They will decide which of their findings are the most significant and summarise them using the following headings:

- Three recommendations
- Three points for action
- Three implications for leadership


Additional questions can test out the findings:

- 1 Which of these outcomes did you expect to see?
- 2 Is there anything surprising from what you see?
- 3 What about omissions – what is not there that you would have expected to see prior to this workshop and why do you think that is?

In order to secure some key actions please ask colleagues to consider the following:

- 1 What are the implications for leadership at a local level that have emerged from your enquiry?
- 2 How can we improve our partnership working so that outcomes for young people are maximised and community needs in situ are recognised and addressed?
- 3 What are the key messages for leaders at all levels and across all services?
- 4 What actions will you commit to as a result of this workshop?

Facilitator prompts: local challenge workshop



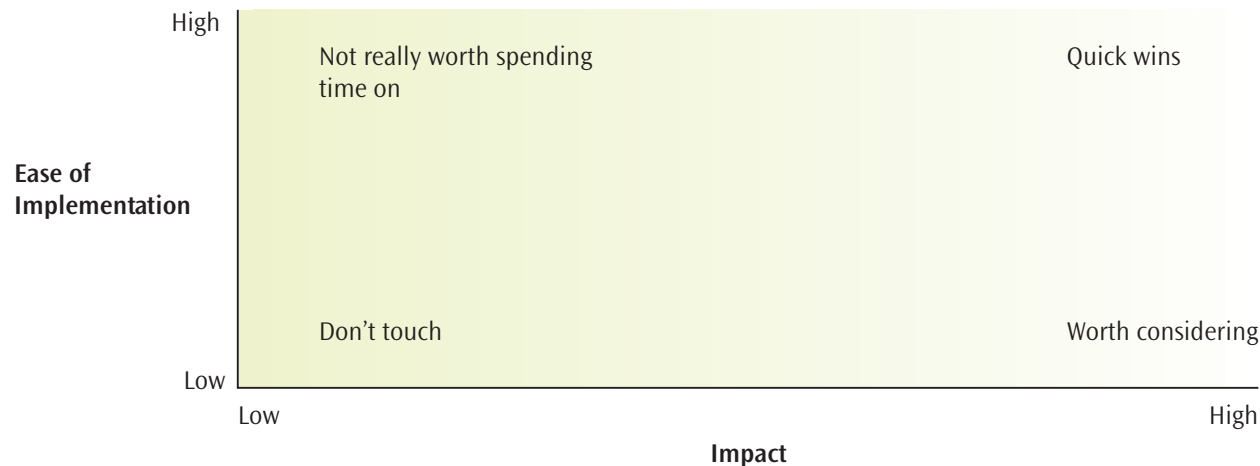
*“It was mind
blowing how much
information and
evidence the group
gathered.”*

Participant: local challenge workshop

Phase 5: Review learning and output and move to action

The group then selects a group member to report back in plenary where the overall response to the challenge can be examined. If key actions are recorded action by action on individual post-its prioritising the actions can be done collaboratively through inviting participants to move them within a grid.

At this stage names can be put against actions. In order to get a sense of collective responsibility participants can be asked to write their name next to an action and to nominate the name of a colleague against a further action



"People had worked so hard that we had masses of recommendations at the end which was great but daunting! But when we prioritised them a number of them were ones we could do almost immediately, they were in the top right-hand quarter. This gave us a real sense of achievement and confidence to tackle the more complex and longer-term actions."

Participant: local challenge workshop



“There was a sudden realisation that people can make a difference and it doesn’t need to take you years.”

Participant: local challenge workshop

What about timing?

09.00	introduction
09.30	provocateur
10.00	questions to provocateur
10.20	coffee
10.35	the challenge; introduction
10.40	group interrogation of the challenge
11.10	visits to witness zone and learning zone
11.40	community zone – hosted conversations
12.15	lunch
13.00	visits to witness zone and learning zone
13 30	introduction to Phase 4
13.35	group discussion and learning summary
14.20	feedback from groups
14.40	movement to action
15.30	finish

A timetable: local challenge workshop

Conclusion

Challenge workshops are one way of maximising all the assets in a locality to build solutions to complex local challenges. They also model a collaborative, open-minded, evidence-based and enquiry approach to achieving better outcomes for children and families. They have helped some localities who felt stuck, and unable to make progress. They have helped others to achieve a more positive trend in previously worrying statistics. They have helped groups to talk and work together who found it difficult before. They have created a sense of optimism in local people as change agents.

“It was mind blowing how much information and evidence the group gathered.”

“I was really sceptical at the beginning but we got to a great outcome together – I didn’t think we would do this but we did.”


“The community is the resource, we don’t have all the answers – I see that now.”

“We have progress at last!”

Participants: local challenge workshops

We would be delighted to hear about challenge workshops you have run as a result of this publication. This methodology will be developed and improved on by you and your partners and we look forward to learning from your experience.

Please email us at: ecmandstandards@ncsl.org.uk

A young boy with dark hair is smiling and looking down. The image has a green overlay. A yellow circle on the left contains text. The bottom of the image is decorated with various colored dots (blue, yellow, purple, white, orange, pink) of different sizes.

“Taking part in the challenge workshop has challenged the views of the participants. They now want to enter into a dialogue with the community rather than take the more traditional approach of – let’s form a committee and then move into action.”