Department for Education

Can behaviourally informed communications increase applications, and appointments, to System Leadership roles?

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Executive Summary

In September 2016, the Department for Education (DfE) commissioned the Behavioural Insights Team (BIT) to investigate how behavioural insights could help to facilitate a school-led improvement system. This investigation led to the trial reported on here. The purpose of this trial was to test the impact of behaviourally-informed messages on applications for, and take up of, the National Leader of Education (NLE) and Teaching School (TS) programmes (collectively but not exclusively, 'system leaders').

This publication provides a summary of:

- The background to the trial, the hypotheses and outcome measures, and methodology
- How the exploratory work informed the development of the interventions
- The nature of the intervention, how it was delivered, and the results.

Key Findings

The effectiveness of the intervention was tested in a Randomised Controlled Trial (RCT). The numbers of applications and appointments for the group that received the intervention were compared to the group that did not receive the intervention (the 'control' group). For the target behaviours, the trial intervention:

- Increased the number of NLE applications, and appointments
- Had no statistically significant effect on the number of applications or appointments to the TS role.

The treatment group (who received the behaviourally informed intervention) were more than twice as likely to be appointed an NLE.[1] If the entire sample (2,051 schools) had received the treatment, an additional 16 NLEs would have been appointed, compared to the entire sample receiving standard (business as usual) communications about the system leader programmes. However, the conversion rate for both NLE and TS (proportion of applications that went on to be successful) was lower for the group that received the intervention compared to the control group. The increase in the number of applications led to additional work for DfE staff in reviewing applications in this application cycle and more schools spending time on applications that were then unsuccessful, an important consideration alongside the results of the trial.

[1] Please note that this effect is statistically significant at the 10% level.

Background

The DfE is working to further develop a school-led improvement system. The principle behind this is that schools should learn from other schools, drawing on best practice within the sector, with the intention of ensuring effective coverage of school improvement support so that any school in need of support can access it.

System leaders are school leaders who work with schools outside their own, to provide school-to-school support. The DfE operates a designation process for system leader programmes based on meeting eligibility criteria of academic performance, including Ofsted ratings, skills of the applicant and the track record of providing school to school support. Two of the designations which provide school to school support are:

- **National Leaders of Education (NLEs)** are school leaders who have experience in effectively supporting schools in challenging circumstances. The National Leader of Education (NLE) status is held by the headteacher, with their school designated a national support school (NSS).
- **Teaching Schools (TS)** are strong schools led by leaders that work with others to provide high-quality training, development and support to new and experienced school staff.

Methodology

First, exploratory research was completed in the form of (i) policy research and a literature review; and (ii) semi-structured interviews. This exploratory research informed the development of intervention materials.

Second, the intervention materials were then tested in a RCT. The sample in the trial was split into two groups. One group, the 'control' group, received the business as usual communications from DfE. The other group, the 'intervention' group, additionally received the intervention developed by BIT and DfE.

Target Behaviours and Research Hypothesis

The overall hypothesis of the research was that:

> *Behavioural insights, which tailor the communication of opportunities to apply for system leadership programmes and streamline the application process, encourage more headteachers to apply to become designated as a NLE and/or TS, increasing appointments to these roles.*

Interventions were designed to increase two outcomes:

1) Applications for a system leader role - NLE or TS
2) Appointments to a system leader role - NLE or TS

Intervention Exploration and Development

Exploratory research was conducted to inform the development of the intervention materials. The activities included:

- Reviewing existing policy research
- Conducting semi-structured interviews with 6 headteachers, 8 senior leadership team members and 10 classroom teachers across 6 schools in 4 school districts (including 2 Opportunity Areas[2] (OAs))

The policy research and semi-structured interviews highlighted a few key themes which informed the development of interventions that aim to encourage system leader applications.

First, the interviews found that these potential system leaders had some reservations regarding the additional workload the role entails and rarely discussed these reservations with current system leaders. Hearing from another school that had successfully taken on the role may therefore be an effective strategy. If headteachers see that similar schools and heads have navigated such challenges successfully, they might be more inclined to submit an application.

Second, the policy research indicated that some headteachers were concerned by opposition from their governors. Therefore, an encouraging message from a chair of governors at a school currently operating as a system leader may also be an effective strategy.

Third, the interviews revealed that while many headteachers had a strong intrinsic sense of duty to support other schools, the status of a system leader role was also appealing. Receiving encouragement from a trusted and respected figure in the education profession could therefore effectively motivate headteachers to submit an application.

These findings suggested that targeting schools with the potential to undertake system leader roles with messages from (i) another school that had already taken on a system leader role and (ii) a respected figure in the education profession, could be an effective strategy.

[2] Opportunity areas are identified by the DfE as the most challenged when it comes to social mobility. They have been given access to funding to address the biggest challenges they face. https://www.gov.uk/government/news/social-mobility-package-unveiled-by-education-secretary

Trial Implementation

This trial tested the impact of behaviourally-informed messaging to headteachers and chairs of governors (that academic performance data suggests are strong candidates) on application to, and take up of, the NLE and TS programmes.

The intervention comprised two letters/emails:

1. **Peer-to-peer**: A letter of encouragement from headteachers currently operating as system leaders. The letters outlined the benefits to the school of taking on a system leadership role (NLE and/or TS) and drew on behavioural research showing that people are more responsive to suggestions that come from messengers who are like them. Concurrently, the chairs of governors at target schools[3] were also sent letters of encouragement from their counterparts at schools operating as system leaders.

2. **Exclusive invitation**: An email and letter from Teaching Schools Council (TSC) representatives or Regional School Commissioners (RSCs) inviting headteachers to put themselves or their schools forward for the NLE and/or TS role. The invitation was designed to convey the exclusivity of the role to appeal to the self-esteem (or 'ego' in behavioural science terms[4]) of the recipient,emphasising that a special effort was being made to recruit them. Pre-filled application forms were also provided to reduce friction in the application process, making it easier to apply.

Conclusion

The results of this trial demonstrate that behavioural insights can be used to help facilitate a school-led system by increasing the number of NLEs. Specifically, providing encouragement from peers and an exclusive invitation from a respected figure in the education system has been shown to increase applications and appointments for the NLE role. However, this intervention did not statistically significantly increase applications and appointments for the TS role.

The results of the trial support consideration of the roll-out of this approach to stimulate the supply of NLEs. Delivery of the trial identified further opportunities to improve the targeting of the intervention and the conversion rate to ensure that DfE staff time is used as efficiently as possible and that schools do not spend time on applications that are unlikely to be successful.

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[3] Target schools are schools targeted by the intervention to apply for a system leader role (NLE or TS).
[4] Please note 'ego' is the commonly used behavioural term in this context, the research team are not making judgements on the personalities of the sample.

1. Policy Context, Objectives and Methodology

The purpose of this research was to test the impact of behaviourally-informed messages on applications to, and take up of, the National Leader of Education (NLE) and Teaching Schools (TS) programmes (collectively but not exclusively, 'system leaders'). In this section, the policy context and challenge are outlined. The measurable behavioural outcomes targeted by the interventions are then stated.

1.1 Context

The Department for Education (DfE) is working to further develop a school-led improvement system. The principle behind this is that schools should learn from other schools, drawing on best practice within the sector. This is especially challenging in areas of lower social mobility, where there are fewer high performing schools available to spread best practice.[5]

1.1.1 National leaders of education

NLEs are school leaders who have experience of effectively supporting schools in challenging circumstances. NLEs work alongside TS and other system leaders to provide high quality support to those who need it most. The NLE status is held by the headteacher, with their school designated a National Support School (NSS).

NLEs usually work with schools identified as being in need of significant improvement by the DfE, Ofsted, a TS, a Regional Schools Commissioner (RSC), local authority or diocese. The work is varied and is tailored to the needs of the school being supported, but usually involves a part-time staff placement (NLE or NSS Senior Leadership Team member), delivery of training, and management assistance.

NLEs who are approached for support, negotiate a deal to provide services with the commissioning local authority, school or other organisation. NLEs and/or their NSS staff are expected to undertake a placement at least once over the course of a year, supporting a headteacher and their school. The length and type of work can vary significantly.

[5] Further detail on this is available in Annex 2.

1.1.2 Teaching Schools

Teaching Schools work to provide high-quality training, development, and support to new and experienced school staff. Teaching Schools have an important role to play in a school-led system and school improvement, with a role focussing on:

- co-ordinating and delivering high quality school-based ITT (Initial Teacher Training)
- providing high quality school-to-school support to spread excellent practice, particularly to schools that need it most
- providing evidence-based professional and leadership development for teachers and leaders across their network.

1.1.3 Recruiting system leaders

Although a change in the eligibility criteria has unlocked more supply,[6] DfE wishes to enhance recruitment activities to widen the coverage of school improvement support so that any school in need of support can access it.

1.2 Methodology

First, BIT completed exploratory research in the form of (i) policy research and a literature review; and (ii) semi-structured interviews. This exploratory research informed the development of intervention materials.

Second, the interventions were then tested in a Randomised Controlled Trial (RCT). The sample in the trial was split into two groups. One group, the 'control' group, received the business as usual communications from DfE. The other group, the 'intervention' group, received business as usual communications from the DfE, as well as the intervention developed by BIT and DfE.

1.3 Target behaviours and measurable outcomes

The purpose of this research was to test the impact of behaviourally informed messages on applications, and appointments, to the NLE and TS programmes (collectively, 'system leaders').

[6] DfE broadened the criteria so that those with an Ofsted rating of Good can apply.

To achieve this objective, the research team chose to focus on increasing applications and successful appointments to system leadership programmes (NLE and TS).

Table 1: Target behaviours and measurable outcomes

Primary Outcomes
(1) Applying for a system leader role (NLE or TS)
(2) Appointment to a system leader role (NLE or TS)

1.4 Structure of the report

The structure of this report is as follows:

Chapter 2: Exploratory Research and Intervention Development

This chapter summarises the exploratory work undertaken to inform the development of the interventions. It then outlines how learning from the exploratory work and wider evidence from the behavioural insights literature informed the development of the interventions.

Chapter 3: Trial Implementation and Results

This chapter provides details of the trial intervention and how the trial was operationalised. It goes on to explore the results from the intervention on the number of applications and appointments to two system leader programmes (NLE and TS).

Chapter 4: Conclusion

This chapter summarises the key findings from the research and considerations in regard to future application of the learning from the trial.

2. Exploratory Research and Intervention Development

To change people's behaviours, the attitudes, beliefs or practical considerations underlying them must first be understood. Exploratory qualitative work was conducted to develop this understanding and to inform the design of the interventions. This involved:

- Reviewing existing policy research
- Conducting semi-structured interviews with 6 headteachers, 8 senior leadership team members, and 10 classroom teachers across 6 schools in 4 school districts (including 2 Opportunity Areas (OAs) selected at random).

2.1 Reviewing existing policy research

This section provides a brief review of relevant research concerning how headteachers make the decision to apply to become a system leader. The review identified limited research on system leadership designations and insufficient learning about the behavioural barriers to application, prompting further qualitative research.

While there is some research concerning the operation of both NLE and TS programmes, there is relatively little evidence on what motivates or acts as a catalyst for headteachers to apply for these designations.

Gu et al. (2015) found that a strong altruistic mission and commitment to meeting local needs motivated the headteachers that they interviewed to apply to lead Teaching Schools. They also highlight that, in some cases, becoming a TS is perceived as a next step for those already active in providing initial teacher training (ITT), school to school support (StSS) and continuing professional development (CPD). However, this study involved only two Teaching Schools, who were amongst the first to be designated, and it is possible that their motivations and catalysts have changed over time.

Evidence from surveys provides some further context. A 2010 online survey (Hill, 2011) of headteachers[7] asked participants to rank motivations for pursuing system leadership roles. The belief that the experience would improve their school and hasten personal development was the most popular response (Hill, 2011). There was no meaningful difference in the motivations stated by current and potential system leaders. Additionally, in a survey of NLEs conducted by the NCTL in 2014[8], 70% of teachers cited the opportunity to support challenging schools as their first or second motivation to become a

[7] 404 respondents – 216 current system leaders and 188 potential system leaders.
[8] 336 NLEs participated in the survey of the 868 invited.

TS, with 65 percent indicating that becoming a TS simply formalised a role they were already completing (NCTL, 2014b).

While informative regarding general attitudes towards system leadership, this research reports relatively little on why some headteachers do not apply for system leader designations, even when eligible. The only study identified that addressed low application rates, pointed towards governor opposition as a key barrier. Governing body were reported to be concerned that headteachers and senior leadership team (SLT) deployments to other schools could jeopardise school performance (Hill & Matthews, 2008a; Hill & Matthews, 2008b).

BIT judged the current evidence to be inadequate to sufficiently understand the barriers to applying for system leadership. This knowledge gap informed the decision to undertake further qualitative research prior to developing intervention ideas; the design and findings of which are presented below.

2.2 Qualitative research methodology

In this section, the fieldwork methodology is described. The sample consisted of schools located in areas where DfE had identified a need for more TS and NLE support (including in OAs). Structured interviews were conducted in person with each school's SLT and teachers about system leadership. A further set of relevant interviews were conducted with non-school organisations[9].

2.2.1 Sampling process

To ensure that a diverse range of schools were interviewed, 5 school districts were selected from across the country for the fieldwork. All 5 were in the bottom 50% of educational attainment and improvement capacity indicators, and 2 were OAs (Oldham and West Somerset).

In each district, schools were selected to participate in the research on the basis of NLE and TS eligibility.[10] Schools were invited to participate by DfE in December 2017 via direct email to headteachers, or the listed school enquiry address. Due to a low response rate to these invitations, further contact via local authorities and education partnerships that were interviewed as part of this project was required. It is possible that the schools recruited were systemically different from those that would have been recruited if DfE were rolling out the trial, since the schools that were involved had previously worked with

[9] Organisations that provide training, support or guidance to schools
[10] Data allowing us to identify these schools was received in mid-November 2016.

BIT on prior projects and so are perhaps more proactive than other schools. However, as the original recruitment strategy did not yield any schools that could be compared to the sample, this hypothesis could not be tested. Additionally, the schools that both BIT and DfE approached were eligible for system leader roles and therefore similar on observable characteristics, somewhat mitigating this risk.

Despite this change in sampling process, interviews were secured with 6 schools which formed a diverse set.[11] They were spread across all districts bar Northampton, recorded a median eligibility for Free School Meal (FSM) share of 24%,[12] were a mix of local authority (LA) maintained, academy and faith schools, and varied in their interest and participation with system leader designations.[13]

In each school, interviews were conducted with headteachers and members of the SLT to explore views on system leadership. In total, 6 headteachers, 8 SLT members (either assistant or deputy heads) and 10 more junior teachers with 1 to 6 years classroom experience were interviewed.

Interviews were also conducted with key school-to-school relationship brokers in each area (i.e. The Somerset Challenge), as well as bodies with an ethos of promoting an ambition for attaining a position of school leadership (i.e. Teach First). These interviews were conducted in an unstructured format and were not coded and analysed alongside the in-school interviews. To ensure conversations were candid, viewpoints are not attributed to any specific organisation.

2.2.2 Qualitative interviewing and analysis procedures

For the interviews in schools, the research team adopted a standardised interviewing approach to ensure insights could be easily tabulated across schools. Interview topics and questions explored the gaps identified in the literature. Interviews were semi-structured to allow flexibility and provide the opportunity for the interviewer to divert or probe the interviewee ‘off-script’. This enabled the capture of themes and nuances mentioned by the interviewee which were not previously included in the framework (Rabionet, 2011).

[11] BIT originally targeted 10 schools for interview, but only 6 that met NLE and TS Ofsted eligibility were recruited.
[12] The national average is 14.3 percent (DfE, 2016).
[13] For a full description of the characteristics of each school, see Appendix 1.

The interviews were conducted in person on the school site. Headteacher interviews averaged 60 minutes, with SLT interviews running for 35 minutes and junior teachers interviews for 12 minutes.

After the interviews had been conducted, they were transcribed and coded for analysis. Using a qualitative software programme[14], the analysis then compared and contrasted the thematic coding across the different cases (Bazeley, 2013).

2.3 Qualitative researching findings

In this section, the cross-cutting findings from the fieldwork are presented. These are presented by highlighting first the ways in which headteachers differ in their attitudes towards system leadership designation and, second the beliefs which appear consistent across the headteachers in the sample. As the qualitative research involved a limited sample, the findings cannot be robustly generalised to the general population of headteachers.

The purpose of the qualitative research was to inform the design of the intervention materials. As such, underlying behavioural barriers that might be amenable to interventions are noted and potential interventions are further elaborated on later in this section.

2.3.1 Contrasting attitudes to designation

In order to understand what behaviourally-informed interventions might drive system leader designation applications, BIT sought to explore the contrasting attitudes of interviewed headteachers towards system leader designations.

Some of the interviewed headteachers acted quickly to become an NLE or TS once eligible. These headteachers were comfortable with their autonomy in a school-led system and had planned accordingly.

In one such school, the executive headteacher and headteacher had a clear vision of building the school into a regional hub by embracing opportunities made available in the shift to a more school-led system. Their outreach was motivated by a desire to improve provision in feeder schools and nurseries, contribute to the local area, develop staff, and maintain viability of both the original school and their new multi-academy trust (MAT).

[14] The qualitative software programme used was Dedoose.

In another school, the headteacher described applying for both roles as a result of receiving an Outstanding rating from Ofsted. The school is currently working to establish a MAT with two other schools in their federation, with an ambition to open a free school nearby.

This suggested that some headteachers may not need to be coaxed into applying; for them, the opportunity to apply, and information about the process and criteria can be proactively sought out. Once they have the Ofsted grade, academic performance, and track record necessary, they will apply for NLE and TS designations. Such schools might be more responsive to light-touch interventions, but should probably not be where efforts are focused.

Some of the interviewed headteachers reported that they might apply for a system leader role if they believed the duties of the designation aligned with their interests and expertise. This mindset appears most relevant to the TS designation, as it involves a far greater commitment. This suggested that for headteachers with these beliefs, reassurance about alignment with their interests and expertise could encourage them to apply.

One headteacher was an NLE leading a school rated Outstanding by Ofsted in a deprived area with a high English as an Additional Language (EAL) intake. Their strong record of StSS, CPD provision and ITT suggests that becoming a TS is achievable, but at the time of the interview, the headteacher was not interested due to the perceived hassle of running an ITT programme involving Schools Direct.

Though schools may be under the misapprehension that the TS duty to provide ITT must be fulfilled by operating a Schools Direct programme, the wider issue of TS duties being too broad for some schools was raised by the RSC interviewed and one education partnership lead.

Another headteacher held reservations around becoming a Teaching School, specifically around the level of staff time it would absorb and the direction it would pull the school in.

Views collected from these interviews suggested that for some headteachers, the need to provide the full range of TS services can be a barrier to headteachers applying for designation. This is a structural issue for DfE to consider, but the qualitative research suggests that many schools would be attracted to a more modular approach to designation, which would allow partial fulfilment of some TS responsibilities, perhaps for the first few years of operation. This would allow schools to tailor their application to their capacity. Schools who are apprehensive about resourcing requirements could start here and build their way up to more comprehensive engagement.

Another way to achieve this might be to better promote and assist the formation of job-share TS roles or the joining or founding of multi-Teaching School alliances, an avenue one headteacher said they were interested in pursuing.

Friction in the process of applying to become a TS (understanding a more complicated application process, search cost of finding partner schools, negotiating the division of duties, etc.) may act as a barrier. Behavioural insights also suggests that social proof that these barriers can be overcome might help here. If headteachers see that similar schools and heads have navigated such obstacles successfully, they might be more inclined to submit an application.

Some headteachers interviewed were eligible for system leader designations, but had refrained from applying as they viewed ‘the badge’ as unnecessary to their current work or priorities.

One school was working collaboratively with a Teaching School Alliance (TSA) to provide ITT and was also a Local Leader of Education (LLE). The headteacher could not see any benefit from becoming a NLE as they were not seeking additional StSS work, and were frustrated that they would have to apply for a new designation just a few years after being made an LLE.

The headteacher of another school explained that they had only made an NLE application after pressure from their TSA. They predicted the impact of being designated an NLE would be negligible.

Potentially, headteachers who hold this attitude will only apply if their perception of the benefits of engaging with such programmes change. Again, drawing on the persuasive power of peers or respected figures may be useful here. Such schools could be communicated with via their peers, or even using personalised and exclusive targeted invitations.

Some headteachers interviewed were willing to take on the work of a TS or NLE, but their school did not meet track record criteria at the time of the interview.

One such headteacher was interested in becoming a NLE, and while the Ofsted and academic performance criteria were met, they did not have the StSS record to make a successful application, specifically with respect to supporting challenging schools.

They reported that finding opportunities to support challenging schools had been difficult because other headteachers do not believe that the head of an Outstanding school in an affluent area has much to offer such schools.

For some of these schools, it could be possible for them to acquire the track record required to be successful. Such schools may require clearer signposting towards the

behaviours that are required. Where building the required track record is a challenge, such schools might find it helpful to be connected with other schools who have negotiated these challenges successfully.

2.3.2 Common themes

In this section, views of system leadership that were common to the majority of headteachers interviewed are presented. Whereas the viewpoints raised above related to the NLE and TS designations specifically, in this section school collaboration and support in general are also considered. Where a comment is unique to the NLE or TS programmes, this is made clear. For each theme, behavioural insights that might leverage these findings when designing the interventions are identified, with more detail provided in Section 2.5.

(i) Invigorating challenge

Participation in collaboration and support arrangements was seen as an invigorating experience for both headteachers and other staff involved. The headteachers interviewed were all quite long serving, and taking on NLE or TS responsibilities (or pursuing similar roles outside of formal designation) was viewed as a way of keeping things fresh.

This indicated that successful headteachers with longer tenure may be particularly willing to take on broader system responsibilities, as when they feel they have 'mastered' leading a school they may be less concerned about their own capacity.

(ii) Learning opportunity

Collaborating with other schools was perceived to deliver training benefits at both a headteacher and wider school level.

As many schools articulated a fear of seeing results decline due to StSS deployments, this suggested there may be merit in reminding schools that supporting other schools can also lift their own results.

(iii) Moral obligation

Schools often reported a sense of moral obligation as part of the wider school system to engage with other schools who were struggling in order to benefit the education system as a whole.

This aligned with the 2014 NLE survey (NCTL, 2014b), which found that the opportunity to support challenging schools was seen as the number one reason to become an NLE. To leverage this insight, headteachers could be invited to reflect on the educators that have helped them in the past, before prompting them to identify the schools that face

similar barriers which they could help in the future. This intervention leverages 'reciprocity' - the behavioural phenomenon where people are more likely to act favourably towards those that have acted favourably towards them.

(iv) Capacity concerns

Some schools were concerned that collaboration means sacrificing scarce time and resources, which might have a detrimental effect on the education of their own pupils.

Whilst a valid concern, few schools actually decline in performance once designated. As mentioned in *(ii) Learning Opportunity*, headteachers of potential NLE and TS target schools could be reminded that fulfilling a StSS can lead to improvements in their own school.

(v) Concerns of governing boards

Although no headteacher raised disapproval from school governors as a barrier to becoming an NLE, one headteacher said this had happened to other heads they knew.

This suggested that sending messages to governing boards that counter potential concerns could be fruitful.

(vi) Budget

Generally, budget was not viewed as a factor that influenced engagement in collaborative activities with other schools. However, budgets were mentioned as a potential barrier in terms of making financial decisions regarding engagement in professional development opportunities offered or becoming a TS.

Similarly to the 2014 NLE survey, limitations in staff capacity seemed to provide a significant barrier to engaging in further collaboration. Financial concerns were not cited as a major concern for schools in the NLE survey but were mentioned as a barrier to becoming a TS by one headteacher interviewed. As per the comments on capacity, this indicated potential benefits from emphasising the long run positive impact of designation on school prestige, the wider education system and school expertise.

2.4 Implications for intervention development

The policy research and semi-structured interviews highlighted a few key themes which then informed the development of interventions to encourage applications to system leader programmes.

First, the interviews suggested that potential system leaders have some reservations regarding the additional workload the role entails and also rarely discuss these reservations with current system leaders. Hearing from another school that has successfully taken on the role may therefore be an effective strategy. If headteachers saw that similar schools and heads had navigated such challenges successfully, they might be more inclined to submit an application.

Second, the policy research indicated that some headteachers may be concerned by opposition from their governors. Therefore, an encouraging message from a chair of governors at a school currently operating as a system leader may also be effective.

Third, the interviews revealed that while many headteachers had a strong intrinsic sense of duty to support other schools, the status of a system leader role was also appealing. Receiving encouragement from a trusted and respected figure in the education profession could therefore be an effective way to motivate headteachers to submit an application.

2.5 Interventions for trial

The rationale for the different components of the trial intervention are detailed below. This combines the underlying behavioural research and findings from the semi-structured interviews. Details of the final trial design and how this was delivered are provided in Section 3.1 and examples of the behaviourally-informed intervention letters are provided in full in Annex 5.

2.5.1 Peer-to-Peer intervention

This part of the intervention drew on findings from policy research, qualitative fieldwork and the behavioural science literature. These are explored below.

(i) Harness the enthusiasm of successful system leaders

Schools have been found to be most receptive to the views of other schools. There was therefore an opportunity to use the enthusiasm of existing system leaders to maximise the impact of recruitment efforts. For example, successful system leaders could be asked for testimonials or to help with recruitment, especially at times when their enthusiasm is likely to be at its highest.[15] Previous BIT research has found that timely advice from

[15] For example, this might be when schools receive a good or outstanding judgement from Ofsted, exam results are published, teachers complete training at a TS or at the conclusion of a successful engagement with another school.

someone similar, who has now carried out the desired behaviour, has been successful. For example, in a trial for DfE, BIT found that a hand-signed letter of encouragement from a Russell Group undergraduate, who the recipient could identify with, encouraged Year 12s to apply to more competitive universities.[16] Timely encouragement, from the right messenger, can also be effective.[17]

Input to the trial: It was decided that part of the intervention would involve peer-to-peer messages from headteachers already engaged in delivering system leadership.

(ii) Enlist school governing boards

As much as the content of a message is important, often the source of that message is as well.[18] BIT's research and fieldwork suggest that concerns that school governing boards have over their headteacher assuming an NLE role, and being deployed outside of the school, may stop some headteachers from applying. Though past DfE communications to governing bodies have included information about the potential benefits to pupils from schools engaging in StSS work,[19] it is possible that such messaging might be viewed with some skepticism. On the other hand, the exact same message delivered by a fellow governing body may be more influential, as the board could be perceived to be putting the interests of their own school's students first, and to view system-wide needs as a secondary issue. BIT has used 'messenger' interventions like these successfully in the past. A trial targeting charity contributions from investment bankers found that an emailed request from the CEO more than doubled the proportion of bankers donating a day's salary (BIT, 2015a).

Input to the trial: It was decided that the intervention would include a communication from the chair of governors of a school already designated as a system leader, to a chair of governors of a prospective applicant school, to reinforce the messaging sent from headteacher to headteacher.

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[16] http://38r8om2xjhhl25mw24492dir.wpengine.netdna-cdn.com/wp-content/uploads/2017/03/Encouraging_people_into_university.pdf

[17] For more information about using timely moments effectively, see Chapter 4 of BIT's EAST publication: (BIT, 2015c)

[18] For more information on how varying the messenger can alter the reaction to a message, see the Messenger section of the Institute for Government's MINDSPACE report: www.instituteforgovernment.org.uk/sites/default/files/publications/MINDSPACE.pdf#page=19

[19] Website (now unavailable): 'Information for governors on the NLE/NSS programme' See page 85 of Hill & Matthews (2008b).

Summary of intervention

Peer-to-peer: Letters drawing on behavioural research showing that people are more responsive to suggestions that come from messengers who are like them.

The intervention targeted both the headteacher and the chair of governors:

- A letter of encouragement from a headteacher currently operating as a system leader to a fellow headteacher. The messages outlined the benefits to the school of taking on a system leadership role (NLE and/or TS).
- Concurrently, the chairs of governors at target schools were also sent messages of encouragement from their counterparts at schools operating as system leaders.

2.5.2 Exclusive invitation intervention

This intervention drew on findings from BIT's policy research, qualitative fieldwork and the behavioural science literature. These are explored below.

(i) Emphasise the exclusivity of an opportunity

Emphasising the exclusivity of an opportunity by saying how *tough criteria are and how few schools are eligible* may encourage applications. Conveying a sense of praise and recognition to the eligible school and emphasising the sense of moral purpose (which school heads already report that they feel) could help to encourage applications for system leader roles.

BIT has successfully used exclusivity to improve engagement with government programmes in the past. For example, BIT found that businesses were more likely to take up free consulting services when told that they had been selected on the basis of eligibility criteria (BIT, 2015a).

Input to the trial: It was decided that the intervention would be authored by respected figures in the education sector so that headteachers would feel a sense of praise and recognition.

(ii) Headteachers could feel a clear and visible sense of invitation

Previous research suggests that informing people that they have purposefully been selected, can be effective in motivating a desired response. In two trials where BIT sent individuals a message emphasising they were uniquely selected, positive responses increased significantly (BIT, 2016a; BIT 2015b). In this context, the letter could be framed in such a way that headteachers feel a clear and visible sense of invitation.

Input to the trial: It was decided that intervention letters would target schools based on their potential eligibility to apply for system leadership programmes, in order to give schools a clear and visible sense of invitation.

(iii) Make use of personalisation and reciprocity

Personalising a message invites the reader to take notice of the content, and can prompt a reciprocal duty to consider the message due to the perceived effort taken to prepare it. In one experiment which measured survey completion rates, surveys with a handwritten post-it note detailing survey instructions saw double the completion rate of surveys without the handwritten post-it (Garner, 2005)

Additionally, there was an opportunity to draw on reciprocity to prompt application completion by partially pre-filing a system leader application form, which also has the effect of removing friction from the application process.

The behavioural science literature shows that people have a strong instinct to reciprocate a gesture.[20] In a trial BIT ran with Jobcentre Plus, BIT found that sending job seekers a text notification about an upcoming recruitment event with a personalised greeting (Hi James..) and a reciprocal ending (I've booked you a place. Good luck, Matthew) raised attendance from 10.5% to 26.8% (Sanders & Kirkman, 2014)

Input to the trial: It was decided that schools should be sent a personalised invitation to apply for system leader roles.

Summary of intervention

Exclusive Invitation: Messages from TSC members or RSCs inviting headteachers to put themselves or their schools forward as NLEs and/or TS.

In practice, this took the form of:

- A letter (also sent in email form) inviting schools to apply was designed to convey the exclusivity of the invitation to appeal to the self-esteem (or 'ego', in behavioural science terms[21]) of the recipient (emphasising that a special effort was being made to recruit them), and
- Pre-filled application forms were also provided to reduce friction in the application process, making it easier to apply.

[20] For more information about the use of reciprocity in behavioural insights, see section 3.2 of BIT's EAST publication (BIT, 2015c)

[21] Please note 'ego' is the commonly used behavioural term in this context, the research team are not making judgements on the personalities of the sample.

2.6 Options for the trial

Once the interventions were identified, there were a range of possible configurations for a trial. These included:

1. Picking one intervention and testing it in a RCT, with one group receiving the chosen intervention and the other group receiving only business as usual communications from DfE.
2. To combine the interventions and test the combined approach in a RCT, with one group receiving the combined intervention and the other group receiving only business as usual communications from DfE.
3. Testing both interventions in a RCT, with the first group receiving the peer-to-peer intervention, the second group receiving the exclusive invitation intervention and the third group receiving only business as usual communications from DfE.
4. Testing both interventions individually, and the combined approach in a RCT, with the first group receiving the peer-to-peer intervention, the second group receiving the exclusive invitation intervention, the third group receiving the peer-to-peer and exclusive invitation interventions combined and the fourth group receiving only business as usual communications from DfE.

All of these options were considered, but ultimately the decision made was to combine the interventions and test the combined approach in a RCT (option 2). It was agreed that combining the intervention messaging strategies in this manner provided the greatest possible chance of detecting a rise in application rates for a given sample size. Due to the light-touch nature of the intervention, the advantage of this approach was that it would maximise the chances of detecting a statistically significant effect. Learning from previous trials conducted by BIT, it was felt that the interventions would be complementary and work in the same direction, if they had any effect at all. However, this combined approach meant that the results would be unable to ascertain exactly which messaging or strategy drives any changes observed, only the effect of a combined approach. The importance of this is reduced by the minimal cost of intervention, even in a combined approach.

3. Trial Implementation and Results

3.1 Trial design

3.1.1 Hypothesis

The overall hypothesis of the research was that:

> *Behavioural insights, which tailor the communication of opportunities to apply for system leadership programmes and streamline the application process, encourage more headteachers to apply to become designated as a NLE and/or TS, increasing appointments to these roles.*

3.1.2 Interventions

This trial tested a messaging campaign to headteachers that data suggests were strong NLE and TS candidates.[22] Messaging consisted of two separate interventions:

1. **Peer-to-peer:** Letters of encouragement from headteachers currently operating as system leaders. These messages outlined the benefits to the school of taking on a NLE and/or TS role. These letters drew on behavioural research showing that people are more responsive to suggestions that come from messengers who are like them. Concurrently, the chairs of governors at target schools were also sent messages of encouragement from their counterparts at schools operating as system leaders.
2. **Exclusive invitation:** Messages from Teaching School Council (TSC) representatives or Regional School Commissioners (RSCs) inviting headteachers to put themselves or their schools forward as NLEs and/or TS. The letter (also sent in email form) inviting schools to apply was designed to convey the exclusivity of the invitation to appeal to the self-esteem (or 'ego', in behavioural science terms[23]) of the recipient (emphasising the effort being made to recruit them). Pre-filled application forms were also used to reduce friction in the application process, making it easier to apply.

[22] The research team could identify the likelihood of eligibility but could not sample for track record or years in post.
[23] Please note 'ego' is the commonly used behavioural term in this context, the research team are not making judgements on the personalities of the sample.

3.1.3 Intervention development

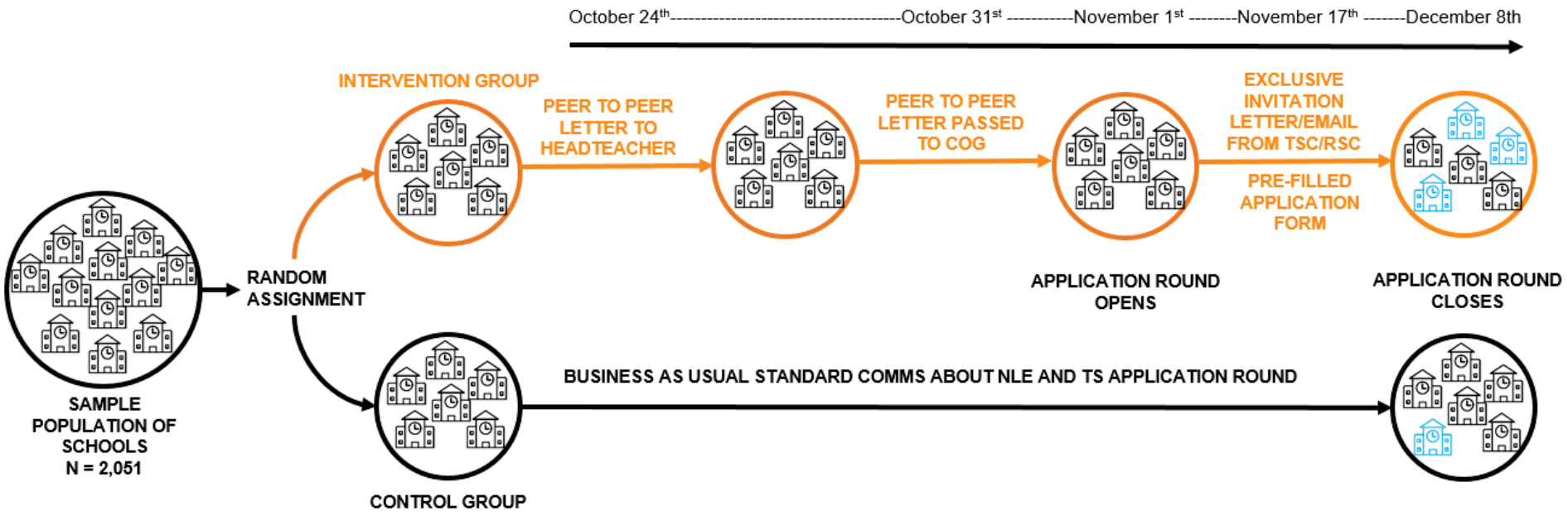
Peer-to-peer: BIT drafted letters for headteachers and chairs of governors. As the research team wanted these messages to include a 'personal touch' BIT asked headteachers and chairs of governors to reflect on their own experiences in the letters. The letter signatories did this, and as a result there were three pairs of letters that were all slightly different. See Annex 5 for an example of a final intervention letter.

Exclusive invitation: BIT also drafted letters/emails for TSC members/RSCs. Because these letters were to be sent in the name of these individuals, they were invited to edit the content. In general, these authors did not edit these messages significantly. See Annex 5 for an example of a final intervention letter/email.

3.1.4 Trial design and rationale

The diagram below illustrates the trial design, highlighting the difference between the experience of the group that received the intervention and the group that did not. There is a full description of this process in the following section.

Figure 1: Trial design



As Figure 1 shows, this trial was a RCT, randomised individually at the school level. First, the ‘Sample Population’ schools that either strictly met or were close to meeting the criteria to assume system leadership roles based on Ofsted (Good or Outstanding overall rating) and attainment data (above average value-added scores) were identified. The strict attainment criteria was for schools with consistently high levels of pupil attainment and progress measures that were above national averages in each of the last 3 years, and stable or rising. In the majority of cases, the schools in the sample did not meet or exceed all the attainment criteria. For the purposes of the trial and with approval from DfE, BIT relaxed the eligibility criteria for schools to be included in the sample to be just below the standard performance requirements. This was necessary in order to increase the sample size to give the research team a reasonable chance of detecting an effect. There were 2,051 schools in the sample.

BIT then randomised the schools into 2 groups. One group (the intervention group) received both the peer-to-peer messages intervention and then the exclusive invitation intervention in two separate letters/emails. The other group (the control group) received neither intervention. The number of schools in each of these groups applying for and successfully being appointed to system leader roles (NLE or TS) were then observed to determine the impact of the combined intervention. For visual purposes, hypothetically successful applications/appointments have been highlighted in blue in the diagram on the previous page.

Combining the intervention messaging strategies in this manner provided the greatest possible chance of detecting a rise in application rates for a given sample size. Due to the light-touch nature of the intervention, BIT thought it was necessary to maximise the chances of detecting an effect. BIT also felt it was likely that the interventions would work in the same direction, if they had any effect at all. However, this combined approach meant that the research team were unable to ascertain exactly which messaging or strategy drives any changes observed. It should also be noted that as the control condition received no communications above DfE’s standard promotion campaign, a simple reminder email or letter which did not leverage the behavioural insights described above could have been as effective as the combination of interventions tested in this trial.

The intervention aimed to focus on schools in target areas - those identified by the DfE as having high potential for benefiting from more system leaders. In some cases, additional schools located on the peripheries of these target areas were included, in order to increase the sample size to give a reasonable chance of detecting an effect. This approach was informed by data on the average distance to school in receipt of school-to-school support.

3.1.5 Outcome measures

The process for obtaining designation involved schools and headteachers submitting applications for the system leader programmes. Once the application round was closed, applications were reviewed by DfE officials and successful schools and headteachers gained designation to system leader roles, either NLE or TS.

The primary outcome measures were:

1. Applications to system leader programmes (NLE or TS)
2. Appointments to system leader roles (NLE or TS)

Secondary outcome measures included:

3. Applications to NLE programme
4. Applications to TS programme
5. Successful applications to NLE programme
6. Successful applications to TS programme

3.1.6 Description of data

Format: Data came in the form of excel files from DfE's record system.

Data merging: The following files had to be merged to conduct the analysis:

Separate TS application record files:

- These consisted of 5 files that logged applications for each of the 5 'types' of TS application. They contain data for every school that started an application, and a variable that indicates whether the application was completed.

Separate NLE application record files:

- DfE provided this data split into 'submitted' and 'unsubmitted' tabs.

Trial arm allocations: to identify trial arm assignment of schools

- This dataset contained all school information and trial arm assignment. The school information (pupil number, % FSM share, phase, etc.) was provided by DfE and goes slightly beyond what is contained in Edubase. Trial arm assignment was generated when the trial commenced in September 2017.

Each record above included a school Unique Reference Number (URN), which allowed for merging across datasets to occur.

3.1.7 Summary statistics

Summary statistics are reported below for key variables. In total, 2,053 schools were randomised in this trial, and after dropping 2 closed schools from the sample there were 2,051 observations.

Almost half of the sample (46%) are located inside a target area, and for those outside a target area the average distance from a target area is less than 6 miles. In the sample, 35% meet the strict eligibility criteria to be designated a system leader. As the criteria to be designated a system leader are fairly demanding, and the required focus on target areas narrowed scope for inclusion in the trial, application of the criteria was softened slightly to help achieve the required sample size. For this reason, 65% of schools in the sample do not strictly meet the eligibility criteria. Regarding Ofsted ratings, 36% of schools in the sample achieved an 'Outstanding' rating, the remainder were rated 'Good'. Schools in the sample have on average 10.7% free school meal (FSM) students, below the national figure of 14%.[24]

3.2 Resourcing requirements for intervention materials

This section outlines the process used to identify the letter intervention authors and how the letters used in the intervention were produced.

The research team estimate that it took 19 days of staff time to develop the interventions for the trial. In any potential rollout, it is likely that these time requirements will be shorter, as authors have already been contacted and are now familiar with the process.

3.2.1 Peer-to-peer

The following steps were taken:

1. BIT worked with DfE to identify headteachers currently operating as NLEs and TS, as well as their chairs of governors (CoGs). The aim was to have a headteacher and CoG for each RSC region but this was not possible due to time constraints. Instead, pairs of headteachers and CoGs covered their own and neighbouring regions.
2. BIT worked with headteachers and CoGs to draft and edit peer-to-peer letters.
3. Drafted letters were sent to DfE officials for further editing and approval by DfE.
4. Letters were mail-merged, printed and sent to recipients.

[24] Statistical First Release 28/2017, 29 January 2017, accessed at: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/650547/SFR28_2017_Main_Text.pdf

3.2.2 Exclusive invitation

The following steps were taken:

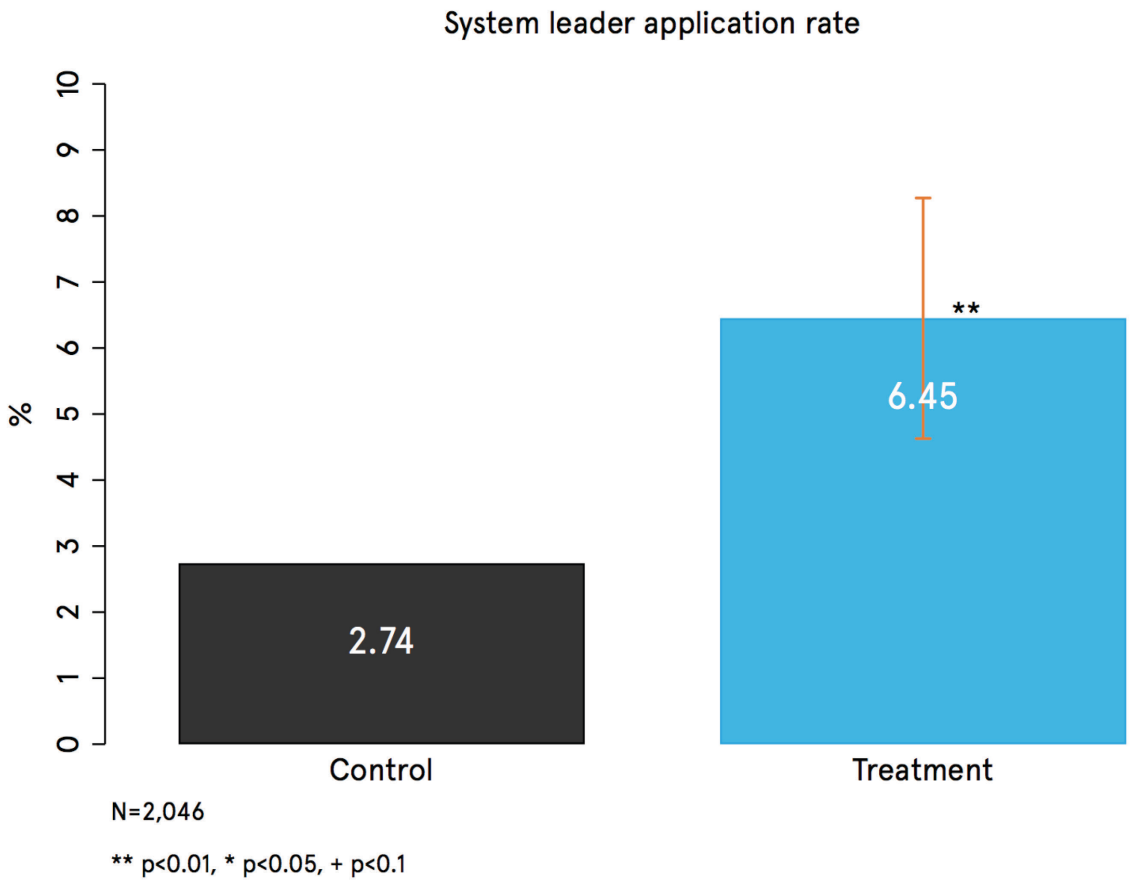
1. DfE identified the TSC members and RSCs that the research team needed to speak to in each region.
2. DfE put the identified TSC members and RSCs in touch with BIT.
3. BIT worked with TSC members and RSCs to draft the exclusive invitation letters and edit them.
4. Letters drafted by BIT were sent to DfE officials for further editing and approval.
5. The list of letter recipients was sent to TSC members and RSCs for approval.
6. Letters were mail-merged, printed and sent to recipients.

3.3 Results

In this section, results of the intervention on application and appointment rates are presented. As per the analysis plan in BIT's trial protocol, 'pooled' results (i.e. results for NLEs and TS combined) are presented first, followed by 'subgroup analyses' of NLEs and TS separately.[25]

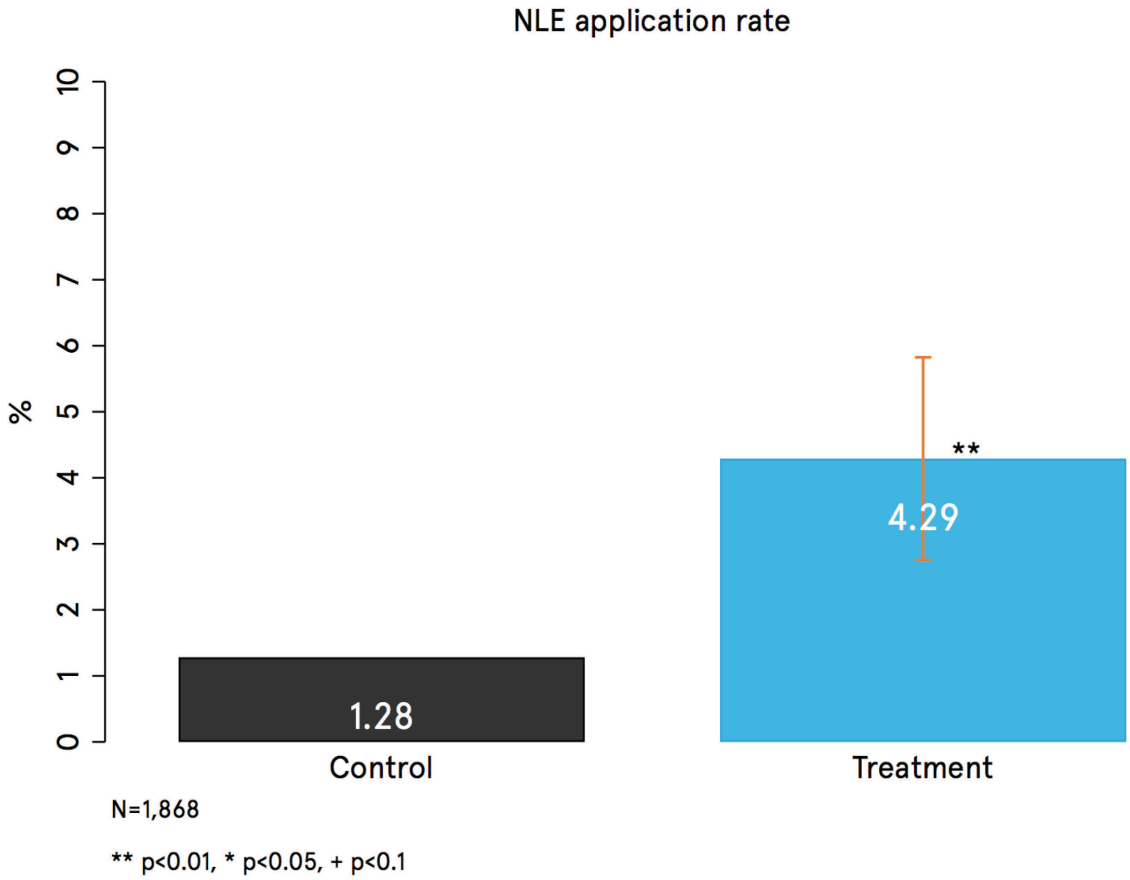
[25] Please note the intervention is only described as having an impact if the result is statistically significant at the 5% level, i.e. there is less than a 5% chance of the result occurring by chance.

Graph 1: System Leader Application Rate



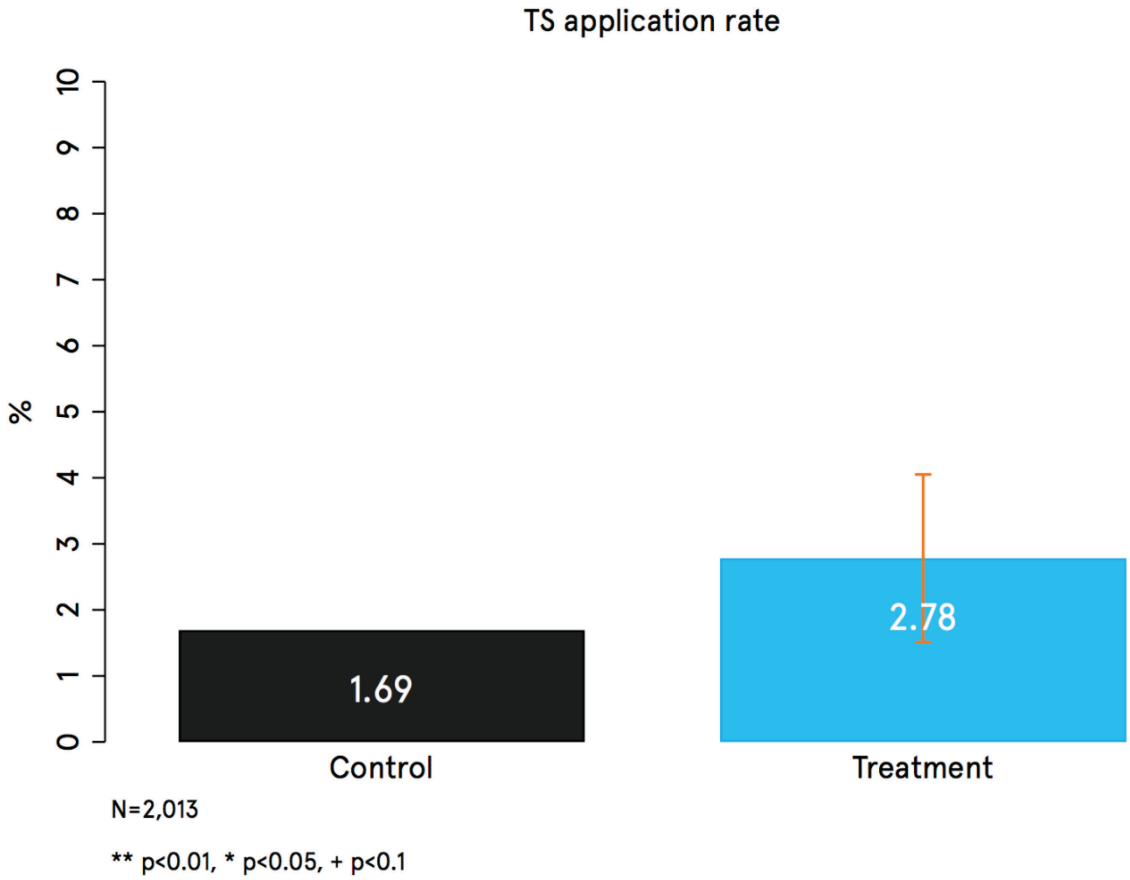
The trial demonstrated that the intervention increased the number of applications for system leader roles, when analysing outcomes for NLE and TS together. The treatment group were more than twice as likely to apply for a system leader role, when analysing results for NLE and TS applications together (6.45% of the treatment group applied for a system leader role, compared to 2.74% of the control group). If the entire sample had received the treatment, an additional 76 system leaders would have applied, compared to the entire sample receiving the control. Please note that as this is a pooled analysis it cannot tell us whether the intervention worked for both NLEs and TS. This is explored further in the subgroup analyses.

Graph 2: NLE Application Rate



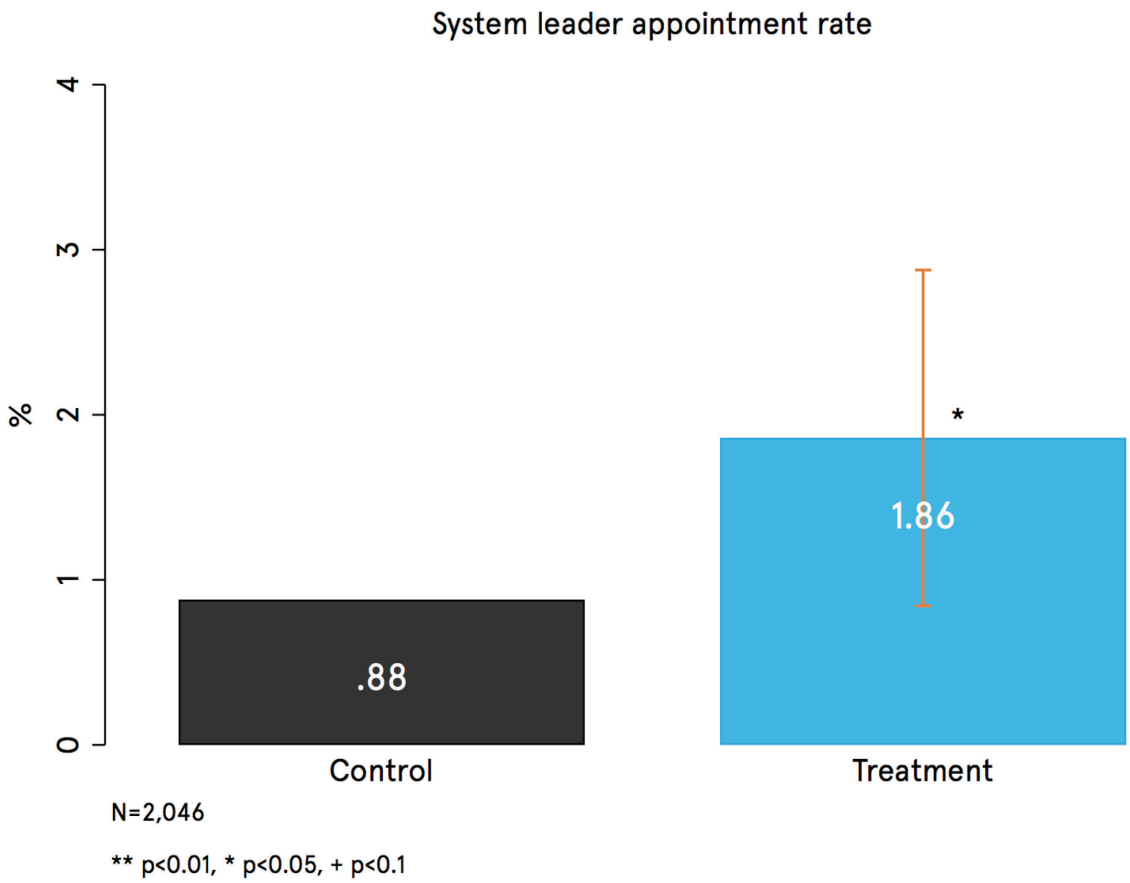
The intervention had a significant and positive effect on the number of applications for the NLE role. The successful result for overall system leader applications was driven by applications for the NLE role. The treatment group were more than three times as likely to be apply to become an NLE (4.29% of the treatment group applied to become an NLE, compared to 1.28% of the control group). If the entire sample had received the treatment, there would have been an additional 56 applications to become an NLE, compared to the entire sample receiving the control.

Graph 3: TS Application Rate



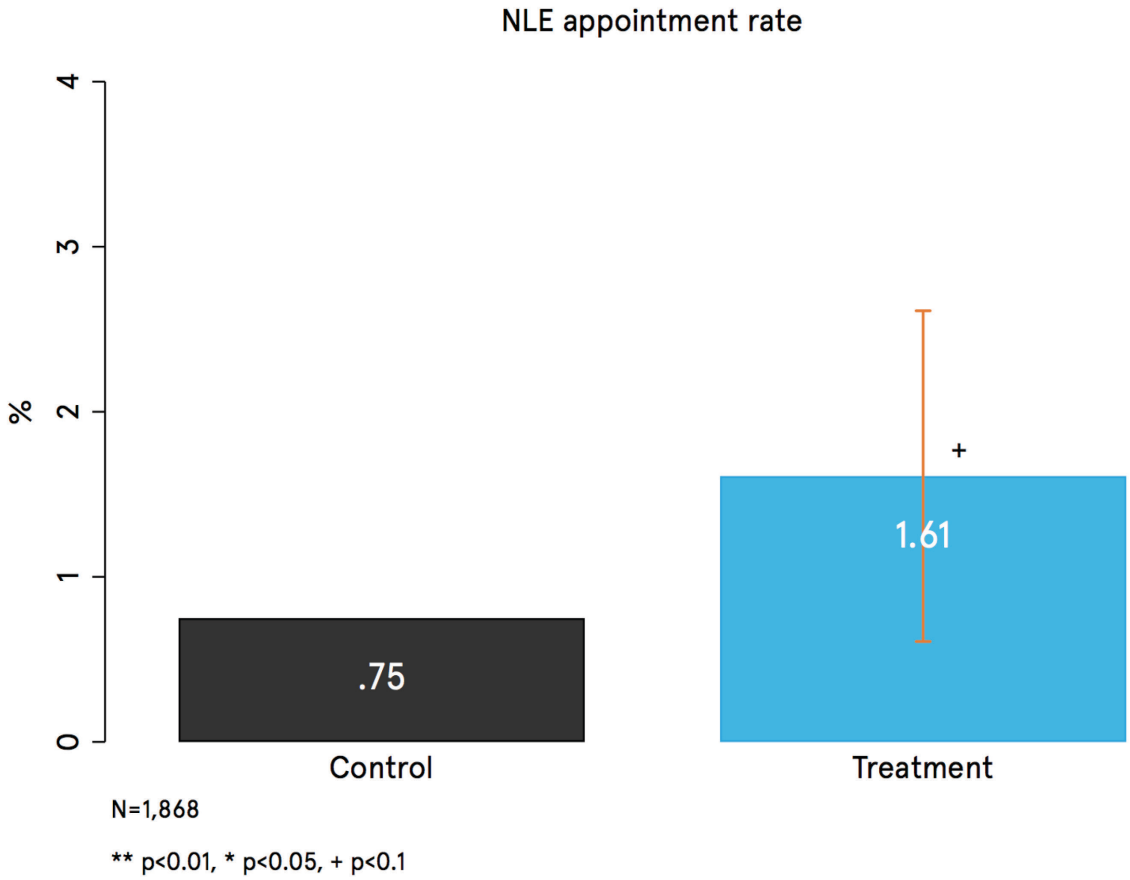
The intervention did not have a statistically significant effect on applications for TS roles. BIT hypothesise that this is because becoming a TS is a bigger commitment than becoming an NLE. This result suggests that it is not sufficiently advantageous to apply this approach in its current form to encourage TS applications.

Graph 4: Overall Appointment Rate



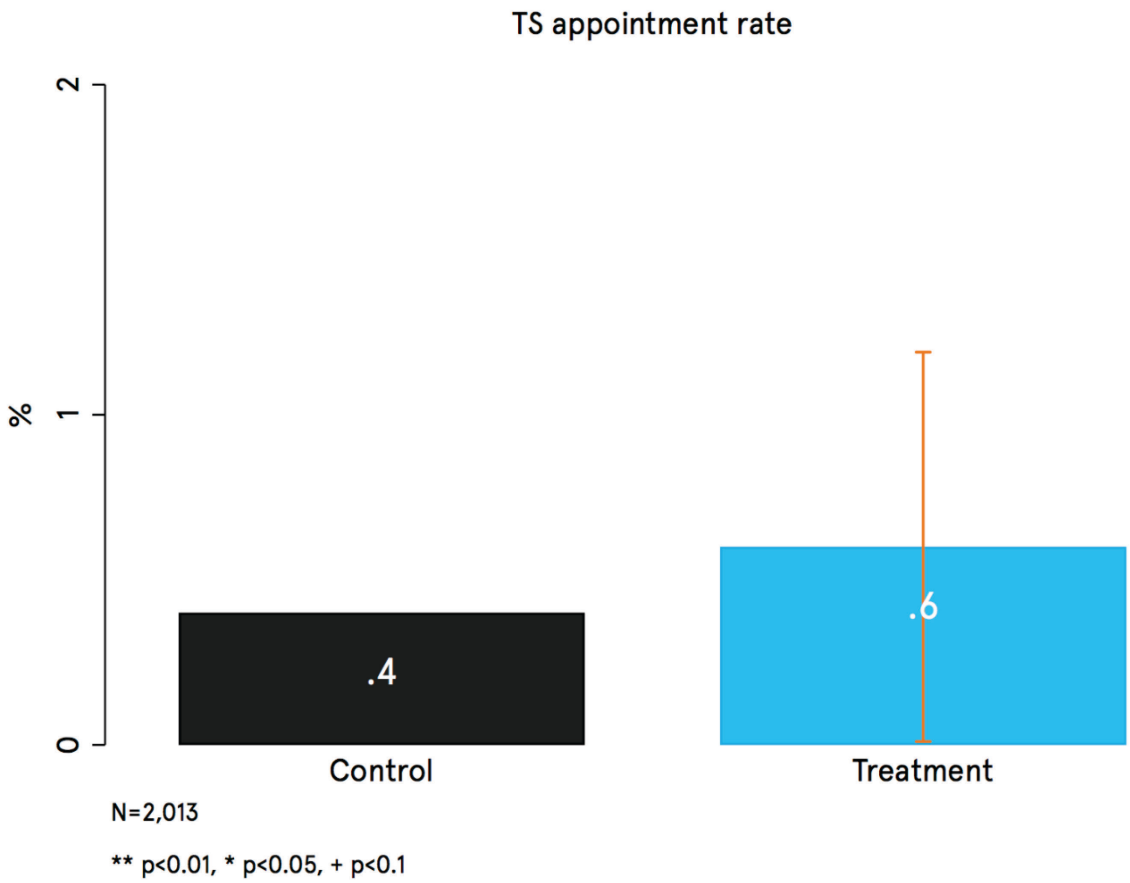
The trial demonstrated that the intervention successfully increased the number of system leaders appointed, when analysing NLE and TS appointments together. However, there is indicative evidence (see below) that the successful result for overall system leader appointments was driven by the number of NLEs appointed. The treatment group are more than twice as likely to be appointed to a system leader role, when analysing NLE and TS appointments together (1.86% of the treatment group were appointed to a system leader role, compared to 0.88% of the control group). If the entire sample had received the treatment, an additional 20 system leaders would have been appointed, compared to the entire sample receiving the control. As stated above when presenting the results on applications, as this is a pooled analysis it cannot tell us whether the intervention worked for NLEs and TS separately. This is explored further in the subgroup analyses.

Graph 5: NLE Appointment Rate



The intervention had a significant and positive effect on the number of appointments to the NLE role. The treatment group are more than twice as likely to be appointed an NLE (1.61% of the treatment group were appointed an NLE, compared to 0.75% of the control group), though please note this effect is only statistically significant at the 10% level. If the entire sample had received the treatment, an additional 16 NLEs would have been appointed, compared to the entire sample receiving the control.

Graph 6: TS Appointment Rate



The intervention did not have a statistically significant effect on appointments for TS roles. As the intervention did not significantly increase the number of applications for TS roles, this was to be expected. This result is insufficient to support the case for roll-out of this intervention in its current form to encourage TS appointments.

3.3.1 Discussion on conversion rates

Although the intervention had a positive impact on some system leader applications and appointments, there are additional issues to be considered when deciding whether to roll out this intervention or variations of it in future cycles.

As outlined in the following table, the conversion rate (proportion of applications that went on to be successful) was lower for the intervention group for both the NLE and TS roles.

Table 2: Conversion rates for control and intervention groups

	Control group	Intervention group
NLE applications	30	73
NLE appointments	9	19
NLE: Conversion rate	**30%**	**26%**

	Control group	Intervention group
TS applications	17	32
TS appointments	4	6
TS: Conversion rate	**24%**	**19%**

The control group applied without receiving the letters of encouragement outlined above. However, they may have had encouragement from another part of DfE (e.g. RSC, TSC, OA team). Therefore, the research team hypothesise that these applications might come from schools and headteachers that have spent more time preparing their application than those in the treatment group. These are schools that may have proactively researched system leader designation and decided to apply for it.

The treatment group applied after receiving the combined intervention, which was 2 letters/emails and a partially pre-filled application form. The results on applications for system leader roles show that this intervention successfully encouraged schools to apply for NLE designation who would otherwise have not made an application.

The results on NLE appointments show that some of the additional schools encouraged to submit an application by the intervention were unsuccessful. As some of these additional schools may not have been planning to apply for this role until they received the intervention, they may have had less time to put together a strong application.

It is important for DfE to consider the resource implications of encouraging more applications for system leader roles, which ultimately are unsuccessful. This trial increased work for DfE staff in developing and delivering the intervention and reviewing applications in this cycle, as the intervention led to a greater number of applications. In assessing the case to apply this intervention more widely, there is a need to weigh the the benefit of the intervention (20 more system leaders – NLE/TS) against the resource implications of implementation for DfE, and for the schools and headteachers preparing applications which are ultimately unsuccessful. Although the intervention messages clearly stated the criteria and that receiving a letter/email was no indication of success, a minority of headteachers perceived the messages as an endorsement and complained when their application was unsuccessful.

It is estimated that developing and delivering the interventions took a total of 19 days. However, it is likely that this could be reduced in any future roll-out, as letter authors have already been identified and are now familiar with the process. As a high-level estimate, it is hypothesised that roll-out could be completed with 11 days of staff time.

If this intervention was rolled out, steps could be taken to improve the conversion rate from applications to appointments. Outside of the confines of a trial, implementation of the intervention could target schools that strictly meet the required criteria. This would ensure that schools encouraged to apply have the best possible chance of being successful. This would also significantly reduce the DfE staff time required, due to a reduction in the number of schools receiving letters.

It is also important to note that applications that were unsuccessful this time may be successful in the future. Schools that are currently just below the eligibility criteria may meet the eligibility criteria in future recruitment cycles. As they are now alerted to the prospect of becoming a system leader, the intervention may help deliver system leader appointments in the coming cycles. Alternatively, there could be a ‘backfire’ effect, whereby schools that were encouraged to apply and have not been successful in this round may be discouraged by this experience from applying in the future. It could be worth monitoring applications from schools in the intervention group for this trial to observe what happens going forward.

3.3.2 Exploratory analysis

BIT performed exploratory analysis to identify whether particular subgroups respond differently to the intervention. For continuous measures, the analysis compared schools with below-median values to schools with above-median values. Only statistically

significant effects are reported.[26] Please note that although there was a commitment to conduct these exploratory analyses, the outcomes were not predicted and there is a need for caution regarding their interpretation. Further qualitative analyses or additional trials could be used to test and verify the hypotheses proposed below.

Eligibility for Free School Meals (FSM)

The treatment was particularly and significantly effective at encouraging NLE applications and appointments for schools with larger FSM populations. For above-median FSM schools, the treatment increased NLE applications by 4.7 percentage points from a base of 0.9%. For above-median FSM schools, the treatment increased NLE appointments by 2.0 percentage points from a base of 1.0%. BIT hypothesise that this could be because schools with large FSM populations do not think that applying for a system leader role is for schools like theirs, but were encouraged by the intervention to apply. However, this result was not predicted and qualitative research and a further trial would need to be conducted to confirm whether this is the case.

Eligibility for System Leader Programmes (NLE and TS)

The sample included a number of schools that did not technically meet the eligibility requirements of the NLE and TS programmes. The treatment was particularly effective at increasing NLE applications from schools that were near the eligibility criteria. For schools that nearly met the criteria, the treatment increased NLE applications by 3.8 percentage points from a base of 0.7%. There were no statistically significant treatment effects between eligible and near-eligible schools in terms of NLE appointments. BIT hypothesise that this result is explained by near eligibility criteria schools only applying when prompted to do so – the equivalent schools in the control group will likely have observed that they did not meet the criteria and decided not to apply. However, this result was not predicted and qualitative research and a further trial would need to be conducted to confirm whether this is the case.

Number of Pupils

The treatment proved to be particularly effective at increasing NLE applications for larger schools. For below-median sized schools, the treatment increased system leader (SL) applications by 2.2 percentage points from a base rate of 1.6%. For above-median sized schools, the treatment increased SL applications by 5.3 percentage points from a base of 3.9%. In short, there is indicative evidence (although note this is only significant at the 10% level) that the treatment was particularly effective at increasing NLE applications from above-median sized schools. BIT hypothesise that larger schools will have larger

[26] By statistically significant effects the research team mean significant at the 5% level i.e. there is less than a 5% chance of the result occurring by chance.

senior leadership teams, and possibly more ambitious headteachers, who may aspire to the NLE role. However, this result was not predicted and qualitative research and a further trial would need to be conducted to confirm whether this is the case.

Distance from Target Areas

In terms of TS appointments, there was indicative evidence (although note this is only significant at the 10% level) that the treatment proved to be particularly effective for schools closer to target areas.

Others

Exploratory analysis subgroups also included academies and free schools, education phase (primary vs. secondary), school capacity, and target areas status, but there were no statistically significant differences in these subgroups' treatment effects.

4. Conclusion

The results of this trial demonstrated that behavioural insights can be used to facilitate a school-led system, by increasing the number of NLEs. Specifically, providing encouragement from peers and an exclusive invitation from a respected figure in the education system was shown to increase applications and appointments for the NLE role.

The intervention did not significantly increase applications, or appointments, for the TS role. The results of this research do not support adoption of this approach, in its current form, to try and increase appointments for the TS role. However, other forms of this intervention may be worth trialling in future, given its success for NLE applications and appointments.

Lessons from trial delivery identified the potential to improve the conversion rate. Whilst the overall result of the trial on NLE applications and appointments was successful, the conversion rate for both NLE and TS applicants (proportion of applications that go on to be successful) was lower for the intervention group than for the control group. Any future roll-out could consider targeting schools that strictly meet the required criteria, in order to improve the conversion rate. The resource cost of developing and delivering the trial, investment of time from unsuccessful applicants, and potential to manage risks would also need to be considered alongside the potential to boost the number of NLE appointments before roll-out.

A more sophisticated version of the intervention could be developed to help potential applicants address specific weaknesses or areas for improvement, though of course this improvement would take additional resource. A refined version of the trial could test whether such changes would be worthwhile.

Looking forward, there is potential to build on the success and lessons learned in this trial to explore whether behavioural insights, and peer-to-peer encouragement in particular, could be applied in other areas that contribute to facilitating a school-led system. For example, behaviourally-informed communciations could be used to encourage schools to ask for school-to-school support.

Annex 1 - Technical Annex

Balance Checks

Randomisation was conducted at the school level, stratifying on whether schools were in a target area for system leader recruitment (or included due to small enough proximity) and by school region (the RSC regions).

1. Balance table of stratified variables

Table 3 shows that the randomisation achieved a balance of schools across the strata, and that none of the cell sizes was unduly small (summing trial arm allocations together by row).

Table 3: Stratified variable balance

	Not in target area		In target area	
RSC region	Control	Treatment	Control	Treatment
East Midlands & Humber	79	79	56	56
East of England & North East	35	35	47	47
Lancashire & West Yorkshire	150	150	78	78
North	64	63	42	42
Central & North West London	52	52	45	44
South East & South London	87	87	40	41
South West	36	35	64	65
West Midlands	55	55	96	96

Additionally, the research team explored whether the role that schools are 'targeted for' differs by trial arm. This variable is relevant as schools may only be eligible to apply for one of the two system leader designations, and if there were more schools eligible for both in one arm, that arm would have more chances to apply (artificially inflating their results). As can be seen in Table 4, there is balance over trial arms of the targeted for variable.

Table 4: Targeted for balance

Role targeted for	Control	Treatment	Total
NLE	17	16	33
TS	88	90	178
Both	921	919	1,840
Total	1,026	1,025	2,051

2. Balance table of other school characteristics

Balance was achieved on all observable variables barring % FSM students. The research team do not have a theory that would predict % FSM students influencing NLE and TS application rates. Nevertheless, % FSM students is included as a covariate in the analysis (along with all other variables below) to account for the imbalance.

Table 5: Balance checks

		(1)		(2)	Difference in means
		Control		Treatment	Difference
Variable	N	Mean/SE	N	Mean/SE	(1)-(2)
In target area	1026	0.456	1025	0.458	-0.001
		(0.016)		(0.016)	
Distance from target area (miles)	1026	6.094	1025	5.845	0.249
		(0.215)		(0.212)	
Meets eligibility criteria	1026	0.354	1025	0.354	-0.000
		(0.015)		(0.015)	
Ofsted: Outstanding	1023	0.358	1023	0.367	-0.009
		(0.015)		(0.015)	
% FSM students	1026	11.362	1025	10.045	**1.317****
		(0.347)		(0.304)	
Number of pupils	1026	411.281	1025	413.114	-1.833
		(11.818)		(11.925)	

The noted significant difference is the result of a t-test.

Note: some schools have not yet been inspected by Ofsted, hence the lower number of observations for this variable

Robust Standard Errors in Parentheses ** p<0.01, * p<0.05, + p<0.10

Analytical Strategy

Analysis was performed for whether a school had lodged any system leader application. BIT also test NLE applications and TS applications separately in order to check if one is more affected than the other. The sample used for the later analysis reflects eligibility for the role (i.e. the NLE outcome measure analysis includes only schools that are already TS, neither TS nor NLEs, or are located in areas where only NLEs are available).

The estimated impacts are 'intention to treat' (ITT) effects, as the research team for the most part cannot ascertain whether the treatment messages were received by headteachers and chair of governors. Note that this method is also a more realistic way to model results, as any potential scale-up is unlikely to have a message delivery method that ensures all intended recipients actually open them.

Primary Analysis

The primary analysis for this trial was an ordinary least squares (OLS) linear probability model on the likelihood of a school completing the NLE or TS applications. Standard errors were adjusted for heteroskedasticity.

It was specified as follows:

(i) $Y_i = \alpha_0 + \alpha_1 D_i + \alpha_2 T_i + \alpha_{3t} X_i + \psi_i + \epsilon_i$

Where:

Y_i is a binary variable denoting whether or not school i completed the NLE or TS application (or both), set to 1 if they did and 0 otherwise;

D_i is a binary variable denoting treatment assignment (1 if in treatment, 0 if in control);

T_i is a vector of school specific variables used to stratify on in randomisation (in or outside of a target area);

X_i is a vector of school specific characteristics (% FSM share, pupil number, Ofsted rating etc);

ψ_i is a region fixed effect (this is included to take into account the regional senders of the letters/emails); and

ϵ_i is the Huber-White error term

Secondary Analysis

The secondary analysis for this trial was performed as per the above model, though where a specific system leader designation (NLE or TS status) is concerned, BIT dropped schools which are not eligible for this status from the analysis.

Robustness Checks

BIT checked robustness by running logit regressions with the analysis model.

Primary Analysis Findings

Below BIT present estimates of the impact of the letter treatment on outcome measures. In each table BIT report estimates as per (1) an OLS model without any covariates, (2) the OLS model specified in the analysis strategy, and (3) using a logit regression of marginal effects to perform the robustness check. In each regression the coefficients of the logit margins are similar in direction, magnitude, and significance, suggesting that the OLS regression produces a reasonable estimate of the effects.

Analysis suggests that the letter treatment did lift the rate of applications overall, and that this was chiefly experienced in NLE applications. The coefficient of the impact of trial arm allocation is smaller in magnitude and statistically insignificant.

Table 6: Primary outcome - System Leader applications

	(1) OLS	(2) OLS	(3) Logit margins
	Submitted a system leader application	Submitted a system leader application[27]	Submitted a system leader application
	b/se	b/se	b/se
Trial arm allocation	**0.037****	**0.038****	**0.040****
	(0.009)	(0.009)	(0.016)
In target area		-0.007	-0.006
		(0.017)	(0.016)
Distance from target area (miles)		-0.001	-0.000
		(0.001)	(0.001)
Meets eligibility criteria		0.00042	0.001
		(0.01001)	(0.010)
Ofsted: Outstanding		-0.001	-0.001
		(0.010)	(0.010)
% FSM students		0.001	**0.001**+
		(0.001)	(0.001)
Number of pupils		**0.000059****	**0.000044****
		(0.000017)	(0.000010)
Constant	0.027**	0.004	
	(0.005)	(0.024)	
RSC region dummies	No	Yes	Yes
Observations	2,051	2,046	2,046
Adjusted R^2	0.007	0.017	

OLS - Robust Standard Errors in Parentheses ** p<0.01, * p<0.05, + p<0.1
Logit - Delta-Method Standard Errors in Parentheses

[27] Note: dropping the SE RSC region to account for implementation issues produces a treatment coefficient of 0.38 (no difference).

Secondary Analysis Findings

The significance of the allocation coefficients in the NLE applications regression (Table 7, all columns) and less significant treatment effect on TS applications (Table 8) suggests, as mentioned above, that the increase in overall applications was likely due to NLE. Column 2 of Table 9 suggests that the letter treatment, on average, increased overall rates of appointments by 1.1 percentage points. This success, as shown in the significance of the trial arm coefficient in Column 2 of Table 10, is similarly attributable to the successful NLE applications, rather than successful TS applications, which did not show significant impact on appointments (Column 2 of Table 11).

Table 7: Secondary outcome - NLE applications

	(1) OLS	(2) OLS	(3) Logit margins
	Submitted an NLE application	Submitted an NLE application	Submitted an NLE application
	b/se	b/se	b/se
Trial arm allocation	**0.030****	**0.031****	**0.034****
	(0.008)	(0.008)	(0.010)
In target area		0.015	0.015
		(0.014)	(0.014)
Distance from target area (miles)		0.001	0.001
		(0.001)	(0.001)
Meets eligibility criteria		0.000	0.000
		(0.008)	(0.008)
Ofsted: Outstanding		-0.010	-0.011
		(0.008)	(0.009)
% FSM students		0.000	0.000
		(0.000)	(0.000)
Number of pupils		0.000	0.000
		(0.000)	(0.000)
Constant	0.013**	-0.003	
	(0.004)	(0.022)	
RSC region dummies	No	Yes	Yes
Observations	1873	1868	1868
Adjusted R^2	0.008	0.007	

OLS - Robust Standard Errors in Parentheses ** p<0.01, * p<0.05, + p<0.1
Logit - Delta-Method Standard Errors in Parentheses

Table 8: Secondary outcome - TS applications

	(1) OLS	(2) OLS	(3) Logit margins
	Submitted a TS application	Submitted a TS application	Submitted a TS application
	b/se	b/se	b/se
Trial arm allocation	0.010+	**0.011***	0.011
	(0.005)	(0.005)	(0.007)
In target area		0.003	**-0.020+**
		(0.010)	(0.011)
Distance from target area (miles)		-0.000	-0.001
		(0.001)	(0.001)
Meets eligibility criteria		0.003	0.004
		(0.007)	(0.007)
Ofsted: Outstanding		0.010	0.010
		(0.008)	(0.007)
% FSM students		0.000	0.000
		(0.000)	(0.000)
Number of pupils		**0.000*****	**0.000*****
		(0.000)	(0.000)
Constant	0.017***	0.006	
	(0.004)	(0.016)	
RSC region dummies	No	Yes	Yes
Observations	2018	2013	2013
Adjusted R^2	0.001	0.022	

OLS - Robust Standard Errors in Parentheses *** p<0.001, ** p<0.01, * p<0.05, + p<0.1
Logit - Delta-Method Standard Errors in Parentheses

The below tables present the impact on successful applications: to system leaders, NLE, and TS. The findings suggest that the treatment did raise appointments to system leaders overall, as well as to NLE, but not significantly to TS.

Table 9: Secondary outcome - Successful System Leader Applications

	(1) OLS	(2) OLS	(3) Logit margins
	System Leader Appointment	System Leader Appointment	System Leader Appointment
	b/se	b/se	b/se
Trial arm allocation	**0.010**$^{+}$	**0.011***	**0.011**$^{+}$
	(0.005)	(0.005)	(0.006)
In target area		0.003	0.007
		(0.010)	(0.009)
Distance from target area (miles)		-0.000	0.000
		(0.001)	(0.001)
Meets eligibility criteria		0.007	0.007
		(0.006)	(0.006)
Ofsted: Outstanding		0.010	0.009
		(0.006)	(0.006)
% FSM students		**0.001***	**0.001****
		(0.000)	(0.000)
Number of pupils		**0.000****	**0.000*****
		(0.000)	(0.000)

	(1) OLS	(2) OLS	(3) Logit margins
	System Leader Appointment	System Leader Appointment	System Leader Appointment
	b/se	b/se	b/se
Constant	**0.009****	-0.019	
	(0.003)	(0.013)	
RSC region dummies	No	Yes	Yes
Observations	2051	2046	2046
Adjusted R^2	0.001	0.019	

OLS - Robust Standard Errors in Parentheses *** p<0.001, ** p<0.01, * p<0.05, + p<0.1
Logit - Delta-Method Standard Errors in Parentheses

Table 10: Secondary outcome - Successful NLE Applications

	(1) OLS	(2) OLS	(3) Logit margins
	NLE Appointment	NLE Appointment	NLE Appointment
	b/se	b/se	b/se
Trial arm allocation	**0.009**$^{+}$	**0.010**$^{+}$	**0.10**$^{+}$
	(0.005)	(0.005)	(0.006)
In target area		0.005	0.010
		(0.010)	(0.010)
Distance from target area (miles)		-0.000	0.000
		(0.001)	(0.001)
Meets eligibility criteria		**0.011**$^{+}$	**0.011**$^{+}$
		(0.006)	(0.006)
Ofsted: Outstanding		0.009	0.007
		(0.006)	(0.006)
% FSM students		**0.001****	**0.001*****
		(0.000)	(0.000)
Number of pupils		**0.000***	**0.000****
		(0.000)	(0.000)
Constant	**0.007****	**-0.025**$^{+}$	
	(0.003)	(0.013)	
RSC region dummies	No	Yes	Yes

	(1) OLS	(2) OLS	(3) Logit margins
	NLE Appointment	NLE Appointment	NLE Appointment
	b/se	b/se	b/se
Observations	1873	1868	1868
Adjusted R^2	0.001	0.018	

OLS - Robust Standard Errors in Parentheses *** p<0.001, ** p<0.01, * p<0.05, + p<0.1
Logit - Delta-Method Standard Errors in Parentheses

Table 11: Secondary outcome - Successful TS Applications

	(1) OLS	(2) OLS	(3) Logit margins
	Successful TS Application	Successful TS Application	Successful TS Application
	b/se	b/se	b/se
Trial arm allocation	0.002	0.002	0.002
	(0.003)	(0.003)	(0.004)
In target area		-0.005	-0.005
		(0.007)	(0.009)
Distance from target area (miles)		-0.000	-0.001
		(0.000)	(0.001)
Meets eligibility criteria		0.006	0.009
		(0.004)	(0.006)
Ofsted: Outstanding		0.002	0.003
		(0.004)	(0.005)
% FSM students		0.000	0.000

	(1) OLS	(2) OLS	(3) Logit margins
	Successful TS Application	Successful TS Application	Successful TS Application
	b/se	b/se	b/se
		(0.000)	(0.000)
Number of pupils		**0.000***	**0.000****
		(0.000)	(0.000)
Constant	**0.004***	-0.001	
	(0.002)	(0.009)	
RSC region dummies	No	Yes	Yes
Observations	2018	2013	1455
Adjusted R^2	-0.000	0.016	

OLS - Robust Standard Errors in Parentheses *** p<0.001, ** p<0.01, * p<0.05, + p<0.1
Logit - Delta-Method Standard Errors in Parentheses

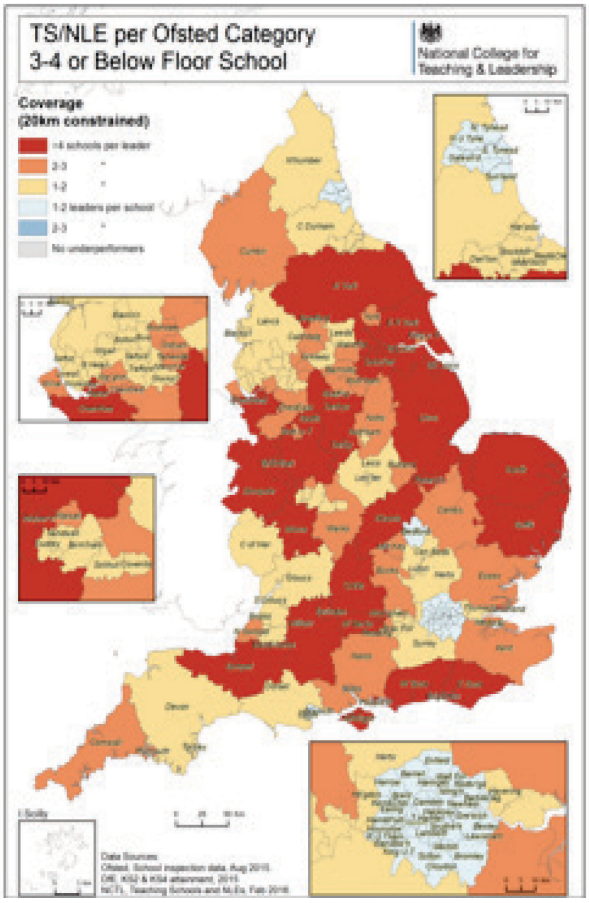
Discussion

From these findings, the research team can conclude that the letter treatment had a significant impact on both application submissions and appointments. Overall, the letters increased systems leader applications by 3.8 percentage points (p<0.01), and NLE applications by 3.1 percentage points (p<0.01). In one of the specifications of the treatment impact on TS applications, the results showed a 1.1 percentage point increase in applications (p<0.05), though this statistical significance is not confirmed in the robustness check). The impact on successful appointments was, unsurprisingly, of a slightly lower magnitude: overall, appointments to systems leaders increased by 1.1 percentage points (p<0.05), and NLE appointments increased by 1 percentage point (p<0.10). Treatment impact on TS appointments was small (0.21 percentage points) and with a high p-value (p = 0.564), suggesting that the driver in overall appointment increases likely came from the NLE appointments.

Annex 2 – TS and NLE density by local authority

There is a significant spatial aspect to NLE and TS recruitment. The map below shows the ratio between system leaders (TS and NLEs) and the demand in terms of numbers of schools in Ofsted category 3 and 4 or performing below floor standards. It demonstrates that there is a gap between supply of support services and demand across large parts of the country. Hence, DfE has a list of target areas where further TS and NLEs are being sought.

Figure 2: TS & NLE density by local authority



Annex 3 – Summary statistics

Table 12: Summary statistics

	mean	min	max
In target area (%)	46%		
Distance from target area (miles)	5.97	0.0	25
Meets eligibility criteria and Ofsted criteria for over 3 years (2014-16)[28] (%)	35%		
Ofsted: Outstanding (%)	36%		
FSM students (%)	10.7%	0.0	71%
Number of pupils	412.20	13.0	2,293
Observations	2051		

[28] This denotes schools that meet the standard eligibility criteria, and did not require the relaxed criteria to be included in the trial.

Annex 4 – References

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Annex 5 – Intervention Materials

Figure 3: Peer-to-peer letter from headteacher (Page 1)

Dear

I hope this finds you well. I am writing as the next National Leader of Education (NLE) and Teaching School (TS) recruitment round is opening in November. As a CEO/ headteacher who has had the pleasure of working within the school system for a considerable period of time, I wanted to recommend it to you, subject to you meeting the criteria.

I became an NLE in 2008, after was rated Outstanding by Ofsted. I have since worked with my Senior Leadership Team and Specialist Leaders to support in aiding school improvement in a number of schools within the Greater Manchester area.

This has given my senior staff so many more opportunities to grow as leaders, and they have become more confident in their work at and within the Trust. The journey is one that I would actively encourage you to take for your school; it has enabled me to keep talented staff within the school. Being able to offer this to prospective staff has also made recruiting talented and ambitious middle leaders easier.

Taking on a system leadership role has very much been a two-way learning process. It is a privilege to visit schools and see the commitment and passion that so many people show on a daily basis, sometimes in quite challenging circumstances. The lessons that I and my staff have taken back are countless and we very much feel that we have often gained more than we could possibly give.

If you're looking to take on a challenge that will benefit the schools you assist, your staff, and your school, I recommend applying to become an NLE or TS.

I've outlined the criteria to become an NLE/TS overleaf.

Kind regards,

Figure 4: Peer-to-peer letter from headteacher (page 2)

More information on becoming an NLE: www.gov.uk/guidance/national-leaders-of-education-a-guide-for-potential-applicants#who-can-apply

More information on becoming a TS: https://www.gov.uk/guidance/teaching-schools-a-guide-for-potential-applicants#who-can-apply

To become an NLE you need to have:

- A track record of strong school leadership with at least 3 years headship experience
- A track record of providing effective school-to-school support which has led to improved outcomes for pupils over a sustained period.
- The full support from the school's governing body and a reference from a commissioner of school-to-school support.

To become a TS you will need to:

- Be judged to be a good serving headteacher (or equivalent) with at least 3 years' headship experience.
- Provide evidence of successful partnerships.
- Show excellent leadership with a proven track record of school improvement.
- Have a leadership team with the capacity to lead the core areas of the teaching school role.

To be a TS or NLE your school must:

- Be judged to be at least good by Ofsted.
- Demonstrate sustained high pupil performance and progress over the last 3 years.
- Have the capacity to support schools in challenging circumstances to improve.

Figure 5: Peer-to-peer letter from chair of governors (page 1)

Dear Chair of Governors,

I am writing to encourage you to apply to become a National Leader of Education (NLE) or Teaching School (TS), subject to meeting the criteria. I am the Chair of Governors at my school and I think that becoming an NLE has benefited us immensely.

Our headteacher, became an NLE in 2008 after our school was rated Outstanding by Ofsted. She's since worked with our Senior Leadership Team to assist in turning around a number of schools within our own Local Authority and within the Greater Manchester area.

The experience these opportunities have given our senior staff have been invaluable in growing them as leaders, and in keeping challenged professionally. Moreover, the lessons staff brought back from these schools led the school to revise a number of strategies, which has helped not only maintain but improve our KS2 results. We're also now finding it easier to recruit middle and senior leaders as the opportunity to assist other schools seems to be quite appealing.

All governing bodies are aware of the need to motivate and develop not only the Senior Leadership but all leadership within a school; we have found this to be an excellent vehicle in building a talent bank within the school. I would recommend that you discuss becoming an NLE/TS with your head teacher in the next week or two, ahead of applications opening on the DfE website in November.

Sincerely,

Figure 6: Peer-to-peer letter from chair of governors (page 2)

More information on becoming an NLE: www.gov.uk/guidance/national-leaders-of-education-a-guide-for-potential-applicants#who-can-apply

More information on becoming a TS: https://www.gov.uk/guidance/teaching-schools-a-guide-for-potential-applicants#who-can-apply

To become an NLE you need to have:

- A track record of strong school leadership with at least 3 years headship experience
- A track record of providing effective school-to-school support which has led to improved outcomes for pupils over a sustained period.
- The full support from the school's governing body and a reference from a commissioner of school-to-school support.

To become a TS you will need to:

- Be judged to be a good serving headteacher (or equivalent) with at least 3 years' headship experience.
- Provide evidence of successful partnerships.
- Show excellent leadership with a proven track record of school improvement.
- Have a leadership team with the capacity to lead the core areas of the teaching school role.

To be a TS or NLE your school must:

- Be judged to be at least good by Ofsted.
- Demonstrate sustained high pupil performance and progress over the last 3 years.
- Have the capacity to support schools in challenging circumstances to improve.

Figure 7: Exclusive invitation letter (Page 1)

Dear

I hope this finds you well. I trust you are aware that the National Leader of Education (NLE) and Teaching School (TS) recruitment round is now open, and the DfE is looking for high performing schools in England to apply. An assessment of academic attainment and Ofsted ranking indicates you may be a strong candidate.

To minimise workload for you, I have been able to arrange pre-filled application forms. This means you won't have to spend as long filling in the application form. You can complete the pre-filled applications here (login instructions are overleaf): https://nctl.custhelp.com/app/account/overview.

I hope you consider applying to join the small but talented group of headteachers who have taken on these vital roles. In our region you will join a network of system leaders committed to school improvement, seeking to improve outcomes for all our children.

I should add that this letter does not guarantee your application's success, but does mean that on key measures your school meets many of the criteria for NLE/TS status. Over-page you can find the full set of criteria.

If you have any questions, you can reach DfE's system leader helpdesk on 0800 085 0984 during business hours.

Sincerely,

Figure 8: Exclusive invitation letter (Page 2)

More information on becoming an NLE: www.gov.uk/guidance/national-leaders-of-education-a-guide-for-potential-applicants#who-can-apply

More information on becoming a TS: https://www.gov.uk/guidance/teaching-schools-a-guide-for-potential-applicants#who-can-apply

To login to the website, please use admin@boyle-petyt.n-yorks.sch.uk as your username and use the password you have used previously. If you have forgotten your password, or if it's the first time you've logged on with this email address, please click on the "Forgot your username or password?" link and enter the email address above.

To become an NLE you need to have:

- A track record of strong school leadership with at least 3 years headship experience
- A track record of providing effective school-to-school support which has led to improved outcomes for pupils over a sustained period.
- The full support from the school's governing body and a reference from a commissioner of school-to-school support.

To become a TS you will need to:

- Be judged to be a good serving headteacher (or equivalent) with at least 3 years' headship experience.
- Provide evidence of successful partnerships.
- Show excellent leadership with a proven track record of school improvement.
- Have a leadership team with the capacity to lead the core areas of the teaching school role.

To be a TS or NLE your school must:

- Be judged to be at least good by Ofsted.
- Demonstrate sustained high pupil performance and progress over the last 3 years.
- Have the capacity to support schools in challenging circumstances to improve.

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