OFFICE FOR STANDARDS IN EDUCATION

SOUTHWARK
LOCAL EDUCATION AUTHORITY

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OFFICE OF HER MAJESTY’S CHIEF INSPECTOR OF SCHOOLS
in conjunction with the
AUDIT COMMISSION
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BACKGROUND

1. This report details the findings of a short inspection conducted under Section 38 of the Education Act 1997 in November 1999. The purpose of the inspection, which was carried out at the request of the Secretary of State for Education and Employment, was to evaluate the progress made in responding to the findings and recommendations of the inspection which took place in 1998.

2. This second inspection has followed up the progress in implementing the Education Development Plan (EDP) and the Post-Inspection Action Plan (PIAP). In particular, attention was paid to the extent of the improvement in:

   - strategic planning;
   - support for schools causing concern;
   - the cost effectiveness of services to schools.

3. The inspection was conducted by a small team of Her Majesty’s Inspectors (HMI) in conjunction with the Audit Commission. Documentation provided by the LEA, including plans, committee reports and performance data, was scrutinised. Interviews were conducted with elected Members, the Chief Executive and members of his Department, the Director of Education and Leisure, and senior officers; and representatives of headteachers and teachers associations, consultation groups and the Education Action Zone. A questionnaire was sent to all of the LEA’s schools and the two pupil referral units. The response rate was 58 per cent. In addition, HMI visited eight primary schools and four secondary schools for half a day. During the school visits, discussions were held with the headteacher, chair of governors and Members of the senior management team, the special educational needs coordinator, and, where relevant, the literacy or numeracy or information and communications technology coordinators.
COMMENTARY

4. Southwark LEA was first inspected almost exactly a year ago. It received a report which made some sharp criticisms and set the authority a number of important recommendations. However, at that stage, the expectation was that the LEA had sufficient management competence as well as a sufficiently good relationship with its schools to implement the recommendations and to improve.

5. In the event, that expectation has proved over-optimistic. The LEA has gone through a difficult period, in which large numbers of posts have been unfilled in the schools and in the Education department. At the same time, the national agenda for change has not ceased to press as hard upon Southwark as on all other LEAs. It has implemented some of the recommendations, not always competently. Overall, however, the LEA has regressed. In particular, it has lost the trust and respect of its schools, some of which can no longer discern any useful purpose that the authority serves.

6. Many of the best schools in Southwark no longer feel that the LEA supports them. That feeling is a direct consequence of the LEA rightly attempting to direct its resources to need. The schools’ reaction reflects a culture of dependency which should, in time, be dispelled. To an extent, therefore, we sympathize with the view expressed by the Chief Executive and others that the LEA is going through a sea-change and that things will, "get worse before they get better." However, we see no immediate prospect of improvement and are, therefore, impelled to ask, "how much worse, and for how long?"

7. There has been a failure of strategic management serious enough to lend credence to the view, expressed to us several times, that the LEA has, in key aspects, insufficient educational expertise. That failure is, first of all, one of leadership. The final set of recommendations in our original report invited the LEA to move into the modern era, to delegate more to the schools and to make a significant shift from providing to securing services. It has sought to do so, not with great conviction, and it has managed the details of that change very poorly. Even more importantly, it has failed, if indeed it has sought, to convince schools of the benefits of such a change for them. As on many other issues, the LEA has assumed the right to direct. Where it went, the schools would follow. Consultation, explanation and persuasion on this issue have not figured prominently.

8. The Council must shortly make a key decision: to appoint a new Director of Education. Members expressed the view to us that the Director need not be an educationalist. They are, in that respect, poorly advised. The LEA not only lacks a Head of School Effectiveness and thus educational expertise at the top level, but it also lacks a convincing, coherent educational vision. What the LEA most needs is a director who has such a vision and the capacity to communicate it to the schools, while redefining the ways in which the authority must set itself to work with them.

9. There has also been a failure of planning. The draft "education strategy" does not succeed in its stated intention to demonstrate a vision for its schools which fits coherently into the Council's overall strategy. It sets out, rather imprecisely, a number of aspirations, which have little in them that is particular to Southwark. Similarly, the EDP, even after several revisions, remains an incoherent document. It is poorly tailored to the borough's
needs, with little logical relationship between priorities and targets, and the actions to be taken in order to achieve those targets. The EDP fails to map what actually goes on in its schools and the scale of the challenge facing many headteachers, governors and their staff. It does little justice to some of the more effective work done by officers and advisers. The plan betrays little serious thinking about the changing relationship between an LEA and schools.

10. Not everything the LEA does is badly done. As often, where there is a failure of strategic management, the overall picture is one of acute variability. In some areas, competent staff remain, tenaciously guarding surviving good practice, for example in the support for literacy and numeracy. The LEA continues to fulfill its statutory duties with regard to special educational needs and access.

11. There are, however, too many weaknesses, of which two areas are key, in the sense that they have fatally undermined the authority’s overall reputation for competence. The delegation of personnel and payroll services has been incompetently handled, to the point where the LEA’s performance in relation to these services now seriously impedes the heads’ capacity either to run their schools or, because the baseline position is so poor, to go elsewhere. The accurate payment of salaries cannot be guaranteed, pension rights are in jeopardy, and timely, accurate budget information too often cannot be obtained.

12. The earlier OFSTED/Audit Commission report contained the judgement that “the LEA’s ability to prevent under-performing schools from going into further decline is weak.” That ability has declined further, to the point where the LEA’s capacity to provide any effective, systematic support for its more vulnerable schools must be in some doubt. Since the last inspection, a further eight schools have been judged to require special measures or serious weaknesses. Several schools causing concern were visited for the purpose of this inspection. In almost every case, governors felt let down by the failure of the LEA to intervene more effectively at an earlier stage. For many, the excessively positive, uncritical messages given in the past prepared staff and governors poorly for the rigours of external scrutiny. Our judgement is that the work of the LEA in relation to these schools has frequently constituted an obstacle, not an aid, to improvement.

13. We are therefore obliged to conclude that the LEA is not adequately fulfilling its statutory duty to perform its functions with a view to raising standards in schools. Nor do we believe that it currently has the capacity to do so.
THE CONTEXT OF THE LEA

Update

14. There has been no significant change in the socio-economic characteristics of the LEA since November 1998. The LEA maintains 98 schools, of which 59 are designated community schools, four foundation and 30 aided schools. An aided secondary girls school has already secured beacon status and two other aided schools have been invited by the Department for Education and Employment (DfEE) to apply. A statutory notice for the closure of a primary school in special measures and the opening of a Fresh Start school on the same site in April 2000 has been issued. The Secretary of State gave approval for the closure of a boys secondary school in special measures in August 1999; a new mixed 11-18 comprehensive is due to open on the refurbished site in September 2000. However, proposals to change the character of a girls school to provide additional places for boys was not approved.

15. There has been no significant change in the performance of Southwark schools since the first inspection. It remains below national averages at all key stages, with the exception of Key Stage 1 where it is improving at about the national rate. The following detailed points are worthy of note:
   
   • Twenty five per cent of reception pupils performed below the expected level in their baseline assessment in writing, 16 per cent in reading and 20 per cent in number.
   
   • Mathematics at Key Stage 2 improved at a rate faster than the average nationally, particularly among boys.
   
   • Attainment in English, mathematics and science at Key Stage 3 remained well below national averages, despite improving faster than the national rate.

16. The political balance of the Council has shifted since the first inspection and requires the Mayor’s casting vote, with Labour 32 seats, Liberal Democrats 27, Conservative four and one independent.

17. There has been no significant change to the Committee or departmental structures, although there have been considerable changes in the staffing profile of the Education & Leisure Services Department. Following the first inspection, the LEA reorganised its Inspection, Advice and School Development functions into a new School Improvement Division. But it has been unable to make a substantive appointment as Head of School Improvement. During the same period, a number of longstanding inspectors and advisers left the authority. Although external consultants were contracted to fulfil some of the school improvement functions, including, for three months, the Head of School Improvement, vacancies remain in this and other key areas. For example, the LEA has one postholder managing both the National Literacy Strategy and the National Numeracy Strategy. In the absence of a substantive postholder to lead on school improvement in the Directorate, oversight of the EDP and the PIAP has been the responsibility of the Director of Education
and Leisure Services and the Head of Learning Services. The Director has since announced his retirement, and will leave the authority once his successor has been appointed next year.

18. Following the most recent failure to recruit to key posts in the School Improvement Division, a working party of Members, officers and school representatives was convened after the Education Committee on 25 October 1999. Its remit is to explore in more detail ‘the processes for commissioning and managing an outsourced contract’ for school improvement.

STRATEGIC MANAGEMENT

The Council’s strategy for education

19. The Local Authority, in part in response to government policy and in part because of the diversity of the needs it serves, has a large number of plans focusing on the regeneration of the Borough. It analyses these into twelve key corporate strategies, all of which in principle and in most cases in practice impinge upon education. The complexity generated by the multiplicity of focus involved is considerable, and presents a severe management challenge.

20. The Southwark Education Strategy sets aspirations for the Education Service, including the schools, over the next decade, and attempts to clarify the relationship between the school improvement strategy and the Council's overall thrust. It does not wholly succeed, perhaps because the task is impossible, in showing "how the strategies connect, complement and support each other and how the inevitable tensions can be best addressed."

21. The strategy document is, intentionally, aspirational. It sets out a vision of how the demands society makes of schools are likely to change and of the ways in which schools should respond. That vision is somewhat general, not as yet widely discussed in the education department itself, or with schools, and not related to any projections peculiar to Southwark; indeed, it is hard to see that it is based on any empirical evidence whatsoever. To the extent that it is a statement of the desirable, rather than the probable, that is intellectually justifiable, though it somewhat reduces its practical utility as a basis for planning and resource allocation. The vision includes a statement of the role of schools in the 21st century and of the role of the LEA in support of schools. The schools' role is seen as significantly broader and more autonomous, while that of the LEA is envisaged as largely unchanged from what it currently is. The combination suggests a lack of rigorous thinking, as well as a reluctance to change, that in fact does little credit to the Council's conscious, although as yet tentative, shift from acting as a provider of services to ensuring their provision.

22. The North Southwark Education Action Zone (EAZ) is an important factor within the Council's overall strategic thrust. The EAZ was one of the first twenty-five to be approved by the DfEE. A director was appointed in September 1998 and since January 1999, work has begun in 18 schools in all phases, an Early Years Centre and Southwark College. The Zone brings together a range of partners from higher and further education,
business, the public sector and the arts. It was not part of the remit of the inspection to comment on the work of the EAZ. Nevertheless, the key objectives of the EAZ are clearly compatible with the priorities set out in the EDP. Indeed, because they are more specifically framed with a view both to combating disadvantage and to utilising the considerable cultural resources of the Borough, they are arguably more relevant to its specific context. They are:-

- developing good practice in early years
- raising standards in literacy, numeracy, science and ICT
- developing the 14-19 curriculum
- a multi-agency approach to health, safety and crime prevention
- promotion of family learning
- establishing positive models for staff recruitment, professional development, training and collaborative management.

23. The last priority deserves some emphasis. The aim is not only to support raising standards, but to affect the way schools are managed, by encouraging joint reflection and discussion. There is some evidence that this is happening, and also some evidence, less clear, that the LEA is taking steps to achieve a degree of dissemination to schools outside the zone, not just of particular projects, but the management processes that led to their success. As yet, however, this is at best embryonic (not surprisingly so), and needs to be more firmly embedded in revisions to priority 5 of the EDP on self-managing schools.

24. There are also, self-evidently, risks. The schools within the EAZ are, typically, in receipt of funding from many sources, mostly directed toward similar issues. The risk of duplication is obvious, as is that of innovation overload, or simple confusion both about funding, and about fundamental purposes.

25. Secondary schools in Southwark are also involved in the Excellence in Cities (EiC) initiative which has had a positive impact on relations between schools. All local secondary headteachers have been involved, including the local City Technology College, in designing a scheme that fits its local context. The LEA has maintained a hands-off approach, although the allocation of an officer from the Director's office to provide back-up to the secondary headteachers has been much appreciated. The project is at an early stage; a coordinator post has only recently been advertised. However the self-managing dimension to EiC has already been beneficial in offering the LEA an alternative model of working with its secondary schools.

The Post Inspection Action Plan (PIAP)

26. The Council accepted the findings and recommendations of the first inspection and submitted its PIAP to the DfEE in July 1999. However, the timetable to produce the PIAP coincided with consultations on the draft EDP and the scheme for financing schools. Separate consultation on the PIAP was minimal. Progress in the implementation of recommendations A, B and D is evaluated as part of the Education Development Plan later in this report under the section headed ‘School Improvement’; recommendations C and E are evaluated in the ‘Access’ section. The issues highlighted in recommendation F
are inextricably linked with developments, since the first inspection, in government policy on the allocation of resources to schools and are covered later in this section.

**Other relevant plans**

27. Since the first inspection the LEA has been required to produce a number of plans. These include:

- **The School Organisation Plan (SOP)** which was approved in September 1999, following the formation of the School Organisation Committee earlier in March. The draft SOP was issued for consultation in May 1999. The District Audit report for 1998 confirmed the view of the first inspection that the LEA has sound and effective plans to ensure a sufficiency of places.

- **The Class Sizes Plan** was subject to consultation and submitted to the DfEE in October 1998. At that time the LEA had some 18 infant classes of over 30 pupils. The plan set out its proposals for eliminating all classes in excess of 30 pupils.

- **The Asset Management Plan** is well underway. The LEA has provided effective leadership in this area. Property services and the LEA performance in maintaining the condition of school buildings continue to be strengths of the LEA. From 1993, the LEA has undertaken comprehensive stock condition surveys that have been kept up to date, and as a consequence the LEA was in a position to respond well to the New Deal for Schools initiative. In addition, the LEA has commissioned a comprehensive computerised database to support its Asset Management Process. Schools involved in a pilot scheme which aims to extend the scope of the current condition survey to meet the requirements of asset management planning are enthusiastic about the results.

**Consultation**

28. The first inspection reported that the responsiveness of the LEA to schools and other stakeholders had improved following the extensive consultation exercise conducted by the Southwark Education Commission in 1994. Nevertheless, the first inspection team judged that the LEA needed to take the views of schools more into account when planning and evaluating its priorities. The volume of draft policies and plans has increased as the LEA has attempted to respond to the findings of the inspection, as well as the DfEE requirements for the EDP, and the Scheme for Funding Schools (Fair Funding).

29. In all the schools visited during this inspection, with the exception of one headteacher, chairs of governors and headteachers were unanimous in their criticisms of the LEA’s approach to consultation. They were especially critical of the volume of the paperwork, the repeated circulation of drafts (particularly of the EDP) the failure to engage schools in clearly identifying the depth of concerns, and the range of possible responses. At the same time individual services too have been consulting. Too many headteachers felt that consultation was managed to reduce the opportunities actively to dissent from the options preferred by the LEA; too many governors described being overwhelmed by requests to consult on huge documents which in their view served to undermine, rather than encourage, genuine consultation.
30. Taken as a whole, the LEA’s approach demonstrates a lack of coherence, foresight and coordination at the centre. The level of scepticism reported in the first inspection has deepened; governors report that the budget is the only item on which they are prepared to engage in a meaningful dialogue with the LEA. In the past year the credibility of the authority has been seriously undermined by the way it has sought to involve schools in its planning.

**Resources and Fair Funding**

31. The first inspection found that the LEA was committed to maintain spending above Standard Spending Assessment (SSA) and the expenditure per pupil was rising faster for primary than that for secondary pupils. The cost of LEA services was high, yet schools’ perception of the quality of services varied from good to unsatisfactory. These concerns were reflected in recommendation F of the first inspection report. At that time, further work needed to be done to develop performance measures which allowed the cost effectiveness of service delivery to be properly evaluated by schools and the Education and Leisure Services Department.

32. At the time of the inspection, Southwark delegated a relatively low proportion of its education budget to schools and the proportion was falling. Schools had inadequate control of the monies being spent on their behalf and there was no justification for the proportion of the budget held at the centre. Proposals under the Fair Funding regime would compel the LEA to delegate far more of its education budget to schools.

33. Education expenditure has continued to exceed SSA and the education budget for 1999/2000 of £128.552m exceeds SSA by 3.5%. The budget for 1999/2000, the first under the Fair Funding legislation, has involved the delegation of some £1.306m expenditure along with cuts in central services.

34. However, only some 77% of the local school budget is currently delegated to schools. This is still amongst the lowest in London and substantially less than the average of 81.5% for London LEAs and the 82.4% national average. Further delegation will be required for the financial year 2000/01 to meet the DfEE benchmark of 80%.

35. A purposeful start was made in addressing the costs of services. The LEA set up a scrutiny panel which undertook a detailed benchmarking exercise in relation to LEA services over the summer of 1999. This provided the basis for a set of proposals for the re-analysis of the LEAs finances, further delegation and sound service cuts that have been the subject of consultation with schools. The agreed proposals involve a substantial increase in the level of delegation to schools. The LEA is well placed to draw up a budget for 2000/01 that meets the DfEE requirements for delegation of 80% of the LSB and the reduction of strategic management to a cost which is less than £75 per pupil.

36. The first inspection commented on the lack of differentiation in the way many LEA services worked with schools. The LEA has sought to address this by categorising schools according to need. Already there are clear shifts in the pattern of service provision, from an entitlement for all schools to increased support, to those schools graded
category 3 or above in a hierarchy of concern. Category 1 in that hierarchy indicates no concern, and category 5 denotes a school in special measures. Furthermore, a combination of service cuts and delegation has substantially reduced the number of management support services provided by the LEA. While these developments represent progress in respect of this recommendation, there are weaknesses in the LEA’s management systems which militate against the development of customised services to schools. While schools in category 3 and above are entitled to additional services, the diagnostic processes necessary to identify the specific weaknesses in each school are undeveloped. In visits to schools in special measures, those who received the most relevant and effective support were those where there was an experienced and effective head or consultant able to articulate the underlying problems and determine the remedial support required. The LEA is currently developing a management database which will contain all relevant available information on schools and schools’ performance. It is hoped that this will facilitate the analysis of likely strengths and weaknesses within schools, and the identification of the kind of support that may be required. However, unless there is a substantial improvement in the capacity of the LEA to diagnose accurately the support needs of schools, the development of such a database will be largely irrelevant.

37. At the time of the last inspection, schools held the LEA’s payroll and personnel services in particularly low regard. Senior management within the Council were already fully aware of the deficiencies in these services. While there had been an on-going review of these services, there were no immediate proposals for remedial action. The initial response following the criticisms in the inspection report to the recommendation was swift and radical. The LEA agreed, after consultation with schools, to:

- Withdraw from the traded service for personnel and reduce the personnel management element of the LEA to the statutory duties.
- Transfer personnel files and the responsibility for the administration of personnel files to schools.
- Delegate responsibility for payroll services.
- Support schools in procuring replacements for the payroll and personnel service previously provided by the LEA.
- Include detailed guidance on personnel management in the School Business Handbook.

38. However, while this action has been implemented and responsibility for both of these functions has been delegated to schools, schools’ opinion of the LEA in relation to both services has fallen further. In respect of payroll services, the transfer of responsibility to schools coincided with the replacement of the Council’s payroll system by the SAP system. Implementation was rushed, and it rapidly became apparent that the new system could not cope with the peculiarities of employment arrangements within schools. This led to inaccurate payments and incorrect information being provided to schools. This, in turn, affected the accuracy of financial information provided to schools and undermined their ability to monitor and manage their budgets.
39. The delegation of responsibility for personnel management to schools coincided with the implementation of the 1997 single status agreement for non-teaching staff employed by the Council within community schools. The LEA was legally obliged to implement this agreement. A remuneration team was set up to support schools in the implementation of the agreement (which involved re-evaluation of the job descriptions of all non teaching staff) and to assist school staff in establishing sound arrangements for delegated personnel management. While the intention may have been to work with and support schools, in practice the remuneration team failed to gain the confidence of schools, and in far too many cases displayed a lack of understanding of the way schools work. In some schools, including one visited, the exercise was carried out properly and professionally. In most, however, advice was inconsistent and offers of support, as time went on, have been replaced by increasing pressure, amounting to threats to remove financial delegation from schools that did not co-operate with the remuneration team. Headteachers and governors are rightly cautious about making mistakes in what has already proved to be a legal minefield, particularly in the face of inconsistent and frequently inaccurate advice from LEA personnel staff.

40. Since the last inspection, the Council’s business planning process has continued and plans now include a far more comprehensive set of indicators and more information relating to the cost of services. These are periodically included in reports back to management and the Education and Leisure services Committee. A similar increase in the clarity of costs and the basis of charges is evident in the Traded Services schools brochure.

41. Substantial progress has been made on the development of performance measures and elucidating the basis of service costs. The LEA services scrutiny panel has provided considerable insight into the cost of strategic management functions. However, much of the process of performance reporting is directed towards senior management and Members within the LEA. More should be done to provide schools with regular accessible school-focused performance monitoring information for each LEA service and function. The benchmarking exercise undertaken in respect of strategic management services could usefully be extended to the other Fair Funding categories of expenditure of access, special educational needs and school improvement.

42. Since the last inspection, the LEA has produced the School Business Handbook which provides comprehensive guidance to support financial, human resources and property management. However, a further series of actions, included in the Post Inspection Action Plan, designed to support the integration of business planning disciplines and techniques with school development planning, has not progressed owing to the vacancies in the School Improvement Unit. For example, it has not been possible to convene the working party of headteachers, or to produce specific revised school guidance on development plans at this stage. The school survey indicates that schools rate support for the head teacher and senior managers as less than satisfactory. In none of the visits to schools was there any relevant effective support given by LEA staff to heads and senior managers on putting together a post-OFSTED action plan or in school development planning. Where school development planning was effective, it was due either to the contribution of an effective consultant or the influence of a competent, confident and experienced head. A consistent view expressed by heads and senior managers in
schools during school visits, and echoed in written comments included in school survey responses, is that, throughout the LEA, and in particular in the School Improvement Unit, there is a lack of staff with experience of senior management in schools.

Summary

43. Progress in implementing the recommendations listed under F has been uneven. The overall objective was to provide schools with efficient services that meet their needs and improve the accountability of service providers to schools. However, the implementation of these profound changes in the financial relationship between schools and the LEA has not been well managed. While the LEA is aware that schools vary in their capability to accept the increased responsibilities that go with delegation, they are doing too little to identify those schools that may have problems and to prepare them for the change. The proposals will fundamentally affect the role and service responsibilities of the LEA, yet thinking in relation to this new role is at an early stage, despite some changes to the structure in April 1999. There are no detailed proposals in relation to how LEA services will need to be restructured to meet more effectively the demands of the new role; planning for the reconfiguration of services is at a very early stage. The LEA will need to address both of these issues urgently in order to avoid the consequences of schools failing to fulfil their new responsibilities, and to provide a more effective service structure to meet the demands of the reduced and changed role of the LEA.

44. Recommendations

To prepare schools so that they are better able to take on the increased management and procurement responsibility that will result from increased delegation:

- Undertake a review to ascertain, before April 2000, the capability of individual schools to take on the additional management responsibilities which will arise from increased delegation

- Use the findings of the above review to specify any additional support required by schools or groups of schools in order that they can cope with the new demands of additional delegation

- Co-ordinate the above process with the process for supporting schools causing concern

To establish the LEA’s client role in ensuring schools secure effective support services there should be:

- An urgent review of the current configuration, structure and orientation of LEA services in the context of their changed role under Fair Funding, the Code of Practice on LEA-School Relations and the increased delegation of responsibility to schools from April 2000.
The findings of the above review should be used to:

- Implement interim changes to the management structure and processes so that it is in a position to fulfil its new responsibilities from April 2000.

- Establish better mechanisms for collating and analysing information available from all sources, in order to monitor the performance of schools in fulfilling their increased management responsibilities.

- Establish arrangements to ensure that the process of review of management performance in schools is co-ordinated with the parallel monitoring processes associated with supporting schools causing concern.

To improve the quality and consistency of support to schools in self evaluation and development planning so as to:

- Secure for the School Improvement Unit expertise in school management, and business and development planning.

- Ensure that all schools in categories 4 and 5 have access to expertise in school management and business and development planning appropriate to their needs.

To improve the quality of continuing personnel service provision and the implementation of the single status agreement:

- Arrange for a process of independent arbitration between the remuneration team and those schools currently under threat of withdrawal of delegation because of alleged non-co-operation with the implementation of the single status agreement.

- The remuneration team should be supplemented with personnel with recent expertise in senior school management.

To improve the performance management of services to schools the Council should:

- Follow up the scrutiny strategic management costs with similar benchmarking exercises in relation to access, special education needs and school improvement.

- At least annually provide report back to relevant consultative groups on the quality and cost effectiveness of LEA services along with proposals for remedial action and/or service improvement.
SCHOOL IMPROVEMENT

The Education Development Plan (EDP)

45. At the time of the original inspection, Southwark, like other LEAs, had only a draft EDP, on which consultation had taken place. The LEA’s principal strategic plan, intended to achieve the objectives set out in the Council’s Regeneration Statement, was “Raising Achievement – Working in Partnership (RA-WIP)”. This identified seven key objectives, which were by no means identical to the seven priorities eventually set out in the EDP. Nevertheless, RA-WIP set out “a coherent agenda for school improvement” and formed a strong base on which to build the EDP.

46. The promise implicit in the inspectors’ judgement, quoted above, was not in the event immediately fulfilled. The EDP submitted to the Secretary of State on 28 February 1999 had a number of serious weaknesses and was therefore approved for one year only, on stringent conditions. Those weaknesses included:

- inadequacies in the audit of performance;
- unduly modest targets; weaknesses in the target-setting process;
- poor match of activities to priorities (and a lack of obvious reason for undertaking some activities);
- overlap between priorities; poor action planning;
- vague success criteria;
- inadequate definition of some activities; and
- haphazard resource specification.

47. Further modifications were required by the DfEE in their letter of 26 March 1999. These included:

- a reduction in routine monitoring
- an improved strategy for schools causing concern
- clarify who will take the lead on each of the actions

48. That list of weaknesses did not suggest an LEA perfectly attuned to the planning process – and the weaknesses proved hard to eradicate. A letter from DfEE dated 11 June 1999 reiterated the inadequacies in the audit of performance, a need to revise the literacy and numeracy strategies, and to improve the strategy for schools causing concern. Moreover, by that stage, the LEA had presented a post-inspection action plan which had been developed in parallel, rather than in alignment, with the EDP. In both, the actions set out needed much sharper focus, and the post-inspection plan needed to be much clearer about who was responsible for particular activities, and for the management and monitoring of those activities.

49. In the light, then, of what has been extensive comment from DfEE officials, the LEA undertook further revisions to both the PIAP and the EDP in the summer of 1999. The revised EDP has gained considerably in complexity, but less in sophistication or manageability. It retains weaknesses which, given the effort that has gone into developing the plan, suggest a deep-seated lack of management confidence in the LEA.
The plan sets out the following priorities:

- To raise standards of pupil achievement in literacy.
- To raise standards of pupil achievement in numeracy.
- To raise standards of achievement and teacher competence in the use of ICT.
- To improve pupil attendance and behaviour.
- To promote self-managing schools.
- To provide early identification, intervention and support to schools causing concern.

50. These closely match the national priorities and are related to an audit of need, although not an especially detailed one. The disadvantaged, multi-ethnic nature of Southwark is not reflected in the priorities themselves nor, sufficiently, in their detailed working out.

51. The revised plan is prefaced by “guarantees” for parents, pupils and schools and expectations of parents, pupils and schools. That is, in itself, an idea with a respectable provenance. Each of the guarantees begins with the pronoun “we”, but it is not clear to whom “we” refers. It should reasonably refer to the whole education service, as it is clearly not possible for the education department to guarantee given levels of attainment, since those are outcomes of the work of the schools (nor, incidentally, is it clear in what helpful sense LEAs can properly have expectations of parents). To point to this lack of clarity is not mere logic chopping. It identifies a central uncertainty which is at the heart of the continued difficulties in planning. The LEA fundamentally has no settled conception of what its role is: what it must do itself, what the schools must do for themselves, and what may best be done by partnership between schools, or between schools and the LEA.

52. Thus, the LEA throughout the plan accepts in principle that improving standards is, to a large extent, a function of the self-managing school. Its role in reinforcing that autonomy is support for self-review or self-evaluation. Neither is ever defined, nor is the function of review within the school development planning process set out in the draft presented to the inspection team. Fortunately, thinking on self-review by senior advisers had proceeded rather further than drafting, and a structure (if not a model for promoting self-review) was being put in place, involving school clusters and, interestingly, the provision of business mentors for secondary heads. The framework for self-review is essentially OFSTED-based and, arguably, restricts the process too narrowly to preparation for inspection, as opposed to the meeting of targets. The LEA has not sufficiently rigorously asked itself the question whether the scale of its own activities, particularly through the link advisers, is more likely to support school autonomy, or to undermine it. The LEA also continues to set itself an unrealistic and excessively expensive number of tasks, too many of which are universally directed. This is, for example, the case with monitoring visits, which all schools receive.

53. The first inspection was critical of the LEA’s ability to identify schools causing concern, and arrest the decline of under-performing schools. The number of schools in special measures, or with serious weaknesses, was high and increasing. The support given to schools causing concern is discussed elsewhere in this report. One of the recommendations arising from the first inspection was to work closely with schools on the
implementation of the Code of Practice on LEA relations with schools and this is reflected in the revised EDP. Schools are now grouped into five categories of concern:

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1:</td>
<td>No concern</td>
<td>60%</td>
</tr>
<tr>
<td>2:</td>
<td>Some concerns</td>
<td></td>
</tr>
<tr>
<td>3:</td>
<td>Significant concerns</td>
<td></td>
</tr>
<tr>
<td>4:</td>
<td>Serious weaknesses/formal warning</td>
<td></td>
</tr>
<tr>
<td>5:</td>
<td>Special measures</td>
<td></td>
</tr>
</tbody>
</table>

54. Some appropriate actions are set out in relation to schools in the higher categories, but the LEA has not seriously asked itself the question why it needs to support all schools, even those which give no, or little, concern. Moreover, although the schools causing greater concern appropriately attract a higher tariff of support, the plan is for them to do so across all the EDP activities, irrespective of whether or not the issue addressed is, or is not, problematical in the specific school. This is plainly absurd and not, in practice, what occurs. The "package" set out in the EDP is, in effect, an accounting tool, designating a particular quantum of resource which the LEA is entitled to retain. The targeting of that resource is then decided case by case, depending on the severity of the issues identified in a particular school. That is appropriate in itself, but the danger is that the schools see the package as an entitlement. Interviews with focus groups of headteachers did in fact suggest that the distinction between intervention, as a statutory function of the LEA, and curriculum support, which schools should purchase, was not securely established.

55. The criteria for allocating schools to a particular category have not been well thought through, in the sense that the distinction between, for example, "some" and "significant" concerns has not been established. Overall, the triggers for levels of concern, as set out in the EDP, are not sufficiently precise. For example, "some aspects of leadership and management and/or quality of teaching" offers no possibility of the precise differentiation that is needed. Nor are they sufficiently broadly framed. For example, concern about the under-performance of particular groups of pupils is not listed as a criterion, and it is hard to believe that the LEA would not consider a formal warning if there were serious financial difficulties, evidence of statutory non-compliance, or examples of bullying or racial harassment.

56. Furthermore, the actions set out in the plan are so numerous that questions of feasibility and overload inevitably arise. Close to the heart of the detailed weakness of Southwark’s EDP is a misunderstanding of the nature of target-setting. The description of the target-setting process is more complex than it was, and stands in some danger of engendering further confusion. What it really describes, however, is more sophisticated extrapolation, and more extensive benchmarking. The key, however, to realistic target-setting is not arithmetic, but the capacity to design and implement improvements in provision that have some chance of influencing attainment for the better. Any such capacity is still notably absent from Southwark’s EDP, although discussions with some senior officers suggested an awareness of the issue not yet translated into the written plan.
Summary

57. Overall, then, the EDP is still not an effective blueprint for school improvement. The responses to the school survey, moreover, do not suggest that consultation over it was effective in securing widespread commitment to achieving the priorities. It is not, in that sense, an expression of a genuine partnership. Nor does it do justice to many of the activities actually proceeding in the LEA, apparently unknown to the authors of the EDP. Where inspectors were able to form a view on the actions actually taken, for example by members of the School Improvement Division, they were in every case more sensible than those set out in the plan. The EDP requires fundamental reconsideration which should dwell less on the written plan than on the changing nature of the LEA role and relationship with schools. The stress on the self-managing school is right, but the LEA has been slow to reflect on the implications of the fact that such schools already successfully exist in Southwark. It is not the fount of all wisdom. Schools believe that it too often acts as though it were. There is some foundation for their view.

Progress in implementing the EDP

Priority A: To raise standards of pupil achievement in literacy

58. The first inspection found that despite the fact that attainment in literacy in Southwark was weak with test results below national averages, the implementation of the National Literacy Strategy had led to improvements in the teaching of literacy. The support given to schools by the LEA was generally effective, although a little less so in the secondary than the primary schools. The LEA’s work in supporting the NLS had built on pre-existing initiatives, such as the School Effectiveness projects funded by the SRB.

59. The LEA conducted an evaluation of its progress in July 1999. This showed that most of the intended actions set out in the EDP had been carried out. The LEA did not report on all the proposed actions such as the identification of needs for EMAG teachers and bilingual classroom assistants, or the provision of training and guidance for primary lead teachers on monitoring the literacy hour with particular attention to effective word-level work. The Conferences held, including that for secondary heads and deputies, are said to have been well regarded. Only the promotion of parental and wider community involvement in literacy was said to have been less than “at least satisfactory”.

60. In reading and writing at Key Stage 1, the trend is upwards with some evidence of narrowing the gap with the national level. At Key Stage 2 in 1999, performance was less encouraging, in that the increase of 4% per year for the last two years was insufficient to meet targets. Twenty-two schools were at least 10% adrift from their own targets for 2000. Attempts have been made to ascertain why. Not all of the reasons given hold water; discontinuities in staffing and pupil mobility are familiar causes of inadequate progress in London schools, but it is not acceptable to adduce as a reason for under-performance that “the cohort had a high proportion of pupils with SEN” since this should have been clear when the targets were set, while “weak teaching” is not a fact of nature, but an obstacle which it is the purpose of the strategy to overcome. Nevertheless, action has been taken, and the strategy is back on course.
61. Some difficulties in staffing have been overcome, first by prompt action taken by the strategy manager, and subsequently by new appointments. The NLS is now well staffed, with a third consultant providing a degree of contingency not previously available. An arrangement to share consultants with a neighbouring LEA was a well-conceived effort to achieve economies of scale, but led in practice to constraints. It has been largely abandoned, except in so far as there is some shared INSET. The Senior School Improvement Adviser is Strategy Manager for both the NLS and the NNS, having been promoted from a post as English Adviser. There is something to be said for consolidating the management of the two strategies, and it is clear that the introduction of the NNS has benefited from the lessons learnt from the earlier implementation.

62. At Key Stage 3 there is some evidence of continued slow progress, with a slight narrowing of what remains a large gap between the LEA and the national average.

**Priority B: To raise standards of pupil achievement in Numeracy**

63. As in the case of literacy, standards of numeracy in Southwark schools were below the national average at the end of all the Key Stages, and levels of attainment were low. The first inspection took place before the implementation of the NNS, though some groundwork had been done in that the Southwark Numeracy initiative was being trialled in nine schools, using materials adapted from the National Numeracy Project (NNP). The take-up of training in numeracy was good, but standards remained low – a fact related to a severe shortage of suitably qualified staff and rapid turnover in maths co-ordinators. Support for numeracy in secondary schools was unsatisfactory.

64. The LEA’s own evaluation for the period ending June 1999 was that progress overall was satisfactory. The LEA’s reporting does not cover all the actions proposed, including especially those activities, such as training for EMAG teachers, which are focused on the differentiation of the strategy. The numeracy Consultants are said to be effective, and both the three day training for all schools and the five day training for the 33 intensive support schools have been well received. At Key Stage 1, 84% of pupils achieved Level 2 in mathematics, and at Key Stage 2, the improvement in 1999 was 11%. Southwark’s performance is now 12% below the national average. At Key Stage 3, the proportion of pupils attaining level 5 in Mathematics increased by 7%. The project is well documented and carefully monitored. Nevertheless, there have been staffing difficulties, in that the senior inspector for maths left the authority at restructuring, and it has not been possible to find a replacement. Despite this, the strategy has remained on track.

**Priority C: To raise standards of achievement and teacher competence in the use of ICT.**

65. Previous drafts of this priority in the EDP were criticised by the DfEE for failing to discriminate between ICT as an administrative tool, a teaching tool and the teaching of ICT. Success criteria were not sufficiently well related to the achievement and progress of particular groups. These deficiencies remain. Despite the extensive analysis of different aspects of the activities, the majority of actions remain frustratingly vague and open ended.
They provide together an altogether unconvincing overall set of steps to meet the objectives set out.

66. The EDP identifies the links between this EDP priority and other plans and initiatives, in particular the implementation of the National Grid for Learning (NGfL) and New Opportunities Fund (NOF). The NGfL bid’s proposed activities and targets overlap many of the activities set out in the EDP’s priority 3. The bid provides more opportunity to set out the proposals for ICT and the links between administration and curriculum support. However, it is clear that the activities and targets within this bid are far more specific and rooted in a thought through strategy than those under priority 3 of the EDP. In addition, there are inconsistencies in the targets set within the EDP and the NGfL bid. For example, the former refers to 80% of primary schools receiving satisfactory or better OFSTED reports by 2002-2003, while the latter refers to a reduction in the number of critical OFSTED reports for ICT to below 10% in 2002. These findings indicate the inadequate linkages between different strategies relating to ICT and a confusion in relation to targets and objectives.

67. At the EDP monitoring and review group meeting of 9 July 1999 reasonable progress was reported on all three activities related to this priority. However, this was not confirmed during the visits to schools. The effectiveness of the ICT support in the nine schools where it was examined was variable with an equal number of schools where the rating was good, satisfactory and poor. However, much of the work appeared to be associated with supporting the implementation of NGfL or responding to the specific needs of schools causing concern, rather than implementing the EDP priority.

Priority D: To improve pupil attendance is evaluated in the section of the report on Access

Priority E: To promote self-managing schools

68. The first inspection acknowledged that the recruitment and retention of senior staff were particular challenges for Southwark. Although information to headteachers was considered good, support for school development planning was variable. The report further noted that the LEA’s policy of retaining much of the funding for school improvement at the centre constrained the ability of maintained schools to plan and drive school improvement, in stark contrast to the way the LEA provided services to local grant-maintained schools. At the heart of those criticisms lay a concern that neither the LEA nor many of its schools were fully committed to the government’s agenda of self-managing schools. Furthermore, the LEA lacked the management capacity within its officers to deliver the kind of robust intervention required to challenge headteachers and governors to become more accountable for managing the performance of staff and pupils in their schools. It was hoped that the different relationships developed with grant-maintained schools might provide the basis for an alternative approach for developing autonomous schools. Priority 5 of the EDP provides little evidence of the fundamental shift required. There are far too many activities, the majority of which are predicated on the notion of the link school improvement adviser as the main catalyst for change – a strategy which has patently failed to deliver in the past. Headteachers and governors of many of the LEA’s community schools have not seen their role as managing and monitoring the performance
of staff, and have been guilty in the past of abdicating this role to link advisers. In part, the number of schools causing concern is testimony to the effectiveness of this approach.

**Priority F: To provide early identification, intervention and support to schools causing concern**

69. The first inspection found that support for schools requiring special measures and those with serious weaknesses was of variable effectiveness and needed to be more consistent. Despite the fact that the LEA had been successful in supporting three schools to come out of special measures, the number of primary and secondary schools in special measures gave serious cause for concern. At the time of the first inspection, fifteen maintained schools in Southwark had been judged to require special measures since 1993: ten primary and five secondary schools. Of those, ten had been placed in special measures since the beginning of 1998, including three secondary schools after their second Section 10 inspection. One secondary school was in special measures for three years and closed last August. In addition, two secondary, eight primary and four special schools have been identified by OFSTED as having serious weaknesses. Four of the 14 schools were identified in 1997/98; two in 1998/99. Nine of the schools have been visited by the OFSTED School Improvement Team and in all but two cases no further monitoring was judged to be required.

70. Recommendation D was taken on board and incorporated with the EDP. Progress has been poor. In the absence of a coherent and focussed strategy to bring rigour and foresight to the work of the LEA in this regard, visits to schools reveal a catalogue of ineffective intervention or failure to act despite written pleas to advisers and officers to do so. In every instance once schools are judged to be underperforming, the LEA asserts in its statement of action that these concerns were known to them, or that its team has had significant involvement with the school. That involvement has led to little or no improvement. Pupils deserve better. The LEA has become experienced in fire-fighting, but lacks any discernible capacity to intervene effectively to address concerns.

71. Having identified a further 25 schools as causing concern in Category 3, the LEA has not provided a coherent programme of support to those schools. The workload of those remaining advisers, supplemented by external consultants, is focussed almost exclusively on the twelve primary and four secondary schools in special measures and serious weaknesses. The notification during this inspection that two more Southwark schools have been judged to have serious weaknesses or special measures this half term (both in Category 3) merely serves to underline the continuing failure of the LEA to support its most vulnerable schools.

**Recommendation**

72. In order to provide strategic direction to the work of the LEA in support of school improvement, the EDP should be completely revised. The revision should be extensive, and aimed at providing a workable plan, based on clear principles and embodying the authority’s real intentions. The revision should include the following:
- A much improved audit of need, which clearly determines the targeting of resources to under-performing groups of pupils, and accurately matches the scale of the challenge in supporting the weakest schools

- An amended categorisation of schools, retaining the fivefold categorisation for priority 5 only, otherwise directing support to evidence of particular need

- Complete overhaul of annex 3 in order to achieve the detailed match between targets, activities, actions and success criteria which is currently almost completely lacking. To achieve this, the authority will need detailed guidance, in view of its repeated demonstrations of inability to write plans that offer any possibility of leading to desired outcomes

- A sharp reduction in the number of activities planned

- Renewed, and much more effective, consultation with schools, coupled with a genuine commitment to undertaking all the actions set out

- Cross-referencing of the actions proposed to:
  (a) the planning of the EAZ
  (b) provision made under "Excellence in Cities"

- Revision of the objectives and activities under priority 3 to ensure closer alignment with NGfL.

- Amalgamation of priorities 5 and 6

- A redefinition, again with informed guidance, of what is meant by "the self-managing school", setting out in full the implications for school self-review, and also for the changing role of the LEA, not least with regard to the dissemination of good practice

- A further revision of the description of target-setting, giving less emphasis to statistical processes and more to the LEA's role in assisting schools to design improvements in provision to raise standards.

**SPECIAL EDUCATIONAL NEEDS**

**Update**

73. The LEA continues to meet its statutory duties with regard to special educational needs. It has one of the best rates for the completion of SEN statements (97 per cent) within 18 weeks nationally. Since the inspection the LEA no longer funds an inspector for SEN, although an advisory teacher is still in post. Schools are unhappy at the reduction in curriculum support for SEN.

74. At the time of the first inspection, the LEA had just completed a wide ranging review of special needs provision in order to deliver the LEA's strategy on inclusion; consultation had been comprehensive. The LEA then consulted on the SEN Action Plan. The SEN Action Plan was agreed by the School Organisation Committee on 15 September 1999.
Statutory proposals are in train for one special school to change its character. A number of schools have expressed an interest in becoming resourced schools for particular learning or physical disabilities but are somewhat constrained by the LEA’s pace of change. A more urgent approach needs to be adopted.

Recommendation

75. The LEA should move more quickly to increase the number of resourced schools.
ACCESS

Attendance

76. The first inspection found that the LEA employed effective strategies to ensure that statutory duties were met. However, support to schools to improve levels of attendance was variable. The report recommended that in order to support improvement in attendance, the LEA should review both its strategies for supporting schools in tackling poor attendance, and the deployment of the EWAS.

77. Good progress has been made in 1998/99. Although levels of unauthorised absence at 1.7 per cent in primary schools have only reduced by 0.1 per cent, there has been reduction in authorised absences to 0.5 per cent, which is below the national average. Attendance has risen in secondary – nearer to the national average; unauthorised absence is still high at 2.3 per cent. The Borough is on course to achieve the 2000 attendance targets in the EDP.

78. The LEA has taken effective steps in regard to the deployment of specialist staff. Since September 1999, all schools have a link EW officer, which is seen as a welcome development. However, there is still some way to go in defining the brief of those officers in school. A minority of them still see their role as monitoring compliance. While this still remains one of the statutory functions, the service is becoming increasingly flexible in working alongside staff on the school’s attendance agenda.

Ethnic Minority Achievement

79. The first inspection was critical of the LEA’s support to raise the attainment of black Caribbean pupils. Since then the LEA has successfully bid for additional funds in its Ethnic Minority Achievement Grant (EMAG) and has sought to address the concerns in the post-inspection action plan. Developments to date have been piecemeal and lacking in coherence. Overall progress has been slow, partly because of the failure of the LEA to appoint an EMAG adviser, for which funding had been retained centrally until the beginning of November, and partly because of the substantial workload of other school improvement advisers. In the meantime, some schools have got on with using their monies, primarily to buy additional resources or to train classroom assistants using alternative providers; others have postponed developing training until the arrival of the postholder.

80. The LEA has provided schools with an analysis of performance data by ethnicity: this is helpful. However, it has yet to set up systems for intervention in schools where progress of minority ethnic groups is unsatisfactory. There have been some recent moves to identify effective practice, but no evidence as yet of wider dissemination. A number of schools have maintained their involvement in a joint LEA-Institute of Education research project on Black Caribbean pupils. In particular a group of teachers, officers and advisers have completed MA courses and, expect their dissertations to contribute to Southwark’s research base on effective practice in local schools.

APPENDIX
RECOMMENDATIONS

Strategic Management

To better prepare schools so that they are able to take on the increased management and procurement responsibility that will result from increased delegation:-

- Undertake a review to ascertain, before April 2000, the capability of individual schools to take on the additional management responsibilities which will arise from increased delegation

- Use the findings of the above review to specify any additional support required by schools or groups of schools in order that they can cope with the new demands of additional delegation

- Co-ordinate the above process with the process for supporting schools causing concern

To establish the LEA’s client role in ensuring schools secure effective support services there should be:-

- An urgent review of the current configuration, structure and orientation of LEA services in the context of their changed role under Fair Funding, the Code of Practice on LEA-School Relations and the increased delegation of responsibility to schools from April 2000.

The findings of the above review should be used to:-

- Implement interim changes to the management structure and processes so that it is in a position to fulfil its new responsibilities from April 2000

- Establish better mechanisms for collating and analysing information available from all sources, in order to monitor the performance of schools in fulfilling their increased management responsibilities

- Establish arrangements to ensure that the process of review of management performance in schools is co-ordinated with the parallel monitoring processes associated with supporting schools causing concern

To improve the quality and consistency of support to schools in self evaluation and development planning so as to:-

- Secure for the School Improvement Unit expertise in school management, and business and development planning
Ensure that all schools in categories 4 and 5 have access to expertise in school management and business and development planning appropriate to their needs.

**To improve the quality of continuing personnel service provision and the implementation of the single status agreement:**

- Arrange for a process of independent arbitration between the remuneration team and those schools currently under threat of withdrawal of delegation because of alleged non-co-operation with the implementation of the single status agreement
- The remuneration team should be supplemented with personnel with recent expertise in senior school management

**To improve the performance management of services to schools the Council should:**

- Follow up the scrutiny strategic management costs with similar benchmarking exercises in relation to access, special education needs and school improvement
- At least annually provide report back to relevant consultative groups on the quality and cost effectiveness of LEA services along with proposals for remedial action and/or service improvement

**School Improvement**

In order to provide strategic direction to the work of the LEA in support of school improvement, the EDP should be completely revised. The revision should be extensive, and aimed at providing a workable plan, based on clear principles and embodying the authority’s real intentions. The revision should include the following:

- A much improved audit of need, which clearly determines the targeting of resources to under-performing groups of pupils, and accurately matches the scale of challenge in supporting the weakest schools
- An amended categorisation of schools, retaining the fivefold categorisation for priority 5 only, otherwise directing support to evidence of particular need
- Complete overhaul of annex 3 in order to achieve the detailed match between targets, activities, actions and success criteria which is currently almost completely lacking. To achieve this, the authority will need detailed guidance, in view of its repeated demonstrations of inability to write plans that offer any possibility of leading to desired outcomes
- A sharp reduction in the number of activities planned
Renewed, and much more effective, consultation with schools, coupled with a genuine commitment to undertaking all the actions set out.

Cross-referencing of the actions proposed to:
(a) the planning of the EAZ
(b) provision made under "Excellence in Cities"

Revision of the objectives and activities under priority 3 to ensure closer alignment with NGFL

Amalgamation of priorities 5 and 6

A redefinition, again with informed guidance, of what is meant by "the self-managing school", setting out in full the implications for school self-review, and also for the changing role of the LEA, not least with regard to the dissemination of good practice.

A further revision of the description of target-setting, giving less emphasis to statistical processes and more to the LEA's role in assisting schools to design improvements in provision likely to lead to improved standards.

An appropriate and realistic work load for advisers.

**Special Education**

The LEA should move more quickly to increase the number of resourced schools.