

Item No. 20.1	Classification: Open	Date: 23/7/03	Meeting Name Council Assembly
Report title:		Annual Review of Education Development Plan 2 (EDP2)	
Ward(s) or groups affected:		All wards.	
From:		Strategic Director of Education and Culture Director of Education Services, Atkins Education Head of School Improvement, Atkins Education	

RECOMMENDATIONS

1. That Council Assembly agree the report as recommended by the Executive Committee on 8 July.
2. That Council Assembly note the progress that has been made in implementing EDP2.
3. That Council Assembly agree the changes to activities outlined in Appendix 1, as costed in Appendix 2.

BACKGROUND

4. The local education authority (LEA) has a statutory responsibility to produce an education development plan (EDP). The purpose of the EDP is to provide a structured framework through which the LEA will support schools to raise standards of pupil achievement and attainment.
5. The first generation of EDPs came to an end early in 2002 and all LEAs were expected to submit new EDPs to the Department for Education and Skills (DfES) for ratification by 31 January 2002. The new Southwark EDP (referred to as EDP2 in this report) was duly ratified by the DfES and has since been implemented across the LEA.
6. The DfES places a requirement on LEAs to review their EDP2 and submit an annual report evaluating the EDP2 for the period April 2002 to March 2003, including the lists of activities within each priority, to submit to DfES by 18 July 2003.
7. This report covers the first year of the implementation of the EDP2. In preparation for this report relevant Education Department officers and staff from Atkins Education have reviewed the actions taken across the LEA in support of the EDP2's six priority areas as set out in the original Annex 2 of EDP2. This report summarises the feedback from this review activity and Appendix 1 to this report sets out the revised Annex 2.
8. The Office for Standards in Education (Ofsted) inspection of the LEA in the spring of 2002 indicated several areas where EDP2 could be revised. The recent review has taken account of Ofsted's recommendations in this respect and the changes are also reflected in Appendix 1 to this report.

9. EDP2 was structured around the following six priority areas:
- i) Priority 1: Raising Attainment in the Early Years and Primary Phases, especially in Literacy and Numeracy;*
 - ii) Priority 2: Raising Attainment in Key Stages 3 and 4;*
 - iii) Priority 3: Support for Schools Causing Concern;*
 - iv) Priority 4: Social and Educational Inclusion: Improving Participation and the Quality of Education for All;*
 - v) Priority 5: Ensuring a Consistently High Quality of Education is Provided for All Through the Development of Effective, Self Managing Schools;*
 - vi) Priority 6: Recruitment and Retention.*
10. The purpose of this report is to update Members on the progress of activities carried out to date and to recommend any changes that might be necessary in the light of the progress being made.

KEY ISSUES FOR CONSIDERATION

Summary of Development Activities and Progress

The developments that have taken place under the first year of EDP 2 have been characterised by:

11. Capacity Building
Increase in the capacity of the service to support school improvement including four School Improvement Advisers (two with headship experience), and a range of consultants working on our support for boys' achievement, primary ICT, primary literacy, primary numeracy, KS3 Science, KS3 ICT and foundation subjects in KS3.
12. Systems
Development of standardised and robust systems for working with schools including:
- Annual cycle of Link Adviser visits, focused on Annual Review and Target Setting, Evaluation of Teaching and Learning and Support for Development Planning
 - Introduction of a School Self-Review and Evaluation model
 - Development of a framework for Evaluation of Teaching and Learning
 - Development of a range of audit tools
 - Development of a cross-service strategy for supporting schools
13. Resource Allocation
Allocation of time and other resources is now linked more directly to each school's performance in accordance with the LEA/School Relations Code of Practice.
14. Supporting National Initiatives

Work has continued on delivering the key national initiatives on Key Stage 3 Strategy, Literacy and Numeracy (now combined into the Primary Strategy) and development of ICT in the curriculum.

15. The review of development activities did not indicate that any change was needed to the six priority areas themselves but suggested that there is a need to consider the following strategic issues in the coming year – these are reflected in changes of emphasis within the School Improvement Plan:
- Developing strategies for the identification, accreditation and sharing of good practice.
 - Developing more coherent and integrated cross-service support to schools
 - Managing the reduction in Standards Fund activities
 - Increasing awareness across the education service including schools of the need to meet and, where possible, exceed our targets
 - Focusing resources more carefully on areas of greatest underperformance
 - Developing strategies to support collaborative activities between schools
16. The review also highlighted changes needed to some of the actual activities, reflecting the fact that some had been completed, some required amendment, and some new activities were needed in accordance with developing priorities over the year.

Commentary on targets

17. The targets for 2002 were set in EDP1 and are therefore not a reflection on the effectiveness of the activities included in EDP2 which is the subject of this report. However, they are provided here as an essential link between the two plans and to provide a context against which EDP2 priorities and activities can be reviewed.
18. The following tables set out a comparison between the LEA targets for 2002, as set in the EDP1, and the actual results achieved. (General note: A positive difference means target is exceeded and a negative difference means the target has not been met).

Performance Targets	2002 LEA Target	2002 LEA Result	Difference
Key Stage 2			
English Test Level 4 and above	75%	67%	-8%
Maths Test Level 4 and above	70%	62%	-8%
GCSE/GNVQ (Key Stage 4)			
5+ grades A* - C	35%	36%	+1%
1+ grades A* - G or equivalent	96%	96%	0%
Average Points Score per pupil	33.0	34.3	+1.3

Source of Targets: Southwark EDP Revised 2000-2002 (Part 1): Section 1.1

Source of Results: DfES Performance Tables 2002

19. The English and Maths results at Key Stage 2 show that the targets for 2002 were not met. The results at GCSE show that targets for all measures were achieved in 2002.

Targets for reducing exclusions & unauthorised absence	2002 LEA Target	2002 LEA Result	Difference
Exclusions			
Number of permanent exclusions	50	50	+0
Unauthorised Absence			
% of half days missed, maintained primary schools	1.0%	1.8%	-0.8%
% of half days missed, maintained secondary schools	2.0%	1.7%	+0.3%

Source of Targets: Southwark EDP Revised 2000-2002 (Part 1): Section 1.2

Source of Results: DfES Pupil Absences From Schools 2001-2002 (Provisional) - Table 4

Note: Unauthorised absence has been replaced with attendance in EDP2

20. The unauthorised absence figures show that the 2002 target for secondary schools was exceeded and the target for primary schools was not met. The Southwark Schools Attendance Support Strategy focuses on improved overall attendance in schools and the success of this is reflected in the improvements made in school attendance rates since 2001. The secondary attendance figure for academic year 2001-2 was reported in July as 91.0%. The target has been met and improvement made on the baseline rate of 90.4%. The primary attendance figure for academic year 2001-2 was reported in July as 93.3% against a target of 93.8% and a baseline of 93.2%. This shows that 0.1% progress has been made from the baseline although the target was not met overall.

Targets for most underperforming ethnic minority group	2002 LEA Target	2002 LEA Result	Difference
Black Caribbean			
Key Stage 2			
English Test Level 4 and above	74%	59%	-15%
Maths Test Level 4 and above	67%	53%	-14%
GCSE/GNVQ (Key Stage 4)			
5+ grades A* - C	28%	23%	-5%
1+ grades A* - G or equivalent	94%	97%	+3%
Average Points Score per pupil	30.0	29.5	-0.5

Source of Targets: Southwark EDP Revised 2000-2002 (Part 1): Page 11

Source of Results: Management Information and Analysis, Education Service

21. The English and Maths results for Black Caribbean pupils at KS2 show that targets were not met. The GCSE results show that the target for pupils achieving 1 or more GCSE grades A* - G was exceeded by 3 percentage points, although targets for the other measures of attainment at GCSE were not met.
22. In addition, the percentage of children looked after achieving at least 1 A* - G grade at GCSE/ GNVQ or equivalent increased by 12 percentage points from 34% in 2001 to 46% in 2002.

Strategies for improvement in underperforming schools

23. Strategies have been developed for improving the identification of underperforming schools. For primary schools this is based on analysis of raw attainment data and value added data, as well as other factors including gender differences in attainment levels, differences between school targets and outcomes, and attendance of teaching staff at training courses. Intervention is then differentiated on the basis of targeted support in inverse proportion to need.
24. At Key Stage 3, intervention is targeted on the basis of prior attainment of pupils on entry to secondary school, value added results and audits of leadership and management. At Key Stage 4, intervention is based around the London Challenge agenda.

LEA targets and aggregate targets for schools for 2004

25. The following tables compare the LEA targets set for 2004 and the aggregate targets for schools.

	2003-4 LEA Target	2003-4 Aggre- gated School Target	Difference
Key Stage 2			
English Test Level 4 and above	83%	71%	-12%
English Test Level 5 and above	32%	20%	-12%
Maths Test Level 4 and above	80%	71%	-9%
Maths Test Level 5 and above	28%	22%	-6%
Key Stage 3			
English Test Level 5 and above	65%	54%	-11%
Maths Test Level 5 and above	65%	53%	-12%
Science Test Level 5 and above	60%	52%	-8%
ICT Teacher Assessment Level 5 and above	75%	51%	-24%
GCSE/GNVQ (Key Stage 4)			
5+ grades A* - C	40%	39%	-1%
5+ grades A* - G (Inc English and Maths)	90%	87%	-3%
Average Points Score per pupil	37.5	33.0	-4.5

Source: EDP 2002 & 2003 submissions to DfES

Note: Aggregated school targets for KS3 & KS4 do not include Bacons CTC Targets

Bacons CTC is included in the DfES published LEA performance tables. If Bacons

CTC was included it would raise the aggregated school target as it is a high performing school.

26. The comparison between LEA targets and aggregated school targets for 2004 highlights the very challenging nature of the LEA targets. As we do not yet have performance data for 2003 it is not possible to judge how far we are on track for meeting these targets.
27. The significant gap between the LEA and aggregated school targets is a product of the different methodologies used to arrive at the figures. The LEA

target is the subject of discussion with the DfES who have national targets in mind. The process for setting the 2004 school targets was more robust than in previous years as it was based on applying progress indicators to individual pupil data. This value added methodology (developed by the Fischer Family Trust) shows school outcomes if their pupils progress:

- the same as the progress made by all pupils nationally
- the same as the progress made by pupils in similar schools
- consistent with the overall improvement needed to achieve LEA targets
- similar to the progress made by the pupils in the "top 20%" of schools nationally last year

28. For 2003/04, the focus will be on target getting rather than target setting. The responsibility for setting school targets rests with the Governing Body and we have used the Fischer Family Trust model to provide challenge to the Governing Body and the head teacher in this process. Our efforts are now concentrated on focused work to support schools to exceed the aggregate school targets to close the gap between that and the overall LEA targets. As the table shows, the differences are particularly marked at Key Stages 2 and 3, and this focused activity has been incorporated in the Primary Strategy and the Key Stage 3 Strategy.

Effectiveness of the activities carried out in EDP2

29. This section outlines the main outcomes of the review of the six EDP2 priorities and highlights the changes in emphasis within the priority where any have been made. This section also identifies recommendations for change/ new activities where relevant and includes commentary on the cost-effectiveness of each priority.

30. Priority 1a – Raising Attainment in Early Years

The split of responsibility for Early Years between Atkins and the Council has significantly reduced the effectiveness of the activities under this priority. No substantial change is envisaged in the activities for the coming year although the issue of joint working will need serious consideration if the intended outcomes are to be realised.

Recommendations for Change/New Activities

- The Southwark Progress Profile needs to be reviewed in the light of the new National Foundation Stage Profile.

31. Priority 1b – Raising Attainment in the Primary Phase

In response to relatively poor outcomes in the 2002 Key Stage 2 tests a robust KS2 Action Plan was created. This built on the strengths of the literacy and numeracy strategy work and included specific targeted work with schools and pupils where greater focus on preparation for the tests was most likely to result in improved attainment. Evidence from adviser visits, Ofsted reports and other feedback suggests that progress in this area is satisfactory.

Activities focusing on the attainment of Black Caribbean pupils at KS2 are continuing, including guidance, training and support work in schools

by the Advisory Teacher for Ethnic Minority Achievement (EMA). The focused work on KS2 through the Action Plan, and through other support programmes such as the Saturday booster classes, will impact on under-achieving ethnic minority pupil groups through their focus on general under-achievement at this level.

Recommendations for Change/New Activities

- This area of activity has been reviewed and revised through the production of the Key Stage 2 Action Plan.

32. Priority 1c and 1d – Literacy and Numeracy

Evidence from the 2002 results, feedback from national strategy managers and adviser visits suggest that input from the literacy and numeracy teams has had a measurable impact on the outcomes of pupils in the schools where focused activity has taken place. We shall not be able to evaluate the extent to which the improvements in teaching and learning are embedded in these schools until further SAT results are available. However, we are conscious that too much time is taken up with supporting weaknesses in teaching and learning and insufficient time is being devoted to addressing the leadership and management aspects within schools. Going forward we have identified support for leadership and management as a particular priority.

Recommendations for Change/New Activities

- The programme is limited by the number of available consultants. Atkins have bid for additional resources to allow the programme to be extended.

33. Priority 2 – Raising Attainment in Key Stage 3 and 4

Progress in delivering the Key Stage 3 Strategy has been acknowledged as good by a number of external organisations, including the national KS3 Strategy manager. There is now a clear recognition amongst schools that weaknesses at Key Stage 3 need to be addressed. Schools have appointed co-ordinators and they have been receptive to implementing the recommendations of the strategy team. Adviser feedback shows improvements in classroom practice and expectations of improved outcomes are high. A fuller evaluation of the impact of our work will be possible after the KS3 results for 2003 are known.

Activities focusing on the attainment of Black Caribbean pupils at Key Stages 3 and 4 are continuing, including guidance, training and support work in schools, although the impact of this work is hampered by lack of capacity. The KS3 Strategy will impact on ethnic minority pupils as it raises expectation of teaching and learning and pupil outcomes in general.

Recommendations for Change/New Activities

- There is a need to provide more direct support for the development of leadership and management at all levels within secondary schools.
- There is a need to provide more differentiated support with a stronger focus on underperforming schools and departments.

34. Priority 3 - Support for Schools Causing Concern

There has been a considerable amount of activity supporting Schools Causing Concern. Our observation over the past year has been that the work we have carried out has been most successful in schools where there is sufficient management capacity to make the required change. Where there has been weak leadership and management much of the support has been effective only when the consultants have been active within the school. In general, support activities need to continue but a greater focus is to be placed on addressing issues of leadership and management through a co-ordinated programme so that sustainable improvements can be realised.

Recommendations for Change/New Activities

- Activities across a range of services require better co-ordination to ensure a collaborative approach to school support.

35. Priority 4 - Social and Educational Inclusion: Improving Participation and the Quality of Education for All

As with many of our activities, it will be easier to evaluate the impact of our work when attainment data are available in early autumn. However, the Access & Inclusion Team are now confident that they are able to identify 99% of vulnerable children and they have clear referral routes in place to ensure that each child has access to appropriate education provision. Of particular note is the work of the Traveller Education team that has achieved unprecedented levels of attendance amongst the Traveller community. Effective implementation of the Behaviour Improvement Programme means that pupils on fixed term exclusions now have provision from day one. We have also secured a number of places in local college provision to ensure that the needs of vulnerable pupils in Key Stage 4 are being addressed. Broadly, the activities identified under this priority are felt to be the right ones and we do not feel a need to make significant changes. However, the focus of these activities is being amended so that we can ensure that the needs of children in public care, pupils with Special Educational Needs and pupils with medical needs are adequately met.

Recommendations for Change/New Activities

- Better liaison with parents/ carers over matters of concern to ensure that children cannot slip through the net of support.
- Increased focus on children in public care and pupils with statements whose placement is difficult.
- Review of EPS and EWAS to ensure they offer appropriate support to schools.
- Additional resourced places for dyslexic pupils.
- Additional places at the secondary pupil referral units.

36. Priority 5 - Ensuring a Consistently High Quality of Education is Provided for All Through the Development of Effective, Self Managing Schools

Implementation and embedding of the Authority's approach to school self-review and evaluation has been the cornerstone of our work in this area. This has been based around high quality materials which assist schools in carrying out the self-review supported by clearly structured link adviser visits. The

process provides a robust level of challenge to ensure schools address the need for continuous improvement.

Recent additional work with Schools Facing Challenging Circumstances and those schools that are underperforming has been supplemented through use of external consultants and a refocusing of the School Improvement Team with an officer dedicated to ensuring the needs of such schools are being properly addressed. As an extension to our work on Social Inclusion, conferences are being held on revising 14-19 opportunities to provide alternative certificated courses for pupils in this age group.

Recommendations for Change/New Activities

- The focus on self-managing schools needs to be supported by the creation of an LEA framework to identify, accredit and disseminate best practice from school to school.
- Provide a better integrated approach to the development of leadership and management at all levels within all types of school.

37. Priority 6 - Recruitment and Retention

Problems over provision of data by schools have hampered work in this area. In particular, it has been difficult to assess individual school vacancies and therefore to target activities at addressing such schools' recruitment needs. However, there is much activity on a borough wide basis to support recruitment and retention of high quality staff. The initiative to develop the notion of "a career in Southwark" which has Continuous Professional Development as a key theme remains a high priority. The Recruitment Strategy Manager continues to work with local and national agencies to maximise take up of opportunities for Overseas Trained Teachers and those who might seek Qualified Teacher Status through routes other than traditional teacher training.

The need for adequate accommodation for teachers remains high. There is evidence of high quality staff leaving the borough because of difficulties over the affordability of housing. Proposals for use of Porlock Hall as accommodation for Newly Qualified Teachers are well advanced and negotiations with a local Housing Association on affordable housing are also proceeding well. Fifty teachers have already been housed under these initiatives and this focused activity will need to continue.

Work was carried out on the feasibility of setting up a local supply agency to source teachers for Southwark schools. However, the exercise showed that such an approach would not be economically viable so we do not propose to continue with this activity. However, work will continue in forging relationships with the supply agencies to ensure that our schools are well served with quality supply teachers where absence needs to be covered.

Recommendations for Change/New Activities

- Develop school systems and school administrative staff expertise in managing human resource data.
- Establish feasibility of providing accommodation for Overseas Trained Teachers and teachers with families.

- Consider how the LEA will work to support schools with the new programme of Workforce Reform.
- Establish range of provisions to support teacher retention including childcare in schools, flexible working and well being programmes.

Policy implications

38. The issues raised in this report link directly to the Council's priority of raising standards in schools. This report also meets the DfES expectation that local authorities will review their EDPs on an annual basis.

Effect of proposed changes on those affected

39. The overarching aim of the EDP is to improve the quality of education available to all young people receiving education in the borough's schools. A major element of the EDP focuses on social and educational inclusion. Many of the activities in the EDP are concerned with targeting support at particular vulnerable and disadvantaged groups. The EDP also seeks to address the needs of the teaching force in the borough both in terms of their personal and professional aspirations.

Resource implications

40. The EDP activities as set out in Appendix 1 to this report will be delivered through prudent use of the resources made available to Atkins through the core budget and various grants. This includes reallocation of some £124,000 from other non-EDP activities to compensate for the reduction of Standards Fund that was previously available to support Schools Causing Concern. Atkins has separately advised the LEA of areas where the EDP would benefit from additional resources, in particular the delivery of the Key Stage 2 Action Plan which is an extension of the EDP activity. However, there are no additional resourcing implications arising directly from this report.

Consultation

41. Full consultation took place on the original EDP2 in line with statutory requirements. The activities carried out under the EDP are continuously evaluated through discussions at the various headteacher meetings held throughout the year.

Formal evaluation of the first year of EDP2 and the amended priorities in Annex 2 was discussed at the Director's meeting with headteachers on 4 July. Their views are summarised below:

Overall summary

Heads were supportive in general of the changes made to EDP2. There were general comments as follows:

- Inclusion of success criteria
- Process for agreement to targets
- Lack of resource column for costing of activities
- Approach to priority setting – led by LEA or schools?

Early Years (Priority 1a)

- suggest rename 'Foundation Stage'
- Query re role of Early Years Advisory Teacher as responsible person for most activities
- Suggested amendment to activity "Improve pupil progress by ensuring the Early Learning Goals/ Foundation Stage curriculum is firmly in place in all settings including nursery and reception classes"
- General statement that Foundation Stage is huge issue for many primary heads and lack of understanding needs to be addressed

Secondary (Priority 2)

- Central training –request that this could be bespoke rather than same for all needs
- Link advisors – request for commitment to continuity of provision
- Support for development of collaborative activities including LIG

Development of Effective, Self-Managing Schools (Priority 5)

- Data protocol – responsible person should be Head of Strategy and Resources

Recruitment and Retention (Priority 6)

- General praise and support for activities in this priority
- Query re Workforce Reform Facilitator and funding for this post

SUPPLEMENTARY ADVICE FROM OTHER OFFICERS

Comments of the Borough Solicitor and Secretary

42.1 Members are being requested to:-

- (1) agree the report as recommended by the Executive Committee on 8 July;
- (2) note the progress that has been made in implementing EDP2;
- (3) agree the changes to activities outlined in Appendix 1, as costed in Appendix 2.

42.2 Section 6 of the School Standards and Framework Act 1998 (SSFA) requires the LEA to prepare an Education Development Plan. In exercising its functions in this respect, the LEA must have regard to Guidance given by the Secretary of State. Section 7 SSFA requires the LEA to submit the Plan for approval by the Secretary of State. EDP2 was approved by the Secretary of State in 2002.

42.3 Under section 7 SSFA, the Secretary of State is required to keep approved EDPs and their implementation under review. The LEA is also required to keep its EDP under review (Education Development Plans (England) Regulations 2001) and the LEA may, at any time after approval, submit modifications to the Secretary of State for approval. To assist the Secretary of State and the LEA in carrying out these duties, Guidance was issued in October 2002.

42.4 The Guidance confirms that the submission of an annual report evaluating EDP2 and the list of activities within each priority for 2003/4 are general conditions of approval attached to the EDP. Therefore, in the event that this requirement is not met, or met in accordance with the Guidance, the Secretary of State may exercise his powers under section 7(5) SSFA, which are as follows:-

- (1) where he is of the opinion that the statement of proposals should be modified (or further modified), he may withdraw his approval and require the LEA to make such modifications as he may specify; and
- (2) where he is of the opinion that the LEA's proposals are not being properly implemented by them, he may withdraw his approval for such period as he thinks fit.

42.6 However, the Guidance also states that the changes to EDP2 will only require approval on this occasion where there have been changes to the national school improvement priorities or changes to the local school improvement priorities which do not flow from external inspection and review.

42.7 The information in paragraphs 11 –41 of the Report is largely compliant with the requirements of the Guidance, except that the cost-effectiveness of the activities is not set out. Atkins may have a good reason for not including this in the Report.

42.8 Members should note that additional resources had been sought by Atkins under the existing PPP Contract, and much, if not all, of this has been resolved in recent negotiations. Care must be taken not to agree to activities that do not have funding within the current Budget. Paragraph 40 of the Report is not entirely clear on this point.

BACKGROUND DOCUMENTS

Background Papers	Held At	Contact
<i>Title of document(s)</i>	<i>Title of department / unit</i>	<i>Name</i>
<i>Education Development Plan 2002-2007 (EDP2)</i>	<i>Strategy Support and Communications</i>	<i>Kate Sturdy</i>
<i>Post-Ofsted Inspection Action Plan</i>	<i>Address</i>	<i>Phone number</i>
	<i>John Smith House</i>	<i>020 7525 5185</i>

APPENDIX A

Audit Trail

32. *This section must be included in all reports.*

Lead Officer	Roger Smith, Strategic Director of Education and Culture, Southwark Ian Turner. Director of Education Services, Atkins	
Report Author	Geoff Conway, Head of School Improvement	
Version	Draft version 3	
Dated	18/7/03	
Key Decision?	Yes	
CONSULTATION WITH OTHER OFFICERS / DIRECTORATES / EXECUTIVE MEMBER		
Officer Title	Comments Sought	Comments included
Borough Solicitor & Secretary	Yes	Yes
Chief Finance Officer	Yes/No	Yes/No
<i>List other Officers here</i>		
Executive Member	Yes/No	Yes/No
Date final report sent to Constitutional Support Services		