



OFFICE FOR STANDARDS  
IN EDUCATION

**INSPECTION OF  
SOMERSET  
LOCAL EDUCATION AUTHORITY**

**January 2002**

**Lead Inspector: Miriam Rosen HMI**

**OFFICE OF HER MAJESTY'S CHIEF INSPECTOR OF SCHOOLS  
in conjunction with the  
AUDIT COMMISSION**

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## INTRODUCTION

1. This inspection was carried out by OFSTED in conjunction with the Audit Commission under Section 38 of the Education Act 1997. The inspection used the *Framework for the Inspection of Local Education Authorities* (September 2000) which focuses on the effectiveness of local education authority (LEA) work to support school improvement. The inspection also took account of the Local Government Act 1999, insofar as it relates to work undertaken by the LEA on Best Value.

2. The inspection was partly based on data, some of which was provided by the LEA, on school inspection information and audit reports, on documentation and discussions with LEA elected members, focus groups of headteachers, staff in the education department and in other council departments and representatives of the LEA's partners. In addition, a questionnaire seeking views on aspects of the LEA's work was circulated to all its schools. The response rate was 82 per cent.

3. The inspection also involved studies of the effectiveness of particular aspects of the LEA's work through visits to seven primary schools, four first schools, one junior school, five secondary schools, two middle schools, one special school and one pupil referral unit. The visits tested the views of governors, headteachers and other staff on the key aspects of the LEA's strategy. The visits also considered whether the support which is provided by the LEA contributes to the discharge of the LEA's statutory duties, is effective in contributing to improvements in the school, and provides value for money. The inspection also took account of relevant evidence from Her Majesty's Inspectors' national monitoring work.

## COMMENTARY

4. Somerset is a medium-size rural LEA which was established in its present boundaries in 1974. It is more advantaged than average, although there are areas of urban and rural disadvantage. The proportion of the school population belonging to minority ethnic groups is very low. Somerset maintains a wide variety of types of school, and has a high proportion of small schools.

5. The performance of pupils is average at the end of primary education (Key Stage 2), and above average at age 16 (Key Stage 4). Secondary schools perform more strongly than primary schools. They are particularly successful at Key Stage 4, where pupils make above average progress. However, there was no improvement at Key Stages 2 or 4 between 2000 and 2001, and the LEA has some way to go to meet its 2002 targets for Key Stage 2. Performance at A-level is broadly average.

6. The LEA provides its schools with support which is in most instances effective. Strengths considerably outweigh weaknesses. The support for school improvement provided by the education development service is particularly strong, with very few weaknesses. The LEA has a coherent and clear Education Development Plan, which is being soundly implemented. Schools are provided with monitoring and challenge, and support and intervention are well targeted at needs. The advisers have considerable expertise, and are well regarded by schools. Management support services are also all at least sound, and are appreciated by schools.

7. The LEA is making sound progress overall in implementing its strategies for the inclusion of pupils with special educational needs, although there have been some problems in the first year. The LEA has listened to schools' expressions of concern and is making further changes. A review of special schools is well underway. There remain weaknesses in the support for the most vulnerable pupils. Here, recently, the LEA has been active, for example in commissioning a review of provision for pupils without a school place. The review revealed the extent of the weaknesses in this area, and provides a basis for plans for improvement.

8. The following functions are particularly effective:

- information on, and range of, services available to schools;
- financial services;
- admissions to school;
- support for schools causing concern;
- support for governors;
- support for school management;
- support for early years education; and
- partnership with schools.

9. The following functions are not exercised adequately:

- provision for pupils without a school place;
- support for attendance; and
- support for behaviour.

10. The director of education has a vision for education in Somerset which is shared by many schools. The focus is clearly the raising of standards. A further feature is the development of community learning partnerships, which schools are encouraged to form with other education providers and partners. Three pilot projects have been established in areas of particular need, and early signs are encouraging. Overall, senior officers in education provide highly satisfactory leadership. Planning within education is highly satisfactory.

11. The LEA's partnership and consultation arrangements with its schools are good. Schools trust the LEA and feel that their views will be listened to. An influential planning group of headteacher representatives and senior officers meets monthly, and provides a very useful forum in which strategy and policy can be discussed at an early stage of development in an atmosphere of trust and confidentiality. This is a particularly good feature, and enables schools to influence the direction of policy. Headteachers are also represented on many of the LEA's working groups.

12. Elected members have demonstrated their support by spending above the Standard Spending Assessment for education. However arrangements for scrutiny of education in the new council structure, to be implemented in October, have not been finalised, and scrutiny in the past lacked sufficient rigour. Corporate planning by the council is satisfactory overall. However, although there is a medium-term financial plan, there is no corporate plan to show how the council's priorities are to be achieved.

13. The LEA is aware of the weaknesses outlined in this report, and has already started to tackle many of them. The inspection team is confident that the LEA has the capacity to address the recommendations made and to continue to improve.

## **SECTION 1: THE LEA STRATEGY FOR SCHOOL IMPROVEMENT**

### **Context**

14. Somerset is a medium-size rural LEA which was established in its present boundaries in 1974. Its towns are relatively small, and several of the rural areas are sparsely populated. The economy is dominated by small and medium sized enterprises often linked to tourism and rural life. Overall the LEA is more advantaged than average, although there are areas of rural and urban disadvantage. Unemployment rates are lower than the national average and the proportion of pupils eligible for free school meals is below average. According to the Department of the Environment's Index of Deprivation (2000), Somerset's districts range from the 237<sup>th</sup> (South Somerset) to the 102<sup>nd</sup> (West Somerset) most deprived districts out of 350 in England. According to the 1991 census, the proportion of the population in high social classes is broadly average.

15. The population of Somerset is about 500,000 and the maintained school population is about 71,000. The proportion of the school population belonging to ethnic minorities is very low, at 0.9 per cent in 2000, compared with 12.1 per cent nationally. The staying on rate at 16 into full-time education in 2000 was nearly 70 per cent, which is close to the national average.

16. The proportion of the school population educated in special schools is less than one per cent, which is lower than the national average. The proportion of pupils with a statement of special educational needs is below average in primary schools (2.1 per cent in 2000 compared with 2.7 per cent nationally and in similar authorities), and average in secondary schools (3.7 per cent in 2000 compared with four per cent nationally and 4.1 per cent in similar authorities).

17. Somerset maintains a wide variety of types of school, resulting from successive past reorganisations. The total number of schools is 275, made up as follows: 16 infant (pupil age four to seven); 43 first (pupil age four to nine); 150 primary (pupil age four to 11); 14 junior (pupil age seven to 11); nine middle (pupil age nine to 13); 21 secondary (pupil age 11 to 16); three secondary (pupil age 11 to 18), five secondary (pupil age 13 to 18 including one boarding); one secondary technical school (boarding); nine special schools and four pupil referral units. Seventy-nine schools in the primary phase have fewer than 100 pupils. An Education Action Zone in the Bridgwater area includes most of the local schools. A 'virtual' Education Action Zone uses information and communication technology to link a number of schools in Somerset and Kent.

### **Performance**

18. Overall, pupils' attainment is average at the end of primary education (Key Stage 2) and above average at age 16 (Key Stage 4). Secondary schools perform more strongly than primary schools; the strongest performance is at Key Stage 4, where pupils make above average progress. In common with many other LEAs, provisional results for 2001 show no or little improvement compared with 2000. Details are given below.

19. Baseline assessment undertaken by the LEA indicates that pupils' attainment on entry is slightly above average.

20. Pupils' attainment in 2000 at the end of Key Stage 1, when compared with that found nationally and in similar authorities, was average in reading, writing and mathematics. Provisional results for 2001 also appear close to average.

21. At the end of Key Stage 2 in 2000, pupils' attainment was average in English, mathematics and science, when compared with that found nationally and in similar authorities. In English, 75.9 per cent attained Level 4 or above, compared with 75.0 per cent nationally and 76.7 per cent in similar authorities. In mathematics, 70.8 per cent attained Level 4 or above, compared with 71.7 per cent nationally and 73.0 per cent in similar authorities. Provisional results for 2001 show no improvement, which is similar to the situation nationally.

22. At Key Stage 3 in 2000, pupils' attainment was average in English and mathematics, when compared with that found nationally and in similar authorities. It was above the national average in science, and in line with that found in similar authorities. Provisional results for 2001 show slight improvements in both English and mathematics, and a larger improvement in science.

23. At GCSE in 2000, pupils' attainment was above the national average and in line with that in similar authorities. The proportion of pupils achieving five or more grades A\*-C was 55.8 per cent compared with the national average of 47.4 per cent and an average of 52.2 per cent in similar authorities. The proportion achieving one or more grades A\*-G was 97.7 per cent compared with the national average of 95.6 per cent and an average of 96.4 per cent found in similar authorities. The average points score was 42.1, compared with 38.4 nationally and 40.3 in similar authorities. Provisional results for 2001 show no improvement in the proportion of pupils attaining five or more grades A\*-C.

24. The average points score of pupils in maintained schools at A-level (17.7) was broadly average compared with that found nationally (18.2) and in similar authorities (18.8).

25. Between 1996 and 2000, the rate of improvement at Key Stage 2 in English, mathematics and science has been below the national trend, although, apart from in English, it has been broadly in line with the trend in similar authorities. At Key Stage 3 and in GCSE the rate of improvement has been similar to the national average.

26. The progress of pupils between Key Stages 1 and 2, and between Key Stages 2 and 3, is average. The progress of pupils between Key Stages 3 and 4 is above average.

27. The percentage of primary schools judged to be good or very good in their last inspection (82 per cent) is well above the national average (70 per cent) and that of similar authorities (76 per cent). The figures for secondary schools are even better; 85 per cent were judged to be good or very good compared with 67 per cent nationally and 78 per cent in similar authorities. Junior and middle deemed



secondary schools, however, do less well overall than those nationally or in similar authorities.

28. Attendance is average in primary and secondary schools. Unauthorised absence is below the national average. The rate of permanent exclusions is below the national average and that of similar authorities.

## Funding

29. The 2001/02 education Standard Spending Assessment (SSA) for Somerset at £2,706 per pupil is lower than statistical neighbours (£2,784), English counties (£2,795) and the English average (£2,958). Somerset's education budget has increased over the last four years, although less than the increase in SSA, and is currently set at 4.6 per cent over SSA .

	Education SSA (£m)	Expenditure (Budget)	Expenditure as % of SSA
1998/1999	165.3	175.2	106.0%
1999/2000	175.6	185.9	105.9%
2000/2001	186.1	194.7	104.6%
2001/2002	196.8	205.8	104.6%

(Source: LEA)

30. Centrally retained spending was also low in 2000/2001. The amount held centrally was only £386 per pupil compared with the county average of £427 per pupil. Comparisons of spending patterns within this retained sum show the LEA to be generally in line with English and county averages. There were however some exceptions, notably:

- the retained special educational needs spending was low at £125 compared with England (£160), county (£147) and statistical neighbours (£130);
- home to school transport costs in Somerset (£91 per pupil) were lower than the county average (£100) and statistical neighbours' average (£116); and
- Somerset, at £370 per pupil, had a much larger than average expenditure on health service partnerships/special medical attention, with the county average being £119 per pupil and the English average £48 per pupil.

31. Primary budget allocation was above the average for the comparator groups. Secondary budget allocation was in line with the county average but slightly lower than the average for statistical neighbours.

2000/2001	Somerset	County Average	Statistical Neighbours
Primary ISB per pupil	£1,805	£1,739	£1,717
Secondary ISB per pupil	£2,378	£2,376	£2,396

(Source: CIPFA)

32. The council has taken up its full Standards Fund allowance in 2001/2002. It has taken advantage of opportunities for attracting external funding. For example, between 1996 and September 2000 secondary schools within Somerset received

£13.6 million from the Arts and Sports Councils for lottery funded projects. The LEA has secured formula capital allocations from the Department for Education and Skills as a result of satisfactory progress on its asset management plan and is investigating alternative methods of funding capital programmes.

### **Council structure**

33. Somerset Council is made up of 29 Liberal Democrat members, 24 Conservative and five Labour. The Liberal Democrats have control, by virtue of the chair's vote. Prior to the June 2001 elections, the Liberal Democrats had an overall majority, and had been in control for eight years.

34. The council started to change its political organisation in 1999. An executive and eight policy review committees were set up, one of which focused on schools. All decisions were made by the executive board. This was not felt by members to be a success, and a new system is to be implemented from October 2001.

35. The new system consists of an executive board, one scrutiny committee, a regulation committee, and a standards committee. In addition, there are six policy development panels which advise portfolio holders. One of the portfolio holders is for lifelong learning. Interim arrangements, which are similar to those proposed, have been set up for the period from June to October.

### **The Education Development Plan**

36. The LEA's Education Development Plan (EDP) is highly satisfactory. The progress on its implementation is sound. The plan is based on an appropriate audit of strengths and areas for development, although it provides insufficient detail of the outcomes. Overall, the plan is clear, accessible and feasible. Most schools find that it aids their school improvement planning.

37. The priorities of the Education Development Plan are to:

1. raise the quality of leadership, management and governance;
2. raise the effectiveness of teaching and learning;
3. raise standards of information and communication technology capability and standards of achievement through the use of information and communication technology;
4. raise standards of literacy for learners;
5. raise standards of numeracy for learners;
6. raise the quality of educational experience for learners; and
7. raise the standards of educational experience and outcomes for underachieving groups.

38. The priorities strongly emphasise national initiatives but due account is given to local concerns, such as the importance of creative experiences, in priority 6. The schools are satisfied with the extent of consultation about the plan and agree with its intentions. It has overall coherence and there is little overlap between the priorities and related activities. Costings are usually precise, responsibilities are clear and success criteria are appropriate, although some are targeted too generally at all

schools and a few others lack precision. Apart from the target on exclusions, the EDP's targets are challenging and those for Key Stage 2 particularly so. Links with other LEA plans have been considered carefully and are set out in a detailed map.

39. The action plans are mainly suitable and there are arrangements for regular monitoring and evaluation, involving officers, members and headteachers. Each priority has a strategic manager and one or two co-ordinators, and the LEA is making satisfactory progress overall in implementing the EDP. In relation to improving the quality of leadership, management and governance, the progress has been good. However, there has been inconsistent progress in implementing priority 7, thus limiting the achievement of vulnerable groups of pupils.

40. The LEA's progress towards the achievement of its statutory targets is uneven. At Key Stage 2 the recent rate of improvement has not been great enough to ensure that the very challenging 2002 targets for literacy and numeracy will be met, despite an appropriate range of strategies. However, the GCSE targets are well within reach. The LEA is also on course to achieve its targets for attendance and exclusions.

41. The LEA has good arrangements for constant review of the EDP and is adapting it to changing circumstances.

### **The allocation of resources to priorities**

42. Somerset's approach is generally satisfactory but there are several weaknesses. Corporate three-year medium term financial planning is being developed to ensure that overall resources are matched to departmental priorities but there is currently no corporate plan defining corporate priorities. In setting the 2001/2002 budget the council addressed specific areas within education. Additional resources were identified for intervention work undertaken with schools causing concern, for improving the education of children out of school by working towards full-time provision and also for the implementation of an autism strategy. These are linked to two of the four education department strategic priorities; raising achievement through the implementation of statutory plans and implementing the LEA's inclusion strategy. However, resources for supporting children out of school were not approved.

43. Procedures for the delegation of financial responsibility to budget holders are clear and, following the advice of the external auditor, the authority has recently introduced monthly departmental budget reporting to the treasurer. Within the education department budget making is accurate in most respects although there is an overspend in home to school transport because of high increases in the cost of renewing contracts. However, budget difficulties are recognised promptly and remedial action is initiated.

44. In 2001/2002, 85.8 per cent of the local schools' budget is delegated to schools and for the first time in many years there is real growth in the delegated budget. Following extensive consultation, the authority has introduced an element of activity-led funding which tries to match funding more carefully to schools' actual needs.

This has particularly improved funding for the primary phase. Somerset is committed to the further development of activity-led funding and its incremental introduction.

45. The LEA is currently, through the appointment of an additional member of staff, extending its provision to support grant bidding by individual schools. This is an area which was rated as less than satisfactory in the school survey.

46. School deficits are acceptably small and controlled but balances held by schools in March 2001 were too large in too many instances. Fifty per cent of primary, 78 per cent of special and 18 per cent of secondary and middle schools had balances in excess of ten per cent. There are mechanisms in place whereby schools inform the LEA of their plans for surpluses and the LEA intends to introduce a procedure to make further enquiries of schools that have excessive surpluses year on year.

### **Best Value**

47. The arrangements in place for Best Value are satisfactory. The external auditor criticised Somerset's initial approach as unduly bureaucratic, overcomplicated and insufficiently independent. For the second year of the review programme the authority has shortened the review manual; redesigned the training and support programme to match the stages of the review; ensured each review is chaired by a senior manager who is wholly independent of the service; defined more clearly the various roles; and has established easier reporting processes. It has also set up systems designed to encourage members to be more fully involved.

48. The 2001/2002 Best Value Performance Plan has been approved by the external auditor. It states the authority's aims and identifies targets for all services. However, the action plans for completed reviews are varied and range from some very detailed and precise ones to insubstantial ones with limited measurable outcomes and uncosted activities. The education department has taken part in various cross-cutting reviews and in year one completed reviews of education finance, community education and the youth service. The Best Value review of education financial services is commented on in an appendix to this report.

49. A framework of management competencies has been developed in the authority and the European Foundation Quality Model is being introduced into all departments as a performance management tool. This has led in the department to a more systematic and consistent approach to identifying areas for improvement; setting objectives; the use of action plans; and monitoring against plans and objectives.

50. The LEA's delegation scheme includes a clear statement of Best Value principles and schools are required to supply a statement on how they intend to address Best Value principles. Nevertheless the implications of Best Value are not widely understood at school level. This year the LEA has introduced support to schools in procuring services from other providers. It also circulates annual financial benchmarking data for schools to make judgements about their own spending patterns in specific areas.

**Recommendation**

- Provide further guidance to schools on their approach to Best Value principles.

## SECTION 2: SCHOOL IMPROVEMENT

### Implications of other functions

51. The education development service provides strong support for school improvement, with very few weaknesses. Most other functions provide at least sound support for school improvement. This includes the strategic management of education, management support services and support for special educational needs. However support for attendance, behaviour, and pupils without a school place are unsatisfactory or poor, and insufficiently support school improvement.

### Monitoring, challenge, support, intervention

52. The LEA's provision of monitoring, challenge, intervention and support is highly satisfactory and has some strengths. The education department's vision statement emphasises working in partnership to raise achievement and the work of the education development service has been revised to focus on this. The LEA's commitment to the Code of Practice on LEA/School Relations is evident and schools are encouraged to be responsible for their own improvement. They understand that they will receive support in inverse proportion to their success. However, provision for pupil referral units has not been up to the standard of that provided to other schools. The LEA has acknowledged this and recently seconded a headteacher for this purpose. Additionally, an adviser for special schools and pupil referral units has just been appointed.

53. The role of link advisers is crucial to the provision of monitoring, challenge, support and intervention, and is well regarded by schools. Link officers have access to performance data and their time is allocated appropriately according to schools' need of it. A school performance group, composed of key advisers and officers from across the department, serves an important **monitoring** function in meeting fortnightly to consider link advisers' reports and other information about schools and to plan support and intervention. Rightly, if a school is discussed, it is informed and receives feedback. The LEA categorises schools according to the degree of concern that their performance, needs or circumstances cause and the consequent amount of support, challenge or intervention needed. In practice, this is an effective system and is understood by the schools that benefit from additional LEA help. However, many schools that are not causing concern to the LEA are unclear about important details such as their category, the amount of link adviser time to which they are entitled or the criteria that would give rise to concern. The LEA is taking steps to ensure that all schools are adequately informed.

54. Schools are appropriately **challenged** by link advisers in the annual target-setting visit. Many schools are also challenged by their annual reviews but some high-performing schools feel that this process lacks rigour and does little more than confirm their good practice. All visits to schools result in written reports that are copied to headteachers. However, the quality of these is uneven, with description taking precedence over evaluation in too many cases, and they are not routinely sent to the chairs of governing bodies.

## Recommendation

- Ensure that written records of visits to schools are more consistently evaluative and that copies are routinely sent to chairs of governing bodies.

55. The basis for **intervention** is clear and, where it is needed, it is applied rigorously but supportively, as the section below on schools causing concern illustrates.

56. There is a clear distinction between the **support** that is an entitlement and that which schools may purchase. In addition to the differentiated support that link advisers are able to give, the LEA provides centrally-funded support for governors, performance management, headteacher appointments, newly-qualified teachers and assessment. It also offers support for schools to purchase under the Somerset partnership for school improvement, which is jointly managed and quality assured with headteachers and closely linked to Education Development Plan priorities.

57. Link advisers are appropriately qualified and experienced to help schools bring about their own improvement. Most have headship experience and are practising OFSTED inspectors. However, a minority of schools have had several changes of link adviser and are concerned about the accuracy of the LEA's knowledge of them. The education development service is well led and provides very satisfactory value for money. It has clear performance management procedures that make suitable provision for induction, personalised job descriptions, target setting, monitoring, evaluation and professional development.

## Collection and analysis of data

58. The LEA's support for the collection and analysis of performance data and for their use in target setting is highly satisfactory. It has had significant recent development and is well linked to Education Development Plan priorities for school improvement.

59. The schools are provided with appropriate data in hard copy and disc forms. Full electronic transmission will soon be available, ahead of the LEA's target. The data supplied by the LEA add to those available nationally, for example by giving comparisons with similar schools locally. Useful analyses of the results of baseline and reading tests are also provided. Guidance on the use of data is given to headteachers and governors by link advisers and through training courses and guidance documents.

60. Value added data have been provided for secondary schools since the mid-1980s. In the primary phase, the use of reading tests is similarly well established. Appropriately, the LEA is now developing and implementing a system of pupil tracking that produces value added data for all pupils, including groups such as boys, minority ethnic pupils, high attainers and children in public care. This is an important enhancement of the data available to schools, especially in the primary phase.

61. Primary schools have recently been grouped, for benchmarking purposes, according to contextual data. Headteachers find this information useful and are

being consulted about further refinement of the groups. A helpful annual schools' expenditure analysis, including basic unit costings for secondary schools, is also produced. Other analytical services, including further contextual analyses, are available to schools that wish to purchase them.

62. Schools confirm that the target-setting process is challenging but based fairly on the prior attainment of individual pupils. Headteachers feel that link advisers are well prepared and informed for their discussions and that they take into account local circumstances, such as pupil mobility. The LEA is seeking to strengthen further the target-setting process by engaging an independent organisation to analyse the previous performance of individual pupils in the context of national key stage data and to prepare targets at pupil and school levels for discussion by link advisers and schools.

### **Support for literacy**

63. The LEA's support for literacy is highly satisfactory with some good features and is well regarded by teaching staff.

64. Attainment in schools has shown considerable improvement over the last four years, but progress has been limited over the last two years, and the LEA is unlikely to meet its 2002 target. At the end of Key Stage 2, 75 per cent of pupils achieved Level 4 in English. These results are in line with the national average, but as is the case nationally, show no improvement on the 2000 results. This leaves nine percentage points to be gained over the next year if the 2002 target of 84 per cent is to be achieved. At Key Stage 3, provisional test results for English in 2001 were similar to the national average and that of statistical neighbours. The GCSE results in English for the past three years have consistently been above the national average.

65. The Education Development Plan priority for literacy has clear and comprehensive activity plans. These are well-linked to action plans and success criteria which cover a wide range of initiatives. Actions are clearly defined with particular attention to mixed-age classes in Key Stage 1 and under-performing schools. Collaborative training between early years support staff and the literacy team has led to the production of very useful additional guidance for small schools. The literacy team also collaborates with special educational needs support staff. An appropriate range of monitoring and evaluation strategies has been established. The LEA's evaluation shows that there has been sustained improvement in results in a majority of 'focus schools', although improvement was greater in 2000 than in 2001.

66. The LEA has provided training for all schools and additional support has been well targeted at schools in need. Support is provided through a well-structured programme of training for school co-ordinators, which involves working with the team of literacy consultants. The literacy team also works closely with headteacher groups to ensure that the benefits of support are maximised across the curriculum. Consultants provide an audit of need for schools and then arrange specific training using leading literacy headteachers and expert literacy teachers. Specially produced 'booster' materials for years five and six and for summer schools aid continuity from



primary and middle to secondary school. The LEA promotes good practice by making arrangements for teachers to visit other schools and observe lessons, including visits by secondary teachers to primary schools and vice versa. The LEA is supporting the introduction of the National Literacy Strategy at Key Stage 3. It is also collaborating well with the Bridgwater Education Action Zone to support the development of literacy at Key Stage 3.

67. Responses to the school survey and visits to schools indicated that support for literacy is well regarded by schools. Literacy consultants are highly regarded as effective teachers and communicators in assisting staff to raise standards.

### **Support for numeracy**

68. Support for numeracy is satisfactory with many good features and is well targeted according to specific needs.

69. Provisional results of the 2001 tests for Key Stages 1 and 2 indicate that pupils' attainment is in line with the national average. Although at the end of Key Stage 2 there has been an improvement of 11 per cent over four years there has been no improvement over the last two years and the LEA has a significant shortfall to address to meet the 2002 target of 76 per cent. At the end of Key Stage 3, 71 per cent of pupils achieved Level 5 in 2001, an improvement of two per cent on the previous year and above the national average of 66 per cent. For the past three years, the GCSE results in mathematics have been above the national average.

70. The LEA has set out a clear action plan well linked to the Education Development Plan priorities. The plan identifies key roles and responsibilities for delivery of the numeracy strategy and the priority to focus support on under-performing schools. It is also providing improved support for schools via close liaison between the link advisers and the numeracy consultants. A useful guidance booklet has been produced for small schools to help them cope with a range of ages and abilities in one class. Effective support for teachers is also provided by the LEA's 26 leading mathematics teachers. A summer school programme provides additional support for pupils in years six and seven. Other strategies include providing targeted pupils in Years 4 – 6 with booster classes to raise the proportion reaching Level 4 at Key Stage 2. An extensive range of family and parent learning opportunities are also available.

71. The LEA targets resources at schools most in need. Fifty-eight schools are currently receiving additional support. A recent evaluation by the LEA revealed that 58 per cent of these had improved on their 2000 results compared with 43 per cent of schools overall. However in 2001 the intensive schools made less progress. Pupil tracking is now taking place in those schools where the assessment manager information and communication technology software is operating. Analysis of the progress of individual pupils has led to the setting of curriculum targets as a way of improving teaching and learning. The consultants provide effective support including teaching demonstration lessons. They also observe teachers and offer useful feedback afterwards. This work is consolidated via area meetings run by the mathematics team and training courses that target weaknesses identified from the analysis of results of statutory tests. The training is also well linked to developments

in information and communication technology. All secondary schools are receiving visits as part of appropriate preparation to help establish the National Numeracy Strategy across the curriculum. The LEA is collaborating well with the Bridgwater Education Action Zone to support the development of numeracy at Key Stage 3.

72. Evidence from the school survey and visits during the inspection revealed a high level of satisfaction with the support provided by the LEA with the majority of schools rating it good or very good.

### **Support for information and communication technology**

73. Support for information and communication technology (ICT) in the curriculum is improving after a difficult start and is now highly satisfactory. At Key Stage 1 and Key Stage 2 pupils are increasingly using ICT as part of their work in literacy and numeracy. At Key Stage 3 assessments carried out by teachers in 2001 show 75 per cent of pupils' attaining level 5 or above which is well above the national average. At Key Stage 4 performance in the GCSE has fluctuated over the past three years but has been in line with, or above, the national average. OFSTED reports between 1996 and 1999 show that at Key Stage 4 the LEA had fewer poor lessons in ICT than were found nationally or in similar LEAs.

74. As a result of feedback and consultation with schools, provision of equipment has been improved. Support for hardware and software has improved significantly through the National Grid for Learning (NGfL) initiative. The ratio of computers to pupils in the LEA's schools is in line with the national averages for primary schools but slightly below average in secondary schools. However, there are also significant variations in provision between schools within the LEA, particularly in primary schools. To resolve this situation additional funding for hardware has been secured so that by 2002 the situation is likely to be much improved. The LEA also supports schools in the selection of equipment although it has no procurement role.

75. The ICT strategy is clearly defined in the Education Development Plan and is linked well to other priorities such as those for literacy, numeracy, teaching and learning and special educational needs. Actions are well set out in the plans with officers allocated to oversee them, but there is little information on the strategies to be used. The LEA is undertaking a major review of the overall strategy, involving all ICT advisory groups, in order to improve provision and support.

76. The LEA's staffing for ICT support has been significantly improved in order to meet increased needs for both maintenance and curriculum support. The help-line and support for servicing equipment are improving and a remote on-line support service is currently being introduced. Given the widespread nature of rural schools this is a sensible way forward. The ICT support staff are aware of current issues and the overall management of the service is good.

77. The LEA has made good progress with implementing the National Grid for Learning and New Opportunities Fund training for teachers. All schools and link institutions such as libraries now have Internet access. Eighteen schools are in a partnership with the national Digital Brain initiative, which provides online curriculum materials and a framework for their use. Schools had to produce an agreed ICT plan

before being included in the National Grid for Learning initiative; they received good support to achieve this.

78. Monitoring of pupil performance is in place and the LEA has encouraged primary schools to adopt a checklist of skills for individual pupils and follow the Qualifications and Curriculum Authority scheme of work. A useful LEA website and intranet service have been established and well-prepared curriculum materials are available to schools via the 'south west grid for learning' which is a south west LEA partnership scheme. There is good liaison with the work being undertaken to support schools in the Education Action Zone. The LEA has encouraged schools to consider a range of National Opportunities Fund training providers in line with the principles of Best Value and the school visits confirmed a high level of satisfaction with the training. However, in some cases schools have not had sufficient resources to enable teachers to develop skills and teaching styles following training.

79. Schools in the school survey rated support for ICT in the curriculum as better than satisfactory. Visits to schools revealed some concerns regarding the levels and quality of maintenance support available. However, in spite of some shortcomings the team's view is that the LEA has made considerable progress in this area.

### **Support for schools causing concern**

80. The LEA provides good support for schools causing concern. The proportion of schools found by OFSTED inspections to require special measures, to have serious weaknesses or to be under-achieving is low. One first school is in special measures, four schools in the primary phase and one pupil referral unit have serious weaknesses, and one first school and one middle school are designated as under-achieving. The under-achieving schools have been confirmed by OFSTED to be making good progress. The LEA's determination to provide strong support is illustrated by its challenging but attainable target for 2002 that no schools will be in the special measures or serious weaknesses categories.

81. The clear and comprehensive strategic policy statement on schools causing concern was included in the original Education Development Plan and has been revised annually. It was discussed with headteachers, professional associations and members, and its procedures were piloted in schools. It provides for regular reports to senior officers and members. In addition to the OFSTED categories, it also deals with schools that are causing concern to the LEA because of weaknesses in their performance. The list of such schools is reviewed frequently. It usually numbers about 30.

82. The LEA provides very strong, supportive intervention in schools that are in special measures or have serious weaknesses, although it was unable to prevent one school slipping from serious weaknesses to special measures in November 2000. The provision is usually proportionate to need and well targeted to the weaknesses identified by OFSTED inspection. A particularly effective feature is the establishment of a core support group in each school to plan and monitor improvement. Such groups include representatives of the school's senior management and governors, the education development service, and other services, such as behaviour support, as appropriate. The LEA has not hesitated to replace or

mentor ineffective heads, deputies and teachers and its monitoring of school performance is frequent and rigorous. Schools are also given positive support through, for example, bespoke training for staff and governors, financial assistance, and advice on personnel and legal matters. The amount of LEA involvement is adjusted according to the school's rate of progress so that it can increasingly take responsibility for its own improvement. However, transitional support is sensibly provided for schools as they emerge from special measures or serious weaknesses.

83. The LEA has not recently needed to withdraw delegated powers from a governing body or to issue a formal warning notice but it has procedures for such eventualities. Its own list of schools causing concern and consequently needing additional support or challenge is compiled by the cross-departmental school performance group, which meets fortnightly. These schools are identified according to appropriate, published criteria relating to standards of achievement, quality of teaching, and quality of leadership, management and governance. They are kept informed and receive additional support according to their identified needs. The LEA's aim is to help its under-performing schools to take increasing responsibility for their improvement and it sensibly gave them priority to undertake the OFSTED self-evaluation course that it provides.

### **Support for governors**

84. The LEA provides good support for governors. It emphasises their role in developing school autonomy through monitoring, accountability, performance management and recruitment. The quality of the support is appreciated by schools but governors are not yet included routinely in the target setting and annual review processes.

85. Every school is invited to subscribe to the LEA's effective governing body programme and 94 per cent did so in 2000/01. Governors are involved in the development of training, for example the self-evaluation training pack that has been produced to complement the course for schools' senior and middle managers. It is helpful to governors that the comprehensive training programme includes both central and area courses. The topics are highly relevant and focus on effective governance. The LEA's records show that about two-thirds of governors attend training in a year. Only one school was not represented at any training event in 2000/2001.

86. About 12 per cent of governing bodies subscribe to the LEA's clerking service, which is sensibly offered at three clearly-specified levels. Clerks of all governing bodies are offered twice-termly briefings on procedures, good practice and organisation, which schools find very helpful.

87. New governors are inducted. All governors are kept well informed through an attractive and informative termly magazine, and a governors' handbook. Governors acknowledge the responsiveness and helpfulness of LEA staff. The governors' library, based in Street, overcomes geographical difficulties by making postal loans of literature and audio-visual materials.

88. The LEA consults governors effectively through area and county forums. Area forums meet termly at six venues. They comprise governing body chairs, members and senior officers and consider a range of matters including LEA policies and the training programme. The county forum also meets termly. It includes representatives of the area forums and is chaired by the executive board portfolio holder for schools.

89. The LEA provides strong support for governors of schools causing concern. It has not yet found the need to appoint additional governors onto their governing bodies but it has identified a number of people suitable for this purpose. Currently, the LEA's support is not helped by the fact that it maintains two databases on governors, one for personal records and the other for training involvement.

90. Vacancies are monitored regularly. At the time of this inspection, they stood at nine per cent, which is within the Education Development Plan target of ten per cent. The LEA approaches schools if they have vacancies that extend beyond 12 weeks and operates an annual recruitment programme, which includes media publicity and open evenings.

### **Support for school management**

91. The LEA's support for school management is very good. The schools rate it very highly. OFSTED inspection evidence shows that the quality of management and efficiency in Somerset primary schools is in line with the averages for similar LEAs and the nation as a whole. In secondary schools, it is better than that found elsewhere. In both phases, the rate of improvement is greater than in similar LEAs and in the nation as a whole.

92. Priority 1 of the Education Development Plan is to raise the quality of leadership, management and governance. Its activities focus on the use of information to support and challenge schools, professional development for school leaders, developing the governance role, and developing self-managing, self-evaluative and self-improving schools. The LEA is making good progress in implementing this priority.

93. Relationships between the LEA and headteachers are very good. There is a well-established pattern of meetings with the headteachers' associations and with area development groups of heads. An informative secondary senior management newsletter is published twice yearly and there is an association of deputy heads and vice principals. The LEA facilitates a range of effective collaborative projects for small schools. It holds an annual conference for the headteachers of small schools and is working with a group of them to develop a small schools' policy. A headteacher support service provides confidential professional and personal support to primary heads, including training in stress management. The LEA reports that there has been a marked reduction in primary headteachers' long-term absence and the support service is likely to be extended to the secondary phase.

94. Schools value the LEA's participation in all headteacher appointments and in some deputy heads' ones. The extensive provision for newly-appointed heads is arranged by the association of primary headteachers and officers and includes a number of conferences over a two-year period. The LEA is a Headlamp provider

and the induction programme is well targeted to the funding criteria and to the national standards for headteachers. The National Professional Qualification for Headship and the Leadership Programme for Serving Headteachers are promoted successfully. This national provision is complemented by a leadership group development programme for senior managers that has been developed by the south west initiative for training, in which Somerset participates.

95. The schools have particularly benefited from the OFSTED self-evaluation training, adapted to local need, which the LEA has provided. The senior management teams of all middle and secondary schools and almost all primary schools have been represented. Two hundred and fifty secondary middle managers have also been trained, to encourage self-review within departments. Link advisers maintain the emphasis on self-evaluation through their visits to schools. Evidence from school visits indicates that it is well established.

96. The LEA also provides a comprehensive programme of continuing professional development through link advisers and associate consultants. It is closely linked to the Education Development Plan and national priorities and places appropriate emphasis on raising the quality of teaching and learning. The induction and support for newly-qualified teachers and the training for their tutors are very good. Increasingly effective use is being made of the good practice that exists in schools, for example through using the expertise of advanced skills teachers and of Beacon schools to help teachers and schools with weaknesses, and the LEA is rightly extending its role in the dissemination of good practice.

### **Support for early years**

97. Support for early years is good and there is a well co-ordinated, coherent, approach to developing provision. There is clear strategic plan and the Education Development Plan contains a number of references to early years. These are well integrated into the priorities and activities such as management and leadership, quality of teaching and literacy. Staffing is well structured to meet needs.

98. A number of initiatives have been established including the early years development and childcare partnership. The partnership is working effectively and is meeting its targets for the provision of places; 98 per cent of eligible children are now accessing provision. An effective early learning accreditation for providers has been set up and European Funding has been used to promote the training of special educational needs co-ordinators and all early years providers. Links with pre school and reception staff are well established.

99. The authority has made some promising developments in provision: for instance, it has established a Sure Start project and a children's information service. There is also an extensive training programme for schools, voluntary and private providers. A working party led by the manager responsible for early years has produced a very clear guidance document which has been distributed to all providers and is well linked to a good range of courses designed to assist the implementation of the foundation stage. There is also a childcare link website as part of the children's information service.

## **Support for 14-19 education**

100. The development of a broader curriculum for students aged 14 and over is included in priority 6 of the Education Development Plan and the LEA is providing satisfactory support for 14-19 education. It works closely with the education business partnership, which is heavily involved in the development of key skills for 14-19 year-olds and is supporting schools to provide vocational courses in Key Stage 4. The LEA has worked with deputy heads on curriculum development and schools have co-operated with tertiary colleges to devise courses for disaffected students. The Education Action Zone is developing a skills framework in its 5-19 plan, for wider dissemination in the LEA.

101. The LEA has held discussions with the eight schools with sixth forms about broadening the post-16 curriculum. As a result, 55 students in six schools are following a course in which they spend two days weekly in schools on key skills and related studies, and three days with tertiary colleges and independent providers on National Vocational Qualification and related courses. Some of the students followed vocational courses in Key Stage 4 but most chose the course because they felt an academic post-16 curriculum would not be suitable for them. The learning and skills council has provided funding for the extension of this scheme and the schools involved have also contributed financially.

## SECTION 3: STRATEGIC MANAGEMENT

### Corporate planning

102. Corporate planning is satisfactory overall, although there are some weaknesses. Somerset county council has a clear vision statement publicised in the Best Value Performance Plan; a good quality of life for all Somerset residents. There are six specific corporate objectives, the first of which is: educational achievements by all Somerset's young residents and access to learning opportunities and training for all residents.

103. The council has a range of sound corporate plans, such as the Quality Protects management action plan, the asset management plan and the Best Value Performance Plan, which are being competently implemented and regularly monitored. There is also a medium-term financial plan which aids the process of allocating resources to departmental priorities. However, there is not an overall corporate plan which sets out how the council's objectives will be achieved. Additionally, the objectives are not supported by a clear statement of priorities. There has been little progress so far in formulating a community plan.

#### Recommendation

- The council should develop a corporate plan, which clearly states the council's priorities and sets out how they are to be achieved.

104. Strategic planning in the education department is highly satisfactory. A strategic plan outlines the principles of how the various education department plans should support the achievement of the department's vision statement, which includes broad ranging aims and priorities. The three core aims are: raising achievement; promoting lifelong learning; and developing effective learning communities. The four strategic priorities are concerned with implementing major plans such as the education development plan and the inclusion strategy, developing community learning partnerships and building capacity across the education department through implementing the performance management, human resource and information and communication technology strategies. The priorities provide a broad guide only for the allocation of resources, but in practice, statutory plans and requirements are given top priority for spending, followed by new policies. Departmental plans are clearly cross-linked.

105. As part of its strategic planning, the education department has also produced a prospectus for community learning partnerships, entitled *Learning in Somerset, Looking Forward 2000-2020*. This sets out the background to the proposal to create community learning partnerships, and invites schools to begin to form them with other education providers and partners, bearing in mind that the prospectus is describing a 20 year vision. The vision has the potential to help schools, especially small rural schools, to survive and to achieve the department's key aims. Although at an early stage, there are already some promising developments (see paragraph 115).

106. Performance management is satisfactory. There has been significant progress over the last 12 months and further work is planned. An officer in charge has been



appointed, and an overall framework and service plans are in place. Priorities in service plans are cross-referenced to strategic plan priorities. There are stronger links made between the work of individuals and the outcomes identified in operational plans.

107. A range of complementary monitoring and evaluation strategies are being put in place. There are examples of good practice, such as the use of the European Foundation Quality Model by contract services and others to evaluate working practices and make changes. There is particularly effective line management within the education development service, with emphasis given to monitoring both the completion of tasks and the quality of their impact. All service plans identify several methods of monitoring but few schedule them in the form of an action plan that makes clear who will do what and when. There is some variation in how well the current framework is implemented at present; the department is aiming for greater consistency.

108. Members are committed and supportive, but scrutiny of education is not sufficiently rigorous. Members have demonstrated their support for education by consistently spending above Standard Spending Assessment and by their service as school governors. Although members hold differing views the education spokespersons all consider raising attainment to be the first priority. Members have worked productively together in working groups, for example, on the group which put forward the activity-led funding formula for schools. The new leader is aware of the need to have sharper priorities. In an important step forward, the leading group has recently met to reconsider and sharpen the overall vision statement for the council, and to produce prioritised, measurable objectives for each department. These have just gone to officers for consideration and costing.

109. The council started to change its political structure in 1999, and a new structure is due for implementation in October 2001. At the time of the inspection, which followed soon after the election of a new council in June 2001, interim arrangements were in place. Under the new arrangements, the lifelong learning and other portfolio holders are supported by a cross-party panel, whose role is to discuss and advise the portfolio holder on policy. While potentially the lifelong learning panel can serve a useful function and early indications are encouraging, some members still regret the loss of their role as committee members and have not come to terms with the new structure and their own new roles. The new executive board has increased the speed and efficiency of decision making, even though one of the opposition parties has not taken up its place on the board, leaving three vacancies, which will fall to two in October.

110. New standing orders are being written, and the new council has not yet established clear procedures for the way in which it intends to monitor and evaluate the work of the education department. While the scrutiny committee is likely to be responsible for the monitoring and evaluation, there is a lack of clarity about how and when this will be carried out. Previously, scrutiny lacked sufficient rigour. Members regularly received and considered reports from officers, but there was little evidence of members intervening to secure changes or improvement.

## Recommendation

- Members should scrutinise the education service rigorously and effectively.

111. There are satisfactory procedures for keeping members informed about educational issues. Members are on the intranet and receive information sheets electronically. Leading members of all parties are briefed regularly. Members receive good advice from officers. However, the usefulness of briefing papers is sometimes weakened by the lack of a concise summary.

112. The leadership provided by the LEA's senior officers is highly satisfactory. The director of education provides strong and challenging leadership together with a commitment to the development of community learning partnerships and to raising achievement. The education department was reorganised in the summer, for the third time in recent years. The new structure and cycle of meetings are based on a coherent and clear rationale. The director of education together with the deputy director, the two assistant directors and a group manager, make up the departmental management group. Group managers and senior advisers make up an education leadership group, which works to the departmental management group. A period of stability and consolidation is now needed. Overall, managers within the departmental management group and the education leadership group provide highly competent leadership and management. Where necessary, as in some groups within the additional educational needs area, provision is being reviewed and improvements are being made. A good example is the recent review of provision for pupils without a school place.

113. The LEA's partnership with its schools is a good feature. The education department's strategic plan stresses the importance of partnership and consultation is very strong. There are good arrangements for consulting with schools and schools in general feel that their views are listened to. The three headteachers' associations, Somerset association of secondary heads, Somerset association of primary heads and officers (SAPHTO) and the Somerset association of heads of specialist provision, meet regularly and are well developed organisations. SAPHTO is unusual in including officers in its membership, and in having the services of a full-time ex-headteacher who is jointly funded by schools and the LEA.

114. LEA officers have regular meetings with the executives of the headteachers' associations, with headteachers who belong to the area development groups, and also hold termly consultation meetings with all headteachers. In addition, an influential group called the Somerset education planning team (SEPT), meets monthly. This comprises representatives of the three headteachers' associations, the director of education and the deputy director. This group provides officers with a forum where strategy and policy can be discussed at an early stage of development in an atmosphere of trust and confidentiality. SEPT has been involved in developing the policy on inclusion, and has influenced the direction this has taken. It also had a major input into the recent work on the activity led funding formula for schools. Headteacher representatives frequently serve on different LEA working groups. There are also good arrangements for consultation with teachers' professional associations.

## **Partnerships with other agencies**

115. The LEA has a wide range of partnerships with other agencies. The LEA's vision statement emphasises a partnership culture with local communities, and links are currently being significantly strengthened as part of the priority to develop community learning partnerships. There are three pilot community learning partnership projects under way so far, which are targeted at communities in particular need. These are the West Somerset Initiative, the Bridgwater Education Action Zone (Education Action Zone) and an initiative consisting of all the schools in Frome. The LEA liaises appropriately with this Education Action Zone and provides it with support. The LEA has less contact with the 'virtual' Education Action Zone, which has just appointed a new co-ordinator to increase the amount of collaborative working between schools.

116. The LEA has a strong tradition of community education, based around the designated community secondary schools. This is being reorganised in order to meet targets for adult education set by the learning and skills council. The LEA has a community education officer and is active in promoting work with different groups within the community. Projects include those for family literacy and numeracy and family centres in some secondary schools.

117. The LEA liaises with the police and the fire service, which both provide a good range of projects to support schools. The fire service is currently involved in a worthwhile initiative to motivate disaffected young adults through a work experience placement where the focus is on responsibility and teamwork. Good links have also been established with diocesan representatives and the standing council for religious education, and with the education business partnership.

118. Education, social services and the health authority have effective links at director and assistant director level. Education and social services jointly undertake some key responsibilities, primarily those for children in public care and child protection. They are increasingly looking to see how they can work in partnership, for example, with regard to Sure Start, and drugs education and prevention.

119. The LEA and the health authority have made sound progress on joint strategic developments such as the teenage pregnancy strategy and the healthy schools programme. The two organisations have this term established a new part-time post of partnership adviser. The aim of the post is to pull together all health related and social inclusion projects and initiatives into a coherent presentation for schools. However, schools report a shortage of mental health support for pupils, and relationships between the two organisations are not clear at all levels.

## **Management services**

120. The quality of information provided on services available to schools is good. The annual 'blue book' includes details of services from both the education department and other departments in the county council presented in a consistent, attractive and easily accessible format. Schools have the information they need to exercise choice over the level, volume and amount they wish to spend on services. Each section describes central provision and the various levels of traded service into

which schools can buy. Contract terms and conditions are also included in the book. Although there are few details on alternative providers, the latest edition contains a new module, *Making the Most of the Market*, aimed at helping schools develop their procurement role.

121. The LEA appropriately seeks the views of schools through the education support services advisory board comprising representative headteachers and bursars. Marketing and monitoring of services are carried out extremely well by a customer support team who visit schools annually to discuss the provision and quality of services. In the school survey both primary and secondary schools rated the clarity of service specifications and their involvement in the review processes in the top 25 per cent of LEAs inspected

122. Support for **the use of information and communication technology for administration** is satisfactory overall. All schools have access to the Internet and electronic communication with schools is in place. A range of services is offered to schools and 99 per cent buy back management and administrative support. In the school survey, primary schools rated the service above average and secondaries rated it in the top 25 per cent of LEAs inspected. The LEA has a three-year ICT strategy aimed at meeting the government targets for electronic communication. It has developed a policy for the uses and development of electronic data and information systems, an electronic communications strategy and protocol, and an information strategy. Management responsibilities are clearly assigned.

123. The LEA recognises that the department's systems need rationalising. It is planned that the current plethora of ICT systems, mostly duplicating data, will be reduced to eight within two years and that the variety of software formats will be rationalised. However it is unsatisfactory that, although the education budget contributes to corporate ICT, there is no detailed service level agreement.

<b>Recommendation</b>
<ul style="list-style-type: none"><li>• Ensure that corporate information and communication technology charges to the education department are subject to agreed standards in terms of specification and costs.</li></ul>

124. **Personnel support** is effective and well regarded by schools. There is a high take up of the personnel standard level agreement and ad hoc purchases. Particular strengths are in the exercise of its casework function and the management and organisational support it offers schools. The manual of personnel practice and policies is comprehensive and up to date. However there have been delays in the processing of some staff contracts partly owing to the LEA's incomplete electronic personnel database.

<b>Recommendation</b>
<ul style="list-style-type: none"><li>• Improve personnel administration by quickly installing a comprehensive electronic personnel system, integrated with the rest of the LEA management system.</li></ul>

125. The LEA has recently established a teacher recruitment and retention project to produce an outline developmental programme, guidelines and materials to enhance

recruitment to Somerset schools. Few schools in Somerset have unfilled vacancies, but many report reduced numbers of applicants for teacher and headteacher posts. The consultant's interim report suggests that strategies should include the marketing of Somerset, the development of school web sites and the development of a teacher support facility. The LEA has also set up a pilot recruitment register for newly qualified teachers coordinated by an external consultant. For the last three years it has offered a primary SCITT course and the number of the trainees obtaining posts within Somerset has increased each year.

126. **Finance support services** are good and highly regarded by schools. The education department provides services through the education financial services and the schools' finance team. Education financial services offers a selection of traded services designed to meet schools' needs. A report on the Best Value review of education financial services appears as an appendix to this report. The schools' finance team provides statutory services in relation to school budgets. Co-ordination works well in practice.

127. Financial transactions and reconciliation processes are available on-line and schools report high levels of satisfaction. The service recognises that issuing budget information to schools in mid to late March is too late and is aiming next year to circulate the information to schools in February. Similarly staff are aware of the importance of allocating a larger percentage of the devolved Standards Fund prior to the start of the financial year. Both the education department and schools' budgets are effectively monitored.

128. Internal audit has responded to the recommendations of the external auditor and their reports are comprehensive, clear and helpful. Similarly the payroll service functions well and has a low error rate.

129. There are clear systems for providing **client-side advice** to schools in contracting services for ground maintenance and cleaning. A high proportion of both primary and secondary schools purchase the client catering service provided by the LEA which was deemed to be above average within the school survey.

## **SECTION 4: SPECIAL EDUCATIONAL NEEDS**

### **Strategy**

130. Overall, the LEA's strategy for special educational needs is sound. The vision for special educational needs and much of the strategic planning are good. The strategy is new and there have been some weaknesses in its implementation, but these are outweighed by strengths and by the careful planning and recent positive developments which indicate that the LEA has the capacity to continue to improve.

131. There is now a thorough and coherent policy and development plan for special educational needs, which defines inclusive aims and entitlements for pupils. After extensive structured consultation the LEA has further developed a wide-ranging and ambitious strategy for inclusion called 'access and achievement for all'. This is soundly based on the Department for Education and Skills' programme of action and on an analysis of local need. It provides a clear direction for schools and officers. The inclusion strategy occupies a central position in departmental planning. It has been agreed by elected members, who have been made aware of the need for a substantial funding commitment to achieve the strategy's aims. Contributory plans are, appropriately, often developed and managed by working groups made up of LEA officers and a representative range of partners, including headteachers.

132. There has not been a clear, strategic view of the role of the special schools and resource bases. The sector includes examples of recognised good practice, but overall the provision does not match the pattern of need and has too much poor quality accommodation. In the past the LEA has not made effective use of the expertise available within the sector, which has been isolated from LEA developments. This is now changing, with a well-managed review of special school provision underway, and a planned follow-on review of resource bases for pupils with special educational needs. Early indications are that the outcome plans will be achievable. The LEA has recently appointed a link adviser with a specific remit to cover special schools. It is increasingly supporting joint work between mainstream schools and the specialist sector, together with shared training and use of resources.

133. OFSTED inspections of schools indicate that there is a higher than average proportion of good provision for special educational needs pupils in mainstream schools. The LEA maintains a lower than average number of statements, and there has been a clear trend since 1996 towards an increase in the number of pupils placed in mainstream rather than special schools. The LEA has a sound approach to independent special school placement. The number of pupils placed in independent special schools has decreased steadily and is significantly lower than the national average.

134. All special educational needs funding except central support services is delegated to schools. In general the system is fair, transparent and targeted at needs. The system has been recently revised to provide SEND-plus for pupils with severe/complex needs, based on an audit completed by schools and moderated by the LEA. In addition, schools receive SEND, which provides general learning support, according to a formula based on proxy indicators. Funding arrangements are well presented, audit criteria are clear and rigorous, and moderation is

comprehensive. However, there have been some difficulties in the first year of the new system. The school survey and visits to schools indicated a relatively high level of dissatisfaction with the new system. Only 40 per cent of applications for SEND-plus were agreed, and the audit process was time consuming. The LEA has responded to schools' concerns and intends to review the flexibility of the criteria to ensure they cover all pupils with the most complex needs. Arrangements for the audit have been revised to make them less burdensome. The rationale for allocation of SEND funding is to be reviewed in order to better match the pattern of need in schools. Additionally, schools have not always appreciated that they should be using some of their age weighted pupil unit funding to support special educational needs.

<b>Recommendation</b>
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| <ul style="list-style-type: none"><li>• Speedily complete the review of SEND funding.</li></ul> |
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135. Despite efforts by the LEA to communicate its strategy to schools, the level of understanding by schools varies widely. Schools are sent regular briefing documents and there are a number of mechanisms for consultation and involvement with schools, including a range of working groups which include headteachers. The LEA has recently established a special educational needs co-ordinators liaison group, which should strengthen these arrangements, and has plans for a partnership group. However, the LEA has not fully exploited the regular local meetings of special educational needs co-ordinators as a mechanism for ensuring that they all feel well informed and genuinely involved in the inclusion process. Additionally, special educational needs co-ordinators were not provided with sufficient training in advance of the recent SEND-plus audit.

<b>Recommendation</b>
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| <ul style="list-style-type: none"><li>• Make greater use of the existing special educational needs co-ordinators networks to disseminate information.</li></ul> |
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### **Statutory duties**

136. The LEA takes reasonable steps to meet its statutory obligations for special educational needs. Within the education department, the LEA completes 100 per cent of statutory assessments within the recommended 18 week timescale. However, the situation is less good when awaiting advice from other agencies, particularly health, although the completion rate has improved from 52 per cent in 1999 to 63 per cent in 2000. Further improvement is still required.

<b>Recommendation</b>
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| <ul style="list-style-type: none"><li>• Work more effectively with the relevant health authority in order to improve the timeliness of advice concerning statutory assessments.</li></ul> |
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137. The quality of statements is sound. All statutory annual reviews are monitored, and there is a suitably rigorous approach to ceasing to maintain statements. Attendance at statutory annual review meetings is appropriately prioritised. There is a joint education and social services protocol for monitoring the quality of independent schools.

138. The parent partnership service is well established and of good quality, with a positive commitment to mediation through trained independent parental supporters, and positive plans to train LEA casework officers. There is a good range of well presented leaflets and support documentation for parents.

### **School improvement**

139. Support for school improvement is sound overall. The LEA's support for special educational needs is well linked to school improvement.

140. The system for deployment of central support services effectively enables support to be targeted at needs. Each school has an annual consultation meeting, with additional meetings arranged according to need. The meetings bring together school and area support service staff to review the deployment of school based special educational needs provision, agree action for individual pupils and manage the process of referral to centrally provided support services according to clear criteria. The system is still being developed and although it is monitored there is some variability in approach by individuals.

141. Behaviour support is dealt with in Section 5. Other support services are well managed. Service budgets are well monitored. In the educational psychology service, staff turnover plus changes in allocation have affected the service provided to some schools. However the service has an active recruitment strategy with positive links to local training providers. Provision of support services is rated as satisfactory by schools in the school survey.

142. There is insufficient target setting for individual pupils and groups of pupils with special educational needs within the mainstream and in special schools. Despite positive work on adapting the P Scales, these are only in use in a relatively small proportion of mainstream schools.

#### **Recommendation**

- Introduce a system of target setting for special schools and extend target setting for pupils with special educational needs in mainstream schools to all schools.

143. The LEA provides high quality professional training and development for staff, ranging from accredited courses to well stocked learning resource centres. It has developed a sound framework of school self review with regard to special educational needs, which has been used well by a number of schools. However, at present take up is limited.

#### **Recommendation**

- Improve schools' capacity to manage inclusion, by promoting more widespread use of school self-review of provision for special educational needs.

144. Though at an early stage in terms of the impact on schools, there are good arrangements to manage the planning of entry to school for pre-school age pupils with severe and complex needs; the beneficial effects of this will become increasingly evident as the cohort reaches statutory school age this year.



## Value for money

145. Somerset's overall expenditure on special educational needs is at about the same level as the LEA's statistical neighbours, but lower than the English county average as a percentage of the local schools' budget. Its central expenditure of £125 per pupil is lower than the county average of £147 and statistical neighbours' average of £154, which reflects the high level of delegation. The special educational needs budget is well monitored, with no overspend for the past four years and sound planning across a single budget with regard to the distribution of available resources.

146. Spending on the area of health service partnerships is considerably higher than other counties. This is partly because the LEA is a high spender on speech and language therapy. There are nine communication resource bases attached to schools for speech and language therapy; this has helped to keep pupils in county and out of independent schools. The LEA is reviewing the provision of resource bases, including formal scrutiny of the purchase of therapy.

147. Schools are well provided with information on their allocation for special educational needs, and a recent positive development is the publication of all schools' budgets to enable clarity and comparison as necessary. The consultation meetings consider individual pupil's progress on a school by school basis. However, this monitoring is more qualitative than quantitative, and data derived in this way are not routinely aggregated to inform a county wide tracking system of expenditure compared with the outcomes for pupils.

### Recommendation

- Improve the monitoring of pupils' progress and establish a link between outcomes for pupils and expenditure on provision for special educational needs, in order to target resources more effectively.

148. The Best Value review currently in progress, is indicating a number of developments likely to improve effectiveness and efficiency, such as the development of a traded approach to special educational needs support services.

## SECTION 5: ACCESS

### The supply of school places

149. Management of school places is highly satisfactory. School organisation is a significant issue in the LEA which has a variety of two and three tier provision. Somerset is a net importer of children from neighbouring authorities with whom there is effective liaison. The LEA has a comprehensive school organisation plan for 2001-2006 and an effective school organisation committee. The class size plan has been implemented in line with requirements. The LEA's written policy on small schools is vague, but is in the process of being revised. The authority has successfully federated two small primary schools and is committed to the wider community use of school buildings. The LEA has adopted an all-through primary policy, but has found little support for changes in school organisation. Five proposals to amalgamate infant and junior schools have been made but only one has been implemented. Three did not progress beyond the consultation phase and one was overturned by the adjudicator.

150. The LEA has acted on the recommendations in the recent external audit report. It is developing a process, for reviewing long term planning concerns, and a five year planned admissions numbers strategy to help resolve the specific issues in urban secondary schools. Nine per cent of primary schools in January 2000 had more than 25 per cent surplus places; this was lower than the county and national average. The figure for secondary schools was higher, but by 2001/2002 only 10.3 per cent of secondary schools had more than 25 per cent surplus places. There are plans for further improvements in 2003/2004 to 7.7 per cent in secondary schools, and to 4.2 per cent in primary schools.

### Admissions

151. The administration of admissions to schools in Somerset is good. The service handles the complexities caused by the mixture of provision and the number of admission authorities well. The operation of the admissions criteria for oversubscribed schools results in the fair allocation of school places and performance indicators for satisfying parental preference are in line with national and county averages. Information for parents provided for 2001/2002 complies with the Admissions Code of Practice. The booklets are comprehensive, attractively presented and very readable. Translation facilities are now offered as well opportunities for parents to receive personal assistance in understanding the process and completing the forms. The new booklets, unlike those for 2000/2001, also appropriately define more precisely the process for measuring the distance between home and school.

152. The appeals process complies with legislation and is carried out in a satisfactory and timely manner. A relatively high number of appeals were successful in 2000/2001, and the authority has rightly taken action to investigate the reasons.

153. The **home-to-school transport service** is good with schools rating the service in the top 25 per cent of LEAs inspected. Although the authority spends less than the average for English counties on home-to-school transport, its budget has

recently been overspent mainly because of increased retendering costs. The school transport team has been involved in a fundamental corporate Best Value review of passenger transport. They are currently engaged in a year one improvement plan in which they will helpfully review special educational needs transport, review their early years transport policy, improve invoicing timescales and carry out an audit of budget monitoring systems.

### **Asset management and property services**

154. Somerset's asset management is sound with very few weaknesses. The LEA has made satisfactory progress in developing its asset management plan and the capital allocations for the next three years reflect this. The outcomes of the condition and suitability surveys on all of its schools are held on a commercially developed database. It is planned that all schools will have on-line interactive access to the data by spring 2002. Detailed consultation on the priorities for investment take place with the asset management plan steering group comprising headteacher, governor and diocesan representatives. However, several schools visited were uncertain about how to complete the surveys themselves despite the LEA's provision of detailed guidance and a helpline.

155. The authority provides an agreed five year maintenance plan for each school, which is updated annually, by surveyors from the property services department. Helpfully they also offer schools the opportunity to access free professional advice on how their identified needs for new buildings might be met.

156. Support to schools in the **property services** area is generally satisfactory. Building maintenance is conducted jointly with schools through a combination of a strategic programme of repair and maintenance and a risk spreading co-operative building maintenance indemnity scheme to which 97 per cent of schools subscribe. The school survey rated building maintenance in the top 25 per cent of LEAs.

157. There were mixed views from schools about the programming and management of building works but the majority considered it to be satisfactory and it was rated in the top 25 per cent in the school survey. Informative, comprehensive and easy to follow guidance on managing their own building projects has been provided to schools.

158. Although previous investment has been low, there has been a significant increase over recent years in capital allocations and plans are in place to address the maintenance backlog. The LEA has not, however, sufficiently explored opportunities for acquiring additional resources. There are over 818 teaching areas in temporary accommodation, many of which have exceeded their design life. In March 2001 the authority rightly agreed a framework whereby surplus temporary buildings are no longer transferred to new sites but are phased out over the long term.

#### **Recommendation**

- Explore more vigorously the full range of funding opportunities to enhance the capital programme.

## **Provision of education otherwise than at school**

159. Support for pupils without a school place is poor, but improving. The LEA carried out an internal review in the summer term, which revealed extensive weaknesses in the provision for excluded pupils. As a consequence the existing procedures for referral were stopped at the end of the summer term, interim arrangements were put in place, and an improvement plan produced.

160. The findings of the review were substantiated by evidence gathered during the inspection. There was a lack of clarity regarding the relative responsibilities of schools and the LEA. An inappropriate practice of 'informal' exclusion had developed whereby schools were accessing the LEA's provision for education otherwise for pupils who had not been formally excluded. This led to confusion over the numbers as not all those pupils who were out of school genuinely lacked a school place. There was no proper monitoring system to ensure that a school's pupil retention grant was reduced for each pupil permanently excluded in order for the funding to be used for the pupils' education elsewhere. Four pupil referral units and a unit offering vocational training provided for Key Stage 4 pupils who were excluded or were at risk of exclusion. However, a high rate of referrals together with a low rate of reintegration back into mainstream schools was creating a delay. Pupils were often not being placed quickly enough. The LEA had tried to put in place an agreement whereby schools took in excluded pupils, but this broke down. There was no specialist provision for younger pupils, who were given individual or small group tuition for between five and fifteen hours per week. The review recognised that individual tuition was unsuitable for many pupils and was not an efficient use of resources.

161. Some changes were made immediately following the review, and the LEA has put forward a series of proposals for more extensive changes, including to the referral process and access to resources. Schools are being consulted on these proposals in the first half of the autumn term. In the meantime the LEA has started three limited pilots of new arrangements, called local social inclusion partnerships, with a small number of schools. Other improvements to date include restructuring the management of the education otherwise team, improvements in the tracking of pupils who are out of school and in the time taken to secure a placement.

162. Plans for providing full time provision by September 2002 for all pupils excluded for more than 15 days are at an early stage. The age range and scope of the pupil referral units are being reviewed. However, the LEA has not yet secured funding or prepared strategies to ensure that the requirements are met. The LEA provides hospital tuition for pupils who need it. There are sound arrangements for monitoring the education of children whose parents chose to educate them at home.

### **Recommendations**

- Improve the provision for pupils who have no school place by securing the active support and commitment of all headteachers and governing bodies for the current proposals; and
- devise and agree a strategy to secure suitable full-time provision for all pupils excluded for more than 15 days from September 2002, and ensure there is the necessary money to pay for it.

## Attendance

163. Support for school attendance is unsatisfactory overall. The quality of the service lacks consistency partly because there are no service agreements with schools and the education social work service (ESWS) does not specify the quality of provision for the schools. Schools' perceptions of the quality of support to improve attendance are very varied because the availability and quality of support from individual education social workers (ESWs) are inconsistent. At its best, the experience of schools is of an ESW who is in regular contact with the school and works effectively with the school and families to improve attendance in order to improve attainment. At its worst, there is inadequate focus on the school's need to improve attendance. Many schools report high turnover of staff and significant gaps between when one ESW leaves and the arrival of a permanent replacement. This does not support the schools' ability to improve attendance.

164. The ESWS is located within the council's social services department. The basis of this location is a joint agreement between the LEA and social services in 1996. The service is not adequately meeting the priorities of schools which require a speedy response to their needs with a strong focus on improving attendance in order to raise achievement. Funding of the service is low in comparison with similar authorities and those nationally. The service is scheduled for evaluation in year four of the council's Best Value process. In view of the current weaknesses, an earlier review of provision is needed.

Recommendations
<ul style="list-style-type: none"><li>• Improve the consistency of quality of service across all schools by introducing service agreements between the education social work service and schools as a matter of urgency; and</li><li>• speedily review the provision and location of the education social work service and its contribution to social inclusion.</li></ul>



165. The service has been restructured with the aim of bringing more consistency of operation across the county and in response to recommendations from a review by district audit. Management has been strengthened as a part of the restructure but is not yet having a significant impact on service delivery in schools. The resources deployed to support schools are now better targeted but are still not based on a sufficiently detailed analysis of need.

## Behaviour support

166. The LEA's strategies and services to support behaviour at school are unclear and unsatisfactory although improvements are being made. The authority delegates funding to schools for behaviour management and also provides a centrally funded behaviour support service. Schools access the support service via the annual consultation meeting. However, they are not always clear about the core level of entitlement.

167. The behaviour support service was established in 1997 with a budget to focus on short, early interventions. The service was quickly inundated with requests and

made subjective judgements about which schools merited resources. The provision became unsustainable and, in addition, the service had a recruitment and retention problem. Over £1million is now delegated to schools for this work, but there is still an expectation that the authority has money to distribute.

168. The authority now proposes that support obtained through the consultation meetings will be in the form of advice and guidance to the school or classroom teacher but not in the form of assistance in the classroom. In order to try to bring much needed clarity to this area the LEA plans to produce guidance for schools, early in this present term, on how to access behaviour support.

169. The authority does not maintain an effective behaviour support service for schools. The service has suffered from staff vacancies. The quality of support is inconsistent and the deployment of resources is not rooted in sufficiently clear criteria. However, schools in special measures have been targeted and have received good support. The revised behaviour support plan has been helpful in assisting some schools to develop their behaviour policies and procedures. A concern for many primary schools is the lack of support at Key Stages 1 and 2 and the service has not had the capacity to undertake prevention and early intervention initiatives with primary schools. However, additional staff have recently been recruited to provide behaviour support for these age groups. A new service manager has recently been appointed.

170. Satisfactory progress is being made with reducing permanent exclusions but the number of fixed term exclusions is a cause of concern. In order to bring about reductions, the service aims to improve schools' awareness of pupils' pastoral and special educational needs at Key Stages 3 and 4, and officers have noted a growth in the use of pastoral support programmes in schools.

#### **Recommendation**

- Improve the effectiveness of behaviour support by ensuring that it is of more consistently high quality, and by clarifying for schools the levels of support they may expect and how they gain access to the support.

#### **Health, safety, welfare and child protection**

171. The LEA has sound procedures for child protection. Registers of the designated teachers for child protection in schools are updated annually, and the information used to inform a good range of training. The training is well regarded by schools. Teachers are also provided with a good level of written information and a handbook. The LEA is appropriately represented on the area child protection committee. Links with social services ensure the designated officer is provided with technical advice. Schools are able to contact their local duty social worker when necessary, although the effectiveness of local links is not consistent across the county's areas.

172. Arrangements for discharging responsibilities for health and safety are satisfactory. They are co-ordinated by the county health and safety unit based in the personnel department. Regularly updated health and safety guidance documents and specialist training are provided for schools. Monitoring is in place and the

content of training is informed by the findings of audits. Appropriate systems exist for safety problems to be promptly reported by schools. Response to critical incidents in schools is well led by members of the education and psychology service.

### **Children in public care**

173. The council undertakes its responsibilities for children in public care satisfactorily. There are lead officers in both the education and social services departments who work in partnership to promote the welfare and achievement of this group of pupils. A group of elected members demonstrates a strong concern about the welfare and achievement of the youngsters and a members' panel of visitors to the children's homes helps to raise awareness of the group. However, there is not a sufficiently clear emphasis on the council's corporate parenting responsibility.

174. Educational attainment was last reported in November 2000, when the progress of children at all key stages was reported. Prior to that only the attainment of those leaving care was reported. Attendance and exclusions have not been reported regularly, and the arrangements for reporting to members in the new council structure have not been specified in detail.

<b>Recommendation</b>
<ul style="list-style-type: none"><li>• Ensure that the corporate parenting responsibility for children in public care is clearly located with members and that clear reporting lines keep members informed on a regular basis of the educational achievement and all other relevant matters of these young people.</li></ul>



175. Schools have designated teachers for children in public care. Schools also have confidence that they are informed by the council when a child in public care is admitted to the school. At the time of the inspection a high proportion of school aged children who were looked after by the authority had a personal education plan.

### **Ethnic minority children**

176. The LEA's support for minority ethnic pupils and Travellers is satisfactory overall. The Traveller education service is effective. It provides classroom support which is valued by schools and monitors attendance and achievement. Attendance is promoted by visiting non attenders on site and providing clear guidance and study packs to families who are travelling. Attendance has increased in both primary and secondary phases in the last year.

177. The support for English as an additional language is sound and schools value the work of the service. The LEA monitors the attainment and attendance of minority ethnic pupils, but accepts that its current data are not sufficiently robust in that schools are not always certain about the categorisation of their pupils according to ethnic group. A start has been made on analysing the Key Stage 4 data. On the basis of the data currently available, no under-performing groups have been identified, which has led the service sensibly to continue to focus on the teaching of English as an additional language as its main priority. There is scope for improving the data and using them more effectively to identify need, target resources and provide guidance to schools on how to develop strategies to raise achievement. Link

advisers do not raise the progress of minority ethnic pupils as part of their programme of school visits.

#### **Recommendation**

- Improve the systems for monitoring of achievement and attendance of all ethnic minority children and, if appropriate, use the findings to develop strategies to raise attainment.

#### **Gifted and talented**

178. The LEA is working closely with its schools in developing sound strategies for the identification and teaching of the most able pupils. A detailed analysis of the performance data is being used to identify potential high achievers by age and gender. Good practice has been developed in a number of schools, especially secondary schools, over the last few years and more recently as part of the enrichment courses run by the Bridgwater Education Action Zone. This has been used, together with advice from other sources, in producing a policy and guidance document circulated to schools.

179. The Education Development Plan priority for improving teaching and learning is also part of developing differentiated work for the most able and increasing their personal targets. It also includes strengthening the links between primary and secondary schools by encouraging joint working between specialist secondary teachers and primary teachers. The LEA has run successful summer schools for gifted and talented pupils. The majority of schools have had training for co-ordinators responsible for such pupils. Plans are in place for collaborative work between the LEA and Beacon schools to train teaching assistants to work with gifted and talented pupils.

#### **Combating racism**

180. The measures the LEA takes to combat racism are satisfactory overall. A good start was made, although the priority accorded to this work has not been sufficiently high in the last year. The LEA responded well to the recommendations of the *Report of the inquiry into the death of Stephen Lawrence* (Macpherson report, 1999). The LEA's anti-racist working party, together with a representative group of headteachers, produced a comprehensive policy and guidelines for schools on managing and recording racist incidents.

181. The production of these was timely and was followed by training for school staff. However, the pace was not sustained and the year 2000/2001 was the first in which racist incidents were recorded. The LEA has been collating the data for the first time in the present autumn term. The LEA has not yet analysed the data the recording has produced or provided feedback to schools and members of the anti-racist working party or to important partners in this work such as the Somerset racial equality council. The LEA has an equal opportunities action plan in which a start has been made in setting equality targets.



<b>Recommendation</b>
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| <ul style="list-style-type: none"><li>• Ensure the work already started on combating racism is pursued with greater vigour and that liaison with the Somerset racial equality council and other relevant groups such as the anti-racist working party is strengthened.</li></ul> |
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### **Social exclusion**

182. The measures the authority takes to combat social exclusion are unsatisfactory overall. Although there are a number of initiatives in which the authority works in partnership which are progressing well, some of its own services which have a focus on social inclusion do not fully meet the needs of young people. Work which helps to combat social exclusion and which is progressing well includes support for the Bridgwater Education Action Zone, partnership with Somerset health authority on the development of the teenage pregnancy strategy, drugs education and prevention. The LEA's work on developments for very young children as a partner in the early years development and childcare partnership is also progressing well. The community learning partnerships are beginning to play a useful role in promoting social inclusion.

183. However, a number of the authority's services vital to social inclusion are not satisfactory and have been referred to in previous sections of this report. These are: provision for pupils who have no school place; support for attendance and support for behaviour. The authority's strategic planning has not yet brought coherence to its work in this area but there are plans to address most of the issues raised.

## **APPENDIX 1: SUMMARY OF RECOMMENDATIONS**

### **SECTION 1: THE LEA STRATEGY FOR SCHOOL IMPROVEMENT**

#### **In order to improve support for the implementation of Best Value:**

- provide further guidance to schools on their approach to Best Value principles.

### **SECTION 2: SCHOOL IMPROVEMENT**

#### **In order to improve the way the LEA fulfils the functions of monitoring, challenge, support and intervention:**

- ensure that written records of visits to schools are more consistently evaluative and that copies are routinely sent to chairs of governing bodies.

### **SECTION 3: STRATEGIC MANAGEMENT**

#### **In order to improve strategic management:**

- the council should develop a corporate plan, which clearly states the council's priorities and sets out how they are to be achieved; and
- members should scrutinise the education service rigorously and effectively.

#### **In order to improve support for management services:**

- ensure that corporate information and communication technology charges to the education department are subject to agreed standards in terms of specification and costs; and
- improve personnel administration by quickly installing a comprehensive electronic personnel system, integrated with the rest of the LEA management system.

### **SECTION 4: SPECIAL EDUCATIONAL NEEDS**

#### **In order to improve the LEA's strategy for special educational needs:**

- speedily complete the review of SEND funding; and
- make greater use of the existing SENCO networks to disseminate information.

#### **In order to improve the speed of completion of statutory assessments:**

- work more effectively with the relevant health authority in order to improve the timeliness of advice concerning statutory assessments.

**In order to improve schools' capacity to support pupils with special educational needs:**

- introduce a system of target setting for special schools and extend target setting for pupils with special educational needs in mainstream schools to all schools; and
- promote more widespread use of school self-review of provision for special educational needs.

**In order to improve the LEA's capacity to target resources for special educational needs more effectively:**

- improve the monitoring of pupils' progress and establish a link between outcomes for pupils and expenditure on provision for special educational needs.

**SECTION 5: ACCESS**

**In order to enhance the capital building programme:**

- explore more vigorously the full range of funding opportunities.

**In order to improve the provision for pupils who have no school place:**

- secure the active support and commitment of all headteachers and governing bodies for the current proposals; and
- devise and agree a strategy to secure suitable full-time provision for all pupils excluded for more than 15 days from September 2002, and ensure there is the necessary money to pay for it.

**In order to improve support for attendance:**

- improve the consistency of quality of service across all schools by introducing service agreements between the education social work service and schools as a matter of urgency; and
- speedily review the provision and location of the education social work service and its contribution to social inclusion.

**In order to improve the effectiveness of behaviour support:**

- ensure that it is of more consistently high quality, and clarify for schools the levels of support they may expect and how they gain access to the support.

**In order to improve support for children in public care:**

- ensure that the corporate parenting responsibility for children in public care is clearly located with members and that clear reporting lines keep members informed on a regular basis of the educational achievement and all other relevant matters of these young people.

### **In order to improve support for ethnic minority children:**

- improve the systems for monitoring of achievement and attendance of all ethnic minority and Traveller children and use the findings to develop strategies to raise attainment.

### **In order to improve support for combating racism:**

- ensure the work already started on combating racism is pursued with greater vigour and that liaison with the Somerset racial equality council and other relevant groups such as the anti-racist working party is strengthened.

## **APPENDIX 2:**

### **Best Value review of education financial services**

Somerset's education financial services support the LEA, schools and other establishments in managing their finances effectively as well as ensuring adequate protection is in place for managing public money. Education financial services has been in existence for just over ten years and became a trading unit in 1992. It is situated in the finance and planning management area of the education department and works alongside the LEA core finance team. It has a service level agreement with the LEA and offers various levels of traded services to schools.

The service provided by education financial services is strong and well regarded by schools. It is responsive, efficient and officers have a close working relationship with schools. The school survey and visits confirmed that schools justifiably recognise the quality of this service.

The Best Value review process was managed well and external challenge was provided within the team by a primary headteacher, a primary governor, a special school governor, a secondary bursar and the LEA finance manager from North Somerset Council as well as the human resources manager from social services and the head of exchequer services.

The review appropriately challenged the need for the service by setting out to address key questions including those concerning the financial needs of schools and the LEA, their expectations, and the models of service delivery available to meet those needs.

The review team had difficulty in finding standard information nationally upon which to gauge the top 25 per cent in this area of service. However, comparative and benchmarking data was sought from other LEAs and also prices for services from private companies. Although education financial services prices for services to schools were found to be cheaper than the private sector, no comparisons were made for the work provided to the LEA. However, it was agreed that education financial services provided more in services to the LEA than they charged. Surveys carried out with customers indicated that the current service was a good performer and the review team felt this was confirmed by the fact that the service had been cited in an Audit Commission publication as an example of good practice.

The review team commissioned an investigation into alternative models of delivery and looked in depth at three generic groupings: external provision – including other LEAs, outsourcing, private companies, partnerships; school provision - schools selling services to other schools; county council traded provision – the present model, a model based on greater integration with other finance teams. Each model was measured against defined criteria. The review group recommended that education financial services should be maintained, with planned improvements and regular reviews. However, they rightly felt that education financial services being reviewed ahead of the rest of a finance crosscutting review and an information and communication technology review inevitably limited the potential for choosing one of the more radical options. Considering the quality of this service, there was little justification for education financial services being timetabled into year one of the programme other than that the service volunteered.

The improvement plan helpfully includes success criteria and performance indicators but does not include details of resources and in several areas it refers to further reviews. As the service is good, the review is unlikely to lead to a step change. However it confirms the developments that this good and highly valued service was planning.

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**Office for Standards in Education  
33 Kingsway  
London  
WC2B 6SE**

**Tel: 020 7421 6800**

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