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IN EDUCATION**

**INSPECTION OF  
MERTON  
LOCAL EDUCATION AUTHORITY**

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in conjunction with the  
AUDIT COMMISSION**

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## **APPENDIX: RECOMMENDATIONS**

## 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 which focuses on the effectiveness of local education authority (LEA) work to support school improvement.
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 members, 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 63 schools. The response rate was 83 per cent.
3. The inspection involved studies of the effectiveness of particular aspects of the LEA's work through visits to ten first schools, five middle schools, four high schools and two special schools. The visits tested the views of governors, headteachers and other staff on key aspects of the LEA's strategy. The visits considered whether support provided by the LEA contributes, where appropriate, to the discharge of the LEA's statutory duties, is effective in contributing to improvements in the school, and provides value for money. Evidence from other HMI visits to schools in the LEA was also considered.

## COMMENTARY

4. Merton is a small Outer London Borough with about one fifth of the population from ethnic minority groups; 96 different languages are spoken but a relatively low proportion of pupils have English as an additional language. The proportion of pupils eligible for free school meals is around the national average.
5. Merton LEA faces some significant challenges. Standards in schools are too low. Schooling is organised in an over complex three-tier arrangement of first, middle and high schools. Secondary schools in neighbouring authorities admit pupils at age 11, some operate selective education and there is a lack of parental confidence in some of the Borough's high schools. In 1999, the parents of 23 per cent of Merton pupils opted to have their children educated out of Borough, or in independent schools, at Year 7. Of these pupils, 84 per cent obtained average or above average levels in the National Curriculum tests.
6. In the last three years the LEA has faced these challenges with determination and good progress has been made, particularly in Key Stages 1 and 2. Merton has embarked upon an ambitious and appropriate school reorganisation, to restructure all its schools into primary and secondary provision and to establish new arrangements for special educational needs (SEN) in mainstream schools. An effective strategy for school improvement is being implemented which is beginning to raise standards at Key Stages 1 and 2. Standards are now in line with national averages. Standards at Key Stage 2 are increasing faster than the national rate. Nevertheless, standards at Key Stages 3 and 4 remain too low and pupil attendance, particularly among secondary aged pupils, is well below national norms and not improving quickly enough.
7. The LEA's approach to monitoring, challenge, support and intervention is good and is getting better. Schools visited as part of this inspection are making good progress in identifying their strengths and weaknesses, and support and intervention are well targeted by the LEA at the weakest schools. The consistently high quality of challenge provided by the inspector assigned to each school, and the good and improving data held by the LEA, and provided to schools, have been crucial to the progress being made.
8. There are considerably more strengths than weaknesses in the LEA's support for school improvement. Overall the majority of functions are exercised effectively at a cost which is in line with other LEAs with similar characteristics.
9. In addition to monitoring, challenge, support and intervention the following functions are carried out particularly well:
  - the provision and use of performance data;
  - support for management;
  - support for governance.

10. The following functions are exercised well:

- support for literacy;
- support for numeracy;
- support for schools causing concern;
- financial support to schools;
- personnel support to schools;
- identification of information and priorities in the Asset Management Plan;
- statutory assessments for pupils with special educational needs;
- health, safety, welfare and child protection;
- planning for the early years;
- measures taken to combat racism;
- liaison with other agencies.

11. The following functions are carried out inadequately:

- support for information and communication technology (ICT), both in the curriculum and in administration;
- provision for pupils not attending school;
- maintenance of school buildings;
- support for raising the attainment of pupils from ethnic minorities.

12. The key issue for the LEA and the schools is whether standards can be maintained and improved over the next three years when the change in the age of transfer is taking place. The education development plan (EDP), the main LEA plan for school improvement, is well conceived and is being well implemented. Consultation with schools on the plan has been good. However, the proposal to change the age of transfer, a key strategy for raising standards, particularly at Key Stage 3, is given too little attention and is insufficiently detailed in the plan.

13. Operational implementation of planning in a number of areas has not been clearly enough communicated to schools. Examples include not only the age of transfer but also the implementation of the policy for SEN, the delegation of SEN funds to schools and preparing schools fully for the implications of fair funding.

14. Some of the services provided by the LEA to help headteachers and governors in the management of schools are good. They allow managers to focus their attention on the key task of improving standards. However, other services are weak and, overall, there is too much variability in their quality. Service level agreements do not define service standards sufficiently precisely. As a result schools are unable to take quick and well informed decisions about their use.

15. Elected members have demonstrated their commitment to education by protecting the budgets of schools when cuts have been made in other Council services. Changes to the structure of the Council, in response to *Modernising Local Government*, have the potential to improve the decision making process

with regard to raising standards. However, protocols and expectations have not yet been sufficiently defined to ensure the changes will lead to improvement.

16. There is clear and effective leadership in many areas of the LEA and a shared vision of the centrality of school improvement. The raising of standards was central to the decision to change the age of transfer. The pressures upon the management and leadership of schools and the education service to deliver these changes, whilst continuing to raise standards, will be considerable. The progress made so far would suggest that the LEA is capable of meeting these challenges.

## SECTION 1: THE LEA STRATEGY FOR SCHOOL IMPROVEMENT

### Context

17. Merton is a small LEA on the outskirts of Southwest London with a population of approximately 182,300. Around one fifth of the population is from minority ethnic groups. Unemployment has fallen since 1996 and is lower than the London average, and a higher proportion of Merton residents work in managerial and professional occupations than the Outer London average.
18. In 1998 the school population was 24,322 and 32.1 per cent were from minority ethnic groups. The two largest groups were Black African (5.4 per cent) and Black Caribbean (4.8 per cent). The proportion of Merton pupils with English as an additional language (EAL) is lower than the Outer London average, although 96 different languages are spoken. Refugee children represent 7.2 per cent of the school population and numbers are increasing.
19. In 1998, 18.5 per cent of pupils, overall, were eligible for free school meals. This was broadly in line with similar LEAs and the nation as a whole. There are considerable variations in free school meals across the Borough's schools (from 2.3 to 42.8 per cent).
20. In January 1999 the overall percentage of pupils in Merton schools, including special schools, with a Statement of SEN was above the national average of 3.3 per cent. The proportion of Merton secondary pupils, 4.8 per cent, was well above the national average, and the proportion of primary pupils, 2.4 per cent, was also above the national average.
21. Merton operates a three-tier system, a form of school organisation which has increased in complexity over the years. There are 63 maintained schools: 37 first schools, 14 middle schools, nine high schools and three special schools. The complexities in arrangements are illustrated below.

#### Merton Community and Church of England schools.

Types of School	Category/ Sex/ Co-educational (Co-ed)	Number of Schools
3-8 First Schools	All Co-ed. 28 community, four VA.	32 (four C of E)
8-12 Middle Schools (deemed primary)	All Co-ed. 11 community, one VA.	12 (one C of E)
12-16 High Schools	Two girls. Community. One boys Community. Three Co-ed. Community	7
11-18 High School	One boys VC.	1
<b>TOTAL</b>		<b>51</b>



#### Roman Catholic schools.

Types of School	Category/ Sex/ Co-ed	Number of Schools
3-9 First School	All Co-ed and VA	5
9-13 Middle Schools (deemed secondary)	Both Co-ed, and VA	2
12-18 High Schools	One boys VA one girls VA	2
<b>TOTAL</b>		9

22. Three special schools cater for pupils with moderate learning difficulties, emotional and behavioural difficulties (EBD), and severe, profound and multiple learning difficulties. Three specialist units are located in first and middle schools.
23. Every Merton First School has part time nursery provision for three and four year olds and in 1998, 80 per cent of these age groups were in LEA maintained schools.
24. The LEA and the schools perceive the three-tier system of schooling as a constraint on raising standards. A significant proportion of pupils leave Merton schools at the end of Year 6 to enter secondary schools, many of which are selective, in neighbouring boroughs. In 1999 the proportion was 23.2 per cent, and 84 per cent of the pupils concerned attained level 4 or above in the National Curriculum tests at the end of Key Stage 2. Not only does this leave middle schools with surplus places in Year 7, but it also affects the overall levels of attainment of the pupils entering high schools. Proposals have been agreed by the Secretary of State, to change to a two-tier system of primary and secondary schools with transfer at age 11. Of the 60 first, middle and high schools, 13 will close, four new schools will open and 47 will change character, including the establishment of an additional seven new SEN resourced units. Transitional arrangements begin in September 2000 and full implementation will have been achieved by September 2002.

#### The performance of schools

25. The LEA's baseline information and OFSTED inspection data indicates that attainment on entry to Merton first schools is broadly in line with similar<sup>1</sup> LEAs and LEAs nationally, although there are considerable differences between schools. Attainment on entry to secondary schools is below the national average, reflecting the migration to neighbouring boroughs that takes place at the end of Year 6.
26. In 1999, the proportion of pupils achieving level 2 or above in the Key Stage 1 National Curriculum tests in reading, writing and mathematics was broadly in line with averages for similar LEAs and the nation as a whole. At Key Stage 2, the proportion of pupils achieving level 4 or above in English, mathematics and science tests was broadly in line with national figures and those for similar LEAs. At Key Stage 3, the proportion of pupils achieving level 5 or above was

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<sup>1</sup> A "similar LEA" is one of a group of LEAs with social and economic characteristics statistically similar to those of Merton.

below that nationally and for similar LEAs in English and science. In mathematics it was in line with the national average but below that for similar LEAs.

27. At Key Stage 4 in 1999 the proportions of pupils achieving five or more A\*-C grades, and one or more A\*-G grades at GCSE were below the national averages and those for similar LEAs. Attainment in terms of the average point score was below the national average.
28. Attainment at Advanced Level GCE and in the Advanced GNVQ in 1999 was in line with national averages for two or more subjects entered, and above national averages for less than two subjects.
29. Since 1997, Key Stage 2 test results in English and mathematics have improved faster than nationally, although in 1999 mathematics improvement was well above the national rate while English was well below. At GCSE, the percentage of pupils achieving five or more A\*-C grades reached a plateau between 1995 and 1998, but saw a significant increase in 1999. Overall progress between Key Stage 3 and GCSE is in line with that reported nationally. Two high schools considerably exceed expectations for pupils gaining five or more A\*-C grades at GCSE whilst two others fail to meet them by a significant margin.
30. Overall, the percentage of Merton primary schools graded very good or good by OFSTED inspectors is in line with the national average and that for similar LEAs. In those schools that have been inspected twice, improvements have been made in the quality of education, the climate of the school, and management. In each case progress has been in line with, or better than nationally. Overall, the proportion of secondary schools graded good or very good is above the national average and that for similar LEAs. There is insufficient evidence to judge improvements following second cycle inspections.
31. Permanent exclusions were in line with levels nationally and in similar LEAs in 1999. Attendance of primary aged pupils in 1999 was 92.8 per cent. This was below the average for similar LEAs and well below the national average. Attendance of secondary aged pupils, 89.5 per cent, was well below the averages for similar LEAs and LEAs nationally. The level of unauthorised absence in the primary sector was above the national average; in the secondary sector it was well above.

## **Funding**

32. Merton puts a high priority on education and spends at the education Standard Spending Assessment, despite reducing spending on other services. The LEA has indicated that its 2000/2001 schools budget covers inflation and meets DfEE targets.
33. Merton's spending per pupil on the local schools budget (LSB) is very close to the average for outer London Boroughs and for LEAs with similar characteristics. In 1999/2000 Merton delegated 78 per cent of the LSB to

schools, less than similar LEAs (81 per cent) and the national average (80 per cent). Delegation has risen in 2000/2001 to 82.8 per cent to meet the requirements of Fair Funding.

34. Overall, central LEA expenditure per pupil in 1999/2000 is broadly in line with similar LEAs, though that for strategic management is higher. This is to be expected, given the current additional demands of planning required for the change in the age of transfer. SEN expenditure is higher per pupil than in similar LEAs, but comparisons are complicated as Merton has no pupil referral unit and some similar LEAs have delegated all SEN funding.
35. The schools budget allocation formula includes an appropriate range of factors for social deprivation and SEN. A safety net limits the annual reduction possible in a school's budget to ten per cent. The formula has been revised annually following consultation. To date, first schools have felt that the formula provides insufficiently for Key Stage 1.
36. Officers are working with a representative group of headteachers to revise the formula to fund the new school structure planned for 2002. Detailed modelling is intended to bring together all aspects of the change in age of transfer, social inclusion, Curriculum 2000, and the agenda for raising standards. The group is also considering the need for transitional funding for 2001 and 2002. The LEA is rightly alert to the need to devise further interim funding factors, protection or contingency funding, as the change in the age of transfer progresses.
37. Capital expenditure was £5.5m in 1999/2000 and nearly half was spent on implementing the class size plan and additional places. The LEA is finalising a complex private finance initiative (PFI) scheme expected to fund about £57m of improvements to the six new community secondary schools.
38. The LEA has been successful in grant bidding to fund its priorities, particularly promoting social inclusion and education through regeneration projects, such as after-school initiatives and environmental works. It has also secured sports lottery and capital challenge funding and is developing a strategy for secondary schools to seek specialist college status.

### **The council structure**

39. The Council restructured in May 2000 in response to *Modernising Local Government*. A Cabinet consisting of the majority party only has been established, made up of the Leader and eight members. A leader elected each year, serves with cabinet members on an all party executive committee. A scrutiny commission has been set up, supported by scrutiny panels. District or area forums are being developed to take account of local issues. A standards committee will be set up to oversee the probity of members and officers.
40. At the time of the inspection, portfolios of responsibility had been clearly defined and members appointed to hold them. Three education portfolios have replaced the traditional education committee, associated sub-committees and

working groups. They are primary education and children's services, secondary education, and the age of transfer. An education forum has been established as a mechanism for consulting the wider educational community. There has been no change in the organisation of service departments. The Council will review arrangements after nine months. This will be essential to ensure that representative groups feel appropriately consulted, officers are not overburdened and elected members are taking a more strategic role.

41. Education is part of the education, leisure and libraries directorate. At the time of the inspection there were four service areas:

- child policy and school effectiveness;
- planning and resources;
- community services; and
- age of transfer.

42. Child policy and school effectiveness has been brought together under the leadership of an assistant director to ensure that services related to school improvement work more closely. There is evidence of the impact of this approach in the work undertaken, for example, to support schools causing concern. A temporary assistant director manages planning and resources, while a seconded second tier officer manages age of transfer. The recent approval to change the age of transfer by the Secretary of State has led the director, appropriately, to re-consider the organisation and management of the project within the current departmental structure.

### **The Education Development Plan**

43. The EDP is the core document for the LEA's planning for school improvement. The priorities within the EDP are clear and are derived from a detailed audit of strengths and weaknesses in the performance of schools. There are four overarching priorities within the plan:

- to raise standards at Key Stage 2, in particular, in literacy and numeracy;
- to raise standards at Key Stages 3 and 4;
- to provide support for schools causing concern; and
- to promote social inclusion as a means of raising standards.

44. Raising attainment is at the heart of the priorities. Improving the quality of teaching and management permeates all the activities which appropriately cover the national priorities for school improvement. The small number of priorities makes the plan easy to understand, and provides coherence to the activities within it. However, some of the priorities cover a wide range of activities. The need to give more attention within the plan to the change in the age of transfer means they are over-ambitious. Annex 8 provides a convincing rationale for the proposals to change the pattern of school organisation. Activities related to this proposal were placed mainly in the third year of the plan. This is too late as the reorganisation and its impact on schools will begin to take effect in summer 2000.

45. The activities within the EDP are well structured; they include appropriate elements of buy back from schools to support their delivery. However, timescales are insufficiently precise.
46. The target setting process outlined in the EDP is good. It has improved this year and is continuing to improve as the quality of data provided by the LEA develops. Targets have been set for all appropriate groups and key stages. The target setting process is closely related to the LEA's approach to the joint annual review (JAR). The school, the assigned school inspector and a multi-disciplinary phase group carry out independent audits based on the data available and grade the school on a range of indicators. It is through this process that targets are set and agreed. Schools have been asked to set targets since 1997 but it is only since September 1999, when assigned inspectors were in place, that the system has been fully operational.
47. In the school survey primary schools rated consultation overall between satisfactory and poor and well below other LEAs surveyed to date. Secondary schools rated it satisfactory and around average. The schools visited were considerably more positive about consultation on the EDP, which they rated satisfactory or better overall. Almost every school was clear about the priorities within the EDP and endorsed them, although a number of schools felt that too little attention had been paid to the age of transfer in the LEA's planning for school improvement.
48. A detailed review of progress on last year's EDP has been carried out. Appropriate activities have been identified for continuation into 2000/2001. Consultation with schools has been good. The LEA's own analysis of data and performance indicators has improved and shows that, although there has been improvement overall and significant improvement in the primary sector, in some activities in the secondary sector it has been too slow.
49. In 1999, 64 per cent of middle schools met their targets for literacy in Key Stage 2, against 86 percent for numeracy. The LEA targets for the year 2000 have been exceeded in numeracy and the target for literacy is likely to be achieved. Progress is less positive at Key Stage 4. Only three of nine high schools met their targets for five or more A\*-C grades at GCSE, and only one met its target for one or more A\*-G grades. This means considerable progress will have to be made if targets are to be met for the year 2000. A similar picture emerges in attendance and fixed term exclusions with regard to secondary aged pupils.
50. The revised EDP recognises these deficiencies by providing for activities designed to improve the quality of self review, management, the quality of teaching and use of data to set targets. As with the original EDP, the revision is clear and well presented. Responsibilities, broad timescales and success criteria have been defined. Activities designed to implement the change in the age of transfer have been recognised in the plan, although timescales, sequencing of the activities, and their impact on the capability of schools to carry out other activities within the plan have been insufficiently defined.

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

51. The LEA has sound systems for financial planning, monitoring and control. There is annual analysis of education priorities, current savings and the costs of possible savings and growth within the context of a three-year financial plan. The new leadership aims to achieve closer links between financial and service planning and greater consistency within, and between departmental plans.
52. A Best Value performance plan has been prepared. Best Value reviews of education services begin in 2001. There has been limited involvement of headteachers and governors so far, although they are aware of Best Value and have legitimate concerns about some LEA services. Appropriate work has begun to develop service and performance management, and to benchmark central service costs and develop performance indicators. However, there is scope for improvement in the evaluation of services and definition of service standards. The education department is preparing for Investors in People accreditation. In reviewing services, corporate overheads have been scrutinised and some comparatively high costs, such as insurance, are being further reviewed.

## **Recommendations**

### **In order to improve the quality of planning for school improvement:**

- put in place detailed plans for the age of transfer, which define precisely what actions will be undertaken and when and how they will impact on school improvement;
- communicate this detailed planning to schools;
- reduce the number of activities and bring them together within the EDP in light of the detailed planning for the implementation of the age of transfer; and
- put in place systematic processes to review and evaluate services and costs in line with Best Value principles.

## SECTION 2: SCHOOL IMPROVEMENT

### Implications of other functions

53. The key issue for the LEA and the schools is whether standards can be maintained and improved over the next three years while changes are taking place in the age of transfer. The EDP is a clear statement of the LEA's intent to raise standards in schools. The revised plan for 2000 is an improvement on the previous one. Priorities are clear and the activities within the plans are well-conceived and likely to lead to improvements. However, the proposal to change the age of transfer, a key strategy for raising standards, particularly at Key Stage 3, is given too little attention in the LEA's key plan for school improvement.
54. Senior officers of the LEA provide clear and effective leadership in school improvement. However, operational planning in a number of areas has not always been clearly enough communicated to schools.
55. Changes in the structure of the Council in response to *Modernising Government*, have the potential to enable the Council to oversee the implementation of the change in the age of transfer and to improve the decision making process with regard to the key issue of raising standards. However, protocols and expectations have not yet been sufficiently defined to ensure the changes will have a direct impact on the quality of service schools receive.
56. Financial and personnel services provide senior managers in schools with effective support. This allows them to focus their attention on the key task of improving standards. However, ICT and property services are weak and the overall lack of clarity in the range and precision of the services offered militates against managers taking quick and well informed decisions.
57. Support to SEN has a clear focus on raising achievement and provision is made in the mainstream curriculum wherever possible. Advice and direction to mainstream schools are generally sound. Strategic direction for SEN is clear but some actions have been poorly communicated to schools and, as a result, there is some uncertainty about the support available. Support to improve attendance and behaviour, and support for children in the care of the Local Authority is at least sound and improving. It is beginning to have an impact on standards in schools. These areas and their effects are dealt with in more detail later in this report.
58. The quality of support to minority ethnic pupils and to pupils educated out of school is variable. In both, support is unsatisfactory at present. However, the LEA has recognised the weaknesses, which are by no means intractable, and actions are being implemented which are leading to improvement.

## **Monitoring, challenge, support and intervention**

59. The LEA's approach to monitoring, challenge, support and intervention is good and improving although, overall, it has not been in operation long enough for its impact to be demonstrated in published test and examination results. The approach has been agreed through negotiation with schools. It was piloted and reviewed by an external consultant and came fully on line in September 1999. Support and intervention are well targeted by the LEA at the weakest schools. All the schools visited understood the LEA's approach and were supportive of it.
60. A JAR is used by the LEA for monitoring and challenging schools, and contributes to identifying schools that cause concern. Self review is well established in the LEA's schools and each school produces a report which includes progress on the implementation of the targets within the school development plan. The LEA carries out a similar exercise based on the data and information held on the school. These are brought together in a meeting between the school and the assigned inspector, where targets are reviewed, new targets are agreed and standards, quality and management are graded. No school receives more than three days of centrally funded assigned inspector time and effective schools receive less. Schools are graded in categories A to F. Those which cause concern, categories D to F, receive additional monitoring, intervention and support. Criteria for grading schools are very clear and well differentiated.
61. The majority of schools carry out self-review in a detailed and rigorous way. Training has been provided which has helped schools manage the process. Schools find the external scrutiny of the LEA challenging and demanding. Governors find the JAR useful in monitoring the progress of the school. The key to the success of the process is the quality of the inspector assigned to each school and the high quality of data held by the LEA. The team of assigned inspectors has recently been brought up to strength and is highly regarded for its professional expertise and the challenge it provides.
62. A multi-disciplinary group of officers has a remit to disseminate advice and good practice, moderate grades, and use the evidence available to place schools in each phase into categories for monitoring, intervention and support. A School Improvement Group allocates resources and directs teams in response to the phase groups. It is made up of the senior heads of support services.
63. The LEA recognises the importance of continuing to improve the quality of schools' self review in the EDP. The grades produced as a result of the JAR are collated by the LEA, and used to monitor and evaluate the effectiveness of the implementation of the EDP and define priorities for future action.
64. Assigned inspectors are part of the school effectiveness service. The service is well managed and has made good progress over the last year. Priorities for the service are those within the EDP. A service deployment plan sets out priorities for team members on a termly basis. Approximately 43 per cent of the service's



work is spent identifying and intervening in schools causing concern. An excellent team handbook defines roles, responsibilities and expectations. It incorporates the team deployment plan and individual targets for each inspector.

65. The reorganisation of schools will put considerable pressure on assigned inspectors. This has been recognised and additional staffing will be appointed to help manage the transitional period. The deployment of this staffing has not yet been decided.
66. Quality assurance is sound and is based on appraisal and the targets set for individual inspectors. The progress made in meeting targets within the EDP is well monitored.

### **The collection and analysis of data**

67. The LEA's provision of data to mainstream schools is good, highly rated by schools, and improving. Guidance on the use of data to set targets is sound, although some of the first schools visited require more training in order to make full use of the data provided. The use of data in special schools is underdeveloped.
68. The EDP recognises the need to continue working with schools to improve the quality of the data analysis used to set targets for improved performance. Activities are appropriate and include the provision of training for governing bodies on data analysis and the setting of targets. The EDP also identifies assessment as a target for improvement.
69. The research and statistics unit is relatively new; it forms part of the planning and resources division, but has strong links with the school effectiveness unit. Schools consider the establishment of the unit to have been crucial in the improvements that have been made to the quality of data analysis within the LEA.
70. The research and statistics unit undertakes an analysis of data, which is benchmarked and provides schools with a clear picture of their pupils' performance. A computerised management system has been purchased to facilitate the analysis of attainment and assessment data and training for schools has taken place on its use. Considerable progress has been made in providing schools with information on the value they add to pupils' attainment across key stages, and in ensuring that data are transferred in an appropriate and timely way from one phase to the next. The LEA is not yet able to analyse the value added by schools to the attainment of ethnic groups, but systems are in place to ensure that this will be possible from September 2000.
71. Visits to schools indicate variation in the use of data to set targets and track pupils' progress. In the middle and high schools it was generally good. Schools are, however, making sound progress overall, and the targets set in 1999 for the year 2000 are likely to be more accurate than those set in the previous year.

## **Support for literacy**

72. Support for literacy is good and having a positive impact in schools, particularly in Key Stages 1 and 2. The LEA should meet its literacy target for Key Stage 2 in the Year 2002. GCSE results are in line with the levels expected nationally. Standards in English at Key Stage 3 are below the national average, and present a considerable challenge to schools and the LEA, particularly during the next three years in the transitional period of the age of transfer.
73. The literacy team is well respected and has the support of schools. It has emphasised the importance of target setting and action planning and has provided training in assessment.
74. Implementation of the National Literacy Strategy has been well managed. The inspector and consultant give a clear strategic lead while being responsive to the needs and circumstances of individual schools. Schools value the strong guidance, support and challenge they receive. In three-quarters of the schools visited, support for literacy was good and it was never less than satisfactory. In the survey, first and middle schools judged it to be good while high schools rated it as satisfactory. The process for identifying schools that need intensive support is thorough and well considered. Assigned inspectors have been trained to monitor literacy effectively. Training is provided to good effect, both centrally and within schools. Teachers' planning and their confidence in teaching the literacy hour are improving. Five appropriate key areas, including SEN and writing, have been targeted for specific attention in the coming year.
75. The LEA has taken steps to strengthen its support for literacy, particularly at Key Stage 2, with the appointment of a second consultant from September 2000. A literacy centre, for the use of all schools, has been established at one high school, recently reopened as a 'fresh start' school. A monthly literacy surgery is held there and it is also the venue for the family literacy group. All schools, through the standards fund, are allocated five days of supply cover for the prime purpose of sharing good practice. Lead literacy teachers, identified over the past year, provide demonstration lessons and develop training for the benefit of other teachers. Literacy forums for headteachers and governors offer information, consultancy and training.
76. The literacy team works closely with the team that is implementing the National Numeracy Strategy, sharing some approaches and techniques, and occasionally offering relevant joint courses. Effective links are also established with the integrated support service (ISS) and the Ethnic Minority Achievement Service, including training for support teachers and assistants.
77. The LEA's support for literacy is appropriately structured for the impending changes in the age of transfer. Courses and conferences are arranged on Key Stages 1 and 2 for staff from first and middle schools, and on Key Stage 3 for middle and high school staff. High school teachers are given opportunities to

observe the literacy hour being taught in middle schools. The middle schools have all extended the literacy hour into Year 7 on some days in the week.

### **Support for numeracy**

78. The LEA's support for implementing the National Numeracy Strategy has begun well and is benefiting schools. The LEA is well on course to achieve its Key Stage 2 target for 2002 of 75 per cent.
79. Implementation of the National Numeracy Strategy is well managed. The inspector and consultant have good subject expertise, a clear overview of developments and a detailed knowledge of schools and their needs. Schools in need of intensive support have been identified appropriately and helped effectively. Numeracy was the focus for the school visits of assigned inspectors in the spring term 2000 and they were well trained to carry out these visits effectively. Overall, numeracy training has been well received by schools' staffs, governors and by LEA personnel.
80. In the survey, first and middle schools rated support for numeracy as good and high schools judged it to be satisfactory. It was never less than satisfactory in the schools visited and in almost two-thirds it was good. The numeracy team is well respected for the quality of its support and guidance and for its responsiveness to the needs and circumstances of individual schools. The team's influence is demonstrated by improvements in the confidence of teachers and in their planning and assessment. Appropriately, the numeracy team is now emphasising target setting and tracking as ways of consolidating improvement.
81. The team will be strengthened by the appointment of a second consultant with effect from September 2000. Leading mathematics teachers have been identified and trained effectively. Schools value the guidance and training they provide. At the time of the inspection, schools did not have the benefit of a numeracy centre but plans are in hand to open one in September 2000. In 1999, the LEA held a successful numeracy summer school with two middle schools and a high school. It intends to follow this with two more in high schools in 2000. The numeracy team works closely with the literacy team, the ISS and the Ethnic Minority Achievement Service.
82. The support for numeracy is well geared to the impending changes in the age of transfer. For example, arrangements have been made for high school teachers to observe demonstration lessons by leading mathematics teachers in Year 6 and Year 7 classes in middle schools. A sensible attempt is also being made to improve the quality of mathematics teaching at Key Stage 3 by inviting higher education providers to tender for a one-year course for non-specialists.

### **Support for ICT**

83. Support for the use of ICT within the curriculum has some sound features, but it is unsatisfactory overall. It is now improving after a period of inadequacy when schools largely planned and managed their own development with insufficient

guidance from the LEA. The inspector who oversees curricular ICT also has significant responsibilities for science and as a general inspector. Consequently, he has limited time to give to ICT. The LEA improved staffing in September 1999 with the appointment of a consultant who manages the re-established training room and supports schools that are weaker in their planning.

84. Since 1996, pupils' progress in ICT has been largely in line with similar LEAs and the nation as a whole. However, the most recent cycle of school inspections by OFSTED revealed that standards, although good in 20 per cent of the LEA's schools, were below expected levels in 50 per cent. ICT was the subject of a key issue for action in 30 per cent of first school inspections.
85. The LEA's support for ICT was satisfactory in about 60 per cent of the schools visited but it was unsatisfactory in the rest. The major emphases of the support provided to schools so far have been on planning and equipment. The LEA's strategic plan for ICT, the Merton Learning Net, has enabled an evaluation of schools' provision and drawn in funding to finance their planning. All schools now have ICT action plans. These are monitored and updated through the JAR process, which has found most of them to be detailed and of a good standard. Schools have been assisted with the installation of the infrastructure for the National Grid for Learning (NGfL) and with links to the Internet. They have also been helped to gain access to external grants.
86. The developing programme of training includes one-day courses on applications and an accredited course mainly for ICT co-ordinators. The New Opportunities Fund training for NGfL is now under way. The LEA has enabled schools to negotiate this training with providers.
87. The LEA is responsive and helpful when schools request advice but, as yet, it has inadequate information to challenge schools on the standards of ICT in the classroom. The LEA has used NGfL funding to pay the subscription for the implementation of the Anglia Campus On-Line which provides curriculum content for all phases. However, guidance to schools on the use of ICT within subjects and areas of the curriculum is inadequate. Schools that are performing well in ICT are doing so largely on their own initiative. Many use outside consultants for support, whom they have largely had to find for themselves.

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

88. Support for schools causing concern is good. Only one LEA maintained school, a high school, has been judged by OFSTED to require special measures. It was placed in special measures in 1997 and received four monitoring visits by HMI. The school was closed in August 1999 and re-opened as a fresh start school in September of the same year. Support for this school, which was inadequate during the first term, has improved. In addition, two first schools have been identified as having serious weaknesses. Both schools received monitoring visits by HMI and were deemed to be making satisfactory progress.

Seven other schools have been identified by the LEA as causing concern and are subject to the LEA's framework for support and monitoring.

89. The LEA has effective procedures for identifying schools that cause concern, targeting support at them and monitoring their progress. A school management support group of headteachers and deputy headteachers are deployed in schools causing concern. This group meets regularly and is used by the LEA to develop further its strategies for school improvement. Six schools were visited which had been identified, either by OFSTED or the LEA for additional support and monitoring. All were clear why they had been identified, and the LEA had negotiated a package of support, which was appropriate to their specific needs. For example, in one school the delegated budget had been removed, a headteacher had been seconded to the school until a new headteacher was appointed, and training had been given to the governing body. In other schools where standards were below expectations, intensive support had been given in literacy and numeracy.
90. Support for schools causing concern is co-ordinated across the school effectiveness, child policy, SEN, and planning and resources teams as appropriate. Clear targets and demanding timescales have been set for improvement and headteachers have been put under pressure by their assigned inspector, the chief inspector and, occasionally, the director to ensure that they are being met. Half-termly monitoring visits, conducted by an inspector not assigned to the school, review progress against targets and set agendas for further development. These reviews, shared with the school and reported to the governing body, are of consistently high quality, hard hitting and valued by the schools. All the schools visited had made progress in the quality of education and management with the help of the LEA. Three of these schools, while clear about the targets they had to achieve, were less clear whether they had improved sufficiently still to be causing concern.

### **Support for management**

91. The LEA's support for management is very good. The second cycle of OFSTED inspections found that management is at least satisfactory in most schools and good or better in three-quarters. The most frequent weakness was identified as monitoring the school's work, which was the subject of a key issue for action in 40 per cent of inspection reports.
92. The LEA's support for school management is firmly rooted in the continued development and refinement of school self review. The JAR tackles the identified weakness in monitoring. The LEA is justified in its claim that self evaluation is now established in all its schools, albeit at varying levels of effectiveness according to the competence of individual schools in monitoring and review processes.
93. Self review is well supported by the LEA's provision of OFSTED self evaluation training for headteachers and deputy heads, which it has now wisely extended to middle managers. Similarly, a lead programme based on a model used

previously with heads and deputies is being provided for middle managers. The LEA has accepted the importance of the National Standards in its management training. Heads and deputies are supported to complete the leadership programme for serving headteachers and the national professional qualification for headship. Middle management training is also based on the National Standards and the tendering process for training related to the age of transfer requires evidence of how the standards will be met.

94. The age of transfer training will focus appropriately on the leadership, vision and management skills required from heads, deputies and middle managers to carry out reorganisation effectively. Importance will be given to training staff in essential new skills. The LEA has reserved two training days in the 2000/2001 academic year which will be devoted to reorganisation. Meetings have been arranged for heads of closing schools, together with a series of headteachers' visits to reorganised schools in other LEAs. A programme of cross-phase headteachers' conferences has commenced.
95. The LEA is making increasingly effective use of the good practice it has identified in its schools. The school management support group provides training and support for experienced and effective heads and deputies who are deployed to support schools in difficulties. The strengths of the LEA's beacon school are well used for the benefit of others, for instance in improving the teaching of modern foreign languages.
96. A thorough induction programme for new headteachers includes support from an assigned inspector for a year. All but the most experienced heads appointed to the LEA's schools are provided with a mentor. Training in performance management for heads and governors has focused on headteachers' targets. The LEA states that 80 per cent of its schools have completed interim appraisal arrangements, including heads setting targets as required. It also reports that some form of teacher appraisal is taking place in 90 per cent of schools, although some are using the previous LEA procedures and others have developed their own systems of professional review. The enhanced programme of support for newly qualified teachers is comprehensive, meets DfEE requirements and utilises expertise from the Beacon School.
97. The LEA acknowledges the gaps in its support for foundation subjects and is planning a rolling programme to improve standards, using expertise in its schools and brokering the services of outside consultants, as required. However, schools report mixed experiences of the quality of the LEA's brokering. The school effectiveness team has provided good support to individual schools for their own curricular priorities and is working effectively with schools on a work-related curriculum for Key Stage 4.

### **Support to governors**

98. Governors are well supported by the LEA. The EDP targets the strategic role of governors through encouraging them to visit their schools regularly, monitor pupil achievement and get involved in the school development planning

process. Individual governing bodies are encouraged to carry out their own school audits as part of the JAR process.

99. All but one of the schools buy into the governor support service. Governors value the range and appropriateness of the training provided; evaluations of training courses are very positive.
100. The LEA supplies an appropriate range of information to all governors via a termly newsletter and a termly mailing. The telephone advice available via the governors' support officer is highly valued by governors.
101. The Merton governors' council is an independent forum that has a close link with the LEA. All governing bodies are consulted by the LEA on major developments and statutory changes. The LEA obtains the views of governing bodies as a result of consultation returns but there is no regular receipt and check of the minutes of governing body meetings for emerging issues. There are useful termly meetings between the Director of Education and chairs of governors with their heads. The short timescales provided for responses to consultation cause concern to governing bodies, but there is a recognition that some consultations involve nationally set deadlines.
102. The LEA has sensibly appointed a second officer to the governor support service to meet the additional demands of the age of transfer.

### **Support for early years**

103. Merton LEA provides good support to the early years. The early years development and childcare plan, recently agreed by the DfEE, provides a clear range of work and targets for maintained, private and voluntary partners. A curriculum handbook sets out for all providers appropriate principles and desired outcomes for children entering compulsory schooling. A very helpful and clear handbook has been issued to assist all providers to fulfil their duties to children with SEN. Parental links are strengthened by a home visit before a child enters the nursery. Recommendations from the 1998/1999 district audit review of under-fives provision are being put in place.
104. All first schools now carry out baseline assessment of pupils on entry to reception classes and that assessment is subject to audit by the LEA. The research and statistics unit links baseline data with Key Stage 1 performance and schools are being trained in its interpretation and use. Moderation and agreement trials of baseline work and assessment are carried out within the authority.
105. An early years standards group has recently been formed to identify strengths and areas for development. Good practice is shared through the early years forum.

### **Support for the most able pupils**

106. The LEA has made limited progress in targeting support at the most able

pupils. An activity has been identified within the EDP for 2000 to develop policy and provision to raise standards for the gifted and able. A summer school for Key Stage 3 pupils is intended to provide a curriculum model that can be used by all schools. A group has been established within the LEA's numeracy strategy to develop models and materials for able and talented pupils.

## **Recommendations**

**In order to improve support for ICT within the curriculum, it will be necessary to:**

- know more accurately pupils' standards of attainment in all schools;
- identify schools that are weak in ICT and target support at them; and
- ensure that schools have access to effective guidance concerning the use of ICT within subjects.



## **SECTION 3: STRATEGIC MANAGEMENT**

### **Corporate planning**

107. Merton's 'A Vision for the Millennium' has four key messages: to tackle inequality and poverty; to provide a better quality of life and healthier lifestyle; to optimise resources to achieve quality services and value for money and to regenerate the local economy and to ensure that Merton is a 'stakeholder community'.
108. The four key themes in the Council's 1998 strategic plan are to provide: quality services; regeneration; a safe, green, healthy environment and lifelong learning. Objectives for education within the plan focus on raising attainment, ensuring accountability, equality of access for all and working in partnership with a range of groups and bodies. The strategic plan defines performance targets which are incorporated into the 1998/1999 local performance plan and have been reviewed for 1999/2000. The targets for education are directly related to those in the key planning documents of the education department, for example, the EDP and the behaviour support plan.
109. The collective will in the LEA to raise standards owes much to the leadership and determination of the director and her senior colleagues. The recommendation to carry out the change in the age of transfer and the establishment of the fresh start school are two examples of the preparedness of senior staff, and elected members, to take difficult and courageous decisions, albeit, in the case of the age of transfer, after the necessity was obvious.
110. Overall, strategic planning for education is satisfactory. Major plans are sound and planning for school improvement is good. There are links between planning across education, leisure and the libraries directorate. Nevertheless, operational implementation of planning has not been clearly enough communicated to schools. Schools are very clear about their responsibilities and the LEA's expectations for school improvement. However, they are less well prepared to take responsibility for further delegation and to manage other areas of work. Responsibility for this rests with the schools as well as the LEA.
111. Elected members are well informed about the key issues for education within the Borough. Reports have been made to them on the implementation of the targets within the performance plan, and to a school standards review panel on the progress of the Borough's schools and standards overall. Elected members have demonstrated their commitment to education by protecting the budgets of schools when cuts have been made to services elsewhere. However, both members and officers recognise that in the past the Council structure was cumbersome and placed a heavy administrative burden on officers. Members were too involved in minutiae at the expense of strategic management and the decision making process was slow. The new council structure is designed to speed up the decision making process, give more time for consultation and

reduce the bureaucratic burden on both members and officers. Chief officers will be given increased powers, allowing members more time to plan strategically and giving officers more responsibility for managing services. It is too early to judge whether the change will have the desired effect. Officers are concerned that the establishment of three portfolios for education will increase the demands made by members on their time, and some representative groups are concerned that the changes will reduce their contribution to the decision making process. Protocols and expectations have not yet been sufficiently defined to ensure that the changes will lead to an improvement. Schools visited were either unaware of the changes which were taking place or unsure whether they would have any effect.

### **Liaison with other agencies**

111. Contacts with a wide range of local authority departments, voluntary and public sector agencies are well established at a strategic level. There is close co-operation with Social Services, the Health Authority, the Police Service, Further and Higher Education, Merton Education Business Partnership, Merton Music Foundation, the Training and Enterprise Council and the lifelong learning partnership. The education department contributes to a number of joint initiatives, such as the children's services plan, the council's anti-poverty strategy, the drugs action plan, the quality protects management action plan and the youth and justice plan. Much of this work is having a direct impact on schools and pupils through the early years partnership, portage programme, drugs advice, careers advice, pupil counselling and mentoring, arts and leisure activities and the healthy schools initiative.

### **Management support services**

112. Services which help senior managers and governors to manage their schools are varied in quality, and the services to schools booklet inconsistently defines service standards. Overall, the schools visited as part of this inspection were unclear about their basic entitlements to central services. Services are not fully accountable and schools receive the support they desire, rather than the levels set in service level agreements. This leads to dependency in some schools.
113. The LEA acknowledges the need for improvement and some progress has been made. In response to its own survey of schools it has increased delegation in 2000 and clarified, and made more flexible, service specifications. There have been some improvements to the weakest services. Schools buy a high number of services from the LEA, although several schools are critical of the lateness in receiving service level agreements, and in the lack of advice on alternative providers.
114. Financial and personnel services provide schools with good advice, monitoring and support. Plans are being developed, which should refocus the services to help schools improve their capacity for self-management. The payroll service is well regarded by schools.

115. The personnel team is being expanded to meet the need to support schools, to draw up shadow staffing structures, identify the key staffing issues in each school and ensure that members of staff are appropriately placed.
116. Support for Administrative ICT, although improving, is a weakness. Schools use a common computerised management system and have access to modules, which include attendance, assessment and SEN. Training and support on the use of the system is mainly provided by the finance team and is well regarded by schools. The system had generally helped improve the targeting and monitoring of pupils and finance in the schools visited.
117. Advice and support for purchasing and maintaining equipment are slow and often confused between different sections in education and the rest of the Council. Increasingly, schools are seeking their own providers and solutions, including leasing and managed services. The allocation of funding to administrative and curriculum ICT has not been made clear to schools. Several schools report that networks are out of order for long periods of time and e-mail is not yet functioning fully. An ICT strategy group, including headteachers, has been established. This group has revised the service level agreement and streamlined support for 2000. Nevertheless, the LEA has some way to go to clarify responsibilities, and to convince schools that support adequately meets their needs.
118. Property maintenance has been poor. The LEA has recently begun to improve property maintenance by establishing a partnership with an external contractor. This has increased the number of schools purchasing the service from 40 to 60 per cent. The majority of schools manage their own cleaning and grounds maintenance.
119. The age of transfer presents schools and the LEA with major challenges with regard to staffing. The LEA anticipates that displaced staff will secure positions in other schools in the spring of 2001, even though they may not take up their appointments until 2002. However, at the time of the inspection details had not been clarified, or agreed with schools.

## **Recommendations**

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

- improve the consistency with which plans for implementing policies are communicated to schools;
- ensure that, in the new Council structure, the demands elected members make on officers' time are kept to a minimum, and that members operate more strategically. In reports to members, provide clear information from which strategic decisions can be made;
- regularly review the operation of the new structure to ensure that elected members operate more strategically;
- help schools to become more independent by reviewing the efficiency, effectiveness and accountability of services to ensure that

- service level agreements are more consistent and specific in defining service standards,
  - services define more precisely the needs of schools and set charges accordingly;
- ensure that administrative ICT is more effective by
  - clarifying the needs of schools,
  - defining the responsibilities of various Council services,
  - considering finding alternative and cost effective providers and monitoring provision and outcomes.

## **SECTION 4: SPECIAL EDUCATION PROVISION**

### **Strategy**

120. 'Achievement Plus', the LEA's policy for SEN, is good. It addresses all the government's key objectives and builds on the LEA's policy for inclusion. It aims to provide for the great majority of Merton pupils with statements of SEN within mainstream schools. Schools generally understand and welcome its principles, but consultation, while extensive, has not always given headteachers the opportunity to discuss key issues.
121. The LEA intends to maintain the three existing special schools and reorganise and expand the current specialist bases in mainstream schools to provide for autism, speech and language disorders and learning difficulties. The planned changes are appropriately timed to take place as part of the age of transfer reorganisation in September 2002. The strategy has been developed in consultation with representatives from schools and a wide range of professional bodies.
122. Whilst the strategic direction for SEN is clear, some actions have been poorly communicated and implemented, for example the devolved budget for support to pupils with statements of SEN. In addition the delegation of a proportion of the budget for services that provide support to schools has left some schools unclear about their entitlement or how to use the devolved funds to obtain good advice.

### **Statutory obligations**

123. Documentation, discussions and visits to schools indicate that the LEA takes all reasonable steps to meet its statutory responsibilities. In 1998/1999, 98.5 per cent of statements were drawn up within the recommended 18 weeks and very few schools reported delays with statutory assessments. The special educational needs assessment team manages the assessment procedures effectively and the LEA is normally represented at statement review meetings. Individual education plans are of variable quality, but those scrutinised during the inspection were mostly focused on appropriate short-term targets, well linked to the pupil's learning needs. A team has been established to monitor statements and assessment procedures, to check provision for pupils and to ensure the proper use of the recently devolved budget for statement support. Merton has had 12 SEN tribunal appeals against its decisions in the last two years, one of which was upheld. Officers have clear and proper procedures for dealing with tribunal cases. The parental partnership scheme provides good, impartial advice to parents on a range of issues and is highly regarded by the schools.

### **Improvement and value for money**

124. There has been a rise in the number of statements issued over the past four

years but the increase is now slowing down. The LEA is cautiously optimistic that their early intervention policy will ensure that this continues.

125. The LEA exercises its functions in support of pupils with SEN, with a clear focus on raising achievement and inclusion in the mainstream curriculum wherever possible. A good example of policy in practice was the closure of the primary age special school for pupils with EBD in 1998. Advice and support to the mainstream schools, to which most of the pupils transferred, was good and pupils were integrated well into mainstream settings. As a result, two statements have now been discontinued. Merton is beginning to be successful in removing statements as part of its inclusion policy.
126. Educational psychologists are well deployed in keeping with the SEN audit carried out in each school. In addition to carrying out their statutory duties, they provide in-service training, advice and counselling for pupils and participate in interagency groups. Guidance and advice provided to schools by the ISS are held in high esteem. Support from the ISS is initiated through school requests and, although these are normally met, the criteria for the allocation of ISS support needs to be clearer and more tightly focused on those schools with the greatest need. Support for pupils with sensory impairment is reported by schools to be very good.
127. The leadership and support for SEN in Merton has been strengthened by the recent appointment of an inspector for SEN. Support and advice to SEN coordinators (SENCOs) are improving and the courses provided by the LEA are well established, of high quality but limited in number. A recent audit of the training needs of SENCOs and mainstream staff is being used to plan future programmes. In training, the LEA does not effectively use the expertise of the staff in the Borough's special schools, although informal networks exist between schools. Plans are in place for training mainstream staff in the skills needed to teach pupils with SEN. A good start has been made with the collection of data on the attainment of pupils with SEN but the LEA cannot yet demonstrate progress for individuals. In the school survey the LEA's provision for SEN was judged to be no better than satisfactory in all categories and less so in some. The evidence from the inspection indicates a better picture, with some strength in service provision.
128. Merton is gradually increasing the levels of delegation for SEN and this is appropriate. However, schools have limited information on the central costs of SEN services or those of comparable providers and headteachers report little involvement in service evaluations or questionnaires. Schools are not in a position to make informed judgements about value for money. The overall cost of SEN provision in Merton is slightly above the national average. Services are mainly good but there are some shortcomings in the information given to schools and in the management of operational changes for SEN. Overall, the LEA gives satisfactory value for money.

## **Recommendations**

### **In order to improve the leadership of the operational management of SEN:**

- provide schools with consistent information on decisions and strategies;
- plan the implementation of strategy well;
- make effective use of the expertise of the staff employed in the Borough's special schools;
- make clear in the service level agreement for the Integrated Support Service the roles, responsibilities and provision to schools.

## **SECTION 5: ACCESS**

### **The supply of school places**

129. Proposals made by Merton LEA to change the age of transfer in its schools were fully approved by the Secretary of State in late June 2000 with completion planned for September 2002. Specific issues arising as a result of these changes are identified throughout this inspection report.
130. There is a strong corporate commitment to the change in the age of transfer. Schools visited during the inspection predicted with confidence that, once implemented, the changes will promote higher standards. However, the period of transition presents considerable challenges in management and organisation to both the LEA and schools. The LEA has produced an age of transfer plan, identifying the key tasks and target dates for action. Mechanisms are in place for monitoring the progress of the plan through the age of transfer steering group, chaired by the chief executive. This group, if maintained, is ideally placed to ensure that identified tasks are appropriately resourced and accomplished within the relatively short timescale available.
131. Progress has been made in ensuring that the age of transfer has been given due consideration when various initiatives have been introduced. Detailed planning is due to be completed at the end of the summer term. As a result, the schools visited as part of this inspection were unclear and anxious about the detail and timing of the proposals. Planning, while continuing to recognise the centrality of the LEA's strategy for school improvement, must ensure that the continuity and progression of learning is maintained for all pupils. The published timetable for change will place officers and schools under considerable pressure.
132. Property planning is effective. Condition surveys have been carried out and priorities are appropriately identified in the asset management plan. The condition surveys form the basis of building proposals for the age of transfer. Every school will require some building work as part of the age of transfer. It has already begun in those schools where additional building work was required to secure the infant class size limit. Overall, the planning which has taken place so far has been good. The LEA has co-ordinated technical resources to speed up planning and other consents. Additional project managers will be employed to oversee the work.
133. Building work in primary schools will be funded through traditional funding routes. The LEA has agreed to fund the 15 per cent governor contribution to work in the Church of England primary schools since these schools offer community places. Building works to the six community secondary schools will be funded through a PFI project.



## **Admissions**

134. Admissions to schools are generally satisfactory, although there are some weaknesses. Information for parents on admissions to LEA schools is clear. Community first schools administer their own admissions unless they are oversubscribed. Church schools are separate admission authorities and operate an earlier timetable, which causes some confusion to parents. Although there are few appeals, some are not resolved until the start of the school year, causing uncertainty for pupils, parents and schools.
135. During the implementation of the change in the age of transfer, the LEA will administer all admissions to community schools. The intention, appropriately, is to ensure equity, minimise work for schools and manage multiple admissions. Information on the reorganisation has been circulated to parents. However, the LEA recognises that this initial information needs to be updated and further information is being prepared. Visits to schools and interviews with representative groups of headteachers and governors indicated varying levels of awareness regarding the proposed changes and concern that parents will be confused, particularly by the requirement that all the Year 3 cohort must apply for a school place in 2001. Inevitably, and unavoidably, some pupils will have to move from their current school, whether they want to or not, even though that school is becoming a primary school and will be admitting pupils in Year 4.

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

136. Arrangements for the teaching of pupils who are educated other than at school are unsatisfactory overall. The LEA recognises this and is taking action to improve the quality of provision.
137. The LEA has established an effective reintegration process, led by the education welfare service (EWS), which is well planned across services. In 1999/2000 two-thirds of the pupils permanently excluded from schools were successfully reintegrated into another school. Permanent exclusions from the high schools have reduced but increases are evident in middle schools, both in permanent and fixed term exclusions. Fixed term exclusions in the Borough are high and totalled 1205 in 1998/1999. All high schools and some middle schools are using the standards fund retention grant for internal behaviour projects to reduce the incidence of exclusion, and in many of the high schools, particularly, these are beginning to have an effect.
138. The Merton policy is to have no PRU and maintain one secondary age EBD special school. Much of the work of the pupil tuition service (PTS) focuses on excluded pupils, although the service also works with other groups of pupils. Those with long-term illness and non-attenders are taught, where possible, at one of three tuition bases, at home, or in hospital. The LEA, through its policy of inclusion, encourages pregnant schoolgirls to remain in school and receive some tuition and support from the PTS. This is a good strategy, which is successful in most cases. Parents who wish to educate their child at home are given good guidance on the necessary steps to take.

139. There are weaknesses in some of the provision for excluded pupils. Teaching time is inadequate at five to seven hours per week for the majority. Plans are in place to increase this to ten hours from September 2000 and to 25 hours in 2002. The curriculum statement is weak; it is broadly based on the National Curriculum but without clear targets for pupil involvement and attainment. There is insufficient liaison between tutors and excluding schools, and the appropriately different ethos of the PTS can present difficulties on reintegration. In the school survey support was rated unsatisfactory by schools for primary age pupils and poor by high schools.
140. In contrast, programmes for individual pupils are often well planned to meet their needs. GCSE courses are available and the Moving On, Moving Out project is successfully taught for 25 hours. Appropriate, new accreditation is being introduced. The LEA maintains a detailed profile on the support provided for, and the progress made by each pupil who has been considered by the pupil placement panel. There are plans to improve support in line with the LEA inclusion policy, and proposals will be published for consultation in June 2000.

### **Attendance**

141. Support for attendance is improving and is now satisfactory. The attendance of primary and secondary age pupils in Merton is below the national average. Improving attendance is a priority for action in the EDP. Targets for 2002 are challenging but realistic. LEA monitoring each half term indicates that the attendance target for primary aged pupils will be met this year but that the secondary target will not.
142. The EWS has recently been reorganised following consultation with schools. This has clarified the core tasks and responsibilities of the service. Education welfare officers are being trained to provide a broader service to schools which includes home visits and individual strategies with pupils and families, together with intensive short-term work with schools to focus on key needs and possible actions. The service is developing an attendance database and produces reports on each school every half term. There is a continuing policy to use legal proceedings when necessary and 39 families were prosecuted last year. The new head of service provides good leadership and has introduced professional supervision and guidance for staff. Interagency links are established and continuing to develop, particularly with the police, social services, the youth offender team and housing. Service planning anticipates the support that will be needed by pupils and schools at the time of the change in the age of transfer in 2002. The impact of the EWS is now generally good.

### **Behaviour support**

143. Support for behaviour is satisfactory overall. The behaviour support plan outlines appropriate strategies for the provision of support to schools. Awareness of the plan across the LEA's schools is varied. A number of the schools visited effectively used the plan to audit their own practice but in other schools knowledge of the plan and its strategies was minimal. There is too little data in the plan on gender and ethnicity. The 1999 EDP goes some way

towards redressing this by identifying support for Black African and Black African Caribbean boys, but it does not go far enough. The EDP for 2000 is better focused. Priorities have actions to support school based behaviour projects, training for anti-bullying and racial equality. Provision for behaviour management during the transitional period of the age of transfer is also broadly covered.

144. Support and advice to schools on behaviour is provided by the ISS and is of high quality. A wide range of strategies is used, including training to improve teachers' behaviour management skills, learning support skills, individual pupil programmes and guidance on the reintegration of excluded pupils. The strength of the service lies in its prompt response, expert advice and flexible approach to the needs of staff and pupils. Almost all the schools visited during the inspection held the service in high regard.

### **Children in public care**

145. Provision for children who are in public care, formerly referred to frequently as looked after children, is sound and improving. It is well planned and monitored by the LEA through the newly formed looked after children team. The core tasks of the team are to raise the attainment of children in public care and provide support to schools in this work. Appropriate targets have been set for the attainment of these pupils and there is up-to-date information on their progress. No pupils in this group are currently excluded and all those in Year 11 will take at least one GCSE this year.
146. The strategy adopted by the LEA focuses on pupils' attainment. Support is deployed, where appropriate, to individual pupils and to monitor out Borough placements. There is individual guidance for pupils through effective mentoring and counselling services that work very closely with the LEA and the schools. Plans are in place for developing the role of carers in relation to the pupils' education, strengthening links with social services, providing guidance for schools on good practice in pupil support plans and preparing a directory of agencies which can offer high quality support.

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

147. Merton appropriately carries out its statutory responsibilities in this area and gives a high priority to the safety and welfare of children. The LEA has clear policies on health and safety and schools are given a good and comprehensive handbook of guidance on policy and procedures. Inspections of school premises are carried out regularly by the LEA and governors are given guidance on their statutory responsibilities. The LEA also provides schools with clear advice on emergency procedures for day to day matters and major incidents. Through the children's strategy group there is effective liaison between departments and with other agencies to ensure that children are protected from abuse. The children's services plan has a clear agenda for action. The recent appointment of an adviser for personal, social and health education is focussing attention in schools on drug prevention policies, health in schools and support for the mental health of adolescents. Training in child

protection procedures is good and the LEA monitors the attendance of schools at the courses provided.

### **Support for ethnic minority children, including Travellers**

148. The LEA's support for pupils of ethnic minority heritage, including Travellers, has some strengths but its quality is not yet sufficiently consistent for it to be judged satisfactory overall. However, the weaknesses have been recognised by the LEA and significant progress is being made.
149. About a third of pupils in the LEA's schools are of ethnic minority heritage but the proportion with English as an additional language, approximately six per cent, is lower than the outer London average. The EDP indicates that the achievement of some minority ethnic pupils needs to be raised and that black pupils are disproportionately excluded, although they have low truancy levels when compared with other ethnic groups. Seventeen Traveller pupils are permanently on the roll in 12 schools, and 29 others, who are highly mobile, have temporary places. The attendance of Traveller pupils at high schools is very poor. Their attendance rates at first and middle schools are also very low but are improving during times when their families are not travelling. About seven per cent of pupils are the children of refugees and asylum seekers.
150. The LEA's Ethnic Minorities and Travellers Achievement Grant (EMTAG) action plan for 2000/2001 contains much better data than the plan for the previous year. It details clear systems for the collection and analysis of data and for setting targets by ethnicity. A careful analysis and comparison of school targets with outcomes has led to the recommendation that grant funds should be targeted where disparities are greatest. The action plan shows that the Ethnic Minority Achievement Service (EMAS) has given appropriate priority to the two main thrusts of the EMTAG, under-achieving minority ethnic pupils and the needs of pupils for whom English is an additional language.
151. The LEA's data on the achievement of minority ethnic pupils have been inadequate and have hindered its ability to bring about improvement. However, this serious weakness has been recognised and EMAS has worked hard with the research and statistics unit to compile a complete database which will be in place by September 2000. The schools' use of money to raise the achievement of minority ethnic pupils is monitored through regular visits, the criteria for which were devised in consultation with the school effectiveness team. Most schools welcome the monitoring. It covers the identification, attainment, needs and targets of pupils, and the visits include the monitoring and enhancement of support for bilingual pupils. The next round of monitoring visits will be improved by the inclusion of classroom observations. EMAS is also seeking actively to reduce the disproportionately high number of exclusions of black pupils and three high schools have set specific targets in this respect.
152. The support that EMAS provides is not highly regarded by schools and the proportion that purchase the service from delegated funds has fallen to 32 per cent from 55 per cent in the previous year. The main reason for this is the

unacceptable variability in quality of the support provided and EMAS' inability to guarantee to allocate individual support staff whom the schools know to be effective. The schools that are allocated effective support are pleased with the service. Those that choose not to purchase EMAS support make their own arrangements to employ staff of the required quality and expertise. EMAS is rightly concerned about the schools' views and is monitoring the quality of the support it provides.

153. Since September 1999, the LEA has provided Traveller education jointly with Sutton LEA. The consortium is a committed, well-intentioned service that has made a good beginning.
154. The LEA's approach to catering for the needs of refugees and asylum seekers is thorough and comprehensive. Merton's corporate guidance, issued in 1996, has been updated, a worker has been assigned and guidelines on welcoming refugees and asylum seekers have been produced. Schools have received guidance on induction. Information on the backgrounds of refugees has been compiled, as has a bilingual register that lists a range of people who can be called upon to help schools. The LEA has identified funding and recently appointed a teacher of refugees.

### **Measures to combat racism and social exclusion**

155. The LEA has good policies to combat racism and responded promptly and appropriately to the MacPherson report. There are clear procedures for monitoring racist incidents but schools report few and the LEA has no firm evidence on how its guidance is being used. It is therefore timely that the LEA has started to investigate how schools are monitoring racism and has stated a clear commitment to improving its procedures if this is found to be necessary.
156. Merton has clear policies to combat social exclusion. This is beginning to be evident in the strategies for SEN. Officers are considering respite provision for pupils with the most severe behaviour problems in order to reduce the need for exclusion, and there is an effective reintegration programme for excluded pupils. The LEA demonstrates its commitment to pupil inclusion in the care taken to give individual support and well planned programmes for pupils with particular needs. Multi-agency approaches with the public and private sectors are developing some effective early intervention for all ages.

### **Recommendations**

#### **In order to improve support for access:**

- in the proposals and consultation on the future of the Pupil Tuition Service ensure that
  - the quality of education for the pupils concerned is improved,
  - proposals are clear and well communicated to headteachers;
- consider whether the EMAG service should be provided to schools unless consistency of quality can be guaranteed.

## **APPENDIX: RECOMMENDATIONS**

### **In order to improve the quality of planning for school improvement:**

- put in place detailed plans for the age of transfer, which define precisely what actions will be undertaken and when and how they will impact on school improvement;
- communicate this detailed planning to schools;
- reduce the number of activities and bring them together within the EDP in light of the detailed planning for the implementation of the age of transfer;
- put in place systematic processes to review and evaluate services and costs in line with Best Value principles.

### **In order to improve support for ICT within the curriculum, it will be necessary to:**

- know more accurately pupils' standards of attainment in all schools;
- identify schools that are weak in ICT and target support at them; and
- ensure that schools have access to effective guidance concerning the use of ICT within subjects.

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

- improve the consistency with which plans for implementing policies are communicated to schools;
- ensure that, in the new Council structure, the demands elected members make on officers' time are kept to a minimum, and that members operate more strategically. In reports to members, provide clear information from which strategic decisions can be made;
- regularly review the operation of the new structure to ensure that elected members operate more strategically;
- help schools to become more independent by reviewing the efficiency, effectiveness and accountability of services to ensure that
  - service level agreements are more consistent and specific in defining service standards,
  - services define more precisely the needs of schools and set charges accordingly;
- ensure that administrative ICT is more effective by
  - clarifying the needs of schools,
  - defining the responsibilities of various Council services,
  - considering finding alternative and cost effective providers and monitoring provision and outcomes.

### **In order to improve the leadership of the operational management of SEN:**

- provide schools with consistent information on decisions and strategies;
- plan the implementation of strategy well;
- make effective use of the expertise of the staff employed in the Borough's

- special schools;
- make clear in the service level agreement for the Integrated Support Service the roles, responsibilities and provision to schools.

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

- in the proposals and consultation on the future of the Pupil Tuition Service ensure that
  - the quality of education for the pupils concerned is improved,
  - proposals are clear and well communicated to headteachers;
- consider whether the EMAG service should be provided to schools unless consistency of quality can be guaranteed.

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

**Tel: 0207 421 6800**

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