

Tim Plash

Keep
for questions!

22 May 1985

MB

PRIME MINISTER

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HMI REPORT ON EDUCATIONAL EXPENDITURE

As usual, the Report is fundamentally hostile. It will be taken as a further sign that we are not spending enough on schools. Among the criticisms are that:

1. "The low baselines that have applied for some years in certain LEAs mean that the small increases in resources are not sufficient to enable all their schools to respond to the various calls for change and development". (Para 6).
2. "There is a statistically significant association between satisfactory or better levels of resource provision and work of sound quality, and between unsatisfactory levels of provision and poor quality work". (Para 7).
3. "There remain shortages of sufficient teachers in some subjects, such as CDT, mathematics and physical science". (Para 11).
4. Books: "in some cases, particularly where the previous baseline was low, some schools are not able fully to replace old stock; in many more they have to choose between replacing old stock or equipping themselves with the books needed to introduce necessary new courses". (Para 12).
5. "The most serious state of affairs is the deteriorating quality and appropriateness of the accommodation ... the decorative state of the accommodation does little to create the kind of

decent and civilised environment usually associated with education ... Without urgent attention to these problems the cost of putting things right may become prohibitive". (Para 13).

6. "Of the resource factors associated with work judged less than satisfactory in the primary schools visited, the most common was unsatisfactory or unsuitable accommodation which adversely affected the work in some 800 lessons". (Para 17).
7. "At the secondary level, unsuitable accommodation, inadequate or insufficient equipment and furniture, and insufficient books were the resource factors most commonly restricting the quality of work". (Para 18).
8. "The present state of repairs in schools was judged to be less than satisfactory or poor in 57 LEAs ... the current programme of maintenance was judged to be less than satisfactory or poor in 65 LEAs". (Paras 48 and 50).

However, despite these adverse comments, the report makes a considerable number of helpful points. These include:

- a. "There were some further improvements in pupil/teacher ratios, in the number of advisers and in the provision made for books". (Para 6).
- b. "The overall number of teachers ... is adequate". (Para 11).
- c. "The provision for books in schools has improved slightly". (Para 12).

- d. "The overall staffing levels for nursery schools were judged satisfactory in 71 LEAs ... in relation to primary schools 80 LEAs were considered to have appropriate overall staffing levels ... for the 11-16 age range the overall staffing levels were regarded as appropriate ... in 80 LEAs". (Para 21).
- e. "20 LEAs improve their primary school pupil/teacher ratios by amounts ranging from 0.6 to 1.9 while 9 LEAs worsened their pupil/teacher ratios". (Para 25).
- f. "17 LEAs improved their secondary school pupil/teacher ratios by amounts ranging from 0.6 to 1.0 and 2 LEAs worsened their pupil/teacher ratios". (Para 26).
- g. "The level of provision of equipment in primary schools was judged to be satisfactory in just over four-fifths of LEAs; and for the 11-16 and 16-19 age groups it was similarly judged in just over two-thirds and three-quarters of LEAs respectively". (Para 63).
- h. "Further and higher education was again generally better provided for, in relation to its needs, than our schools; resources were broadly adequate to enable non-advanced further education to continue to adapt to changes in employment patterns, training needs and the nature of the student population, and for advanced further education to provide for some further increases in the total number of students and for some changes of emphasis in the courses offered". (Para 6).

In addition to these helpful comments, the Report contains a number of points which support Keith Joseph's emphasis on teaching quality, and his present attempts to introduce assessment for teachers.

1. "In all institutions the most crucial factor influencing effective learning was the quality of teacher". (Para 7)
2. "Not surprisingly, in almost all lessons where the quality of pupils' work was judged satisfactory or better, it was the high quality of teaching that was considered to be the most significant contributor". (Para 32).
3. "Overall, in all types of school there was a statistically significant association between work judged less than satisfactory and mismatch between the teachers' qualifications and experience and the work that they were undertaking". (Para 35) ...
"For example, in one school only two of the five teachers of art had any recognisable qualifications in the subject and were clearly not confident in their grasp of the work; while in another school the teaching of woodwork, the responsibility of a PE specialist, was poor". (Para 34).

We recommend that if you are asked about the Report, you could use this as an opportunity for re-emphasising that teaching is the crucial point; that there are enough teachers, and ever better teacher-pupil ratios; and that the need is to improve teaching quality. This could enable you to keep Keith's recent White Paper and initiative on teachers' pay - rather than the HMI Report - at the top of the news stories.

Oliver Letwin

OLIVER LETWIN

EDUCATION SECRETARY COMMENTS ON HMI REPORT

Commenting today on the report by Her Majesty's Inspectors on the effects which local authority expenditure policies were having on the education service in England, Education Secretary Sir Keith Joseph said:

"This year's report identified a range of factors which together contribute to the quality of the education in schools and colleges. These include the level and appropriateness of resources and their efficient management, effective leadership and, crucially, the quality of teaching. The interplay of these factors can only be grasped from the report itself, which deserves to be widely read. I draw attention here to a few main features.

HMI report that overall there were slight improvements in resource provision for education and, as last year, they judged that the quality of most work taking place throughout the system was satisfactory or better. They point to an improvement since 1983 in the pupil to teacher ratio in the schools, and to a continuing improvement in the supply of school books, albeit that provision remains unsatisfactory in some cases. There has been scope too for colleges of further education to respond to the changing needs of employment and to change the emphasis of courses on offer.

However, the report notes that the condition of many school and college buildings is deteriorating and provides an unsatisfactory environment for teaching and learning. This is the accumulated result of inadequate expenditure on the repair and maintenance of the building stock over many years.

If costs can be contained and savings made elsewhere for example in caretaking and cleaning where the Audit Commission report that savings were feasible - there

should be scope in the current financial year for some improvement in expenditure per pupil in many authorities both on the provision of books and on repairs and maintenance. An excessive pay settlement for teachers would once again put this improvement at risk.

Encouragingly the report notes that more LEAs are developing explicit and coherent management policies to meet the challenges of finite resources, falling rolls and school reorganisation. But it is clear that their example needs to be more widely followed. In particular there is scope for a still more vigorous approach to the removal of surplus places in order to improve the quality of the curriculum and at the same time release resources for in-service training, books and urgently needed repairs; and more cost-conscious and imaginative management could reduce the drain on education resources represented by the net cost of the school meals service. At the level of the school, it is disturbing that examples can be found of poor management resulting in resources not being directed to where they are most needed.

HMI found that the number of teachers employed was generally adequate for the tasks they were undertaking. It was the quality of teaching which, in the judgement of HMI, was of central importance to the quality of the work which they observed. Despite the good work of most teachers and the excellence of some, ineffective teaching is still too common. I am therefore glad that there is a clear message in the report that more and better targeted in-service training combined with redeployment of some teachers could help to improve the match between teachers' qualifications and experience and the job they are called upon to do, and their ability to perceive the educational needs and potential of pupils.

For the current financial year I have increased the grants available to local education authorities for in-service training in selected national priority areas. Additionally the MSC will administer an interim scheme of grants for in-service training to promote developments across the curriculum related particularly to the Technical and Vocational Education Initiative. For the longer term, we announced in the March White Paper "Better Schools" plans to legislate for a more coherent framework for the provision and development of in-service training."

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To ask the Secretary of State, when he expects to make available the report of HMI on the effects of local authority expenditure policies on the education service in England in 1984.

SIR KEITH JOSEPH

The HMI report on the observed effects of local authority expenditure policies on the education service in England in the autumn of 1984 has been published today. Copies are available in the Vote Office. This report, the fifth since this Government decided that HMI's findings should be published, should be read with attention by all of us concerned with the provision of education.



AT
cc Whitelaw

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FROM THE SECRETARY OF STATE

Rt Hon Viscount Whitelaw PC CH MC
Lord President of the Council
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Prime Minister.

To note that Sir Keith is publishing the
report tomorrow, at 3.30 pm. It is, as
usual, unhelpful. Policy Unit note is

21 May 1985

at Play A, the report at Play B, and
Sir Keith's press note at Play C.

MEH 22/5

Dean Miller

You may recall that HM Inspectorate produces each year a report on the effects of local authority expenditure policies on the education service. Mark Carlisle - unlike his Labour predecessors - published the report and I have continued to do so. I recently received the HMI report on the effects in 1984 and have arranged for it to be published on Thursday 23 May.

I enclose a copy of the report for your information, together with copies of a Parliamentary written reply and of a brief statement that I intend to issue to the press. You will see that the report, like last year's, explores a range of factors which affect the quality of education. In particular, where education is unsatisfactory HMI has again referred to shortcomings in the teaching in schools and colleges as a key factor. The main emphasis, however, remains expenditure related and, although HMI noted some further slight improvements in the levels of appropriate resources in class and lecture rooms in Autumn 1983, there is a significant catalogue of deficiencies, particularly as regards school and college premises. Although, as HMI point out, some of these deficiencies could be corrected by improved management at local level, we must nonetheless expect critical comment.

I am arranging for appropriate briefing to be prepared for our backbenchers - emphasising that: since we started publishing these reports 4 years ago, the proportions of less than satisfactory provision noted by HMI have, with the exception of those related to accommodation, declined; and that many of the Government's education policies, including those set out recently in the white paper "Better Schools" are directed to remedying just those quality deficiencies which HMI identify.

I am sending copies of this letter and enclosures to the Prime Minister, George Younger, Nicholas Edwards, Patrick Jenkin, John Biffen, Peter Rees and John Gummer.

Gummer

Jenkin

HMI EXPENDITURE REPORT FOR 1984

1. The Report by HMI "On the Effects of Local Education Authority Expenditure Policies on Education Provision in England - 1984" was published on Thursday 23 May 1985.
2. This is not a report by Government, it is a report to Government (both local and central) by the HMI. It is compiled by the HMI from their observations of schools and colleges during the course of visits made in the autumn term of 1984, and it covers all LEAs in England (not Wales) with the exception of the Isles of Scilly, 96 LEAs in all.
3. At one time, such reports were not published, but were retained as a confidential report to the Government. It was Mark Carlisle in the 1979/83 Conservative Government who decided to publish the annual HMI Expenditure Report. One consequence of this, however, is that our opponents, who did not publish the reports in their time, can quote selectively from the report and use it as a stick to beat us with. They can pick out the bits where improvement is needed and ignore the bits where improvement has already taken place. They can make selective quotations to prove that more money is needed; taken as a whole, it is a balanced, impartial assessment of the current state of affairs, and ought to be presented and considered as a whole and not selectively.

4. Finance

The most important aspect of the report is of course not only money, but how the money is used. How are the "resources" being made available for education actually being used? Are they being used as effectively as they could be? And the answer of course is no, not entirely. That judgement is made several times in the report.

5. This year there is a statement within the report which relates the level of funding to the quality of work produced. Inevitably it will be mis-quoted and mis-interpreted as suggesting that the more money is spent the better the education would be. It does not in fact say that, and it is worth therefore quoting in full:-

"Indeed, there are too many variables combined in different ways in different situations for any direct cause or relationships to be claimed between the quality of work and the expenditure on education, although the evidence revealed a statistically significant association between satisfactory or better levels of resource provision and work of sound quality. In this complex relationship, the central importance of the quality of teaching is clear."

And again elsewhere in the report:-

"... there is a statistically significant association between satisfactory or better levels of resource provision and work of sound quality, and between unsatisfactory levels of provision and poor quality work."

And again:-

"It cannot be said too often that the relationship between the levels of educational expenditure by LEAs and the quality of the education provided in individual institutions is neither simple nor direct."

Which, if fairly interpreted, means there has to be enough money spent to get good quality work; that if not enough money is spent then you get poor quality; but that spending more money does not necessarily improve the work done; and even when enough money is spent there are many other factors to be got right before the quality of the work is acceptable.

6. Progress, 1983/84

There has been little change, the report says, in the overall resource provision made for education by the large majority of LEAs for 1984 compared to the previous year. In schools there was modest further improvement in pupil teacher ratios, in the number of advisers, and in the provision of books. Further and higher education was, as before, generally better provided for than the schools.

NAFE (Non-Advanced Further Education) had enough resources to respond to the changing needs and demands.

AFE (Advanced Further Education) had enough to provide for further increases in the total number of students and to change the emphasis of certain courses.

7. Schools

In just over three-quarters of all the lessons in all types of schools seen by HMI, the quality of provision was satisfactory or better.

In just over four-fifths of those lessons, pupils response was satisfactory or better.

In nursery provision, four-fifths of the lessons were satisfactory or better but in top juniors, less than two-thirds.

In secondary, over four-fifths for the 16-19 year olds were satisfactory, but only just over two-thirds of the lessons for the 13 year olds were judged satisfactory.

8. Range of Abilities

In several places in the report, the disadvantages of attempting to teach a wide ability of children within the same class is emphasized.

"In all schools the quality of the work with pupils of below average ability was yet again the least satisfactory. The necessary differentiation of provision according to ability and aptitude was poorest when the teaching groups consisted of pupils of a wide range of abilities."

"In those primary and secondary school classes where pupils were grouped in one way or another according to ability, nearly nine-tenths of lessons for the most able were judged as satisfactory or better, whereas the equivalent proportion for lessons for the least able was considerably lower at just over two-thirds."

9. Teachers

The number of teachers in 1983/1984 decreased by 1.5% to 403,800 in the maintained sector, but over the same period the number of children decreased by 2.1%, and so there has been a further improvement in the pupil teacher ratio.

The overall number of teachers, HMI say, is "adequate for the work being undertaken". (para 11 of the report)

However there remain shortages of sufficient teachers in CDT (Craft Design and Technology), mathematics, and physical sciences.

There is frequently a mis-match between the teachers specialist subjects and the subjects being taught.

There is an unacceptably wide range and variation in pupil teacher ratios both between and within the LEAs.

In-service training provision is there and is increasing, but it is not as well matched as it could be to the needs of the schools and of the teachers themselves.

Levels of teaching staff in the AFE are adequate, and in NAFE generous.

10. Books

There has been a slight improvement in the provision of books, with much of the increased expenditure being used to replace old stock and make good long standing deficiencies.

This improvement follows similar improvements made every year since 1981.

Some schools, however, still have started from a very low base line, and thus still cannot replace old stock or introduce new books for new courses as much as they should.

11. School Premises

In primary schools unsatisfactory or unsuitable accommodation was the most common resources factor (even ahead of inadequate book provision) adversely affecting the quality of the work done. To a slightly less extent, the same comment on accommodation applies to the secondary and special schools.

"The most serious state of affairs is the deteriorating quality and appropriateness of accommodation in which pupils and students learn and teachers and lecturers work. There have been no significant improvements in schools and colleges generally since 1981 when we reported that school premises were less than satisfactory in 63 LEAs. Much of the nation's school buildings stock is now below an acceptable standard."
"Rotting window frames, cracked walls and flaking plaster were all too common."

12. Equipment

There is a close relationship between the adequacy of the provision of equipment and the satisfactory nature of the lessons involving equipment.

The level of provision of equipment in primary schools was judged to be satisfactory in just over four-fifths of LEAs; for the 11-16 age group in just over two-thirds of LEAs, and for the 16-19 year olds, in three-quarters.

In special schools, equipment was judged by the HMI satisfactory in three-quarters of the LEAs.

In secondary schools, the most serious problem was the replacement of ageing costly equipment in science and CDT.

The provision of consumable materials was judged to be better than this, but there were still some deficiencies.

13. Special Schools

The special schools are included in this concern about accommodation, books and equipment. But additionally, the HMI says that there are worrying signs about the standards in some of the special schools.

14. Parental Contributions

Of the 96 LEAs, 4 oppose any kind of parental contribution; 22 oppose using such money for "basic items"; 2 LEAs positively encourage schools to attract parental contributions, and the rest of the LEAs, the majority, allow the schools their own discretion about contributions from parents and how they are used.

Financial contribution by parents is greater in primary schools than in secondary. In the majority of primary and the secondary schools the parental contribution amounts to £2 or more per pupil per year.

The most common use for parental contributions are for audio-visual equipment, computers, educational visits, library and reference books, mini buses, PE and games equipment, musical instruments, and reprographic equipment.

Parents also contribute in kind and with their time, again more in primary than in secondary schools, and this includes accompanying pupils on school visits, helping with reading, games and swimming, working in the library, and the conversion or decoration of the premises.

15. Leadership and Management

The HMI Report comments "The quality of the leadership and management offered by Heads, Principals, and by the local education authority was crucial to the capacity of individual institutions to organise, provide and develop a sound education. In almost one-third of the schools poor leadership and management were judged to be adversely affecting the quality of the work, the levels and deployment of resources and the take up of in-service training. In nearly half the schools visited, the organisation by teachers

of pupils learning, including relating work to the age, aptitude and ability of the pupils, was judged unsatisfactory in some lessons. The internal management of most further and higher education institutions has responded well to the new demands being placed upon the service but there were signs that many LEAs' management of the FHE system was hindered by lack of information arising in part from insufficient advisory support from FHE. This lack of information may impede their ability to manage necessary changes both within NAFE and between NAFE and schools."

16. Conclusion

In all of this detailed comment about premises, books and standards of provision generally, the great emphasis remains the problem of poor teaching and poor management. In the complex relationship between quality of work and standards of provision, the report still says that "the central importance of the quality of teaching is clear".

The HMI Report concludes:-

"The picture for 1984/85 remains one of an education system that is managing to get by in terms of resources and where most of what goes on is of satisfactory or better quality. While both AFE and NAFE are better provided for and more bouyant, it does appear that the cumulative effects of some years of coping in this way are making themselves felt in the schools."

END

24 MAY 1985

