



LEGISLATING FOR CHANGE

**School Reforms
in England and Wales
1979 - 1994**

Joanna Le Métais

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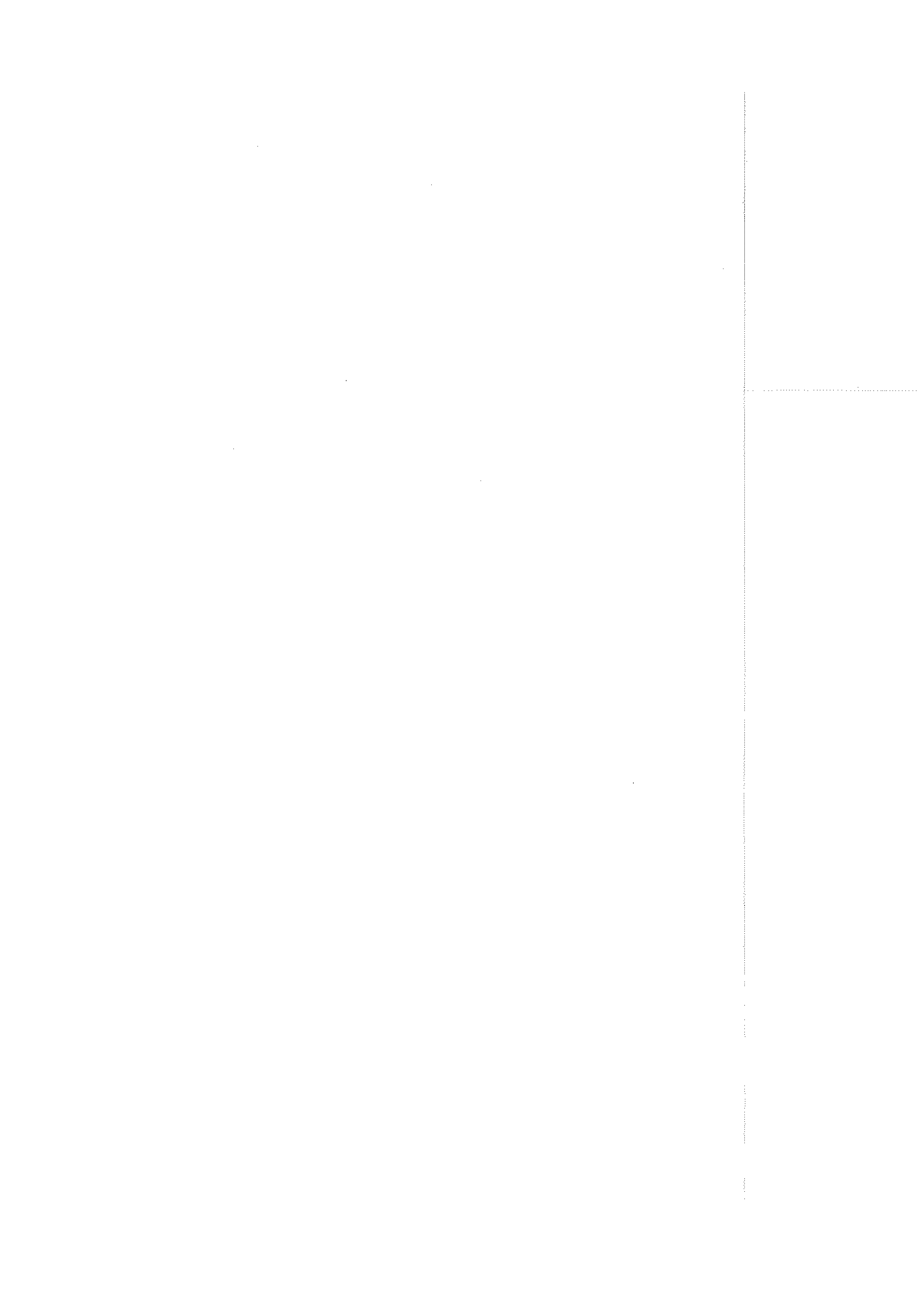
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CONTENTS

1. INTRODUCTION	1
2. STRUCTURE	2
Admission policies	3
Impact of policies on structure	5
3. GOVERNANCE AND MANAGEMENT	6
Governing bodies	6
Responsibilities of governors	7
Responsibilities of head teachers	8
Impact of policies on governance	9
4. CURRICULUM CONTENT AND ASSESSMENT	11
Curriculum	11
Progress towards a common curriculum	12
Assessment	16
Examinations at 16+	16
Standard Assessment Tasks	17
Impact of policies on the curriculum and assessment	18
5. STAFFING	20
Teacher supply	20
Teacher performance	21
Teacher status	22
Impact of policies relating to teachers	24
6. FINANCIAL AND MATERIAL RESOURCES	26
Direct public funding	26
Indirect public funding	27
Public subsidies for education in independent schools	28
Joint funding	29
Management of expenditure	29
Impact of policies on financial and material resources	30
7. EVALUATION	32
Defining targets and measuring output	32
Teachers' performance and accountability	34
Cost-effective provision	35
Consumer satisfaction	35
Impact of policies on evaluation	36
8. CONCLUSION	37
9. REFERENCES	38
ABBREVIATIONS	44



1. INTRODUCTION

The 1980s represented a period of unprecedented activity on almost all educational fronts, except pre-school and adult education. This activity covered what is taught and to whom; when and how pupil learning is assessed; how teachers are selected, trained, deployed, paid and appraised; how schools are structured and funded; who governs schools and to whom and how governors are held to account. The Government introduced a series of programmes and new examinations and also concerned itself with vocational training for the unemployed, youth training programmes, the accreditation of education and training and the reform of higher education.

During this period there were numerous White Papers, Green Papers and consultation documents from the Department of Education and Science (DES, *now the Department for Education – DFE*) and discussion papers from Her Majesty's Inspectorate (HMI, *from 1993, the Office for Standards in Education – OFSTED*), supplemented by the publication of HMI inspection reports on different aspects of education and, from 1983, on individual schools and colleges. The Government instituted seven Committees of Enquiry and commissioned further research and pilot studies from academic and commercial bodies. Statutory agencies and ad hoc working parties were set up to inform decisions and implement legislation, especially in connection with the National Curriculum and its assessment. The period 1979-1994 saw the enactment of 16 laws and the publication of 189 associated Orders and Statutory Instruments. Guidance on implementation was issued in the form of Circulars and, as the rate and pace of change accelerated, explanatory brochures were issued for teachers, parents and employers and, in some cases, for pupils and students themselves.

The Government's stated objectives, in pursuit of its overall aims, were to raise standards, to increase parental choice, to secure value for money in education and to increase accountability.

This publication explores the development of policies relating to the period of compulsory education (age 5 to 16 years) and provides some analysis of their implementation and likely impact.

2. STRUCTURE

The law requires that parents secure for their children aged between 5 and 16 years full-time education suited to the child's age, ability, aptitude and any special educational needs which he or she may have (1944 Act as amended), but it allows parents to choose whether such education shall be provided 'at school or otherwise'. All schools restrict admission to pupils within a particular age-range, e.g. primary or secondary. In some schools pupils are admitted on the basis of ability, special aptitudes or special educational needs. Distinctions may also be made on the basis of sex or religious denomination. Finally, access to independent schools is usually further restricted to those willing and able to pay the fees.

Conservative Governments made no statutory changes to the educational phases laid down in 1944 other than to introduce the concept of Key Stages to mark the periods of learning which culminate in statutory assessment at ages 7+, 11, 14 and 16 years (Education Reform Act 1988:Section 3). However, the Government's exhortations that local education authorities (LEAs) remove surplus school places resulted in school closures and amalgamations and, in some cases, tertiary reorganisation outside the schools sector for students aged over 16 years.

Whilst rationalisation of school places led to a reduction in the *number* of schools during the 1980s, Conservative Governments have attempted to increase parental choice between different school *types*. In 1979, the majority of maintained schools were comprehensive, mixed and non-denominational. Depending on historical circumstances and local demand, there was still a degree of choice between the mixed comprehensive schools and schools which admitted pupils in accordance with a specified religious denomination (usually voluntary schools), by sex or, less commonly, on the basis of their academic or other abilities.

The Government's early action focused on provision for more able pupils. Its first step was to pass the Education Act 1979. This Act repealed the Education Act 1976 – which had imposed on LEAs the 'duty to give effect to the comprehensive principle' in the organisation of their schools – and encouraged schools which wished to change their character from comprehensive to selective, to seek the Secretary of State's permission to do so. The second action was the funding of a number of places for academically able pupils at independent schools through the Assisted

Places Scheme [see below]. The third, through DES Circular 6/93, *Admissions to Maintained Schools* (GB DES 1993), allowed non-selective schools to admit up to ten per cent of their pupils on the basis of ability or aptitude. Fourth, additional funding was made available to enable selected voluntary and grant-maintained schools to make special provision for the teaching of technology and to achieve the status of technology schools.

The Education Reform Act 1988 introduced two new types of school which are outside the control of the LEAs: the self-governing grant-maintained school and the City Technology College [see page 5 below]. If a majority of parents in a school maintained by the LEA votes in favour, the school's governing body must apply to the Secretary of State for grant-maintained status. If successful, the school receives its funding from Central Government – through the Funding Agency for Schools in England or the Welsh Office in Wales – and is managed by the governing body without reference to the LEA.

Finally, the Education Act 1993 required LEAs to establish Pupil Referral Units for pupils who, due to illness or exclusion, cannot attend ordinary schools.

Admission policies

Choice between schools is governed to a considerable extent by the admission criteria which come into operation when demand for places exceeds the number available. The Education Act 1944 required LEAs to respect the wishes of the parents insofar as this would not detract from the provision of efficient education. Legislation during the 1980s saw this emphasis on efficiency progressively give way to the rights of parents concerning their choice of school.

The Education Act 1980 gave parents the right to express a choice of school for their child(ren). Encouraged by the Government to rationalise school places, many LEAs published 'planned admission levels' for each of their schools (GB SI 1981a). Where demand exceeded the number of planned places, published criteria gave priority, for example, to those with siblings at the school, those who lived nearest to the school or those with special social or medical needs. Those pupils who could not be accommodated within the published limits were offered places at other schools. The 1980 Act required LEAs to set up an independent panel to consider appeals. Where parents appealed against the decision, the LEA had to justify its decision on one of three grounds, namely that

the school was physically full, that the pupil had failed to meet the criteria of academic ability (in the case of a selective school) or the admission criteria established by the governors (in the case of a voluntary school), or that the admission would be prejudicial to the efficient provision of education or the effective use of resources in the area.

The Education Reform Act 1988 abolished planned admission levels and obliged schools to admit pupils to the limit of their physical capacity, defined in terms of standard numbers for admission. This policy of 'open enrolment' was based on the assumption that matching supply to demand through competition is the most efficient means of organisation. It was intended to prevent the artificial restriction of admissions to popular schools, so that, for example, a less popular school could maintain viable numbers, with the result that pupil places and the viability of schools would be determined by market forces rather than managed by LEAs.

Legislation also opened up ordinary schools to pupils of a wider range of abilities and educational needs. Acting on the findings of the Warnock Committee (Warnock Report 1978), the Education Act 1981 sought to eliminate the educational deprivation which resulted from the categorisation of pupils by disability. It required LEAs to conduct a multi-professional analysis of a child's specific educational needs and to recommend appropriate provision, either at the parents' request or whenever the educational provision made for a child differed from that made for his or her peers. Both the needs and the proposed provision had to be recorded in a Statement of Special Educational Needs, which would be subject to annual review. It was expected that most pupils would be integrated into ordinary schools, thus reducing the number of special school places. It was also hoped that up to 18 per cent of pupils in ordinary schools, whose educational needs had previously been unnoticed or deemed insufficiently serious to warrant the pupils' transfer to a special school, would benefit from special support. On the basis of experience since the implementation of the 1981 Act, the *Code of Practice on the Identification and Assessment of Special Educational Needs* (DFE 1994) was drawn up and, following a period of consultation, came into effect on 1 September 1994. It established a new relationship between LEAs and schools, with the former acting as purchaser and the latter as provider.

Impact of policies on structure

At present, pupils of compulsory school age may be educated in county schools, voluntary schools, grant-maintained schools, City Technology Colleges, Pupil Referral Units, independent schools, hospitals or at home.

Open enrolment has placed schools in competition for pupils and introduced an element of marketing into the statutory provision of information. The publication, in the form of league tables, of pupils' attendance and truancy rates, examination results and destination on leaving school, was a logical consequence of the market-place philosophy. The Government introduced these measures to provide parents with 'real' information on the performance of individual schools.

However, the right to change the character of a school by approval from the Secretary of State may result in an increase in the number of schools which provide particularly for the academically able, for pupils of a single sex, or for pupils who embrace a specific religious faith. Moreover, if the number of grant-maintained schools or selective schools increases, the result may be greater differentiation between schools on a linear scale of perceived quality and esteem, rather than the positive diversity for which its supporters had hoped. Critics of current Government policy [*see Campbell et al 1987; Cordingley and Wilby 1987; Bash and Coulby 1989*] have discerned a possible future scenario in which a clear hierarchy of schools will re-emerge with independent schools at the top, followed by City Technology Colleges, grant-maintained schools, voluntary schools and the LEA-maintained schools at the base.

3. GOVERNANCE AND MANAGEMENT

Issues of governance deal with the locus of external control and the internal management of schools in terms of structure, content, staffing, other resources and evaluation. The balance of control established by the 1944 Act was dramatically altered during the 1980s, which saw a considerable shift of power from the LEAs to the Secretary of State, on the one hand, and to the governing bodies of schools and colleges on the other. Whilst successive legislation incrementally increased the power of governing bodies in some respects, in others, powers first delegated were subsequently withdrawn. The Education Reform Act 1988 sought to empower parents, teachers and industrialists acting through the governing body, at the expense of the traditional providers, the LEAs.

Governing bodies

The Education Act 1980 required all schools (with the possible exception of linked infant and junior schools) to have a separate governing body and made provision for the election of parent and teacher governors. A category of 'other' governors allowed for a representative of the non-teaching staff and a student representative, aged at least 18 years.

The Education (No 2) Act 1986 increased the proportion of parent governors and introduced a category of 'community governors'. At the same time, it formally excluded pupils from membership of the governing body and extended the governors' period of service from two to four years, to allow for an element of continuity. The legislation strengthened the governing body's role to ensure that it could not be overridden in the exercise of its assigned functions. If elected members did not, between them, have the specialist expertise essential to any effective body, suitable individuals could be co-opted from the local or business community.

With the emphasis on economy and efficiency, rather than on the effective achievement of ideal and school-specific aims, the Government adopted the business board of directors as the model for school management. Thus governing bodies now comprise representatives of the 'shareholders' (who fund the service through taxation and local rates and charges), consumers (parents, employers) and providers (LEA, teachers).

Responsibilities of governors

The Education (No 2) Act 1986 gave the governing body responsibility for the *internal management of the school* (discipline, suspensions) and for the policy relating to pupil admissions and to the use of school premises outside school hours. In the case of LEA-maintained schools, these last two aspects were subject to the approval of the LEA. The governing bodies of grant-maintained schools acquired total responsibility for the management of the school and the use of school premises, as well as the discretion (subject to parents' approval) to negotiate a change in status of the school, in terms of size and character, direct with the Secretary of State.

Prior to 1979, the LEA and governing bodies had enjoyed considerable discretion with respect to the *curriculum*, within the statutory requirement that it suit the age, aptitudes and ability of the pupils at the school. The 1981 Act introduced the obligation to address, in addition, any special educational needs of registered pupils. The Education (No 2) Act 1986 imposed a duty on governors to establish a policy on sex education and, with the LEA and the head teacher, to secure a balanced treatment of political matters (GB DES 1987). The Education Reform Act 1988 introduced the National Curriculum and imposed a duty on each governing body, with the LEA (as appropriate) and the head teacher, to ensure that the curriculum for the school satisfies legal requirements.

In 1979, the *financial resources* wholly at the disposal of governing bodies were limited to the per capita allowance for materials and equipment. All other expenditure, from major building works under the approved capital programme, to minor repairs, cleaning and maintenance, was authorised and handled by the LEA. The Education (No 2) Act 1986 required LEAs to inform each governing body of the total school costs and expenditure. This requirement has been largely superseded by Local Management of Schools (LMS), which was introduced by the Education Reform Act 1988 and phased in between 1989 and 1994. LMS entails the delegation of the school's budget to the governing body, which is wholly responsible for its expenditure in pursuit of the school's responsibilities and objectives. The LEA can suspend the governing body's right to a delegated budget *only* if the governing body is guilty of 'substantial or persistent failure to comply with any requirements applicable under the scheme' or is 'not managing the appropriation or expenditure of the sum put at [its] disposal for the purposes of the school in a satisfactory manner' (Education Reform Act 1988, Section 37).

Under LMS, governors also became responsible for determining the number of *teaching and non-teaching staff* employed in the school, the

salaries payable, the development, appraisal and, if appropriate, disciplinary action leading to the dismissal, of staff. However, the governing body of an LEA-maintained school must consider any advice relevant to the appointment which is given by the Chief Education Officer and it is still the LEA which, on the governors' recommendation, formally appoints and dismisses teaching and non-teaching staff.

In tandem with its increasing authority, the governing body is now held *accountable* to the parents of pupils on the conduct and achievements of the school. In 1980, the emphasis was on enabling parents to make an informed choice between schools on the basis of what the school offered (curriculum, pastoral care and arrangements for discipline, uniform policy etc.) and public examination results. The Education (No 2) Act 1986 obliged school governors to provide an annual report on the work of the school and to hold an annual meeting for parents to discuss the report and any other relevant matters raised by the parents. Moreover, provided that sufficient parents attend the meeting, the governors must take note of and refer to the head teacher or the LEA as appropriate, any resolutions passed at the meeting. Under the Education Reform Act 1988, governing bodies are required to account for the expenditure of their delegated budget and of any monies raised from alternative sources such as Parent-Teacher Association fund-raising.

Responsibilities of head teachers

The head teacher is responsible for the internal management and discipline of the school. Except for regulations concerning records of admission and attendance and the suspension of pupils, these responsibilities were largely undefined until the Education (No 2) Act 1986 and the Teachers' Pay and Conditions Act 1987. The 1986 Act abolished corporal punishment in schools and laid down the head teacher's responsibilities with respect to the curriculum and to discipline. The 1987 Act and subsequent Orders provided a more wide-ranging description including the head teachers' relations with other teachers, parents and outside bodies. The Government has supported the in-service training of head teachers to enable them to fulfil their new responsibilities, specifically through funding under the Grants for Education Support and Training scheme [*see below*], and by sponsoring research.

Impact of policies on governance

In general terms, the changes do not appear to have fulfilled the Government's objectives of wider parental involvement, representation and participation. The restricted range of governing body membership arises from the difficulty of recruiting governors from ethnic minorities, from a perceived need for 'useful' rather than representative governors and from changes in the period of office. Representation on the governing body is still, necessarily, limited to a small number. The extension of the period of office to four years has improved continuity. However, less frequent elections and the fact that parent governors may continue to serve even after their child has left the school, mean that the opportunities for other parents to become governors is proportionately reduced. Some LEA officers have expressed concern at the possible loss of many experienced governors when their period of office comes to an end and believe that 'the Government would be well advised to introduce a system of phasing for governor elections' (Baginsky *et al* 1991:106).

Evidence of non-governor parental participation is even more discouraging. Although more information is made available to parents and other interested parties, the level of real participation at other stages of the democratic process is still limited. Consultation depends on the school governing body, as LEAs have lost the authority to ensure a degree of comparability between schools, for example by influencing the governing body agenda and by circulating papers of the Authority's Education Committee. With respect to decision-making, the detailed statutory definition of the school's principal objectives (in terms of the National Curriculum and its assessment) and the constraints of the budget reduce much 'decision-making' to operational rather than policy levels. On the basis of his findings, Bristow argues that

the experience of the first round of annual reports and meetings suggests that the Government's intention to involve parents more directly in the process of accountability has largely back-fired.... far from tapping a groundswell of active participation and interest which had hitherto lain dormant, in the vast majority of cases parents appeared disinclined to exercise their right to attend a meeting and discuss a report which, in a very high proportion of cases, appears to have been thoughtfully and conscientiously produced.

(Bristow 1988:43)

One LEA governor suggested that 'the system now facilitates the unprofessional, often vociferous, governor dictating on matters such as the curriculum to the professional staff' (Baginsky *et al* 1991:139). There have also been claims, contrary to that recorded by Baginsky *et al* that politically motivated groups are proposing candidates for election to governing bodies [see Baginsky *et al* 1991:11]. Given the demands made by membership, it seems increasingly likely that governing bodies, attracting those with the time and the confidence to undertake the training and responsibilities, will become unrepresentative of the parents and other community constituents.

With regard to the effectiveness of governing bodies, early research into the implementation of legislation has shown that the attraction of experienced private sector managers on to school governing bodies has proved easier for some schools than for others and this has influenced the speed with which they have been able to respond to the demands of the Education Reform Act 1988. There is also some evidence that in some areas governors are unclear about their new responsibilities (Coulby and Bash 1991:68).

The success of governing bodies in meeting the second strand of Government objectives, namely greater accountability and responsiveness to the community, is difficult to assess. Although governors are meeting their obligation to provide information, the extent to which parents and others use this information has not been determined. Attendance at the annual meeting for parents was poor in the first few years [see Bristow 1988]. It is possible that, as schools are drawn into the periodic inspection cycle [see *Evaluation, below*], more parents may attend the meetings.

4. CURRICULUM CONTENT AND ASSESSMENT

Curriculum

The legitimacy of the curriculum as a 'secret garden' for professionals, into which politicians and other lay persons did not enter, was increasingly challenged in the latter half of the 1970s. The Conservative Government's first initiatives comprised specific programmes to make provision in new curricular areas or to promote different teaching styles, for example, the Microelectronics Education Programme (MEP) and its successors. Launched in 1980 as a pump-priming exercise designed to stimulate LEA activity in the use of microcomputers in education, the programme covered curriculum development, teacher training and information services and was linked to the Department of Trade and Industry's Micros in Schools scheme, which assisted a majority of schools to purchase a microcomputer and ancillary equipment.

The second initiative, the Lower Attaining Pupils' Programme (LAPP), was intended

- a) to improve the educational attainments of pupils mainly in Years 4 and 5 of secondary education for whom the existing examinations at 16 years [*then, GCE Ordinary level and Certificate of Secondary Education*] were not designed and who were not benefiting fully from school; and
- b) to prepare these pupils better for the transition to adult and working life.

It was the first curriculum development initiative in recent times to be directly funded from Central Government, with a sum of £2m per year, from September 1983 (GB DES/HMI 1989). The seventeen LEAs who participated had to meet 25 per cent of the costs from their own resources, although some received additional funding from the European Community's programme on Transition from School to Adult and Working Life. The four-year funding was followed by two years of tapered funding (1988-1990).

Thirdly, the Technical and Vocational Education Initiative (TVEI) was launched as a pilot scheme in September 1983, administered by the Manpower Services Commission [*now the Training, Enterprise and Education Directorate of the Employment Department*] and extended into a national scheme in 1987. The main purpose of the pilot initiative was

to test methods of organising and managing the education of 14-18 year-olds across the ability range to improve the provision of technical and vocational education in a way which will widen and enrich the curriculum and prepare young people for adult and working life.

(GB Parliament 1986 Cmnd 9823:para 3.1)

Two new laws influenced the curriculum in schools. The Education Act 1981 required schools to make more varied curricular provision to allow for greater integration of pupils with special needs within ordinary schools. The Education (No 2) Act 1986 required governing bodies to make a statement indicating whether sex education is included in the curriculum and, if so, the nature of such instruction. The head teacher could authorise deviation from the governors' statement only if required by the syllabus of a public examination to be taken by pupils. Circular 11/87 (GB DES 1987) further stipulated that sex education, if provided, must be set in a moral context and have regard to the 'value of family life'. The 1986 Act also obliged the governing body and the head teacher to ensure that no promotion of partisan politics was carried out in the school and that, where political issues were concerned, their treatment would be balanced so as to reflect different views.

Progress towards a common curriculum

The discussion on the curriculum was launched in 1976, and in 1977 the Department of Education and Science (DES) gathered data on LEAs' curriculum policies and the DES and HM Inspectorate published a series of discussion papers and consultation documents [*see GB DES 1977, 1977a, 1979, 1980, 1981, 1981a, 1983, 1983a, 1983b and 1986 and GB DES/HMI 1980 and 1985 and DES/WO 1983*]. In 1984, the then Secretary of State for Education and Science, Sir Keith Joseph, announced that a clearer definition of curricular objectives agreed by all, not least parents and employers, was required to guide teachers in their work. Later, *Better Schools* outlined the contribution which such a definition would make to the quality of education:

A more precise definition ... of what pupils of different abilities should understand, know and be able to do, will assist with the formulation of the curricular policies of the Secretaries of State, the LEA, and the school; will help all concerned to assess the effectiveness of policies and practice; will encourage teachers to have high expectations of pupils (and so help bring about their realisation).

(GB DES 1985:para 81)

As early as 1985, the Government was specific about the need for

some awareness of economic matters, notably the operation of market forces, the factors governing the creation of private and public wealth, and taxation, [as] a prerequisite for citizenship and employment; and health and sex education, taught within a moral framework, [as] a necessary preparation for responsible adulthood. (GB DES 1985:para 71)

As Figure 1 shows, the notions of a common curriculum developed from broad fields of knowledge in 1977, into the National Curriculum of the Education Reform Act 1988, which is expressed almost exclusively as single subject disciplines. The way in which consensus about the principle of a common curriculum had been created by successive reports, including those listed in Figure 1, may be seen in the fact that the thrust of the objections to the consultative document *The National Curriculum 5-16 – a Consultation Document* (GB DES/WO 1987a) concerned the content and weighting of individual subjects within the proposed curriculum, rather than the principle itself.

The Education Reform Act 1988 required schools maintained by LEAs or grant-maintained schools to provide

a balanced and broadly based curriculum which

- a) promotes the spiritual, moral, cultural, mental and physical development of pupils at the school and of society; and*
- b) prepares such pupils for the opportunities, responsibilities and experiences of adult life.* (Section 2)

The Education Reform Act 1988 also reaffirmed the 1944 requirement that all pupils receive religious education and participate in a daily act of collective worship, unless their parents applied for exemption. It further required each LEA to constitute a Standing Advisory Council on Religious Education (SACRE) to advise the authority on relevant matters and on the extent to which 'it is appropriate for the requirement for Christian collective worship to apply in the case of [a given] school, or in the case of any class or description of pupils at that school' (Section 12) [*see Taylor 1991*].

The consultation document reassured schools that a more precise description 'implies no particular view of timetabling or teaching approach' (GB DES/WO 1987a:para 52), but the Government acknowledged that 'if programmes on these lines are to be pursued, it is likely that 80-85 per cent of each pupil's time needs to be devoted to subjects which are compulsory or liable to constrained choices' (ibid:para 69). However, whilst the Secretary of State was empowered to set attainment targets, programmes of study and arrangements for assessment of compulsory subjects at each of four key stages, Section 4(3) of the Education Reform Act 1988 expressly prevented the prescription of the amount of time to be spent on any subject area.

Figure 1: STAGES IN THE DEVELOPMENT OF A BASIC CURRICULUM

DES 1977	DES/HMI 1980	DES 1980	DES 1981	DES 1984	DES 1985	ERA 1988
linguistic	English modern language	English —	English modern language	English modern language	English & literature modern language	English modern language
mathematical	mathematics	mathematics	mathematics	mathematics	mathematics	mathematics
scientific	science	science	science CDT micro-electronics	science technical education	science	science technology
ethical and spiritual	religious education	religious education	religious education	—	religious education	religious education
social and political	history	— preparation for adult and working life	humanity preparation for adult and working life	humanity	humanities economic education sex education health education	history, geography economic awareness, multicultural, health, careers, personal and social, environmental education
physical	physical education	physical education	physical education	physical education	physical education	physical education
aesthetic & creative	applied crafts arts	—	practical, aesthetic	aesthetic	aesthetic practical subjects	art music

Following the introduction of the National Curriculum, DES Circular 7/90, *Management of the School Day* (GB DES 1990b) made recommendations concerning the length of the school day, which were intended to replace the minima set out in the Education Act 1944.

The implementation of the National Curriculum revealed a number of difficulties. These included 'curriculum overload', that is to say, that the prescribed programmes of study allowed insufficient time to cover the cross-curricular themes and other topics which were not specifically part of the programmes. It was also felt that the curriculum was too

rigid, as it did not make allowance for pupils to study subjects outside the National Curriculum such as a second foreign language, economics, classics and so on. Sir Ron Dearing conducted a wide-scale review of the curriculum and his final report, published in December 1993, recommended:

- *a reduction, clarification and simplification of what should be taught – as prescribed by the programmes of study;*
- *a review of the programmes of study in Key Stages 1, 2 and 3;*
- *a revision of the curriculum for Key Stage 4;*
- *the retention and improvement of the ten-level scale;*
- *the uninterrupted continuation of the (slimmer) tests in the core subjects [English, mathematics and science], with further efforts to simplify and reduce administration time;*
- *the development of systems for moderated teacher assessment which underpins standards but avoids bureaucracy and excessive calls on teachers' time;*
- *that the National Curriculum remains available to pupils with special educational needs; and*
- *the simultaneous revision of the curriculum Orders for introduction by schools in September 1995.* (Dearing 1993)

The Government also entered the debate on teaching methods. In 1991, the then Secretary of State, Kenneth Clarke, commissioned a report on primary education. The authors, popularly referred to as the 'Three Wise Men', reported that there was much to commend in the work of primary schools but that there were unacceptable differences in the quality of teaching and in the standards which pupils attained between schools and sometimes between classes within schools (Alexander *et al* 1992). The authors recommended that all schools implement the best practice, including

- that topic work be more sharply focused and rigorously planned;
- that the benefits of whole class teaching be better exploited;
- that teachers raise their expectations of pupils;
- that greater flexibility in the deployment of primary teachers be introduced, allowing for the introduction of specialist and semi-specialist teachers to strengthen the role of the class teacher, and
- that, where pupils were divided into ability groups, such groups be flexible, varying according to pupils' differing ability in different areas of the curriculum.

Assessment

Examinations at 16+

In October 1980, a joint consultation document from the Department of Education and Science and the Welsh Office (GB DES/WO 1980), proposed that the dual system of 16+ examination be replaced by a single examination based on national criteria for syllabus and assessment procedures. This proposal received considerable support from teachers and others who had been calling for a single examination to cater for the whole ability range.

At the 1984 North of England Conference, the then Secretary of State for Education and Science, Sir Keith Joseph, specifically linked excellence to a much higher target for pupil performance. He stated that the Government would no longer accept examinations which formally catered only for the top 60 per cent of pupils. This represented a shift in the Conservative interpretation of excellence, which was no longer to be an objective reserved for those of the highest intellectual ability. Persuaded of employers' needs to know what young people knew, understood and could do, Sir Keith announced the Government's intention to introduce a single examination at 16+ to replace both GCE O Level and CSE examinations. The Government asserted that 'examinations are one important means of assessing achievement; examinations, properly designed, are a stimulus to good performance, and parents and employers, as well as many pupils, rightly value them' (GB DES 1985:para 90).

The objectives of the new General Certificate of Secondary Education (GCSE) examinations are:

- *to raise standards across the whole ability range;*
 - *to support improvements in the curriculum and in the way in which it is taught;*
 - *to provide clear aims for teachers and pupils, to the benefit of both and of higher education and employers;*
 - *to record proven achievement;*
 - *to promote the measurement of achievement on what candidates know, understand and can do;*
 - *to broaden the studies of pupils in the fourth and fifth secondary years and of sixth form students.*
- (GB DES 1985:para 93)

GCSE examinations are criterion-referenced, that is, designed to ensure that 'success or failure depends on the candidate's own performance, tested against defined standards and irrespective of the performance of others, and that similar performance will be similarly recognised and rewarded' (GB DES 1985:para 98).

The emphasis on higher standards for all was further developed in the White Paper *Better Schools*:

It is the Government's longer term aim to raise pupil performance at all levels of ability so as to bring 80-90 per cent of all 16 year-old pupils at least to the level of attainment now expected and achieved by pupils of average ability in individual subjects, i.e. the level associated with grade 4 in the CSE examination; and to do so over a broad range of knowledge, understanding and skills in a number of subjects ... attainment targets are needed also in relation to matters not tested by the GCSE and, in relation to all aspects of the curriculum, for the end of the primary phase.

(GB DES 1985: para 80)

Courses leading to the General Certificate of Secondary Education (GCSE) started in 1986 and the first examinations were held in 1988. In 1994, a new grade 'starred A' (A*) was introduced to recognise outstanding examination performance.

Standard Assessment Tasks

Until the Education Reform Act 1988, participation in national examinations had been optional. Pupils were entered for individual subjects on the basis of the school's assessment of their competence. This voluntary nature ceased with the introduction of a statutory requirement for pupils to submit to assessment of their achievements at the ages of (about) 7, 11, 14 and 16 years.

A Task Group for Assessment and Testing (TGAT) was set up by the then Secretary of State (Kenneth Baker),

to make recommendations about how children's performance and progress across the subjects of the National Curriculum should be assessed, and reported to those with a right to know.

(GB DES/WO 1988:6)

The Group's full report, *National Curriculum Task Group for Assessment and Testing: A Report* (GB DES/WO 1987), recommended that:

- *the basis of the national assessment system should be essentially formative, but also designed to indicate where there is need for more detailed diagnostic assessment;*
- *for pupils aged 16, it should incorporate assessment with summative functions; and*
- *assessment should be concerned with the quality of each pupil's performance, irrespective of the performance of other pupils (criterion-referenced assessment).*

The assessment tests were developed by specialist agencies, under contract to, and supervised by, the School Examinations and Assessment Council and its successor, the School Curriculum and Assessment

Authority. Complaints about their complexity were addressed by Sir Ron Dearing in his 1993 review (Dearing 1993) and simplified tests are currently being developed.

Impact of policies on the curriculum and assessment

Kirk states that the concept of a central curriculum 'reduced education to a cramming exercise... circumscribed professional activity and constrained initiative, and made deliberate use of political power to mould the minds of the young' (Kirk 1986:2). His criticisms are based on the impossibility of securing a consensus and the view that a common curriculum reduces pupil choice, differentiation and the scope for reflecting cultural pluralism.

However, despite the arguments concerning the content of individual subjects and the balance between them, there has been widespread support for the principle.

It is feared that the development of knowledge, skills and understanding which will prepare young people 'for the opportunities, responsibilities and experiences of adult life' (Education Reform Act, Section 1), are increasingly interpreted in the context of economic activity, especially with respect to the UK's economic competitors. Fears that the demands of the compulsory subjects leave little time for a broader curriculum or the pursuit of special interests have been addressed by the Dearing review (Dearing 1993). However, as long ago as 1943, the Norwood Committee (Norwood Report 1943) noted that examinations have a significant influence on curricula, especially at secondary level, and, just as the adoption of national criteria for the GCSE may be seen as an early step towards securing a National Curriculum, it could be argued that the degree of prescription in the National Curriculum tests will exercise considerable influence on the day-to-day implementation of the National Curriculum.

Whilst the Government has centralised control of the curriculum, it has developed a framework in which responsibility for the outcomes of education provision is delegated to individual institutions. In the context of other initiatives (e.g. Local Management of Schools), the introduction of a National Curriculum and its assessment may be seen as an essential prerequisite for the delegation of management responsibility to institutional governing bodies composed largely of lay members. In the market forces system of open enrolment, involving competition between schools, common objectives (expressed in terms of attainment levels and programmes of study), which lend themselves to nation-wide

assessment are laid down so that inter-school comparisons may be made. The perceived loss of local freedom may be offset against the need to secure comparability between the education offered to, and continuity for, pupils who attend or transfer between schools in different parts of the country.

The National Curriculum Council issued guidance on the implementation of the National Curriculum (GB NCC 1989, 1989a, 1990, 1991). However, it has been claimed that the changes introduced were not accompanied by sufficient additional resources, although some funding for in-service training was made available under the Government's Grants for Education Support and Training scheme [*see Indirect public funding, below*].

Despite the relationship in the 1988 Act between attainment targets and children's 'different abilities and maturities', there is little specific provision for pupils with special needs. Head teachers may disregard or modify the curriculum as appropriate for pupils who are the subject of a Statement under Section 7 of the 1981 Act (Education Reform Act 1988 Section 18). Alternatively, in accordance with regulations to be made by the Secretary of State, they may exercise temporary exception or modification for particular pupils not the subject of such a Statement. Nevertheless, all non-statemented pupils are expected to progress through all stages of the curriculum.

Researchers claim that the introduction of Standard Assessment Tasks for children aged about seven may have far-reaching consequences, particularly for those perceived as having 'failed' [*see Gipps 1990; Coulby and Bash 1991*]. They fear that state-endorsed labelling will lead to lower expectations and a reduction in the amount and level of curriculum made available to these children (e.g. through streaming) and that opportunities to stretch the child academically will not be sought. As their self-esteem and expectations are lowered, such pupils may seek out a low-achieving peer group to reduce pressure [*see Hargreaves et al 1975*]. While competition may raise standards for some (Gipps 1990), 'for others it will lower both standards and life chances' (Coulby and Bash 1991:59).

One purpose of the examination reform at 16+ was to enable a greater proportion of pupils to demonstrate what they knew, understood and could do. This objective appears to be achieved as, at the 1994 examination session, there was an increase in the number of examination entries, and the proportion of candidates achieving grades A* to C (equivalent to the former GCE O Level pass grades) was 53.1 per cent of candidates. Almost three per cent of candidates achieved the new 'starred A' grade which is awarded for outstanding performance (GB DFE 1994).

5. STAFFING

The Education Act 1944 established the management of education as a triangle of power shared amongst the Department for Education (formerly the Department of Education and Science), the LEAs and the teachers. Teachers exercise influence on policy through teacher associations and on its implementation in the way in which they interpret and transmit the curriculum to meet the needs of individual pupils (Lawton 1980). This professional role of teachers was emphasised by the Houghton Committee in the conclusions to its report:

in our view ... the teaching profession should be paid adequately and teachers should enjoy reasonable careers. But if the community should the increased cost, teachers must also accept an obligation to use their professional power and expertise in the community's service. In a changing world we all, and parents in particular, look to teachers to promote the educational and social values of rationality and of independent judgement, and to foster maturity in both personal relationships and the approach to work ... As in other professions, these salaries are in part recognition of the fact that the job cannot be compressed within a rigid structure of prescribed duties, hours and days. (Houghton Report 1974:para 294)

Thus, endorsement of professional autonomy was closely linked to the expectation that teachers use their expertise in the community's service. The objectives of education identified in this paragraph are wide-ranging and contain no strictly instrumental objectives. Its assumption of a consensus concerning educational and social values came to be seriously questioned later and both the role and the professional autonomy of teachers have changed during the period in question.

Teacher supply

In the early 1980s, staffing proposals were principally concerned with the efficient use of qualified teachers. The Department of Education and Science discussion paper *School Teacher Numbers and Deployment in the Longer Term* recognised that 'some new policies will give rise to new calls on the time of teachers' (GB DES 1984a:22). It cited as examples: differentiation in teaching; changes in teaching methods and more practical work arising from the Technical and Vocational Education Initiative (*see above*), new examinations and records of achievement;

ongoing curriculum review and evaluation in schools; assessment and provision for pupils with special educational needs; and improvement in teacher quality and versatility, by overcoming the mismatch between teachers' subject qualifications and the curriculum at a time of falling rolls, as identified in *Teaching Quality* (GB DES 1983b). The paper concluded, however, that these initiatives should not give rise to a significant increase in overall teacher numbers as extra resources could be 'found over time'. It was expected that reductions in the number of pupils admitted to special schools would release teacher time for redeployment, as would school closures and the standardisation of pupil:teacher ratios among LEAs. More teaching by head teachers would create some non-contact time for classroom teachers at primary level. At secondary level, the paper's proposals for releasing teacher time included allowing pupils less choice between curriculum options, larger classes, rationalisation of 16+ provision and reduction in class contact time for those aged over 16, for example, by replacing some of the taught periods by periods of directed private study.

Teacher performance

By 1985, concern for teacher numbers was replaced by considerations of the quality of their performance. Her Majesty's Inspectors had conducted a survey and issued a report entitled *Good Teachers* (GB DES/HMI 1985a). *Better Schools* identified the management of the teacher force as 'one of the most crucial responsibilities of the local education authorities' (GB DES 1985 para 177), aimed at ensuring that teachers' professional commitment, skills and knowledge are used to best effect in the schools.

The desire to take control from professionals in 1970s had stemmed from a dissatisfaction with the outcomes of the education system, claimed by some to be responsible for the growing youth unemployment (Weinstock 1976). Sir Keith Joseph's sustained attack on 'the ineffective teacher' whose lack of control led to disruptive classrooms, provided an easy target for parental dissatisfaction. Teachers' industrial action in the mid-1980s provided further grounds for criticism of their unprofessional behaviour, leading to a scheme of teacher appraisal, to be implemented between 1992 and 1995 [see *Section 49 of the Education (No 2) Act 1986 and GB DES 1991*]. The Government claimed that appraisal was

widely seen as a key instrument for managing [the relationship between teachers and their employers], with teachers' professional and career development assisted and salary progression largely

determined by reference to periodic assessment of performance. [It welcomed] the efforts made by many ... to negotiate a new salary structure ... embracing new pay scales, a new contractual definition of teachers' duties and responsibilities and the introduction of systematic performance appraisal, designed to bring about a better relationship between pay, responsibilities and performance, especially teaching performance in the classroom (GB DES 1985:para 181).

Teacher status

Bash and Coulby argued that the main causes for teachers' industrial action in the mid 1980s were the level of salaries and loss of salary negotiation rights, the status of the profession and teachers' removal from the process of education policy-making. These gave rise to a number of legislative measures which, they argue, 'set out to curb [teachers'] power and discretion' (Bash and Coulby 1989:10).

In the first of these, the Government weakened the capacity of Teachers' Unions to negotiate on behalf of their members by repealing the arrangements for negotiating teachers' salaries independently of their conditions of employment, which had been established under the Remuneration of Teachers Act 1965. The Teachers' Pay and Conditions Act 1987 established a formal link between pay and conditions of service and abolished the Burnham pay-negotiating machinery for school teachers, replacing it by an Interim Advisory Committee. The School Teachers' Pay and Conditions Act 1991 established the School Teachers' Review Body (STRB), whose remit is to examine and report to the Prime Minister on the statutory conditions of employment and remuneration of school teachers in England and Wales on an annual basis. The Secretary of State has the power, but not the duty, to consult with relevant associations on the STRB's report, before making an Order which lays down any changes in teachers' pay and conditions for the following year. The appraisal of teacher performance (in accordance with Clause 49 of the Education (No 2) Act 1986) requires the definition of at least the minimum responsibilities associated with each post. Traditionally, teachers' responsibilities had been laid down in case law (the duty to act *in loco parentis*) and in a general contract, which required teachers to be present on the school premises at all times when the school was in session and to carry out such tasks as the head teacher might reasonably require. The Teachers' Pay and Conditions Act 1987 redefined teachers'

responsibilities in terms of 1265 hours of directed activities and specific tasks related to the conduct, teaching, guidance and assessment of pupils; to record-keeping, reporting to and consultation with colleagues, parents and others; and to the management and review of the work of the school and of their own and their colleagues' performance and professional development. Whilst the additional responsibilities of deputy head teachers and head teachers were also clearly defined in this Act, the duties to be performed by holders of the new incentive allowances were very vague.

The Education Reform Act 1988 empowered governing bodies to set staffing levels and, through the LEA, to employ and dismiss staff. Governors may also pay teachers above or below the recommended salary levels. This effective increase in the number of employers, from 120 LEAs to some 20,000 governing bodies, makes it difficult for Teachers' Unions to negotiate national agreements on either salaries or conditions of employment.

Second, the status of teachers was to be improved by raising standards of initial and in-service teacher training. Some initiatives related to improvements in the level of teachers' knowledge and training. These include the requirement that all intending teachers must have achieved a standard equivalent of GCSE grade C or above in English, mathematics and (by 1998) science and the introduction of graduate level training for all new entrants to the profession. Other initiatives sought to improve the match between teachers' initial qualifications and their principal teaching subject through cross-training schemes. In the latter part of the 1980s, a serious shortage of teachers in certain subjects and in certain geographical areas diverted the emphasis from quality back to quantity. Strategies to attract suitably qualified people into teaching included bursaries, retraining, the establishment of the Teaching as a Career Unit (TASC – incorporated into the Teacher Training Agency in 1994) and the early implementation of European Communities Directive 48/89/EC, which allowed for the recognition of Qualified Teacher Status achieved in other Member States of the European Union [*see GB DES/VO 1986 and GB SI 1986 and Council of the EC 1989*]. Two alternative routes to Qualified Teacher Status were introduced, one for non-graduates (licensed teachers scheme) and another for graduates (articled teachers scheme). Both were to be largely school-based with additional courses provided off-site. In 1993, two further forms of postgraduate teacher training were introduced: school-centred initial teacher training (SCITT) and a distance learning course, offered by the Open University.

The third initiative concerns the appraisal of teacher performance. This was formally carried out only during the first year of service (the probationary year) by the LEA and, where appropriate, by Her Majesty's Inspectors. Following the introduction of a system of regular performance appraisal for all teachers [see above], the probationary year was abolished for teachers appointed on or after 1 September 1992 (GB DES 1992).

Fourthly, the Education Reform Act 1988 also reduced a teacher's effective security of employment in two ways. First, where individual governing bodies have delegated powers for staffing decisions, the LEA can no longer redeploy redundant staff from one school to another. Second, a LEA has no obligation to find employment for teachers who do not want to remain in a school after it achieves grant-maintained status.

In the fifth initiative, teachers' involvement in education decision-making was seriously curtailed. Teachers had constituted the largest group on the Schools Council which reviewed and developed curriculum and assessment. The Schools Council was successively replaced by the National Curriculum Development Committee and the Secondary Examinations Council and, after the Education Reform Act 1988, by the National Curriculum Council (Curriculum Council for Wales) and the School Examinations and Assessment Council, which comprised members nominated by the Secretaries of State. In 1993, these councils were once again merged into the School Curriculum and Assessment Authority in England (Curriculum and Assessment Authority for Wales) whose members are appointed by the Secretaries of State.

Impact of policies relating to teachers

Teachers are employed by LEAs in the service of governing bodies (in the case of LEA-maintained schools) or by school governing bodies (in grant-maintained schools), to fulfil obligations laid down by the Secretary of State. Their salaries and conditions of service are determined by an independent School Teachers' Review Body, largely made up of industrialists, and their employment is largely determined by the continuing viability of the school which, in turn, may depend on factors outside the teachers' control. Although deprived of the professional autonomy and the scope to respond to client needs which characterise professional accountability (Becher *et al* 1981), teacher effectiveness is still assessed largely on the basis of pupil performance.

Teachers formerly exercised their role within a professional cycle which involved the analysis of a child's needs, the choice of curriculum and method to meet these needs and the objective assessment of the child's achievements. The Education Reform Act 1988 introduced a compulsory curriculum with attainment targets, programmes of study and assessment instruments. The Government has also entered the debate on teaching methods, which was traditionally a matter for the teachers' professional discretion. The legal requirement that teachers 'deliver' the curriculum in accordance with the relevant Orders, is an indication of the change in role.

This change in status is consistent with the Conservative Government's concept of education as a service delivered in response to market demand. However, the 'responsiveness' dimension of accountability is not followed through. Whilst the local community may determine, by its choice, the continued survival of the school, the school and its teachers have only limited discretion in meeting the education objectives of the market, if these diverge from the objectives set by the Government. Moreover, whilst parents of one cohort of pupils may vote to apply for grant-maintained status – and there is an obligation for the governing body to consider this issue every year – parents of a subsequent cohort of pupils have no way of reversing this change of status.

6. FINANCIAL AND MATERIAL RESOURCES

This section deals with policy concerning the source (public, private, joint) and nature (direct, indirect) of funding and its generation, allocation and expenditure.

Direct public funding

In 1979, the sources of the Local Authority's budget were its block grant from Central Government and its income from local rates and charges. The amount allocated to the education service was determined by the council after consideration of the demands of all the council's services in relation to the council's political priorities. The Education Act 1980 removed the LEA's duty (imposed in 1944) to provide milk and lunch-time meals. Whilst LEAs must still provide for children whose parents are in receipt of specific social security benefits (such as Family Income Supplement or Supplementary Benefits), they enjoy considerable discretion both in the provision of milk and meals to other pupils and in the charges to be levied. This is an early example of the transfer to parents of responsibility for what had previously been provided as a public service.

Subject to their statutory obligations, Local Authorities are free to determine their educational and social priorities and to make such provision as they can afford. Specifically, the Government controls Local Authority (and thus, indirectly, education) expenditure through the level of the block grant which it awards to each Local Authority. In order to reduce wide variations in public sector expenditure and to curb what it deems 'overspending' generally, and especially on activities of which it disapproves, the Government sets standard spending assessments and proportionately reduces its grant to those Local Authorities which exceed this limit (known as 'rate capping' or Council tax capping).

Government action to promote more cost-effective management in education during this period has taken several forms. Some action is specifically targeted at education, other action relates to all public services. In the context of falling rolls, the Government exhorted LEAs to remove surplus places by closure or amalgamation of schools. This

was followed by the Audit Commission reports on cost-effective management of public services in general (e.g. Audit Commission 1984, 1986a, 1988b) and education in particular (e.g. Audit Commission 1986, 1988, 1988a). Encouragement was backed by coercion in the form of reductions in the overall Government grants, in line with its assessment of a Local Authority's expenditure needs and reductions in Government grants to those Local Authorities which continued to spend above the approved level.

The Government took a further step along the path of determining the appropriate level of educational expenditure by establishing, in the Education Act 1993, the Funding Agency for Schools. The Agency is responsible for assessing and administering the grants payable to grant-maintained schools in England. (In Wales, the responsibility for grant-maintained schools lies with the Welsh Office.) When the percentage of pupils within the primary or secondary phase in grant-maintained schools within a LEA exceeds 10 per cent, the Agency takes on joint responsibility with the LEA concerned for ensuring sufficient provision for that phase. When the proportion of pupils in grant-maintained schools reaches 75 per cent, the Agency assumes total responsibility. The Government hopes that an increasing number of schools will achieve grant-maintained status. Grant-maintained schools are funded at the same level as the LEA-maintained schools in their LEA. However, a common funding formula for all grant-maintained schools is being developed and is currently being piloted in a small number of schools.

Indirect public funding

Additional grants are made available to LEAs for education programmes (e.g. Microelectronics Education Programme and the Technical and Vocational Education Initiative) or to make provision for pupils, or areas, with particular needs (for example, Section 11 funding for children from ethnic minorities and Urban Aid Grants). The Education Act 1984 expanded this focused support by enabling the then Department of Education and Science to set aside a total of up to 0.25 per cent of its annual budget for the purpose of selectively subsidising approved LEA activities. Schemes have been established under various names, but are now generally known as Grants for Education Support and Training (GEST). The Government annually specifies the activities which qualify for support, the total sum to be allocated for each activity and the percentage of expenditure (subject to a maximum of 70 per cent) which will be met through central funds. The balance of the expenditure must be met by LEAs. Grant-maintained schools may also apply for support under the GEST scheme.

Public subsidies for education in independent schools

The Conservative Government introduced two schemes for subsidising education in independent schools, the first indirect (the Assisted Places Scheme) and the second direct (the City Technology Colleges).

Under the Education Act 1980, the Assisted Places Scheme enables academically able pupils 'whose talents might otherwise not be catered for' to attend independent schools of proven worth. The Government pays a proportion of the fees and additional expenses according to parental income [see GB SI 1985, 1985a]. The Scheme was expanded by the Education Reform Act 1988 and now provides opportunities for 1 per cent of the relevant age group. This indirect public funding for selected independent schools is tied to the admission and continuing attendance of individual pupils. At present, 295 schools in England and eight schools in Wales participated in the Scheme. In this way, the State and parents contribute, albeit unequally, to the maintenance of an independent sector.

The second initiative focused on direct, institutional support of independent secondary schools which specialise in science and technology (GB SI 1987). These were formalised as City Technology Colleges (CTC) by the Education Reform Act 1988, which broadened the concept to embrace colleges specialising in the technology of the arts (CCTA). CTCs provide education for pupils aged 11-18 of different abilities, drawn wholly or mainly from the area around the school. Pupils are admitted on the basis of technical aptitude and a commitment to remain at school until the age of 18+. Unlike other independent schools, CTCs may not charge tuition fees.

The purpose of establishing CTCs was threefold. First, to help overcome a national shortage of suitably-qualified scientists and technicians and thereby make the country more competitive in the world market. The second objective was to establish prestigious 'magnet schools' in urban areas, where pupil motivation and staff morale were depressed. Thirdly, CTCs would be independent schools, established by sponsors (from industry and commerce), but their running costs would be met by the Government. The sponsors were originally expected to provide, or make a significant contribution towards, the resources required to establish a City College, whilst the Government would pay all recurrent expenditure such as teachers' salaries and materials. The Government hoped that the joint funding arrangement would lead to a closer involvement of industry in the life of the school which, in turn, would make the school

more responsive to employers' needs. The involvement of industry has fallen short of expectations and the Government has paid up to 80 per cent of capital costs of CTCs (Bash and Coulby 1989).

Joint funding

In the past, maintained schools have supplemented their income from the LEA by means of voluntary contributions to the school fund from parents and others, or by raising income at events organised by the Parent-Teacher Association. Although it remains illegal for maintained schools and City Technology Colleges to require parents to make a payment for fees, the Education Reform Act 1988 introduced the right for schools to charge for certain extra-curricular activities. This set the framework for schools to offer a range of priced 'services' to its pupils [*see Maychell et al 1991*].

Management of expenditure

The most sweeping changes in school finance introduced by the Education Reform Act 1988 affect the way in which resources are allocated and managed. Under Local Management of Schools (LMS), responsibility for the management of schools and their budgets was delegated by the LEAs to the governing body of individual schools. The stated purpose of LMS was to improve the quality of teaching and learning, by enabling the governing bodies and head teachers to make more effective use of the resources available to them and by allowing them to be more responsive to the needs and wishes of parents, pupils, the local community and employers. LMS was phased in over a period of four years and many responsibilities formerly held by LEAs have been delegated to schools, including the administration of the budget, staff numbers, staff appointments, and ancillary services such as school meals (where provided) and the cleaning and maintenance of buildings and grounds. Schools which are not yet required to receive a fully delegated budget (i.e. some special schools and nursery schools) continue to receive a partially delegated budget, which includes an allocation for books and other equipment but excludes staff salaries.

The proportion of the LEA's Aggregated School Budget (ASB) allocated to each school is calculated according to the Resource Allocation Formula. A minimum of 80 per cent of the ASB must be allocated to schools according to the number of registered pupils. This includes an allowance for additional points for certain age-groups and special needs

and may also include extra provision for certain subjects for students aged 16+. The calculation of teachers' salaries is based on average costs throughout the LEA and not on the actual salaries paid to teachers at any one school.

Impact of policies on financial and material resources

The calculation of school budgets on the basis of pupil numbers is likely to disadvantage schools with significant numbers of pupils with special needs, but who are not the subject of a Statement of special educational needs.

A second impact arising from the calculation of school budgets is the difference between average teacher salaries (the basis for school funding) and actual teacher salaries which are payable. Since experienced teachers will make greater demands on the school budget than newly-qualified colleagues, it is possible that this factor will influence recruitment and appointment of new staff. Research shows that, in the period 1990-1993, 40 per cent of schools have used the freedom offered by LMS to increase the number of temporary teaching contracts. Head teachers have said that this gives them the flexibility to secure the appropriate teacher skills to suit changing circumstances (Maychell 1994).

The need to generate additional income places different degrees of pressure on different schools. The potential income from letting premises out of school hours may not be available to those schools whose facilities are not perceived as attractive. Even where links with local industry are involved, Beckett *et al* point to the danger of giving 'the impression that schools are only interested in establishing links that will result in financial sponsorship'; conversely, care must be taken that the pupils and the school are not exploited for commercial or public relations purposes (Beckett *et al* 1991:153). It is possible that the pursuit of funding, or the inexperience of heads and governors in dealing with commercial agencies, might make some schools less than fastidious when considering the benefits of partnerships.

The effectiveness of financial management depends, to a large extent, on the competence of those responsible. Given that school governorship is a voluntary, unpaid commitment, there is no guarantee that the members will have the necessary competences and the cost of professional services can be prohibitive. Keys and Fernandes (1991)

found that finance and accountancy was one of the areas of competence lacking among governors. The extent to which governors ask for, and LEAs are able to give free of charge, the services which LEAs formerly provided is not known, and may vary considerably. However, LEAs may only withdraw the delegation of powers when they consider that the governing body

- a) [has] been guilty of a substantial or persistent failure to comply with any requirement applicable under the Scheme; or*
- b) [is] not managing the appropriation of expenditure of the sum put at their disposal for the purposes of the school in a satisfactory manner, or if it appears to them necessary to do so by reason of gross incompetence or mismanagement on the part of that governing body or other emergency.* (Education Reform Act: Section 37)

It is therefore possible that the inexperience of governors might have a detrimental effect on the school whilst, at the same time, the 'slimmed down' LEAs are unable to maintain the appropriate level of oversight.

7. EVALUATION

The Government has traced a clear link between education and economic prosperity. Whilst recognising its obligation to make a contribution towards such prosperity through education, it has had to reconcile this with its objective to reduce public expenditure. The Government was concerned about what it saw as the failure of certain Local Authorities to concentrate expenditure on 'appropriate' policies. Within the education service, it determined

to ensure as far as it can that, through the efforts of all who are involved with our schools, the education of our pupils serves their own and the country's needs and provides a fair return to those who pay for it. (GB DES 1985:para 11)

The evaluation of the education service thus focuses on accountability, by means of four strategies: the measurement of output in relation to closely-defined targets, the control of staff performance by the introduction of contractual obligations and appraisal for teachers, the promotion of cost-effective provision, and consumer satisfaction.

Defining targets and measuring output

Sir Keith Joseph described good education in terms of effective, well-ordered schools in which pupils developed, learned and achieved with a curriculum which is relevant to the real world and to the pupils' experience of it (*see Knight 1990:170*). Although individual effectiveness would be assessed in relation to individual need, he set a target for 80-90 per cent of pupils to achieve a level which had formerly been the average grade (Grade 4 CSE) (GB DES 1985:para 92). In accordance with this principle, the National Curriculum defines targets in specific terms for all pupils and not only for those to be entered for particular public examinations.

The Government argued that the publication of pupils' results in the Standard Assessment Tasks and the General Certificate of Secondary Education would enable teachers, parents and other interested parties to see how children were progressing individually and in relation to the national average. The published results would help schools plan future

provision for their pupils, and would enable parents to choose between schools [see GB DES 1991a]. The Government recognised that the best results did not necessarily indicate the best schools, because

it is difficult to assess the success of the school in building on the pupil's individual capacities and experience – the value that the school has added, and enabled the pupil to add, in developing them.

(GB DES 1985:para 12)

However, its emphasis has generally been on quantifiable indicators and successive Secretaries of State have generally been reluctant to allow published results to be adjusted to take account of input indicators, such as assessments of pupil ability on admission to a school, or criteria of social or economic deprivation. Independent research into ways of demonstrating the 'value added' by schools is being undertaken.

In addition to reports on the school as a whole, the Government has instituted formal rights of access by parents to information on their own child(ren). Statements of special educational needs were introduced in 1983, in accordance with Section 7 of the Education Act 1981, which entitled parents to request an assessment and to see the report. The Data Protection Act 1984 gave parents the right to see their child's school record, subject to certain safeguards. Schools are now obliged to produce a written report each year, recording each child's progress and, where relevant, results in Standard Assessment Tasks (GB DES 1990a). Whilst the format of such reports is at the discretion of schools, the Government has sponsored pilot studies on Records of Achievement and has issued model formats of report cards and National Record of Achievement Folders to all schools to promote their use (GB DES 1990).

Section 77 of the Education Act 1944 placed a duty on the Secretary of State to secure regular inspections as appropriate or desirable by Her Majesty's Inspectorate (HMI) and others. The same section empowered LEAs to inspect their own establishments. One of the trends of education policy during the 1980s was the requirement for more formal HMI inspection of the performance of pupils, teachers and educational institutions and systems. However, the Education (Schools) Act 1992 transferred responsibility for inspections from LEAs to governing bodies and set out the framework for inspections of each school at four-yearly intervals in England and at five-yearly intervals in Wales. These inspections are carried out by inspection teams, led by a Registered Inspector, acting under contract to Her Majesty's Chief Inspector of Schools in England or Her Majesty's Chief Inspector in Wales. The reports of the inspection must be made available to designated people. The governing body (together with the LEA, with respect to the schools

which it maintains), must establish and implement an action plan to overcome any deficiencies identified in the course of the inspections and report on progress at its annual meeting for parents. LEAs are responsible for quality assurance in the schools which they maintain and for taking initial action in any of their schools which a formal inspection finds to be failing to provide appropriate education for its pupils.

National Education and Training Targets have been developed by the social partners and adopted by the Government. These are intended to serve as a stimulus for personal and professional development, and as a framework for measuring the individual's and the nation's progress. There are four Foundation Learning Targets and four Lifetime Learning Targets, which are expressed primarily in terms of learning, competences and experience accredited by National Vocational Qualifications, initially at three levels.

Teachers' performance and accountability

It could be argued that the shift of teacher responsibility, from the identification of and provision for pupil needs to the 'delivery of the national curriculum', has resulted in a role which is largely executive rather than professional. Such rationalisation is consistent with the increased emphasis on the efficient delivery of a service within a restricted budget. Equally, the selection, deployment and appraisal of staff by non-professionals is facilitated by a standardised unambiguous job description. Staff development courses (especially those subsidised by Central Government grants) have tended to concentrate on the development of general management skills for head teachers and on the preparation for new teaching programmes and methods associated with TVEI, GCSE and the National Curriculum.

Teachers' salaries above the main professional grade are no longer expressed purely in terms of posts of responsibility, but rather in terms of performance and incentives. The governing body's discretion to make payments above the main professional scale to recruit and retain staff with specific subject specialisms is not new, but it has been formalised in the School Teachers' Pay and Conditions Act 1987 and subsequent legislation and Orders. The Government has expressed its commitment to the principle of performance-related pay for teachers and some pilot schemes have been established.

Similarly, whilst the informal appraisal of performance in association with promotion is well established, such appraisal is now formalised and extended to all staff, independently of any promotion procedures.

Cost-effective provision

Local Authorities have been forced to make efficiency savings or cuts in 'programmes of lower priority', 'to restrain pay increases for their employees and also look for possible savings in their manpower', so that resources could be reallocated to policy priorities which are acceptable to the Government. Where exhortation failed, the Government implemented rate capping legislation and preferential targets for low spending authorities which, it argued, would help bring about a more equitable distribution of expenditure on schools between LEAs (GB DES 1985:para 218).

Another approach was through the Audit Commission's advice to Local Authorities on the effective provision of public services, and studies specifically in the area of education (GB DES 1985:para 282). The Government claimed widespread support for a new funding mechanism and for more systematic and purposeful planning of in-service teacher education (GB DES 1985:para 175).

The Education Reform Act 1988 introduced Local Management of Schools (*see above*) to improve the quality of teaching and learning by enabling governing bodies and head teachers to make more effective use of the resources available to them.

Consumer satisfaction

Reference has already been made to the Government's attempt to harness parental support for raising educational standards through a market forces model. The Government also sought to 'strengthen the accountability of the governing body to every parent' (GB DES 1984:para 85). The reasoning behind this approach was that

professional processes are publicly financed, and serve parents, employers and the community as a whole as well as the pupils. They ought therefore be subject to a measure of lay oversight and control. That role should be discharged by the governing body, to be composed ... of persons, especially parents, who may be expected to take a close interest in the affairs of the school in question and reflect the views of those whom the school serves most directly.

(GB DES 1984:para 42)

Government strategies included access to information, the right to appeal against school placement, the right to representation on the governing body and the right to complain about the failure of the LEA and/or the governing body to meet the curricular requirements of the Education Reform Act 1988. The Parents' Charter, issued in 1991, encouraged parents to be in active partnership with the school and further clarified parents' specific rights [see *GB SI 1981* and *GB DES 1991b*]. This is in line with the Government's promise that progressively more power will be given to the consumers. The introduction of an annual governors' report and an annual meeting for parents holds both governing bodies and head teachers accountable to parents for the way in which the school meets the needs and wishes of parents, pupils, the local community and employers.

Impact of policies on evaluation

A framework for competition between schools has been created through cost-centred funding and the national prescription of objectives expressed in terms of pupils' participation and attendance rates, curriculum and forms of assessment. Thus it will be possible to hold schools accountable for their achievements in terms of pupils' test results, attendance and staying-on rates, and to compare these with their level of funding.

The appraisal of individual teachers may highlight the fact that many of them were trained for a role which differs considerably from that which they are now asked to fulfil. Their discretion to adapt the content and method to the needs of individual children has been reduced and it is arguable that a teacher cannot be held solely accountable for the failure on the part of individual pupils to achieve the prescribed standards.

The implementation of the Government's policies will reveal, perhaps for the first time, the actual level of funding at the disposal of any given school, from both public and private sources. However, a simple division of funding by pupil numbers to give the cost-effectiveness of individual schools is not a fair indicator, since certain items of expenditure, such as heating and provisions for (unstatemented) special needs, vary considerably between schools. It is therefore feared that Government policies may lead to unjust comparisons being made between schools.

8. CONCLUSION

The principal difficulties inherent in the provision and evaluation of a public, statutory service on the basis of consumer demand is that of dissonance in expectations and the values underlying them. Pronouncements, both public and private, reveal differences between groups and between individuals within groups as well as variations in emphasis over time. Anecdotal evidence abounds of parents who, whilst very satisfied with their child's education, nevertheless subscribe to the view that 'education is a mess and standards have fallen'. Similarly, improved examination results are attributed by some to falling standards rather than to improved pupil performance.

The quantitative nature of the evaluation in the Government's performance indicators, together with the redesignation of the role of the teacher, appear to reflect a greater concern with economy and efficiency than with effectiveness and individual pupil need. Whilst schools may pursue objectives and publish achievements other than the above, such activities would supplement but not replace the Government's requirements. There is a risk that the competition for school places might force many schools to focus on a very narrow set of objectives, to the detriment of the general development of their pupils, without securing a corresponding increase in the level of parental satisfaction.

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ABBREVIATIONS

CSE	Certificate of Secondary Education
CTC	City Technology College
DES	Department of Education and Science
DFE	Department for Education
ERA	Education Reform Act 1988
GB	Great Britain
GCE	General Certificate of Education
GCSE	General Certificate of Secondary Education
GEST	Grants for Education Support and Training
HMI	Her Majesty's Inspectorate
LEA	Local Education Authority
LMS	Local Management of Schools
OFSTED	Office for Standards in Education
SI	Statutory Instrument
TGAT	Task Group for Assessment and Testing
TVEI	Technical and Vocational Education Initiative
WO	Welsh Office



LEGISLATING FOR CHANGE

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