

B.B. /

PRIME MINISTER

HMI Reports

You will remember that Department of Education wished to announce their proposed arrangements for the publication of HMI reports ahead of producing their general policy statement in response to the Rayner scrutiny. You said that you would prefer to see the whole package. Education have now returned to the question (see their submission at Flag A and their letter to Sir Derek Rayner at Flag B).

I have spoken to Mr. Priestley about this and the advice of the Rayner Unit is that if Education feel strongly about the need to make an announcement about HMI reports in advance of the general policy statement, there is insufficient cause to continue to hold them back. Mr. Priestley's advice is at Flag C; it is to the effect that substance of the DES announcement about publication should go ahead but that Education should be encouraged to produce their general policy statement as quickly as possible.

Do you agree that we should reply as Mr. Priestley proposes?

Yes mb TH

4 November 1982

PERSONAL



file
JH

Mr FLESHER

SCRUTINY OF HM INSPECTORATE OF SCHOOLS

I attach a copy letter from Sir Derek Rayner to Sir Keith Joseph on the draft policy statement, of which you already have an advance copy. It will be interesting to see how DES react, if at all.

2. As the next submission to the PM may not be copied here, I suggest that you have an eye to this when you get the papers. We shall of course be glad to advise on the text if the PM wishes.

CP

C PRIESTLEY

24 November 1982

Enc: Copy letter and comments



MANAGEMENT AND PERSONNEL OFFICE

WHITEHALL LONDON SW1A 2AZ

Telephone Direct line 01-273 3508
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18 November 1982

23/11

The Rt Hon Sir Keith Joseph Bt MP
 Secretary of State for Education
 and Science

for Keith

SCRUTINY OF HM INSPECTORATE OF SCHOOLS

Thank you for your letter of 27 October on the publication of HMI reports, which arrived during my absence abroad. I have also seen your private secretary's separate correspondence with the Prime Minister's private secretary. I am delighted that you and your colleagues have gone ahead with publication and you have my warmest good wishes in dealing with the flak which the usual stage army will now no doubt put up.

2. Thank you also for your letter of 9 November and for the draft written Answer and the policy statement. I have set out detailed comments on these in the enclosed note.

3. The policy statement does not seem to me to be the clear call that was indicated by the Prime Minister in her private secretary's letter of 14 June. It also demonstrates the difficulty of rolling up in one text both a Ministerial statement of policy and a managerial action document. My firm advice would be to separate the two and to make the policy statement much shorter and punchier.

4. I have made several comments and suggestions in the enclosed note which I hope you will find helpful. Looking back at the papers, I think you might like to remind yourself of the outline you suggested for an action document in Annex B of your letter to me of 6 April. I think the same points apply to a policy statement. You envisaged achieving the following, both in the context of your "twin objectives of securing effective education and value for money" (letter, ii on page 2):

- "(1) Better perception of HMI's role, its strengths and limitations.

(2) A more outward looking and outward reaching inspectorate.

(3) (Within its educational functions) a more cost-conscious inspectorate - for itself and the system.

(4) A more actively catalytic body even than at present."

5. I suggest that those points, together with the ones I have made in the enclosure, would produce a more convincing statement.

6. I am copying this to Nicholas Edwards.



Derek Rayner

Enc: Comments on the drafts of 9 November

COMMENTS ON THE DRAFTS OF 9 NOVEMBER 1982

Length and Language

1. The draft statement seems much longer than it need be. The managerial content should be separated off into an action document.

Main Impressions

2. The draft statement contains some good things. The most important of these is the publication of the reports of inspections, which is a tremendous step in the right direction (paras 13,14 and 23). My main impressions are, however, these:

- (1) The text looks very similar to earlier descriptions produced by the inspectorate. Some phrases seem to have been inserted ("financial aspects", para. 2, "value for money", para. 8), but these are unconvincing. Importantly, the text ends on the note that the inspectorate exists "to serve the education system" (para. 26).
- (2) The text does not capture the Prime Minister's firmly expressed views (her private secretary's letter of 14 June 1982) that "the national inspectorates should be seen to be working on behalf of families, whose opportunity for a good education is too dependent on chance and locality, especially those who have few to speak up on their behalf"; and that the Government should show it "intends to redress the balance between 'the people's interest and that of bureaucratised professionals' ".
- (3) Overall, the text gives the impression that the inspectorate is something of a state within a state. Ministers and their other officials appear somewhat secondary. References to inspectors' independence of professional judgment seem entirely sensible, but

those to its institutional independence seem overdone.

- (4) Inspectors are referred to at one point as a high cost resource (para. 23), but no data are given. My advice would be to set the references to "financial aspects" and "value for money" in their context by giving the cost of the relevant parts of the education service; giving the cost of the inspectorate; and indicating clearly by what sort of selective action the inspectorate is going to promote greater value for money and better management.

The Prime Minister's Points

3. I believe that the policy statement would be greatly improved if it put the main emphasis on Ministerial targets for inspectorial action rather than on the inspectorate. The text too often gives the impression that inspection and the inspectorate are somewhat neutral or passive; para. 8 says, for example, that the inspectorate "takes account" of the Government's current expectations and "has regard to the system's professional vitality and commitment". I would prefer the text to put far more weight on the points referred to by the Prime Minister in her private secretary's letter of 14 June, namely:

- (1) Inspection of particular schools and colleges (paras. 9 and 10): It is not clear what is meant by an "inspection visit" in para. 9. The reference to "formal reporting" in para. 10 appears to focus on institutions which are "an exemplar of type, style or achievement". This is fine up to a point but should not the statement expressly say that the inspectors will visit schools etc which give cause for concern? (This is tucked away at the end of para 11.)
- (2) Standard of provision in particular local authorities (para 11): Also fine up to a point, but there appears to be a heavy qualification in the implication

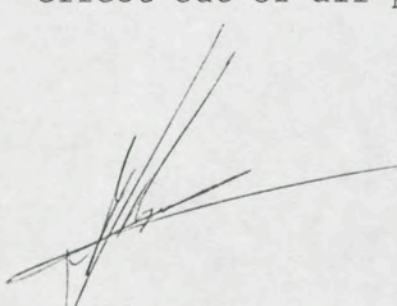
that reporting on an authority may not be the "best use of scarce resources". This sits oddly alongside the reference to the primary responsibility of the authority providing education (para. 11) and also the later reference to the two inspectors who work with each authority (para. 21).

- (3) Prompt publication of full reports (paras. 13, 14, and 23):
This is excellent.
- (4) The problems of educating the children of immigrants:
This is dealt with, not in the policy statement, but in the draft Answer which says only that the inspectorate is "looking at the efficient education of ethnic minority pupils" (para. 2).
- (5) Managing the large schools or colleges:
This is also dealt with in the Answer, where the inspectorate is described as "concerned with the known problems of managing large schools and colleges". I am glad that it is. But it is much more important to say what it is doing and with what intended effects.
- (6) Follow-up to national reports:
The Answer refers to this in terms of speeding up written reports and publications. The references to follow-up in para 16. of the statement are warm and that on the allotment of 10% of "inspection visits" to follow-up is very welcome.
- (7) Staffing: I remain agnostic on the size of the inspectorate (para. 7), which will presumably be or has been discussed with the Chief Secretary. My present points are these:

- (a) As I said in my report to the Prime Minister of 27 May (para. 5), inspectors are expensive, but a cadre of 489 in England and Wales is or should be of formidable potential. In my judgment it gets the emphasis wrong to speak of "scarce resources" (para. 11). It may be necessary to re-think the coverage of the inspectorate's activity (para. 9 for example), specifically and clearly concentrating effort on what matters most.
- (b) I welcome what is said about recruitment (para. 19), but think that it should either go much more clearly in the direction pointed by my minute of 27 May (para. 20(3)) or indicate a firm intention to do so. The six proposed attachments are a step in the right direction but they affect little more than 1% of the inspectorate, in England and Wales.

Effectiveness

4. I hope that the publication of reports will greatly increase the effectiveness and standing of the inspectors. Indeed, if done with resolution, it promises to have a radical and lasting effect out of all proportion to the effort involved.



Derek Rayner

November 1982

Education, Policy, P43

2 NOV 1982





MANAGEMENT AND PERSONNEL OFFICE

WHITEHALL LONDON SW1A 2AZ

Telephone Direct line 01-273 3508
GTN 273
Switchboard 01-273 3000

18 November 1982

The Rt Hon Sir Keith Joseph Bt MP
Secretary of State for Education
and Science

Ken Keith

SCRUTINY OF HM INSPECTORATE OF SCHOOLS

Thank you for your letter of 27 October on the publication of HMI reports, which arrived during my absence abroad. I have also seen your private secretary's separate correspondence with the Prime Minister's private secretary. I am delighted that you and your colleagues have gone ahead with publication and you have my warmest good wishes in dealing with the flak which the usual stage army will now no doubt put up.

2. Thank you also for your letter of 9 November and for the draft written Answer and the policy statement. I have set out detailed comments on these in the enclosed note.
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Derek Rayner

November 1982



DEPARTMENT OF EDUCATION AND SCIENCE

ELIZABETH HOUSE, YORK ROAD, LONDON SE1 7PH

TELEPHONE 01-928 9222

FROM THE SECRETARY OF STATE

T Flesher Esq
Private Secretary
10 Downing Street
LONDON SW1

16 November 1982

Dear Sir,

JF
16/12.

PUBLICATION AND FOLLOW-UP OF HMI REPORTS

Thank you for your letter of 12 November.

My Secretary of State was grateful for the Prime Minister's agreement that his announcement should go ahead. As you will see from the enclosed text of the Answer, which is being given today, the second paragraph has been amended to take account of the suggestion in your letter.

I am copying this letter to Adam Peat (Welsh Office), John Lyon (Northern Ireland Office), Muir Russell (Scottish Office), David Heyhoe (Lord President's Office) and Elizabeth Thoms (Rayner Unit).

Yours ever,

Inogen Wilde

MRS I WILDE
Private Secretary

S
P AND ANSWER

QUESTION: To ask the Secretary of State for Education and Science, whether he will now make public the reports made to him by Her Majesty's Inspectorate on their formal inspections of educational institutions; what arrangements he proposes for following up such reports; and if he will make a statement.

ANSWER: The current practice of issuing such reports in confidence to the maintaining authority or the proprietor, the governors, and the head or principal of the institutions concerned, deprives parents and others of information which is of interest and concern to them. Knowledge of the strengths and weaknesses revealed in the Inspectorate's independent assessments is valuable to those institutions which are not for the time being the subject of such assessments; to the local authorities to maintain them, and to those working in the education system as teachers, governors, teacher trainers, and in other capacities, as a means of spreading good practice and fresh thinking and identifying and correcting short-comings. Citizens, including parents, those who pay for the inspected institutions through rates and taxes, and others who use them should also have the right to see these assessments. My rt hon Friend the Secretary of State for Wales and I have therefore decided to give public access to all reports on formal inspections which issue from January 1983 onwards.

We have also decided to introduce more systematic arrangements for ensuring that there is effective follow-up action in relation both to the institutions inspected and, where reports raise matters of wider general application, to other institutions maintained by the LEA. Action rests in the first instance with the LEA and governing body of the institutions concerned but we shall be ready to consider what we might appropriately do to assist the LEA in relation to such action and, in particular cases, to take up Ministerially with the LEA concerned matters raised by individual reports which are of exceptional concern or importance. These arrangements will apply in the first instance to reports of formal inspections of maintained schools and FE institutions providing full-time education for students aged 16-18 inclusive.

The procedures for giving effect to these decisions must take account of the formal position of those responsible for, and working in, the institutions reported on and of the fact that the reports are issued to specified persons. To this end we are consulting the local authority and teacher associations and other interested bodies about the procedural details.

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16 NOV 1982



MR FLESHER

PUBLICATION AND FOLLOW-UP OF REPORTS BY HM INSPECTORS OF SCHOOLS

Mrs Wilde's letter to you of yesterday attaches a revised draft of the inspired Question and Answer. I have marked the changes in the attached copy; they occur in paragraph 2.

2. You may now think that enough is enough, but if it is not intolerable to comment again I suggest that you might draw attention to the rather awkward difference between the active form of the first sentence in paragraph 2 and the somewhat inert form of the second.

3. If one actually follows the draft letter of consultation, as Mrs Wilde suggests, I would include a reference to the Ministers' action on reports which are of "exceptional concern or importance".

4. I attach a possible draft letter to Mrs Wilde.

5. I also attach a copy letter from Sir Keith Joseph to Sir Derek Rayner and the draft "policy statement", of which you may like to have advance warning.

Sp

C PRIESTLEY

ENCS: Marked copy of Mrs Wilde's draft
Draft letter to Mrs Wilde
Copy letter from Sir Keith Joseph draft policy statement

12 November 1982

REVISED PQ AND ANSWER

QUESTION: To ask the Secretary of State for Education and Science, whether he will now make public the reports made to him by Her Majesty's Inspectorate on their formal inspections of educational institutions; what arrangements he proposes for following up such reports; and if he will make a statement.

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DRAFT OF 12 NOVEMBER 1982

Mrs Imogen Wilde
Department of Education and Science

PUBLICATION AND FOLLOW-UP OF HMI REPORTS

Thank you for your further letter of yesterday.

[As I mentioned to you on the 'phone], there is a slightly awkward change of tone between the first and second sentences of the revised paragraph. The Prime Minister also thinks that as the Answer is based on the letter of consultation it might as well include that letter's reference to action by the Secretaries' of State as follows (in which changes from your text are marked):

"We have also decided to introduce more systematic arrangements for ensuring that there is effective follow-up action in relation both to the institutions inspected and, when reports raise matters of wider general application, to other institutions maintained by the LEA. The LEA and the governing body of the institutions concerned are in the first/^{instance}responsible for action but we shall be ready to consider what we might appropriately do to assist the LEA in relation to such action.

We shall ourselves take up with the LEA matters arising out of a report which are of exceptional concern or importance. These arrangements will apply in the first instance to reports of formal inspections of maintained schools and FE institutions providing full time education for students aged 16-18 inclusive."

I am copying this to Adam Peat/Welsh Office), John Lyon (Northern Ireland Office), Muir Russell (Scottish Office), David Heyhoe (Lord President's Office) and Elizabeth Thoms (Rayner Unit).

TIMOTHY FLESHER

DRAFT WRITTEN ANSWER TO ACCOMPANY PUBLICATION OF DETAILED POLICY STATEMENT

1. My right hon Friend the Secretary of State for Wales and I are today publishing a policy statement on the functions and future operations of HM Inspectorate. This follows the completion earlier this year of a Scrutiny of the Inspectorate within the programme coordinated by Sir Derek Rayner, the report of which will also be published. Copies of the statement and the Scrutiny report are available in the Library/Vote Office.

2. The prime functions of the Inspectorate are to assess by inspection standards and trends in schools (including the independent sector), teacher training and further education in all its forms, to advise the Secretaries of State on the state of the system nationally and to help all those concerned in or with education to improve its performance.

3. In order to advise me the Inspectorate has to keep an eye on the system as a whole. But its effectiveness depends in large part on the selection of priority targets for inspection to match current educational and policy concerns. Thus for example the Inspectorate is at present working closely with the Liverpool education authority. It is caught up with a whole range of activities concerned with the initial training of teachers and the subsequent experiences of new teachers. It is looking at the efficient education of ethnic minority pupils and of children with special educational needs. It is involved with the redirection of local authority higher education being undertaken by the National Advisory Body. It has a particular interest in the current proposals concerning the curriculum of less academically motivated pupils, examinations at 16+ and 17+, and the educational implications of the Youth Training Scheme. And it is concerned with the known problems of managing large schools and colleges.

4. In all its activities the Inspectorate's audit function will be more sharply focussed so as to ensure that all concerned with the provision of education have the clearest possible understanding of

the extent to which the education system on the ground matches the legitimate aspirations of the community and provides value for money. The production of the Inspectorate's written reports and other publications, which, given its small size, are central to its effectiveness in influencing practices and standards in the education service at large, will be speeded up. Formal inspection will continue at the current rate, which results in the issue of some 260 reports each year in England and Wales.

5. Copies of the policy statement are being sent to each LEA and to the wide range of other bodies concerned with the provision of education.



FILE

EDUCATION

EMSW

10 DOWNING STREET

From the Private Secretary

12 November, 1982

Dear Imogen,

Thank you for your letter of 11 November, enclosing a draft Parliamentary statement on the publication and follow-up of HMI reports. The Prime Minister has agreed that the announcement should now go ahead. She has also suggested that the draft answer might be amended to take account of the reference in the letter of consultation to follow-up action by the Secretaries of State in cases where reports raise matters which are "of exceptional concern or importance".

I am sending a copy of this to Adam Peat (Welsh Office), John Lyon (Northern Ireland Office), Muir Russell (Scottish Office), David Heyhoe (Lord President's Office) and Elizabeth Thoms (Rayner Unit).

Yours,
T.

TIMOTHY FLESHER

Mrs. Imogen Wilde,
Department of Education and Science

KM

Cont. March

DRAFT WRITTEN PARLIAMENTARY QUESTION AND ANSWER FOR THE PRIME MINISTER

Ministerial Responsibilities

Q. To ask the Prime Minister which government department has responsibility for the Directorate of Overseas Surveys.

A. The Directorate of Overseas Surveys is at present a Special Unit of the Overseas Development Administration and is located at Tolworth. On 8 July 1981 my Right Honourable Friend the Minister for Overseas Development announced the acceptance of the main recommendations in the scrutiny report for the Directorate of Overseas Surveys. In implementing those decisions it has been decided that the functions and complement of the reduced Directorate will be transferred to the Ordnance Survey at Southampton. Some work will be contracted out to the private sector. The phased implementation of the move will commence on 2 April 1984 and will be completed by March 1985. This phasing will facilitate work at Tolworth on existing contract commitments.

I should like to pay tribute to the hard work of the Directorate. With the objective of assisting developing countries and British dependencies with survey and mapping needs, the Ordnance Survey will provide advice to the Overseas Development Administration, supervise overseas contracts with the private sector, conduct surveys and mapping of less straightforward projects, undertake training and be a source of information to overseas governments and the UK private sector. The costs of these activities as agreed by, and on behalf of, the Overseas Development Administration will be met on the basis of full costs from the aid programme. With effect from 2 April 1984 Ministerial responsibility for the staff to be transferred will pass from my Right Honourable Friend the Secretary of State for Foreign and Commonwealth Affairs to my Right Honourable Friend the Secretary of State for the Environment.

2 pps 1



DEPARTMENT OF EDUCATION AND SCIENCE
ELIZABETH HOUSE, YORK ROAD, LONDON SE1 7PH

TELEPHONE 01-928 9222

FROM THE SECRETARY OF STATE

1, Mr Rickett
2, Prime Minister

T Flesher Esq
Private Secretary
10 Downing Street
LONDON SW1

Agree proposed
announcement?

November 1982

JF

Dear Tom,

Yes - 1
as I have we have
6-archived with
the Scottish
Office

11/11

PUBLICATION AND FOLLOW-UP OF HMI REPORTS

Thank you for your letter of 8 November.

The draft policy statement on the work of HM Inspectorate in England and Wales has now been agreed by Sir Keith Joseph and he has written to Sir Derek Rayner inviting his comments. He hopes to be in a position to put the policy statement forward to the Prime Minister very soon - certainly by the end of this month.

On that basis my Secretary of State is grateful for the Prime Minister's agreement to the proposed Parliamentary written statement which he would like to make early next week. I attach a revised text of the proposed answer. You will note that it fills out what is said about action on reports in line with the letter consulting the local authority and teacher associations which reflects the statutory position. The Secretary of State hopes that the revised text is acceptable.

On public access, we shall be amending the consultation letter to take account of the Prime Minister's points. The principle of open public access is of the essence of what my Secretary of State proposes and is not for negotiation with the education bodies. The purpose of consultation is to ensure that the detailed procedures we propose are practicable and will deliver.

I am copying this letter to the recipients of yours.

Yours ever,
Imogen Wilde

MRS I WILDE
Private Secretary

REVISED PQ AND ANSWER

QUESTION: To ask the Secretary of State for Education and Science, whether he will now make public the reports made to him by Her Majesty's Inspectorate on their formal inspections of educational institutions; what arrangements he proposes for following up such reports; and if he will make a statement.

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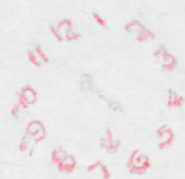
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EDUCATION: POLICY ON EDUCATION EXPENDITURE
HM INSPECTORATES OF SCHOOLS

Pt 3.

7 NOV 1982





Copy No 16:

Sir Derek Rayner
Miss Kelly (HMIS)
Miss Mackay (CPAS)

DEPARTMENT OF EDUCATION AND SCIENCE

ELIZABETH HOUSE, YORK ROAD, LONDON SE1 7PH

TELEPHONE 01-928 9222

FROM THE SECRETARY OF STATE

Sir Derek Rayner
Management and Personnel Office
Old Admiralty Building
Whitehall
LONDON SW1A 2AZ

9 November 1982

Dear Derek,

SCRUTINY OF HM INSPECTORATE OF SCHOOLS

... I can now let you see a draft (copy enclosed) of the policy statement which Nicholas Edwards and I propose to make on the functions and future work of HM Inspectorate.

As I explained to you before, the statement is not an action document of the kind conventionally prepared following a Scrutiny but it contains many references to action already taken or now being taken. It addresses the recommendations in the Scrutiny Report, save those which have been overtaken by events. We see the document as providing a permanent point of reference about the nature and functions of the Inspectorate. Some of the important points which the Prime Minister in particular wished to see given emphasis are more in the nature of immediate priorities than continuing functions and I therefore propose to refer to them in my announcement to Parliament when the policy statement is published. By this means I can give them greater emphasis than if they were included in the document itself: a draft of what I propose to say is enclosed.

I should like to send the draft statement to the Prime Minister as soon as possible with the aim of then consulting the Trade Union Side before publishing the document at the end of November. I should therefore be glad if you would let me have your reactions in the next few days.

I am copying this letter to Nicholas Edwards.

Edward Heath

A POLICY STATEMENT BY THE SECRETARY OF STATE FOR EDUCATION AND SCIENCE AND THE SECRETARY OF STATE FOR WALES ON THE WORK OF HM INSPECTORATE IN ENGLAND AND WALES

1. This policy statement follows a scrutiny of the Inspectorate within the programme co-ordinated by Sir Derek Rayner completed in July 1981 and published in 1982. It describes the functions of the Inspectorate and sets out the ways in which the Inspectorate's work will develop. The Scrutiny largely reflected developments in progress within the Inspectorate. Other developments were stimulated by the process of scrutiny or followed the report. Yet others have arisen and will arise from the need for the Inspectorate to adapt its work to current needs in education and government. This statement is not concerned with the work undertaken by the Inspectorate in the European Schools, abroad or in the Channel Islands and the Isle of Man, or in establishments or services for which the Home Office, the Ministry of Defence, the Department of Health and Social Security or the Department of Employment are responsible.

THE FUNCTIONS OF THE INSPECTORATE

2. The Inspectorate's work relates to the whole of the education system in England and Wales, and includes the independent as well as the maintained sector, except for the universities (other than parts of the adult education and teacher training undertaken by them) and independent further education colleges. From its origins in 1839 the function of the Inspectorate has been to inspect and report in order to assist the Government in the exercise of its responsibilities in relation to education, including the financial aspects, and in the process to contribute to the improvement of what lies within the purview of such inspection. The Inspectorate has an unfettered right of access to any institution which it may inspect.

Purpose language

The present statutory basis for the Inspectorate's work is section 77 of the Education Act 1944. This requires the Secretary of State to cause inspections to be made of primary, secondary, special and independent schools, establishments of further and higher education and of teacher training and adult education; and provides that the inspections should be carried out by inspectors appointed by HM The Queen for this purpose.

4. Thus the Inspectorate's work derives from the service it gives to the Secretary of State in connection with his statutory responsibilities for the education system. It provides an informed and independent basis of evidence and judgement upon which the Secretary of State, and local education authorities, teachers, governors, teacher trainers, parents, students and others can base policies and decisions. On the basis of inspection throughout the system by Inspectors each working across the whole country the Inspectorate:

- a. assesses standards and trends and advises the Secretary of State on the performance of the system nationally;
- b. identifies and makes known more widely good practice and promising developments and draws attention to weaknesses requiring attention;
- c. provides advice and assistance to those with responsibilities for or in the institutions in the system through its day-to-day contacts, its contributions to training and its publications.

In discharging these functions the Inspectorate pays special attention to the needs of the teacher training system, since the Secretary of State has a statutory responsibility for the supply of an adequate teaching force.

5) The Inspectorate has no executive power. But it exercises a control function, delegated to it by the Secretary of State, in respect of advanced (ie higher education) courses in further education; and advises the Secretary of State in the exercise of his supervisory functions in relation to independent schools. The Scrutiny noted developments in the overall management of public sector higher education and advised reduction in the involvement of the Inspectorate in the detailed administration of course approval. First steps have been taken to this end. Further progress depends on policy decisions and the working of the National Advisory Body for Local Authority Higher Education. But, whatever the changes, as the Scrutiny records, the continuing responsibility of central government needs to be underpinned by the independent professional advice based upon detailed acquaintance with the system which the Inspectorate provides.

6. The Management Review of the Department of Education and Science, published in 1979, noted the importance attached throughout the education system to the independence of the Inspectorate; and the extent to which its effectiveness was bound up with this. The Scrutiny recommended that the Inspectorate's professional independence of judgement was essential and must be preserved and protected. The Secretaries of State endorse this recommendation and the present arrangements for securing the independence of the Inspectorate. The Inspectorate forms a hierarchy under the Senior Chief Inspector which is within the Department of Education and Science but parallel to the rest of it, and has in practice been allowed substantial freedom to develop and manage its professional response to the needs of the Secretary of State and the services it offers to the rest of the system. The Senior Chief Inspector has the right of direct access to the Secretary of State. HMI in Wales are seconded to the Welsh Office from the Inspectorate. The Welsh Inspectorate is under the direction of the Chief Inspector for Wales, who has direct access to the Secretary of State for Wales. While the decision to publish what HM Inspectors write rests with the Secretaries of State, any of their work which the Secretaries of State decide should be published is published as the Inspectorate wrote it.

Cost? And efficiency?

(4) 7. The Secretary of State for Education and Science has reviewed the size of the Inspectorate in England in the light of the Scrutiny. He has concluded that having regard to both the Government's manpower policy and to the effective discharge of the Inspectorate's essential functions the present complement of 430 should be sustained. Numbers in post will be brought up to complement as a matter of urgency. The Secretary of State for Wales is considering the size of the Inspectorate in Wales in the context of reviews of staffing within the Welsh Office.

INSPECTION AND AUDIT

8. Inspection, which takes a variety of forms according to its target and purpose, is the tool by which the Inspectorate audits the system to assess the extent to which nationally, locally or in individual institutions it offers an adequate service and secures value for money. In particular, inspection seeks to reduce the element of local chance which can put parents and pupils at a disadvantage within the national education service. Inspection is also the means for assessing the capacity of the system at any given time to undertake new tasks which the Secretaries of State may require. By inspection the Inspectorate builds up a national view of what is possible and what is commonly achieved. In its assessments, it takes account of the range of current expectations of the Government, employers, parents, students and the public as to what the system should be achieving, and has regard to the system's professional vitality and commitment.

9. The Inspectorate's remit extends to over 32,000 maintained and independent schools, some 580 establishments of further and higher education, about 5,400 evening institutions and some 14,000 courses run by Responsible Bodies in adult education, and the youth service (as well as the education provision made by the education service in over 100 penal establishments, together with a range of community facilities with an education component). In choosing targets for inspection the

Inspectorate has to give priority to those matters which by reason of performance or policy are of most urgent concern, and at the same time achieve a coverage sufficient to keep the Inspectorate informed of the state of all parts of the system and allow prompt advice to be given to the Secretaries of State on any aspect of it. The rebuilding of the Inspectorate's audit function in recent years has led to a scale of inspection visits which, with the present complement, enables one-fifth of primary schools, three-quarters of secondary schools and one-fifth of independent schools to be visited in the course of a year; and the great majority of FHE institutions and all initial teacher training establishments to be visited each year. The Scrutiny identified apparent differences between the conduct of inspection visits in schools and those in FHE. In line with its findings, it is now a clear requirement that general inspectors of FHE colleges assemble and act upon the various reports of specialist inspectors as they affect either the individual institution or its role within the authority. The practice of assessment is common to schools and FHE. After every inspection visit the Inspectorate discusses its assessments of what it has seen with those concerned with the institution and, where appropriate, the LEA or other providing body, and records them for the Inspectorate's file on the institution.

10. A proportion of inspection time leads to reports to the Secretaries of State which are issued to the institutions and LEAs concerned, thus providing a formal record of the Inspectorate's findings and an agenda for action. This formal reporting is necessarily time-consuming and therefore used particularly either where institutions provide an exemplar of type, style or achievement, or where the written record is judged the best means of achieving change of direction or improvement. Some 260 such reports (over 200 on schools) were issued in England and Wales in 1981. This level of productivity is planned to continue and, as the Scrutiny suggested, the time of Inspectors working mainly in further and higher education will be shifted towards this type of formal inspection.

(7) Each LEA has a general responsibility for the delivery of educational services to its population. The Inspectorate has recently reported on all aspects of education in two LEAs and on one district of another. The reports were based on recent inspections of all kinds in the LEAs' institutions. Further reports of this kind will be on whole LEAs or some part, as appropriate to the individual case. Full reports on three LEAs will be completed during the academic year 1982-3. This approach, which accords with the Scrutiny's recommendations, will demonstrate the extent to which this is the best use of scarce resources. As in the case of inspection leading to formal reports on institutions, authorities will be chosen for report on a basis of perceived need or exemplification.

How?

USE OF THE FINDINGS OF INSPECTIONS

12. The value of the Inspectorate's work to the nation depends in large part on the use the Government and the rest of the education system make of its findings, communicated both formally and informally. The Secretaries of State regard the ✓ Inspectorate's work as indispensable to the process of making educational policy. The Inspectorate's findings are of immediate interest to those responsible for the work of the institution inspected. They are also relevant to others in the system whose tasks are similar, and are likely to interest many others in education and those who are its clients or interested in its standards.

13. To meet this range of interest a variety of publications based on inspection has, as the Scrutiny recorded, been put on the market. But the potential benefit of issued reports on formal inspections of institutions has been limited by the fact that, for the last 30 years or so, they have normally been made available to the LEA, governors, and head or principal of the institution concerned (and through them to other staff) on an "in confidence" basis. The Secretaries of State announced [on] that from [1 January 1983] such reports, written on the same basis as at present, would be publicly available.

(8)

In the majority of cases action on reports of formal inspections is taken by the institutions and LEAs directly concerned. The Secretaries of State consider that still more effective use could be made of such reports. They announced [on

(9)] that from [1 January 1983] the Department would ask LEAs to indicate to him within three months of the issue of reports of formal inspections of maintained schools or further education institutions providing for full-time students aged 16-18 inclusive the action to be taken in the light of the report's findings. This procedure will shortly be extended to reports on other institutions. There may be (10) occasions when the Secretary of State will himself wish to call the attention of LEAs to matters of particular concern or of wider national interest which are revealed through such a report.

(11) 15. The Inspectorate will continue to publish consolidated inspection reports on national aspects of the system, to enable those within it to see how their work measures up against what is done elsewhere; to spread good practice; to promote a better understanding of problems and weaknesses; to stimulate the discussion and implementation of remedies; and to encourage fresh thinking and development.

(12) 16. The Inspectorate will also continue to play a part in securing an appropriate response from the system to its reports and publications to the extent compatible with the need for further inspections elsewhere. Its programmes reflect the Scrutiny's recommendation that the need in particular is to fuel and prime LEAs and their advisory services and to focus as clearly as possible the Inspectorate's various contributions to in-service training. Going beyond the Scrutiny, the Inspectorate will give particular attention to discussing with institutions providing initial teacher training the relevance to their work of its findings. In all some 10% of inspection visits will continue to be follow-up visits. Time will also be allocated to discussing the implication of reports with the examining and validating bodies and key professional associations.

With what intended effect?

(13) .. In order to increase the impact of publications by the Inspectorate, more copies will, as the Scrutiny recommended, in future be distributed free in appropriate cases. The Inspectorate will also take suitable opportunities to work alongside (14) local authorities, their advisers, institutions and teachers on selected and pressing development work, as currently for example in respect of the secondary curriculum or *Meaning?* the implementation of the 1981 Act.

MANAGEMENT AND USE OF INSPECTORS' TIME

18. The Secretaries of State agree with the Scrutiny on the nature of the problem of managing and using Inspectors' time to the best advantage, and on what the arrangements to this end should achieve. It is this desired outcome which will determine the further action to be taken and the use made of the detailed suggestions offered by the Scrutiny, all of which have been considered and are being kept under review. The effectiveness of the Inspectorate requires a timely, selective programme of inspection consistent with policy needs and the skills of the Inspectors in post; clear and speedy communication within the Inspectorate, with the education system and with its clients; and efficient relationships with the rest of DES and the Welsh Office, with the LEAs and other providers, with the teacher training system and the many validating and change agencies. All these require time, as does the regular *Yes!* review of the Inspectorate's effectiveness. *Indications?* But inspection will continue to take the largest share of all. In particular the Inspectorate will, as the Scrutiny suggests, (14) keep its committee structure under review to reduce the time spent in meetings, while preserving their role in communication and management within a field force. The size and mode of operation of the recently formed Policy Group for Inspection, criticised for unwieldiness by the Scrutiny, will be kept under review by its chairman and the Policy Steering Group.

As education and the demands made on it change, so must inspection targets; and not only the management of time but also the staffing of the Inspectorate must continually adapt without putting at risk the values for which the Inspectorate must stand. The education system requires of Inspectors, whatever their position in the Inspectorate, credibility based on qualification, experience and performance. It follows that Inspectors must have opportunities for specific personal achievement and these will be provided, subject to the needs of the Inspectorate's total programme of work. It is particularly important that the Inspectorate is flexible enough to bring in teachers and others who are leaders in their field, not only as now for half a lifetime's service, but for shorter periods. Within its present complement, the Inspectorate cannot cover all aspects of the education system in equal depth, and uses occasional professional assistance for single inspections or longer periods. Experience of inspection can be shown to have been of value to those so attached when they return to their jobs. It is proposed, as the Scrutiny suggests, to increase the number of such short-term attachments for specific tasks, particularly in areas of rapid obsolescence like information technology or to match an initial spurt of development or to tackle an acute problem. The aim is to arrange within the next six months for perhaps six such attachments for periods of up to three years. Either secondment of, or exchange of post with, teachers, advisers or educational administrators might be the means used and these will be discussed with the local authority associations.

(15)
Fix, but
what about
it now?

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20. The planning of the necessary programmes of inspection, in-service training of teachers and foreign travel is the collective responsibility of the six Chief Inspectors under the Senior Chief Inspector in England and of the seven Staff Inspectors with the Chief Inspector in Wales. Decisions about each term's programme, the continuation or cessation of existing elements and the introduction of new ones, together with longer-term planning, will continue to reflect:

(17) But

decisions

are for

the future?

How

kind?

- i. Government policy and the routine needs of DES and the Welsh Office, whether transmitted through existing planning mechanisms or through day-to-day contact with the Secretaries of State and their other advisers.
- ii. The Inspectorate's knowledge (from inspection and contact with the LEAs) of performance on the ground which identifies growth points and areas of concern.

The implementation of these decisions falls to Divisional Inspectors, Staff Inspectors and individual HMI, who have both specific assignments and interlocking responsibilities. Individual inspectors are kept informed of priorities within their special assignments. HMI check with administrators, and their other direct clients, the value to them and to the system of different programmed activities. Various means of making such checks are likely to be appropriate.

21. All inspection informs the providers. As the Scrutiny suggests, the two Inspectors who in each LEA form the link with that Authority have a special importance in creating relationships of confidence and respect which enable inspection to bear fruit. Account will be taken of this in planning future programmes and assignments, due allowance made for each Inspector's limitations of time and expertise and the overall demand for Inspectors' time.

22. As the Scrutiny suggests, one of the six Chief Inspectors has the responsibility of overseeing the central programmes and the load on the Inspectorate and individuals within it. When the outcome of present developments in the education and training of 16-19 year olds is clearer, fresh consideration will be given to the Scrutiny's recommendation that a Chief Inspector should be appointed to co-ordinate inspection in this important area, now shared by the Chief Inspectors for Further Education and Secondary Education, and, where necessary, co-ordinated by the Senior Chief Inspector. As regards the Scrutiny's recommendation about increased cross-border

Inspection in England and Wales, every attempt will be made to extend present working arrangements to the advantage of both parts of the Inspectorate.

23. Procedures for publishing inspectors' findings and ordering their information in a readily accessible way are, as the Scrutiny suggests, less well advanced, particularly for further and higher education, than those for planning inspection.

(19) The Inspectorate's aim will be to issue reports on individual institutions within six months of the inspection and to accelerate procedures for the bringing together of information and for publication. To facilitate this, it will be essential to

(20) maintain adequate levels of support staff, though no increase can currently be

(21) contemplated. Further analysis will be made by HMI and the Department's Establishments Branch of the benefits of electronic typewriters, distant conference facilities, facsimile transmission and word processors. There is scope for the introduction of modern technology into the work of the Inspectorate and a modest start will shortly be permitted with the computerised register of visits, which was planned at the time of the Scrutiny. With Inspectors a high-cost, scarce resource and no immediate prospect of increasing either support services or the data support unit, special

(22) consideration will be given to the supply of efficient modern equipment for essential tasks such as the standing record of inspectors' qualifications and experience and the construction of the inspection programme. In the light of such developments

(23) attention will be given to the Scrutiny's recommendation that the Inspectorate and the Department should jointly consider the division of tasks between Inspectors and support staff with a view to providing more guidance and training for both groups on what is expected of them.

24. Such innovations would enable Inspectors to spend more time on tasks which make best use of their professional skills and build relationships which lead to action on the ground. If the Inspectorate's findings are to have an impact upon policy formation and execution, sufficient time must be given to good liaison with the

Secretaries of States' other advisers. The Inspectorate's impact on the rest of the stem similarly requires sufficient time. There is no set formula for the effective use of time for either purpose. As regards the former, the Inspectorate will continue to participate in both the permanent and the ad hoc machinery set up within the DES and Welsh Office for the consideration and formulation of policy advice to the Secretaries of State; and its members, like their generalist and specialist colleagues in the DES and Welsh Office, will continue to foster the good informal working relationships which are the Inspectors' most effective tool in this context. As regards relations with those outside the DES and Welsh Office and the LEAs, the Inspectorate must, within the limits of available time, maintain links with a wide range of validating and advisory bodies, educational agencies and representative groups with great collective power to shape education. Priority will be given to those organisations, like the National Advisory Body for Local Authority Higher Education and the Manpower Services Commission and the validating and examining bodies, who are most actively involved in the development and implementation of the Government's current policies.

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LEA ADVISERS AND INSPECTORS

25. The agency best placed to influence the institutions maintained by a LEA is the local advisory service which it appoints. All LEAs appoint a number of advisers, mainly in relation to schools, who in some cases act also as inspectors. The functions of local advisers or inspectors vary widely, as do the scale and scope of their work; they may include administrative tasks concerned with such matters as the employment, redeployment and promotion of teachers. A local advisory service which inspects helps its LEA to be well informed about the institutions it maintains and to devise sound policies for assisting it in the discharge of its responsibilities; it also helps those who work in the institutions to improve their professional performance. This locally based work is complemented by that of HM Inspectorate in

(26)
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i national role. Whatever their locally assigned duties, a strong cadre of advisers and inspectors greatly enhances the contribution which the work of the Inspectorate makes in any local authority. The Secretaries of State intend shortly to explore with the local authority associations whether there is a need for them to offer guidance on the role of local advisory services and the most effective co-operation between them and the Inspectorate. The recommendations of the Scrutiny will form part of the agenda.

CONCLUSION

Really? 26. The policy set out in this statement preserves the essential attributes of the Inspectorate which have stood the test of time but strengthens and sharpens its capacity to serve the education system. It is the continuing duty of those with responsibility for the education system - Government, LEAs, individual institutions and those who work in them - to assess the adequacy of the educational standards achieved and the effectiveness and efficiency with which resources are being used. The new policy of wider publication of HMI's evidence will make the education system and its clients better informed and enable both to play their proper part in achieving effectiveness.

Education, Policy on Expenditure P17

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1 NOV 1982

Mr FLESHER



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PUBLICATION AND FOLLOW-UP OF REPORTS BY HMI INSPECTORS OF
SCHOOLS

withf
TAM
1. We had a word on the phone this morning about the letters from Mrs Wilde to you of ~~2~~ November and Sir Keith Joseph to Sir Derek Rayner of ~~27~~ October.

2. I attach a draft letter for you to send to Mrs Wilde which, I hope, catches the flavour we had in mind.

3. The letter is self-explanatory but you may find it helpful to be reminded that

(1) The start date of January 1983 is given at the end of para. 1 of the draft Answer; and

(2) the "public access procedures" are set out in paras. 5 - 7 of the note on "Procedures for making public reports of formal inspections" annexed to the draft PQ enclosed with Mrs Wilde's original letter of 21 October to Mr Peat (Welsh Office).

4. Incidentally, if you wanted to end your letter to Mrs Wilde on an up-beat, you might add, as a new para. 5, that the PM is pleased that copies of the issued reports will be sent to the press and media (see para. 5 of the note on procedures). The fact is that, if we stick to our guns and get these proposals past the massed bands of the education stage army, we shall have struck a real blow for the rights of parents and pupils, far too long neglected and over-borne. Some such words as the following might do:



"5. Finally, [in which case delete "Finally" from para. 4], the Prime Minister has asked me to say that she welcomes the emphasis given in the intended new proposals to public access, including providing the press and media with copies of reports. She thinks this a most timely and welcome strengthening of the rights of families. She very much hopes that the Education Departments will stand firmly to this point of principle in discussing the intended procedures with the local authority and teacher associations and others."

sp

C PRIESTLEY
4 November 1982

Enc: Draft letter as indicated

Mrs Imogen Wilde
Department of Education
and Science

PUBLICATION AND FOLLOW-UP OF HMI REPORTS

1. Thank you for your letter of 2 November, which I have shown to the Prime Minister, together with your Secretary of State's letter of 27 October to Sir Derek Rayner. ~~This answer covers both letters, as it is the Prime Minister who has raised the question of timing and (in part) of content.~~

2. To avoid further misunderstanding, I should repeat that the Prime Minister would very much prefer to consider the Government's position on the inspection of schools and other establishments in the round. The scrutinies were commissioned as long ago as October 1980 and the Prime Minister was promised a draft policy statement over four months ago. ~~The Prime Minister hopes that this long drawn-out story can now be brought to an early conclusion.~~

3. Mrs Thatcher has considered your Secretary of State's arguments for going ahead with a statement to Parliament so as to protect the intended start date of January 1983. She favours making early progress on this issue, although she would have preferred to see it dealt with as part of the whole, and is prepared to agree that the statement may be made, provided you can assure me that she will receive the draft policy statement by the end of this month.

4. ^{On} ~~Finally,~~ two points of detail

- The Prime Minister sympathises with what you say about action on reports (para. 2 of the revised Answer) but she thinks that the draft should be filled out, using the words of your letter, as follows:

"We have also decided to introduce more systematic arrangements for ensuring that there is effective action, in relation to the institutions inspected and to the local authority's other institutions, both by the local authority and as appropriate by the Education Departments."

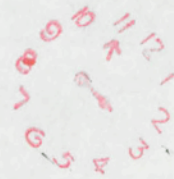
- On public access, the Prime Minister's agrees that copies of reports should be obtainable through both the local authority and the Education Departments as their point of origin. There should be a clear presumption that the local authority would make copies available and a number of additional copies should be supplied automatically to the local authority for deposit in the institution, public libraries etc. And it should be known that copies would be available from the Education Departments' head and appropriate local offices.

Take in suggested para 5 ~~insert~~ a.
page 2 of C. Prestige memo.

5. I am copying this letter to Adam Peat (Welsh Office), John Lyon (Northern Ireland Office), Muir Russell (Scottish Office), David Heyhoe (Lord President's Office) and Elizabeth Thoms (Rayner Unit).

T FLESHER

Govt. Mach : Rayner Prog PT 12



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