

Value for Money (VfM) Report for the South East Wales Education Achievement Service: Phase 1

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Rod Alcott

Betsan O'Connor

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Executive Summary

Over a five-year period from 2018 to 2021 the EAS has commissioned an annual Value for Money (VfM) report based on an evaluation of its performance against the following criteria:

- **Economy:** minimising the cost of resources used while having regard to quality (inputs) – spending less;
- **Efficiency:** the relationship between outputs and the resources used to produce them – spending well; and
- **Effectiveness:** the extent to which objectives are achieved (outcomes) – spending wisely
- **Equity:** the extent to which service provision is needs based to remove barriers and facilitate equal opportunity – spending fairly; and
- **Sustainability:** an increasingly standard consideration within the context of the Well Being of Future Generations Act (WBGFA) – spending for the long term.

The combined effects of resource constraints, changing contexts, shifting focuses, pandemic impact and methodological evolution, are reflected in the overall judgements that were arrived at. These judgements, in chronological order are as follows:

- *EAS is providing good value for money because overall outcomes are improving from a reduced level of spending as a result of resources being used efficiently, fairly and in a sustainable way; with consequent benefits for schools and pupils across the region. (2018)*
- *EAS is providing good value for money in terms of those aspects that are within its control – notably economy, efficiency, equity and sustainability. However, collective action involving EAS, its constituent local authorities and school leaders is required to address concerns over educational outcomes across the region and those schools that are underperforming. (2019)*
- *EAS continues to provide good VfM in terms of the services it provides to schools across the region as evidenced by improved outcomes for some learners and the achievement of the other objectives that it has set for itself. (2020)*
- *EAS continues to provide good VfM in terms of the services it provides, as evidenced by its successful mitigation of the impact of the pandemic on schools, learners and its own workforce. (2021)*
- *The overall conclusion is that the refined S2S delivery model represents good value for money. (2022)*

However, there have been significant changes to the context in which the EAS now operates, and consideration of these changes led the Board to reconsider its approach and opt for a two-year study to replace the annual studies previously undertaken. The revised approach comprises two phases with Phase 1 being undertaken in 2023 and Phase 2 in 2024.

These contextual changes can be summarised as:

- budget pressures;
- socio-economic climate;
- post pandemic recovery; and
- changes to Welsh Government published outcome measures.

While each of the above contextual changes provides a significant challenge to service provision, the EAS considers that budget pressures represent the biggest challenge facing them.

Given the changes to Welsh Government published outcomes evidence gathering for Phase 1 of the study, undertaken in 2023 and reported on here, was broader than previously, and required greater focus on first hand data capture from schools and settings. This was gathered from a sample of 40 schools across the region utilising a refined methodology for capturing learner progress in schools. The process of evidence gathering was compromised by limited access to schools because of Action Short of Strike (ASOS) following on quickly from pandemic related school closures.

Measurement of progress will be facilitated by the fact that findings from the Phase 1 evidence gathering exercise have resulted in further refinement to the approach that will enhance the quality of evidence gathered in Phase 2. This, coupled with greater confidence in schools using new measures of progression, leads to expectation that a more comprehensive picture will emerge from Phase 2.

A substantial body of research has identified that schools becoming effective learning organisations is fundamental to learner progress. The EAS organisational vision aligns with this therefore, the central focus for Phase 2 will be gathering evidence on the extent to which schools are making progress towards becoming Schools as Learning Organisations (SLO). Significant work has been undertaken – based in part on the findings from evidence gathering in Phase 1 – to develop a model that will enable this progress to be measured and enable well-informed judgements to be made in relation to VfM.

The EAS uses its Business Plan arrangements to support its own organisational learning as well as monitor its agreed Business Plan objectives. This year, a known period of change in policy expectations and post pandemic response was utilised to drive and signal upcoming changes. Most significant in a value for money context was the changes to capturing learner progress alongside a critical budget setting context. This year all Business Plan objectives were met, and a mature self-evaluation and risk management approach has been strengthened with an improved focus on impact for 2023-25.

It is not clear whether all stakeholders fully understand the overlap between building system and school level organisational capacity. The underpinning added value of building schools' own capacity through its school leaders to work on behalf of the EAS as partners in the improvement journeys of practitioners and schools has not been fully quantified. Nevertheless, its impact is recognised, and work is underway to strengthen the coexistence and capture the impact.

The priority given by the EAS to strengthen the accuracy of school's own self -evaluation threads through all aspects of its work. Schools with the greatest support needs are supported explicitly. Nevertheless, the new arrangements are yet to fully capture the necessary details consistently on groups of learners, or groups of schools with differing support needs.

Some of the main findings at the end of this first phase are highlighted below:

- The EAS' support to schools is leading to strengthening capacity and capability at both practitioner and leader levels.
- The challenge to respond to the socio-economic climate and lower school attendance has seen most schools intensify their efforts to support vulnerable groups of learners.
- Nearly all schools have identified variation in aspects of teaching or in the performance of groups of teachers. Nevertheless, the honest evaluations and subsequent open conversations with EAS colleagues shape bespoke support.

- A few schools have established a secure baseline from which to monitor and evaluate pupil progress.
- Too many School Development Plans have priorities which do not focus on the outcomes of learning and teaching. However, they have focused on the compliance aspects of delivering the curriculum over this last year.
- Only a few schools have minimised the variation in the quality of teaching sufficiently to impact on the outcomes for all learners.
- Nearly all clusters have worked together to better interpret new expectations of evaluating learning and supporting learner participation in benchmarking their own progress. In a few schools, engaging learners in understanding progression and tracking their own progress is enhancing learning.

Introduction

Early in 2023 a decision was taken by the Education Achievement Service (EAS) Board to change the approach to reviewing, and subsequently reporting on, their performance in providing value for money from the publicly funded services they provide. The decision to change the approach stemmed from recognition of the need to:

- reflect the changed context within which the EAS now operates, and will continue to operate in the foreseeable future;
- rectify potential missed opportunities to learn from previous studies, and
- focus on learning and ongoing improvement.

The changed context relates to several factors, the most significant of which are budget pressures, the socio-economic climate, post pandemic recovery and changes to Welsh Government published outcome measures. The EAS considers that financial stability and sustainability represent the biggest challenge facing them and the financial context is dealt with in more detail in the next section of this report.

The Board recognised that there were missed opportunities to learn due to an historical focus on providing assurance based on a retrospective evaluation of discrete areas of service provision, rather than a broader on-going evaluation.

Taken together, these considerations have led the EAS to commission a longer and broader study that will inform both the next business planning cycle and medium-term financial planning. This also allows for the work on Intent, Implementation, Impact to be included within the organisation's Value for Money (VfM) principles.

Consequently, the decision has been taken to replace the annual Value for Money (VfM) study that has been undertaken for the last five years¹ with a phased study that will be undertaken across two years. This will involve establishing a baseline of evidence to be reported on at the end of the first year of the study with a summative VfM assessment – informed by the findings from Phase 1 – to be reported on at the end of the second year.

Not only has the duration of the study been extended but so too has its scope and timing. In relation to scope, previous studies, constrained by resource limitations, have involved a focus on discrete areas of service provision rather than a wider evaluation of VfM. The intention now is to capture the impact on learners in its widest sense by looking at learning, progress and attainment.

In relation to timing, previous retrospective studies have covered financial accounting years (April to end March) rather than academic years and been reported on in the summer. This has meant that, for example, examination outcomes included within reports reflected the previous summer's results rather than those for the summer in which the report was written. The revised two-year study will capture data for two whole academic years in the autumn of 2023 and 2024. This will ensure that progress data, included within reports, is more up to date.

The two-year approach also allows for learning and improvements to processes and data collation within the life of the report. For example, the way evidence of impact is collected, collated and recorded has been amended to strengthen the range, quality and quantity of information available.

¹ A brief summary of the findings from previous annual reviews is included as Appendix 1 to this report.

Financial Context

From their inception in 2012 regional school improvement consortia have been subjected to a common funding formula from constituent local authorities. While the formula has remained unchanged there has been, for the EAS, a continuous year on year reduction in this core funding as illustrated by the table below.

	2016/2017	2017/2018	2018/2019	2019/2020	2020/2021	2021/2022	2022/2023
LA Funding	£3,376,653	£3,275,353	£3,209,847	£3,145,651	£3,098,465	£3,036,496	£2,960,887
Trading Income	£601,974	£447,460	£0	£0	£0	£0	£0
Total Core Funding	£3,978,627	£3,722,813	£3,209,847	£3,145,651	£3,098,465	£3,036,496	£2,960,887
Grants	£56,082,261	£52,033,572	£51,991,066	£49,022,408	£51,996,479	£60,830,062	£60,023,836
TOTAL	£60,060,888	£55,756,385	£55,200,913	£52,168,059	£55,094,944	£63,866,558	£62,984,723
Delegated to Schools	£50,384,126	£46,481,315	£48,886,304	£46,142,076	£48,754,009	£58,240,283	£57,562,486
Delegation Rate	90%	89%	94%	94%	94%	96%	96%
Residual Income	£7,668,633	£7,278,655	£6,314,609	£6,025,983	£6,340,935	£5,626,275	£5,422,237

Over the seven-year period covered in the table there has been an agreed 12.31% reduction in Local Authority (LA) funding which, along with the elimination of trading income, has resulted in a reduction in total core funding of some £1.018m or 25.6% in absolute terms; although in real terms, when inflation and pay awards are taken into consideration, the reduction has been in excess of 30%.

The annually agreed reduction in Local Authority funding represents efficiency savings on the part of Local Authorities that have typically resulted in a reduction, for the EAS, of around 2% per annum in core funding. The agreed reduction has been implemented on a consistent basis across each of the constituent Local Authorities, typically between 0.5% -3% per annum. However, these reductions are dwarfed by the 10% cut agreed for 2023-24 which, when combined with anticipated pay awards and general inflation, will result in a very significant reduction in real terms. One consequence of this reduction, despite the non- filling of certain vacancies, will be a decrease in the delegation rate to schools.

Over the same time period the amount of grant money received from the Welsh Government reduced year on year up to 2019-20 but has increased over the last two years with a very significant increase of £8.83m or some 17% between 2020-21 and 2021-22², the amount has dropped slightly in 2022-23 by £806k, and will significantly drop in future years while the Welsh Government pass more of the grants from the Regional Consortia Grants into the LA Education Grants. When reductions in LA funding, elimination of trading income and increases in grant money received are added together the increase in total funding is £2.92m which represents a 4.87% increase in absolute terms over a seven-year period. However, when inflation and pay awards are taken into

² Additional grant funding represented part of the Welsh Government's response to the impact of the pandemic and curriculum reform.

account, there has probably been very little or no increase in real terms between 2016/17 and 2022/23. From 2023/24 onwards the scale of the anticipated real terms reduction in income means that, despite achieving £1m savings from the deployment of school based School Improvement Partners (SIPs), financial stability and sustainability represents the biggest challenge facing the EAS.

When increases in the rate of delegation to schools are taken into account then residual income spent on running the organisation, including staffing costs, fell by some £2.25m or 29.3% from 2016-17 to 2022-23. Reduced spending has inevitably resulted in a considerable reduction in staffing numbers, with the number of Full Time Equivalent (FTE) staff reducing from 111 in 2016-17 to 64 in 2022-23, taking the total reduction in FTE staff reduction to 47 over the period 2016-17 to 2022-23, representing a reduction of almost 42.4% in staffing levels. This staffing reduction is a direct consequence of the decision by the EAS to refine its delivery model from a fully staffed central model to a self-improving School to School (S2S) model where schools are funded to provide support and challenge to peer schools within the region.

Overall, the EAS has made significant and regular efficiency savings which support the LAs. These have been made alongside a reducing grant from Welsh Government and the cessation of traded income. Over time, school improvement approaches have been trialled and developed to place greater capacity in schools rather than within the school improvement service. This aligns with the principles embedded in the vision of building a self-improving and learning system across the region.

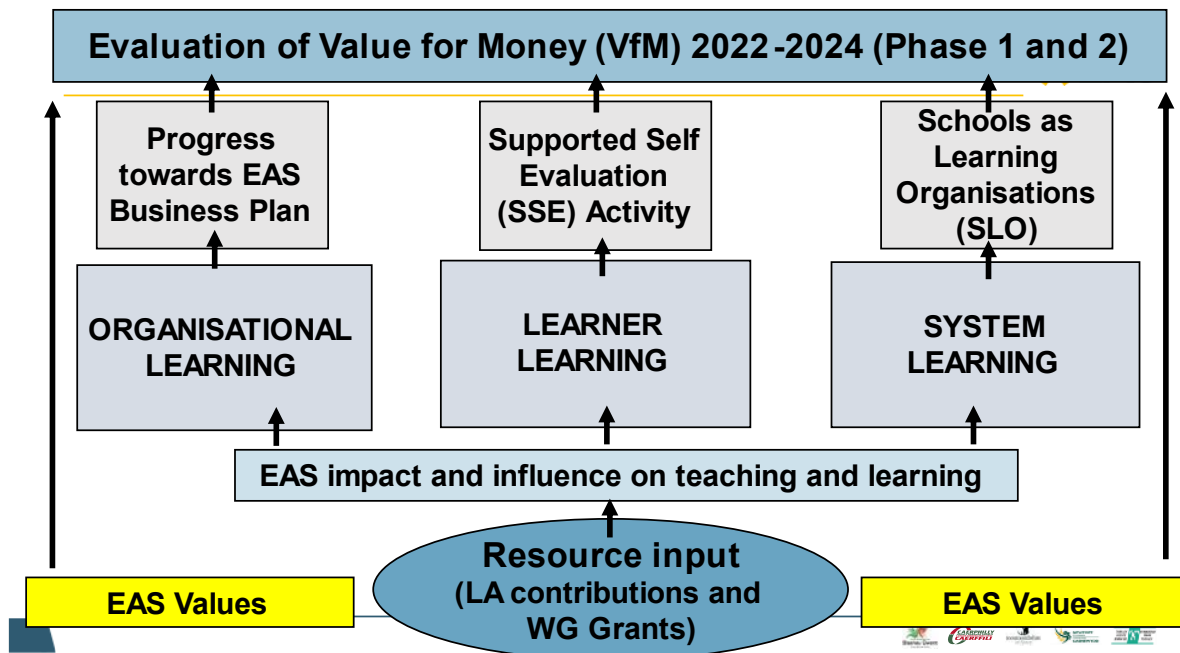
The EAS has shaped its medium-term financial planning around its vision and has over time increased its delegation rates to schools to 96%, placing resources within schools and/or to build system capacity in schools. More recently, during the current business planning cycle (2022-25), the financial planning arrangements, all delivery models, business plan objectives and vision and values dovetail explicitly. The arrangements to evaluate impact under the new policy expectations are yet to fully capture the depth of information necessary to formulate a value for money judgement.

Review Aims

The aim of the review is to bring together the underpinning vision, values and objectives of the EAS and the principles of VfM to reflect the impact these are having on learning. Learning in the context of this review comprises three discrete, but interlinked, areas of learning. These areas are:

- Organisational learning - the progress that the EAS is making towards meeting the objectives set out in its Business Plan
- Learner learning – the impact of supported self-evaluation on learner progress
- System learning – the progress of schools towards becoming learning organisations.

The following graphic provides an overview of the overall approach spanning both phases of the review:



The underlying hypothesis, supported by a substantial body of research, is that improving self-evaluation within schools and supporting progress towards schools becoming learning organisations, are fundamental to improving learner progress. Phase 1 of the review set out to establish a baseline from which to measure progress and to reflect and capture the impact of pandemic related school closures, and Action Short of Strike action³ (ASOS) related access to schools for improvement and monitoring purposes.

Evaluating the impact and influence that the EAS has had, in terms of schools achieving the desired improvement and transition, will be fundamental to a summative assessment of VfM at the end of Phase 2 of the review.

Evidence gathering:

While the findings from the extended study will be based upon analysis of both quantitative and qualitative evidence the gathering of evidence for Phase 1 was confined to qualitative evidence.

Quantitative Evidence:

The changes to publicly available or WG published outcome measures, referred to earlier as contributing to the changed context within which the extended study will be undertaken, will impact upon the analysis of outcome measures. The current position with regard to data availability and use is set out in the following extract from a letter sent out to schools and local authorities by the Director of Education and the Welsh Language at the Welsh Government in March 2023:

‘I would like to reemphasise that the purpose of the AWCDs⁴ is to provide a consistent set of verified data which, alongside each school’s broader set of information, should be used to inform self-evaluation and improvement processes. This data is not to be used in isolation to compare schools or hold schools to account.’

⁴ All-Wales Core Data Sets

Qualitative Evidence:

The gathering of qualitative evidence is essential for evaluating learner progress, particularly given the absence of outcome measures for analysis.

When gathering qualitative evidence, the two essential considerations are those of validity and reliability. Validity is defined as the degree to which you are measuring what you intend to measure. In the context of this study, that necessitated determining an approach to evidence gathering that would enable learner progress to be accurately measured. Reliability relates to the consistent measurement of learner progress based upon the use of the same approach to measurement for all learners within the agreed sample. While reliability is not a guarantee of validity it is true to say that without reliability there can be no validity.

Taking the need for validity and reliability into consideration and recognising pragmatic considerations such as the availability of evidence, the decision was taken to capture information on learning from the EAS intelligence capture system. The primary source of evidence gathering was analysis of Notes of Activity (NOA). These capture activities undertaken in schools but were not generally designed to capture impact on learning⁵. However, there are relevant and useful recordings of activities such as observations, work scrutiny and learning walks included. This information is supported by folders of additional information relating to schools' reviews and visits. In addition, key information on secondary schools, schools causing concern and the annual professional discussions are included.

Having determined what evidence was to be gathered it was also important to determine how the evidence would be gathered. Determination of how the evidence would be gathered required consideration of two factors – the sampling method and the size of the sample. The sampling method chosen was that of probability sampling. This method of sampling involved selecting schools, at pre-determined intervals, from an alphabetical list of all schools within the EAS region.

At the time that the evidence was gathered there were 237 maintained schools within the region, comprising a variety of settings as shown in the table below:

Phase	Number of schools
3-16	2
3-18	1
3-19	1
Infants	6
Junior	4
Nursery	1
Primary	181
PRU	4
Secondary	31
Special	6
Total	237

The original sample size agreed with the EAS was 30. However, the sample size was increased to 40 to ensure the gathering of sufficient meaningful information on learner progress. There was no

⁵ Amended following Phase 1 of the review to better capture impact

specific sampling of sector, Local Authority or medium of teaching; as the sample size was sufficient to capture these aspects.

Review findings

The findings from Phase 1 of the review are set out in three distinct sections:

- *Organisational Learning*
- *Learner Learning*
- *System Learning*

Organisational Learning - the progress that the EAS is making towards meeting the objectives set out in its Business Plan

Each aspect of the EAS' core business contributes to building the capacity of schools as effective learning organisations. Each priority within the business plan therefore has a specific focus and aims to build capacity within schools and settings, as well as the system as a whole. There is an inevitable positive overlap and dovetailing of arrangements to support schools and settings. This section highlights the key findings, based on analysis of quarterly and annual updates to the Business Plan, for each Business plan objective contributing to the overarching vision.

Business plan objective 1
School Improvement: Provide support to schools and educational settings aligned to need. Create and facilitate collaborative networks of professional practice.
Enable. Professional discussions with schools start on the evaluation and collaboration process. Where local authorities and school improvement partners work well together, senior and middle leaders in schools benefit from dialogue to enhance their own evaluations of progress and improvement. Overall schools and LAs have confidence in the school's own understanding of areas for development, and subsequent improvement priorities.
Clarify. Making role and responsibilities clear has been a consistent feature in the EAS' support to schools causing concern or in the Team around the school arrangements. Clarifying what good looks like and a clear focus on expectations helps schools reduce in school variation. In a few schools, new systems have been expanded across whole school, and capacity has been increased through remodelling structures.
Embed. Bringing consistency of approach or expectation. Using systems and approaches across the whole school. Systems and routines become established.
Schools can describe their increased confidence in looking to other schools for support. Working with other schools for professional learning and as SIPs does build confidence

Business plan objective 2

Leadership and Teaching: Provide professional learning and support for the development of leadership and teaching across the entire workforce

Enable. In nearly all schools causing concern, investing time and support to build the capacity of middle leaders has allowed the embedding of new practices. Making sure that the capability and confidence is in the hands of that group of practitioners has consistently opened the door to improvement. In all the secondary schools causing concern in the region, the investment in middle leaders has been significant. Better self-evaluation and understanding of expectation has led to competence and clarity to focus on teaching. The accuracy and relevance of monitoring, evaluation and review systems have led to steady steps towards improvement. Often, the implementation of change, improvement and action is dependent on the enabling role of middle leaders.

Governance. Overall, strengthening arrangements and accountability by using performance management arrangements well to support middle leaders has supported sustaining improvement.

Transform. Many schools can demonstrate at least three factors of SLO. The most significant factor in bringing about change is accurate, transparent self-evaluation. This is most prominent as a trigger for change as practitioners behaviour and attitudes to learning and teaching change.

Empower. Enabling other schools and settings to learn and access professional learning from each other allows staff to see practice elsewhere. They also become empowered to engage with other schools more widely and are open to support from peers as a norm. In time schools who have previously received support are using their skills and knowledge to support and guide others. Informing system change through sharing effective practice and approaches.

Business plan objective 3

Curriculum for Wales: Provide professional learning and support for Curriculum for Wales.

Vision. All schools have engaged with the EAS to establish and shape a new vision and to guide them through the changes necessary for Curriculum for Wales. It is too early to evaluate the transformational nature of this change. In the best cases, governors and learners have been fully engaged and this has enabled the whole school to shape new vision and expectations.

Innovate. The professional learning delivered, which has focused on pedagogical approaches to improving approaches in line with CfW expectations, has allowed many staff to take risks and develop their teaching approaches for the first time. Where staff have been able to take on the required approaches, learners are benefiting. However, a few staff, especially those in schools causing concern have been reluctant to explore and test new ways of working. Undoubtedly, the proportion of collaboration, professional development and engagement in learning by practitioners has been unprecedented, as all school prepare for changes. It is not clear yet whether or not the commitment to resources, time and allocation has permeated sufficiently the practices/ teaching and learning. Nevertheless, recent work with clusters has shown that there is readiness to work together at cluster as new routines become established. The work in clusters has developed to inform system change through sharing effective practice and approaches. It has highlighted how building momentum around challenges can facilitate better collaboration and growth in knowledge.

Empower. Schools and settings have been able to learn and access professional learning together. For example, in the early years settings this approach of peer led and joint training has supported practitioners on improvement journeys.

Business plan objective 4

Health Wellbeing and Equity: Provide professional learning and support for health, wellbeing, vulnerable and disadvantaged groups

Change. Where school leaders invest and support the strategic implementation of programmes to support vulnerable learners, learners are supported to make better progress. The suitable range of programmes available to schools from the EAS focus on leading and facilitating change in attitudes, practice and policy. In the best cases, schools are able to create a positive climate for change. The range of provision to support schools with wellbeing and to support vulnerable learners requires changing culture and expectations. It is too early to review impact as yet but in the best cases schools have worked to shape new visions and expectations.

Equity and Fairness. Practitioners are supported to better guide and enable all learners, including those with ALN, with protected characteristics and vulnerable groups. Engagement in learning is good but the progress and impact on learners is unclear. In many schools, the work is rightly taking time and approaches are careful so that staff and pupils gain confidence.

Explore. Practitioners are supported to build strong purposeful relationships with pupils and parents. Steady steps towards transformation in behaviour and attitudes to learning and teaching are identified at school level but are yet to be confirmed.

Business plan objective 5

School Governors: Provide a broad range of professional learning, support and advice for school governors.

Change. In recent years, influencing improvement in school governance and accountability has been largely focused in schools causing concern or schools where the EAS has been required to help manage complaints or disputes. In these cases, the positive impact on supporting governors to better understand their roles and responsibilities and taking ownership with the senior leadership team, of improvements has led to sustained changes in practice. Governors can create and shape a positive climate for change. When appointing leaders, the EAS supports governors to use these key decisions to drive and influence a vision and expectations in practice. Despite very good feedback on the development programme for new and existing governors, it is not clear whether or not the work is supporting governors sufficiently to drive the accountability arrangements for improvement securely.

Governance. Securing clear governance arrangements and accountability and using performance management arrangements well to support improvement is a thread in professional learning for governors. Where SIPS have supported remodelling structures, retention or recruitment strategies have led to success. However, the impact on sustaining improvement and effective accountability is less clear.

Explore. The broad range of suitable provision exceeds statutory requirements. Investment in high quality learning opportunity have exposed governors to leadership thinking, governance strategies and strategic understanding on school improvement. Nevertheless, we have not yet tested the impact of the approach on influencing SDP monitoring arrangements and driving school level organisational learning.

Business plan objective 6

EAS foundations

Vision. All the EAS' arrangements and systems to drive efficiency are focused on their vision and values. Early indications suggest that these system and process changes are leading to improvements and changing the conditions and approaches to support schools. In general, schools have had the support to build capacity and skills this year to respond to the changes around the new curriculum. Similarly, schools and practitioners were supported during the Covid period to comply with everchanging requirements. This recent track record of responding to need and demonstrating agility establishes secure foundations for further transformation. Shaping new expectations around value for money in response to the change in reporting requirements related to learner outcomes is underway.

Innovate. Staff have been supported to innovate and take informed risks, and additional professional learning has been provided to shape the new approaches. Systems have been refined and refocused to capture information on learner and practitioner impact. Plans are in place to capture precise information this coming academic year.

Learner Learning: - the impact of supported self-evaluation on learner progress

The EAS has taken action to review and refine the way it captures information on learner progress in schools. This has been planned in light of the changes to school performance measures and, following the publication, in June 2022, of Welsh Government's guidance- School Improvement Framework – Evaluation, Improvement, Accountability.

The EAS, began to evolve its approach to capturing learner progress after the joint statement in July 2019 by HMCI, Welsh Government's Director of Education and WLGA's Chief Executive: *We ... strongly advise you to use a broad range of un-aggregated data and information to enable you to discharge your duties when reporting on school performance. Evaluating the performance of individual schools rather than generating aggregated data at local authority level will be more helpful to supporting and challenging individual schools with their improvement.*

However, a period of inevitable and constant change followed. As pandemic related school closures and the relaxation of statutory arrangements came alongside the development of the enabling conditions necessary for the implementation of the Curriculum for Wales. All these factors have combined to create a new space for performance, improvement and accountability.

The EAS has built a collaborative and celebratory approach to recognise the way schools responded to these challenges, and to capture the decreasing reliance on external examinations alone for accountability. This has led to a greater focus on building schools' own capacity and defining improvement and impact through embedded and accurate reflection on learner progress through thorough self-evaluation. This approach underpins the EAS vision to support schools as learning organisations and to build capacity as close to the learner as possible. Nevertheless, the need to support schools to explore and become confident in this new world is significant. Socio economic challenges are increasingly acute for learners and their families and affecting learning. Increasing the quantity of first-hand evidence of learning has also been challenging due to the inevitable reduction in face-to-face contact with schools and learners during the pandemic and subsequent school closures. There are therefore some gaps in the available, up to date information. This year, ASOS has hindered plans to fill these gaps and systematically capture first-hand information.

Nevertheless, the EAS has been able to retain contact with all schools and review the accuracy of school self-evaluation arrangements. Taking a risk-based approach, all schools have engaged in a professional discussion with their Local Authorities and the EAS.

The available information on learning is varied, due to a different focus on aspects or groups of learning in different schools. This bespoke support to schools has been important in responding to need but has left some gaps in the consistent capture of pupils' work.

Schools where risks have been identified have been involved with professional learning, supported self-evaluation and on occasion targeted reviews. In keeping with risk management arrangements, secondary schools causing concern have been prioritised. Therefore, there is a good and detailed oversight of learning in these schools.

The EAS has reviewed at least one aspect of learning in nearly all schools and settings. In general, this has meant working alongside school leaders to evaluate and triangulate the school's own self-evaluation of learning using a range of first-hand evidence. Supported self-evaluation and Review, Refine approaches have provided valuable first hand evidence of teaching and learning. Fewer opportunities to engage with schools due to ASOS have led to fewer opportunities to share and develop practice. In secondary schools causing concern, the collaborative approach has built confidence across school teams to become secure in their own judgments and evaluations.

Where the specific support provided to identified secondary schools has been most focused, improvements in the school's own accuracy of self-evaluation has ensured that the areas identified for improvement are correctly identified and are addressed quickly and systematically. This has led to a larger proportion of learners in more schools making adequate or better progress. Schools have capitalised on the valuable challenge, peer feedback and external view of SIPs to help inform improvement planning.

Overall, most pupils make expected progress from their individual baselines. Where learners make the best progress, there is comprehensive use of base line/ progress data to inform teaching, planning and feedback. Teachers support learners to deepen thinking and there are excellent relationships between pupils and teachers. Where learners make inadequate progress, there is insufficient challenge; questioning is limited and modelling underdeveloped.

The progress of learners living in poverty and/ or in receipt of free school meals is a national priority. On occasion, this is reflected in the priorities and monitoring arrangements for pupil learning. In the schools where pupil progress is notable, there is clear leadership commitment to engaging with vulnerable learners and their families, financial hurdles to access learning resources or opportunities are overcome quickly, and additional support is sought as necessary.

In secondary schools, good quality feedback is supporting progress for learners. In these schools, learners benefit from specific, purposeful, and varied feedback which directly supports their learning and progress.

The development of skills in numeracy, literacy (including Welsh) and digital competence is variable. In the schools where progress is commensurate with age and ability, leaders and teachers are using approaches consistently and to challenge learners.

Many pupils' digital skills have improved significantly as a direct result of the new skills taught and developed during the pandemic. Nearly all pupils make good progress in their learning from their individual starting points. Where learners benefit from a wide range of exciting and stimulating

learning experiences, a wide range of pedagogical approaches are used flexibly and appropriately by classroom staff. However, in and between school variation undermines the progress of too many pupils. This is especially prevalent in schools where evaluation arrangements are underutilised.

Where pupils' learning is consistent and reaches beyond age expectations, they benefit from consistently good teaching. In these cases, teachers demonstrate high expectations for all students and use relevant assessment approaches to check for understanding, track progress and adjust teaching to meet learner needs. In general, effective feedback strategies guide learners on their next best steps in learning.

To support learners achieve, there is effective challenge in areas such as spelling and effective differentiation supports more able and talented learners to make greater progress in core subjects. In the few schools where high levels of challenge support pupils to make greater progress, they can speak, read confidently, and take learning beyond classroom. However, too often reading and writing is generally inconsistent. This affects learners' capacity to engage in further learning.

In early years settings, learners use the engagement with each other and adults to grow their social skills and confidence. In most settings, learners are engaged and develop in line with age related expectations. In the best examples, children can engage in singing and repeat verses. These allow them to partake in social events beyond the setting and grow self-confidence. In a few settings learner progress is less explicit due to limited planning for activities.

Learners enjoy good support for wellbeing in most schools. This means that school leaders often dovetail the most suitable aspects of different strategies. In these schools, the strategies contribute to improved behaviour, learning and attainment. In the best examples, teachers use the available pupil tracking and progress data to inform class level interventions. In most cases, interventions lead to better-than-expected outcomes. This is most prevalent in maths and numeracy. Where schools have taken action to improve wellbeing and use this to strengthen preparedness for learning, all schools have prioritised parental engagement.

Pupils make the best progress in schools where learning and wellbeing are inextricably linked in all school practices. These schools link academic success with wellbeing and understand their learners well. The impact of this is evident in the attitudes of learners. All learners are given the support needed to be successful. The pupils demonstrate positive learning behaviours and strategies to support their learning which results in progress across most subjects. Similarly, the nurture approach to wellbeing and the readiness of pupils to learn despite vulnerabilities is making a difference to learners who need support the most.

For pupils in receipt of free school meals, there is strong pupil progress in lessons, and learners are generally on track to meet targets. However, too often FSM pupils fall below school targets because there is a greater proportion of FSM learners affected by managed moves between schools and higher than average non-attendance.

In secondary Welsh Medium schools, learner progress has accelerated this last year. Recently there has been better and accelerated progress by learners in these schools despite previous concerns. Specific interventions have led to improvements in both preparedness to learn and learning achieved. In primary schools, pupils found that the lack of access to opportunities to speak and use Welsh during the pandemic affected confidence in the classroom. However, this year, pupils appear to have regained their fluency and confidence.

For pupils in receipt of free school meals, there is strong pupil progress in lessons, and learners are generally on track to meet targets. However, too often FSM pupils fall below school targets because there is a greater proportion of FSM learners affected by managed moves between schools and higher than average non-attendance.

This academic year's external examination results as with in 2022, have significant limitations. These include 'Summer Series' exam results only, so do not include any previous awards for early entry; and it is 'All Pupils' only and cannot be split by gender or any other identified grouping. Nevertheless, the trends at school level suggests the stabilising of examination results since the changes to centre assessed and determined grades during Covid. This will help schools better inform their own evaluations of teaching and learning. At school level, information on groups of learners will also contribute to tracking and planned interventions to support learners.

System Learning: the progress of schools towards becoming learning organisations.

The EAS Business Plan sets out how it will implement its vision of: *Supporting and enabling schools and educational setting to thrive as effective learning organisations, learning from each other and the wider educational community.*

This review will establish a base line against which the EAS can begin to evaluate its effectiveness at enabling schools to thrive as effective learning organisations and build a learning system across the region. It will contribute to an interim baseline 2022-23 to inform wider work on efficiency, effectiveness and value for money which will culminate at the end of 2024.

The EAS puts its vision into action through the implementation of its Business Plan. Each objective contributes towards creating a learning and thriving system of schools. The EAS has placed the values and principles of the schools as learning organisations model at the centre of its work.

Responding quickly to changes in delivery methods, policy and expectations during COVID accelerated and facilitated the process of changing approaches and a climate for change within the EAS. This allowed approaches to school improvement to adapt quickly in line with both policy informed practice, best practice and need. Moving to an improvement model primarily driven by peer support and experienced current practitioners has been a feature of the EAS' work for some time. But moving it to the core SIP function has been significant and places the maintenance of recent and relevant practice in the system at the centre.

The EAS recognises that the logistical implementation of its SIP model is variable despite its strengths. There are arrangements to strengthen and secure quality and consistency underway. Progress in reducing this variability is underway and securing improvements. Leaders within the EAS and in schools know and understand that the principles underpinning the approach are secure and will yield system improvement in time. This aspect is key to enabling the vision and to enabling all schools to develop as learning organisations.

Research and critical self-evaluation have informed and influenced the EAS' work. Nevertheless, there are gaps in the evidence available to signify and demonstrate change and impact. School closures related to COVID and ASOS have undermined efforts to strengthen this work. The EAS has put arrangements in place to improve collation and capture during this and the next business planning year.

The proportion of schools formally using the SLO framework to shape and drive improvement are few. However, nearly all schools are using and building on its principles and values to shape and inform their work on Curriculum for Wales and to build leadership capacity.

The most significant aspect of EAS influence on schools' work which has led to improvements is self-evaluation. Many schools in need of significant improvement have built on the own intelligence and the accuracy of their evaluations through specific support from SIPs and partner schools. This aspect underpins the work of schools as learning organisations. All schools engage in dialogue with their SIP annually, which builds on strengthening and triangulating the school's own evaluation of its work.

Many schools can demonstrate at least three features of the School as a Learning Organisation (SLO) model in their progress this academic year. Firstly, in general staff are better informed or can use and understand new strategies to support their work. Secondly, leaders have engaged in support or organisational change and improvement. The most significant factor in bringing about change is accurate, transparent self-evaluation. This is most prominent as a trigger for change.

It is too early to judge the impact of curriculum support on the quality of teaching and learning. Many schools can describe improvements in staff knowledge and on systems to support teaching. But the correlation and impact on learning is yet to be fully captured.

A few schools plan and support vulnerable learners in line with their strategy and vision. However, the impact is yet to be fully captured.

The EAS has used its resources to build capacity and respond to gaps in school capacity during a time of pressure on the system. These decisions have supported the principle of building capacity in and between schools.

Conclusions

Both the policy and financial context within which the EAS delivers its Vision and Business Plan objectives are challenging and changing. Its approach to signalling change in its own work in response to fundamental external influences are captured in the approaches to financial planning and evaluating impact on learning. The arrangements to build capacity within the organisation to better respond to and capture data to support its own self-evaluation and improvement planning are underway. This report captures some early progress and learning.

The EAS uses its Business Plan arrangements to support its own organisational learning as well as monitor its agreed Business Plan objectives. This year, a known period of change in policy expectations and post pandemic response was utilised to drive and signal upcoming changes. Most significant in a value for money context was the changes to capturing learner progress alongside a critical budget setting context. This year all Business Plan objectives were met, and a mature self-evaluation and risk management approach has been strengthened with an improved focus on impact for 2023-25.

Each objective in the EAS Business Plan contributes towards organisational and system wide improvement and capacity building. The underpinning principles of learning organisations permeates the work of the EAS and schools across the region. However, too often, this is not clear to all staff as they undertake their day-to-day work. Where there are senior level decisions made,

such as on the format of school support arrangements or resourcing plans to capture evidence, there is added value to underpin the EAS vision. However, operational level decisions such as those on approaches taken to evaluate learning programmes miss opportunities to draw out the organisational and system level learning. On occasion, the inconsistent explicit focus on the principle of schools as learning organisations means that the EAS can miss opportunities to capture the impact of its work on wider system transformation. Already, plans are underway to strengthen and make these explicit.

It is not clear whether all stakeholders fully understand the overlap between building system and school level organisational capacity. The underpinning added value of building schools' own capacity through its school leaders to work on behalf of the EAS as partners in the improvement journeys of practitioners and schools has not been fully quantified. Nevertheless, its impact is recognised, and work is underway to strengthen the coexistence and capture the impact.

The priority given by the EAS to strengthen the accuracy of school's own self-evaluation threads through all aspects of its work. This begins with the annual dialogue and the identification of school development priorities. Schools with the greatest support needs are supported explicitly. This leads to better quality teaching over time, and this is reflected in the work of learners. Nevertheless, the new arrangements are yet to fully capture the necessary details consistently on groups of learners, or groups of schools with differing support needs.

The EAS' support to schools is leading to strengthening capacity and capability at both practitioner and leader levels. Where this is clearly and explicitly documented, the correlation between intent and impact is clear. It is too early to judge the scale and breadth of this work fully due to the incomplete picture currently available due to ASOS following quickly on from the pandemic related school closures.

A few schools have established a secure baseline from which to monitor and evaluate pupil progress. In these cases, school leaders can review and seek resolutions to hurdles at pupil or teacher level. These interventions lead to improvements in pupil engagement, progress, and achievement.

Nearly all schools have identified variation in aspects of teaching or in the performance of groups of teachers. In these schools, the scale of progress in learning is diluted. Nevertheless, the honest evaluations and subsequent open conversations with EAS colleagues shape bespoke support. Specific teacher knowledge and expertise is highlighted as driving better outcomes in about a third of schools. Physical education, ICT and maths in particular.

Too many SDPs have priorities which do not focus on the outcomes of learning and teaching. Generally, school leaders have over focused on process compliance or implementation rather than on the impact of change. This does not allow the school or EAS to monitor fully the improvement journey of the school and its subsequent impact on pupils learning.

Only a few schools have minimised the variation in the quality of teaching sufficiently to impact on the outcomes for all learners. In these schools, progress is visible throughout the work of pupils, regardless of year group or ability.

The challenge to respond to the socio-economic climate and lower school attendance has seen most schools have intensified their efforts to support vulnerable groups of learners. Specific strategies and programmes to support pupils to make sufficient progress in their learning this year

have influenced teachers and support staff to create a safe climate for learning where possible. Where school leaders have driven whole school interventions, changes in culture and approaches to support vulnerable learners, progression is stronger.

In a few schools, engaging learners in understanding progression and tracking their own progress is enhancing learning. As school leaders and teachers work together in clusters to better interpret new expectations of evaluating learning, supporting learners to see their own progress is a useful / relevant benchmarking tool.

Next Steps – Phase 2

As stated in the introduction to this report the EAS has taken a decision to replace the annual Value for Money (VfM) study that has been undertaken for the last five years with a phased study undertaken across two years. This report covers Phase 1 which was undertaken in 2023. Phase 2 will be undertaken in 2024 and reported on at the end of the year.

The intention of Phase 2 is to build upon the evidence gathering and findings from Phase 1 to enable a valid evaluation of the VfM being achieved by the EAS in relation to a central focus of its activity. This focus is that of supporting progress towards schools and settings becoming effective learning organisations, something which a substantial body of research has identified as being fundamental to improving learner progress.

To arrive at a valid evaluation of the progress schools and settings are making towards realising the seven dimensions within the Schools as Learning Organisations (SLO) model⁶ it will be necessary to gather evidence of:

- the accuracy of schools' self-evaluation and improvement priorities, to determine the extent to which the school's development plan is based on learning from continuous self-assessment and is appropriately focussed on pupil progress and wellbeing;
- the extent to which schools and settings are collaborative, open and inclusive, based on high expectations and the extent to which the EAS is capturing the impact of its work on pupil progress; and
- the extent to which the EAS, in its self-evaluation, considers the impact of implementing its vision and its impact on organisational and system wide capacity and improvement.

Within this overall approach there will be a particular focus on progress being made by secondary schools across the region.

⁶ The seven dimensions of the model are described in Appendix 2 to this report

Appendix 1

Summary of annual VfM reports

The EAS has long recognised the need to demonstrate that it offers value for money to the five local authorities within its geographical remit and their constituent schools. To this end it has, for the last five years, commissioned an annual review and subsequent report to evaluate the extent to which that requirement has been met.

These reviews have been based upon the gathering of sufficient evidence to enable an evaluation of performance in relation to each of the criteria that comprise the VfM framework. These criteria are defined within the reports as follows:

- **Economy:** minimising the cost of resources used while having regard to quality (inputs) – spending less;
- **Efficiency:** the relationship between outputs and the resources used to produce them – spending well; and
- **Effectiveness:** the extent to which objectives are achieved (outcomes) – spending wisely

From the outset it was recognised that basing the reviews on an evaluation of the above criteria would, in an educational context, be too limiting. Consequently, each annual review and report also considered:

- **Equity:** the extent to which service provision is needs based to remove barriers and facilitate equal opportunity – spending fairly; and
- **Sustainability:** an increasingly standard consideration within the context of the Well Being of Future Generations Act (WBFGE) – spending for the long term.

The adoption of this framework allowed an annual judgement to be made of performance against each criterion that could then be aggregated up into an overall judgement of how well resources were being used to achieve intended outcomes.

While the reviews, and subsequent reports, were based on a consistent framework; the context, focus and methodological approach evolved and varied over time. The evolving approach reflected the impact of the global pandemic and a growing realisation that time and financial constraints did not allow for a detailed consideration of the above criteria across the full range of activities undertaken, and services provided by the EAS.

The chronology of this evolution can be traced as follows:

- The first two reviews, 2018 and 2019, were more broad brush in approach and were undertaken in a pre-pandemic context.
- The next two reviews, 2020 and 2021, were more focused on evaluating achievement of specific objectives, and performance in adapting service delivery to respond to a global pandemic.
- The last review, 2022, had a very specific focus on one area of service delivery i.e. school to school working.

The pandemic had an enormous impact on both the availability and collection of evidence. The measures of educational outcomes that had informed previous reviews such as examination results, school categorisation and Estyn inspection reports and were either not available or, where available, did not provide a valid measure of progress. Similarly, evidence gathering and analysis took place remotely to reflect the exceptional circumstances of adapting working practices to combat the spread of the pandemic.

The combined effects of resource constraints, changing contexts, shifting focuses, pandemic impact and methodological evolution are reflected in the overall judgements that were arrived at. These judgements, in chronological order are as follows:

EAS is providing good value for money because overall outcomes are improving from a reduced level of spending as a result of resources being used efficiently, fairly and in a sustainable way; with consequent benefits for schools and pupils across the region. (2018)

EAS is providing good value for money in terms of those aspects that are within its control – notably economy, efficiency, equity and sustainability. However, collective action involving EAS, its constituent local authorities and school leaders is required to address concerns over educational outcomes across the region and those schools that are underperforming. (2019)

EAS continues to provide good VfM in terms of the services it provides to schools across the region as evidenced by improved outcomes for some learners and the achievement of the other objectives that it has set for itself. (2020)

EAS continues to provide good VfM in terms of the services it provides, as evidenced by its successful mitigation of the impact of the pandemic on schools, learners and its own workforce. (2021)

The overall conclusion is that the refined S2S delivery model represents good value for money. (2022)

While all judgements have been positive there is a clear trend towards focusing the judgement on consideration of:

- performance in pursuit of specific objectives;
- the changed context of operating in a pandemic; and
- the impact on schools and learners of a discrete area of service provision.

It is also worth noting that the concentration on S2S working in 2022, based on case studies constructed from Head Teacher interviews, represented a positive response to earlier recommendations. These recommendations included:

Consider whether there are cost-effective ways to secure the involvement of Head Teachers in further developing the annual VfM report. -2019

Extending engagement with recipients of its services to triangulate evidence and further validate findings and conclusions. -2020 and 2021

Methodological evolution has now led the EAS to make the decision to significantly amend its approach to reviewing and reporting on VfM for 2023-24. One of the biggest challenges to this revised approach will be the availability of data on learner outcomes that would typically be central to formulating a judgement on the impact and by extension the VfM of its service provision.

Appendix 2

The Seven Dimensions of the Schools as Learning Organisations Model

Developing: *The SLOs vision is a motivating force for sustained action.*

- A shared and inclusive vision aims to enhance the learning experiences and outcomes of all learners.
- The school's vision focuses on enhancing learners' cognitive and social-emotional outcomes (including their well-being), encompasses both the present and the future, and is inspiring and motivating.
- Learning and teaching are orientated towards realising the vision.
- The school's vision is the outcome of a process involving all staff, including governors and other stakeholders.
- Learners, parents/carers, the external community, and other partners are invited to contribute to the school's vision.

Creating: *The SLOs staff are responsible for their own professional learning.*

- All staff engage in continuous professional learning to ensure their practice is critically informed and up to date. New staff receive induction support.
- All staff have access to coaching and mentoring support.
- Professional learning is focused on the learner's learning and the school's goals.
- Staff are fully engaged in identifying the aims and priorities for their own professional learning.
- Professional learning challenges thinking as part of changing practice.
- Professional learning connects work based learning and external expertise.
- Professional learning is based on assessment and feedback from a range of sources including the learner.
- Time and other resources are provided to support professional learning.
- The school's culture promotes and supports professional learning.

Promoting: *Collaborative working and collective learning are central to the SLO.*

- Collaborative working and collective learning, face-to-face and/or using ICT, are focused and enhance learning experiences, learner outcomes and/or staff practice.
- Staff reflect together on how to make their own learning more powerful.
- Staff learn how to work together as a team.
- Staff feel comfortable seeking advice from each other. Collaborative working and collective learning are central to the SLO.
- Trust and mutual respect are core values.
- The school allocates time and other resources for collaborative working and collective learning.

Establishing: *SLOs uses enquiry to establish change and innovation in educational practice.*

- Staff are willing to take risks and experiment and innovate in their practice.
- The school supports and recognises staff for taking initiative and risks.
- Staff engage in forms of enquiry to investigate and extend their practice.
- Enquiry is used to establish and maintain a rhythm of learning, change and innovation.
- Staff are open to thinking and doing things differently.
- Problems and failures are seen as opportunities for learning.
- Learners are actively engaged in enquiry.

Embedding: *SLOs ensure they are "information-rich" or, more appropriately, "knowledge rich".*

- Systems are in place to examine progress and gaps between current and expected impact.
- Structures for regular dialogue and knowledge exchange are in place.
- Examples of good and failed practices are made available to all staff to inform learning.
- Sources of research evidence are readily available and easily accessed and are used by staff to improve their practice.
- Staff have the capacity to analyse and use multiple sources of data for feedback, including ICT, to inform teaching and allocate resources.
- The school's development plan is based on learning from continuous self-assessment and is updated at least once every year.
- Staff regularly discuss and evaluate whether actions had the desired impact and change course if necessary.
- The school evaluates the impact of professional learning.

Learning: *SLOs exchange information and collaborate with the wider learning system.*

- The school is an open system, welcoming approaches from potential external collaborators.
- The school scans its external environment to respond quickly to challenges and opportunities.
- Staff collaborate, learn and exchange knowledge with peers in other schools through networks and/or school-to-school collaborations.
- The school collaborates with parents/carers and the community as partners in the education process and the organisation of the school.
- The school forms partnerships with higher education institutions, businesses, and/or public or non-governmental organisations in efforts to deepen and extend learning.
- Partnerships are based on equality of relationships and opportunities for mutual learning.
- ICT is widely used to facilitate communication, knowledge exchange and collaboration with the external environment.

Modelling: *Leadership is the essential ingredient connecting the seven SLO dimensions.*

- School leaders ensure that the organisation's actions are consistent with its vision, goals and values.
- School leaders model learning leadership, distribute leadership and help grow other leaders, including learners.
- School leaders are proactive and creative change agents with a strong focus on improving learning and teaching.
- School leaders ensure the school is characterised by a 'rhythm' of learning, change and innovation.
- School leaders develop the culture, structures, and conditions to facilitate professional dialogue, collaboration, and knowledge exchange.
- School leaders promote and participate in strong collaboration with other schools, parents/carers, the community, higher education institutions and other partners.
- School leaders ensure an integrated approach to responding to learners' learning and other needs.