NOTE OF THIRTEENTH MEETING OF THE

STRATEGIC PLANNING AND POLICY FORUM

TUESDAY 4 MARCH 2014 AT 2PM

FORESTVIEW, PURDYS LANE, BELFAST

Attendees

Paul Sweeney	DE	(Chair)
Katrina Godfrey	DE	
La'Verne Montgomery	DE	
Gavin Boyd	ESAIT and SELB	
Clare Mangan	BELB	
Shane McCurdy	NEELB	
Gregory Butler	SEELB	
Barry Mulholland	WELB	
Jim Clarke	CCMS	
Noreen Campbell	NICIE	
Micheál Ó Duibh	CnaG	
Karen Sims	NASUWT	
Sean Maguire	ASPECT	
Avril Hall-Callaghan	UTU	
Clare Majury	NAHT	
Gerry Murphy	INTO	
Mark Langhammer	ATL	
Peter McMurray	GMB	(for John Dawson)
Anne Speed	UNISON	
Kathryn Menary	DE	(Secretariat)

In Attendance

Dale Heaney	DE	(Item 5 only)

Apologies

Fiona Hepper	DE	
Paddy Mackel	NIPSA	
Taryn Trainor	UNITE	

1.   Welcome
1.1   Paul Sweeney, Chair, welcomed everyone to the meeting, noting apologies.

2.   Minutes of last meeting and matters arising
2.1   The minutes (Annex A) of the 3 December 2013 meeting were agreed as an accurate account of the discussion and formally adopted. Paul reported that any matters arising would be dealt with through the agenda. Paul referred to paragraph 3.4 of the minutes in relation to the report of a breakdown in the negotiations around protections for non-teaching staff in the event of school reorganisation. He commented that he was pleased to note that progress had been made in that an agreement in principle had now been reached and a business case was under development.

2.2   Paul provided an update on ESA, reading an extract from the Minister's speech written for the INTO conference the previous week:

"One major policy area I have not been able to progress as I would have wished is ESA. The position on ESA is that I cannot wait anymore. I have tried to broker an agreement that would enable progress to be made. I have made difficult compromises including measures that will retain and develop school autonomy in employment matters. However, my efforts have not been reciprocated.

ESA is a shared commitment of the Executive. It is part of its Programme for Government. But I now must start planning the future of education administration without ESA. The un-sustainability of the current position and Local Government reform forces the issue. If ESA is not to be established, I must have in place for April 2015 a completely new configuration of 5 Education and Library Boards simply to ensure that education administration is compatible with the boundaries of our new 11 District Councils. This will be a massive change programme, involving new legislation, constitutional arrangements and workforce implications. This programme must now be the focus and work has begun."

2.3   Paul advised that there are currently no officials in the Minister's Department working on ESA. Instead, the focus is on what needs to be done to ensure that the ELBs are appropriately constituted for April 2015. He further explained that ESA remained a PfG commitment and that if that commitment changed, it would require a agreement by the Executive; however any alternative way forward was initially a matter for the DE Minister. Paul explained that the only baseline available for costs was the ESA business case; however, it was likely that some alternative options would have funding implications. If reconfiguration was required, this would be undertaken in consultation with key stakeholders. Paul highlighted that the need for education administration to be compatible with the revised local government administration would involve a significant change process and would be challenging within the tight timescales.

3.   Update on Budget Work stream
3.1   La'Verne advised that she had chaired a meeting of the reconstituted budget work stream on the 12 February 2014, in the absence of an agreed chair. Since that meeting, Tom Walsh of ASPECT had been nominated and agreed to take on that role. La'Verne reported that Gillian Uprichard from the Department's Financial Planning Team attended that meeting and provided a presentation which outlined thoughts on the Budget 2015/16, in the absence of any budget having yet been agreed by the Executive.

3.2   La'Verne explained that the draft Terms of Reference (ToR) circulated to members had been agreed by all work stream members and were being presented for Forum endorsement. She highlighted the very tight timescale for the delivery of recommendations by April 2014. Paul thanked La'Verne and acknowledged Tom's commitment to chair the work stream. Paul asked if members remained content that work stream chairs who were not Forum members continued to be invited to attend meetings as required throughout the life of the work stream and this was agreed.

3.3   Paul sought agreement on the draft ToR and members were broadly content. Shane raised a concern that monetary matters appeared to prevail above educational deliverables and it was important to be more explicit about what these were. He added that it was vital that the work stream should identify what the educational priorities are, what they cost and then recommend what might be excluded if additional money is not found or the budget is further reduced. It was agreed that the first bullet point under the objectives in the ToR would include reference to the educational objectives within the DE Corporate Plan.

3.4   Paul advised that the pessimistic prognosis for the Budget 2015/16 and beyond should provide incentive for Forum to support the Minister in efforts to obtain a higher proportion of the NI allocation. Gerry commented that whilst the group was tasked with examining opportunities to maximise the 2015/16 budget within a tight timescale, there could be scope at a later stage to look more strategically beyond 2015/16. It was agreed that the revised draft ToR would be circulated to members, providing 10 days for further comment prior to formal endorsement.
Action 1:   Revised ToR (Annex B) to be circulated to members (Secretariat)

3.5   Katrina provided an update on the CFS Review and proposed way forward commenting that the recommendations of Forum and subsequent consultation response had been most helpful. She advised that the Department hoped to be able to confirm revised budgets to schools for the 2014-15 year within the next week. In considering the way forward, the Minister had been very conscious of the Executive's commitment to target social need and had also given very careful consideration to consultation responses.

4.   Update on Future Development of School Staff Work stream Report
4.1   Paul thanked Avril for agreeing to chair the new work stream and also acknowledged the agreement of Terry Murphy and Ray Gilbert to serve as co-vice chairs on this work stream. Avril advised that the work stream had met on 21 February 2014 and agreed the ToR that had been circulated to Forum for consideration. Avril outlined the emerging issues from the discussion and explained that these had been distilled down into issues to be examined further by three working groups:

- Sub-Group 1: CPD (including what the current arrangements are, what else is required and the mechanisms for delivery) – chaired by Ray
- Sub-Group 2: System Structures and Flexibility (considering what changes are required at a strategic level within the system to facilitate collaboration in a competitive environment) – chaired by Terry
- Sub Group 3: Career Pathways (including potential for reward through salary) – chaired by Avril

4.2   Avril explained that there were less than half a dozen work stream members on each sub-group and given the breadth of the issues to be examined it would be helpful to have additional members, particularly from the employers' side. Barry advised that the WELB would nominate to this group. Avril advised that the work stream had also considered defining the term 'workforce' for the purposes of this exercise. There was an initial focus on teachers and classroom assistants; however

Peter provided a compelling argument for looking at the wider school workforce. This definition has, therefore been left flexible for the moment.

4.3   Avril advised that the group had originally been tasked with considering what could be achieved pre and post-ESA. Given the Minister's recent direction on this issue, the group's focus will now be on what can be achieved on a regional basis in the absence of a regional body. Avril recommended the draft ToR to Forum members, explaining that the work stream were aiming to provide a full report for the Forum meeting in September at the latest and would provide an interim report in June. A number of suggested amendments to the draft ToR were discussed and it was agreed that the document would be subsequently amended and circulated electronically to members for final consideration and sign-off. Paul thanked Avril and reminded members of the request to further populate this work stream.
Action 2:   Revised ToR (Annex C) to be circulated to members (Secretariat)

4.4   Responding to queries, Katrina advised that the Minister was very aware of the need for a regional approach that ensured the provision of increased, relevant, high quality continuing professional development for teachers and school leaders and determined to see progress made in the coming months. An early focus would be on work that would add to the services already being provided by CASS, RTU and CCEA. In that regard, the workstream's output – and its broader focus on all school staff - would be very valuable although it would be important that progress was also made in the interim. Barry Mulholland commented that regionalisation might not necessarily involve a single provider; it could be achieved via a consistent framework. Barry also drew attention to work previously undertaken by the ELBs and CCEA to develop a coherent plan which he felt had worked well in ensuring consistency and appropriate prioritisation within available resources.

5.   Generic System Accountability
5.1   Mark talked through the paper (Annex D) he had circulated to members explaining that his request for a discussion on this issue was triggered by a desire for the Forum to influence the PfG targets that might be included in the next mandate. He expressed a view that the focus of the current PfG target relating to GCSE attainment was too simplistic a performance measure and risked encouraging unintentional consequences, for example, a focus on the C/D boundary and schools not entering pupils for GCSEs. Instead it was important to make schools accountable for what they could change. An emphasis on autonomy and self evaluation was important. He also reported on wider work which the teacher unions (in conjunction with GTCNI) had been undertaking and articulated the profession's continuing unease with aspects of inspection and assessment

5.2   Mark suggested that it may be useful to invite the CBI to a future Forum meeting, highlighting its recent report, '*First Steps – a new approach to our schools*'. It was agreed that it would be useful to consider inviting the CBI to a future meeting.

5.3   Dale Heaney provided a short presentation (Annex E) which set out some of the recommendations within chapter 6 of the recent OECD country report and outlined work in progress to consider a potential basket of performance indicators, stressing that discussion was at an early stage. This work would be informed by

OECD's review of evaluation and assessment and by the outcomes from meetings with stakeholders to discuss the continuing concerns around pupil assessment.

5.4   Paul thanked Mark and Dale for their input. Gerry welcomed the genuine and serious engagement with DE on this important issue and suggested that the ongoing discussions between the unions and the Department should be allowed to continue and any issues brought back to the Forum, if necessary. Barry noted that the employers needed to be included in the debate around evaluation and assessment; it was agreed that this could be addressed through the SEO network and would include CCMS.

5.5   It was agreed that the issue of accountability would not be taken forward by the Forum whilst the intensive engagement between DE and the unions continued. The next meeting would remain focused on the work of the current work streams. In addition, the CBI would be invited to attend. Given the current substantial agenda of work, it was agreed that the Forum would wait until the autumn, to consider establishing a further work stream. At that stage the Forum might consider how best to contribute to the development of the next Corporate Plan for Education and indeed the next Programme for Government, noting that both plans would focus on 2016/17 and beyond.
Action 3:   CBI to be invited to June meeting (Secretariat / DE)

6.   Any Other Notified Business (AONB)
6.1   No AONB items had been requested. Paul reported that DE now had two Deputy Secretaries in post. Unfortunately, Fiona had been unable to attend today's meeting; however, the intention would be to have both Deputy Secretaries attend the Forum. Members agreed that the Forum's Terms of Reference would be tweaked slightly to refer to the Department's Deputy Secretary(ies).
Action 4:   Forum ToR to be updated (Secretariat)

7.   Venue for next meeting
7.1   It had been agreed previously that the next meeting on 3 June 2014 would be hosted by the WELB in Omagh. It was agreed that this meeting would commence at the earlier time of 12 noon (with a working lunch) which would provide sufficient time after the meeting closed (expected at 2.30pm) for a visit to the Lisnelly Shared Education site. Members would be invited to elect to participate in that visit. It was noted that JWP was scheduled for that morning and agreed that this meeting should also be held in Omagh to facilitate.
**Action 5:   Site visit to Lisnelly to be arranged for 3 June 2014
                (Secretariat/WELB)**

7.2   The meeting closed at 3.50pm.

NOTE OF TWELFTH MEETING OF THE

STRATEGIC PLANNING AND POLICY FORUM

TUESDAY 3 DECEMBER 2013 AT 1.45PM
DEPARTMENT OF EDUCATION, BANGOR

Attendees

Paul Sweeney	DE	(Chair)
Katrina Godfrey	DE	
La'Verne Montgomery	DE	
Clare Mangan	BELB	
Shane McCurdy	NEELB	
Gregory Butler	SEELB	
Barry Mulholland	WELB	
Jim Clarke	CCMS	
Noreen Campbell	NICIE	
Micheál Ó Duibh	CnaG	
Karen Sims	NASUWT	
Sean Maguire	ASPECT	
Avril Hall-Callaghan	UTU	
Clare Majury	NAHT	
Gerry Murphy	INTO	
Mark Langhammer	ATL	
Peter McMurray	GMB	(for John Dawson)
Anne Speed	UNISON	
Terry Murphy	CCMS	(Work stream Chair)
Kathryn Menary	DE	(Secretariat)
Mary McAvoy	DE	(Work stream Secretariat)

Apologies

Gavin Boyd	ESAIT and SELB	
John Dawson	GMB	
John McGrath	DE	
Paddy Mackel	NIPSA	
John Curran	SELB	(Work stream Chair)

1.   Welcome
1.1   Paul Sweeney, Chair, welcomed everyone to the meeting. He advised that, prior to the commencement of the official business Forum would receive a brief overview of the PISA results which had been published that day. He welcomed Gayle Kennedy, Head of the Statistics and Research Team.

2.   Presentation on PISA 2012 Results
2.1   Gayle provided a presentation (Annex A) outlining the key points emerging from the study, advising that the full report was available to download from the DE website. Gayle explained that the mean scores of NI pupils in maths, reading and science were not significantly different to performance recorded in the 2009 report. Compared to the other 64 participating countries, scores in reading and science

were similar to the OECD average and scores in maths were lower. Whilst it was difficult to compare performance prior to 2006 due to the large numbers of additional countries that had joined the survey since then; since this time NI performance had remained relatively static whereas a number of countries, most notably the Republic of Ireland, had significantly improved. Gayle provided information on the levels of proficiency identified in each subject, highlighting the proportions of, and gap between, the lowest and highest attainers. She advised that the study also indicated that NI had a higher socio economic status when considered across all of the OECD countries. Unlike elsewhere in the UK, NI had an above average variance in maths indicating that the more disadvantaged pupils here have significantly less chance of performing as well as their more advantaged peers than their counterparts across the OECD average.

2.2   Katrina explained that the PISA results would not be examined in isolation; but in conjunction with other information such as inspection evidence; assessment outcomes; and other contextual information. Katrina advised that the OECD Report was expected to be published on 10 December and would be immediately available on the OECD website. A link will also be placed on the DE website. It was agreed that DE would give consideration to arranging an event in January to which the OECD could be invited to present their report. Key stakeholders would be invited to learn about the findings and then consider what the next steps should be.
Action 1:   Consideration of OECD Report Event (DE)

3.   **Minutes of last meeting and matters arising**
3.1   Paul thanked Gayle for the useful presentation adding that the Department's statisticians should be viewed as a significant resource by member organisations. Paul thanked members for facilitating the change in venue. Apologies were noted and Paul advised that Unite had officially joined the Forum. Paul noted that Seamus Searson had moved on from NASUWT and welcomed Karen Sims. On behalf of all members, Paul acknowledged Seamus' significant contribution as an active Forum member and as Chair of the Budget/CFS work stream. Paul advised that DE had appointed two new Deputy Secretaries and officially introduced Katrina Godfrey. He advised that Fiona Hepper had taken up appointment the previous day and would assume responsibility for John McGrath's portfolio following a handover during the month of December. Paul acknowledged John McGrath's contribution to the Forum and to DE over the last six years and wished him well in his new post in DRD.

3.2   The minutes (Annex B) of the 3 September meeting were agreed as an accurate account of the discussion and formally adopted. Under matters arising Paul reported that he had apprised GTC of the Forum's decision regarding membership. He noted that members had received electronic copies of Barry's paper and the DE circular on the Elluminate system and advised that DE had developed a further circular on cyber safety which was tabled in members' packs. This should be treated confidentiality until published. It was not possible to update members on the ICT Strategic Group's consideration of its role in Gavin's absence.

3.3   Paul advised that no comments had been received when the Budget/CFS Work stream's draft response to the CFS consultation had been circulated and the response had therefore been formally submitted to DE. It was agreed that the Budget Work stream should reconvene in latter part of January when it would review

its mandate and elect a new chair. The existing membership would be invited and Forum members asked again if they wished to nominate to the group. DE would provide a short presentation placing the forthcoming Budget 2015/16 in context. The group would consider how best to maximise the budget allocated to education and identify the issues arising from a potentially smaller budget and how to be creative within that, and prioritise what might be achieved through any additional resource.

Action 2:   Budget Work stream to be reconvened (Secretariat)

3.4   Anne advised of a regrettable breakdown in negotiations on protections for non-teaching staff for which Trade Union Side (TUS) did not accept responsibility. Barry advised that the employers would be meeting as soon as possible, aiming to resolve the issue before the end of the week. Responding to a query from Gerry, Paul advised that expanding the membership of the Area Planning Steering Group remained under consideration.

4.   Leadership in Schools Work stream Report

4.1   Paul invited Terry Murphy (Chair) to introduce the work stream's report. Terry talked through the highlights, explaining that the group had focused on the two objectives set, however other associated issues had arisen particularly around governance and recruitment processes for appointing leaders. He commented that the group's membership was wide ranging and had been very effective and engaged. Other work stream members' present paid tribute to Terry for his skillful handling of meetings, efforts to consult effectively with all stakeholders (in particular school leaders) and combining all of the many strands researched and discussed.

4.2   Members welcomed the carefully researched report noting that it was a substantive piece of work. Concerns were raised regarding the heavy reliance on the establishment of the School Development Service (SDS).   Members discussed what might achieved in the continued absence of ESA until that regional body was established. A perceived move to prioritise the development of the workforce in order of leaders, teachers and then support staff was discussed and members commented on the need for a joined up programme for the development of all staff. It was agreed that the report should be strategically examined in conjunction with the other work stream's report in order to identify the common issues.

5.   School Workforce Review (SWR) Work stream Report

5.1   Gerry introduced the report on behalf of John Curran, explaining that the recommendations were not listed in any order of priority and aimed to provide gateways for further discussion and research. This was a very complex piece of work which would need to be driven forward over a 5-10 year period. Gerry advised that it would be vital to develop a prioritised list of future aspirations. The group felt that the first objective 'to identify what a good school looked like' was already set out in the ESAGS document (page 13). In identifying future requirements of the workforce, members felt that the big issue was professional development and members had raised the same issues as the Leadership work stream in this respect.

5.2   Paul thanked Gerry and other members of this work stream. On a point of accuracy, Gregory advised that bullet point 4 on page 14 should refer to Brookfield Special School. Members commented that both reports referenced the need to share skills between schools. Accomplishing this would require a change in the

competitive schools' culture and also potentially to terms and conditions of service. Members raised concern that developments must not be stymied while ESA was awaited, noting that, with the necessary resources, the Boards/CCMS could proceed to develop things that could later be placed into ESA. Members also discussed the financial reality of achieving the aims within the reports and highlighted a need to prioritise actions in line with available resources and ensure creative examination of things that could be implemented without large cost implications.

6.   Issues for Future Consideration

6.1   It was agreed that the reports provided two substantive pieces of work that should be taken to the next level. Given the commonalities in the recommendations in relation to professional development, it was agreed that a work stream should be established to examine the overall picture for all staff. The new group would be tasked with using the evidence collated and initial recommendations to develop a prioritised action plan, identifying what could be realistically achieved under the current structures (pre-ESA) and latterly what could be done when the envisaged structures were in place.

6.2   It was agreed that it would be important to identify someone who had the necessary skills and dedicated time to chair this work stream effectively and that members willing to nominate themselves or an expert from their organisation to this position should do so through the Chair over the next two weeks. It was also agreed that it would be important to ensure that there was a good balance of representation on the group whilst it should not become too large and unwieldy to be productive. Optimal numbers would be around 8-10 and it might be helpful if members agreed to nominate one or two people to act as collective representatives for their sectors. It was agreed that the secretariat should convene meetings of the new work stream and the Budget work stream in the New Year. Both groups should have agreed draft mandates to put to Forum at the next plenary meeting on 4 March. The secretariat was asked to develop a brief draft Terms of Reference (ToR) for the new work stream which would be shared with members by the end of the week to aide discussions regarding nominations.

Action 3:   Draft ToR to be circulated (Secretariat) and nominations for work stream chair and membership to be considered (All)

7.   Any Other Notified Business (AONB)

7.1   No AONB items had been requested. Mark noted that the OECD report would be published imminently, that there was an ongoing Assembly Committee enquiry into school inspection and that the GTC had raised accountability issues. In light of all of this, he suggested there was merit in a discussion around the issue of accountability. Benchmarking was important but, at all levels, the balance of accountability had to be appropriate. It was agreed that 'generic system accountability' would be included as a topic for discussion on the agenda for 4 March meeting, perhaps with someone presenting to set the scene.

Action 4:   Issue to be added to 4 March agenda (Secretariat)

8.   Venue for next meeting

8.1   The next meeting was scheduled for 2pm, 4 March 2014. It was agreed that this would be hosted by ESAIT in Forestview and also that members would go to the WELB in Omagh for the June meeting. The meeting closed at 4.30pm.

Strategic Forum

Budget Work Stream

Draft Terms of Reference

~~February~~March **2014**

Background

1. The re-constituted Budget Work stream met on 12 February 2014 and agreed to revise the membership and terms of reference (ToR) for the group, as the previous ToR focused on the Review of the Common Funding Scheme. The consultation on the proposed changes for the Scheme closed on 25 October 2013 and the Minister is making his final decisions.

Aim of the Work stream

2. The purpose of the Budget Work stream is to identify opportunities to maximise the education budget and to assist the Minister in his planning for Budget 2015/16 and beyond, into the next Spending Review (SR) period.

Objectives

3. Specifically the Work stream is tasked with identifying opportunities to maximise the education budget which will:

    - Adequately support, and ensure consistency with, existing departmental policy objectives for education within the DE Corporate Plan;
    - Sufficiently take account of Targeting Social Need (TSN) in the Department's drive for sustainable schools;
    - Support schools to improve pupil outcomes and maximise pupil potential.

4. The Work stream will identify issues under these 3 headings and, where possible, make corresponding recommendations. It is important that any proposed recommendations are focused on the needs of children and young people, are practical and deliverable within current Departmental policies, are costed and factor in financial realities. These will then be put to the Strategic Forum for approval.

Operation

5. It is envisaged that the Work stream will meet as necessary with the aim of submitting recommendations to the Strategic Forum by the end of April 2014. The Workforce Planning Team, Department of Education (DE) will provide secretariat to the Work stream. Papers for meetings and minutes of meetings will be circulated to members via email.

6. The Work stream will be Chaired by Tom Walsh from ASPECT.

Membership

Membership of the group will be:

Tom Walsh (Chair)	ASPECT
Gillian Uprichard	DE
Gerry Jones	NICIE
Seán McElhinney	NASUWT
Neil Craig	SEELB
Pat Hughes	WELB
Gerry Murphy	INTO
Peter McMurray	GMB
Seán Ó Muireagáin	CnaG
Jacquie Reid	UTU
Harry Greer	NAHT
Malachy Crudden	CCMS
Taryn Trainor	UNITE
Anne Speed	UNISON
Mary McAvoy	DE (Secretariat)

Strategic Forum – Future Development of School Staff Work stream

Draft Terms of Reference

~~December 2013~~**March 2014**

Background

The Department of Education's Corporate Plan 2012-15 sets out five Corporate Goals including Developing the Education Workforce through:

> *Recognising the particular professional role of teachers and school leaders in delivering an effective curriculum and raising standards and also the important role of other education professionals and those who support them.*

A key success indicator to achieving this goal is a flexible and responsive education workforce. Evidence shows that the school workforce is the key component in the school improvement agenda. Ongoing change will continue to impact on the ways in which the school workforce is deployed and managed. It is clear, therefore, that development of the school workforce will lie at the heart of the future success of our education system. At the same time, the wider world of work is changing, placing new demands on the education workforce.

Work to Date

With these challenges in mind, in March 2013 the Forum agreed to establish two work streams to examine:

- what high quality professional development for school leaders should look like and how best practice can be shared; and
- the key future requirements of the whole school workforce that would support the drive for school improvement and meet individual pupil needs.

The work stream reports were considered at the plenary meeting on 3 December 2013. Forum members acknowledged and commended the substantive work undertaken by each group. The considerable read across between the findings and recommendations of the two groups was highlighted, particularly in relation to the professional development needs of staff and how those needs might be met in an innovative, efficient and effective way.

It was noted that many recommendations were predicated on the establishment of the School Development Service as part of the Education and Skills Authority and any further delay must not stymie action in this important area.

It was agreed that consideration of the professional development of various staff groups (school leaders, teachers and support staff) should not be undertaken in isolation and a coherent strategy for the development of the whole school workforce together was required. The recommendations presented provided a gateway to facilitate further discussion in order to take work to an additional level. A work stream should be established to identify a set of prioritised, time bound and costed actions that could be realistically taken forward now and in the future.

Aim of the Work Stream

To undertake a strategic examination of the recommendations of the Leadership in Schools Work stream and the School Workforce Review Work stream to identify commonalities (or specific differential support where required) in relation to the future professional development of all school staff and determine a strategy for the way forward including a set of prioritised actions. The professional development will focus on improving the educational outcomes for pupils and also take into account the rights and need of employees.

Objectives

Specifically the group is tasked with:-

Examining the recommendations of both work streams to determine the shared aims that could be addressed through the development of:

1. A strategy for the professional development of the whole school workforce; and
2. An accompanying pragmatic action plan which:
   a. Identifies the key actions in order of priority;
   b. Identifies the most appropriate mechanism to take forward each action;
   c. Provides realistic timescales for completion; and
   d. Outlines potential costs taking financial realities into account.

The work stream will consider:

- How the professional development needs of the whole school workforce, founded on the future needs of pupils, can be best identified;
- How career pathways might be developed for all staff;
- What can be developed now (and placed into ESA when established) to ensure consistency in CPD availability for staff in all schools in all areas, including the potential for one organisation to take the lead where necessary;
- The role of various agents to provide and advise on professional development and how these organisations might progress work – CASS, RTU and GTCNI;
- How CPD can be more effective within the school system – need for the facilitation of greater communication between schools, more sharing of resources and greater flexibility for staff to move around the education system; and
- What is required to create a cultural shift to 1) ensure the system needs are appropriately balanced with individual school needs and 2) engender a collaborative ethos and 3) encourage more pro-active self evaluation regarding the need for professional development within schools.

The group will report back to the Strategic Forum on an interim basis in June 2014 with the final report by September 2014 at the latest.

Operation

It is envisaged that the work stream will meet as necessary to meet the latest deadline of September 2014. The Workforce Planning Team, Department of Education (DE) will provide secretariat to the work stream. Papers for meetings and minutes of meetings will be circulated to members via email.

Membership

Membership of the group will be:

Name	Member Organisation
Avril Hall-Callaghan (Chair)	UTU
Terry Murphy (Co Vice-Chair)	CCMS
Ray Gilbert (Co Vice-Chair)	NEELB
La'Verne Montgomery	DE
Suzanne Kingon	ESAIT
Kim Scott	SEELB
Gerry Jones	NICIE
Clare Majury	NAHT
Karen Sims	NASUWT
Gerry Murphy	INTO
John Pollock	ATL
Sean Maguire	ASPECT
Peter McMurray	GMB
Máire Hegarty	CNaG
Paddy Mackel	NIPSA
Mary McAvoy (Secretariat)	DE

Mark Langhammer's Paper on Accountability

Policy Context

The recent OECD review of evaluation and assessment in Northern Ireland was part of a 28 country study which is summarised in the *'Synergies for Better Learning'* Report (OECD 2013)*.*

That overview report places school self-evaluation at the centre of a range of important processes which combine to influence school and teacher practices in pursuit of better teaching and learning and better student outcomes. These processes include:
1) student assessment;
2) teacher appraisal;
3) leadership appraisal; and
4) external inspection (see Figure 6.1 over, OECD 2013:385).

The diagram shows how these processes need to be led and informed by **joined-up policy developments** so that a coherent approach is taken to enable *fair and accurate reporting and informed analysis and comparison* of the value added by teachers, leaders and schools.

It is in this strategic context that NITC (in partnership with GTCNI) has put forward two sets of constructive recommendations within

   1) *'Striking the Right Balance': and*
   2) *Rising to the Challenge*

These recommendations (see Appendix) focus on designing an evaluation and assessment framework based on a more explicit approach to assessing value added to achieve greater buy-in to and support from the profession

OECD CONCEPTUAL FRAMEWORK FOR SCHOOL EVALUATION

Figure 6.1 Conceptual framework for school evaluation
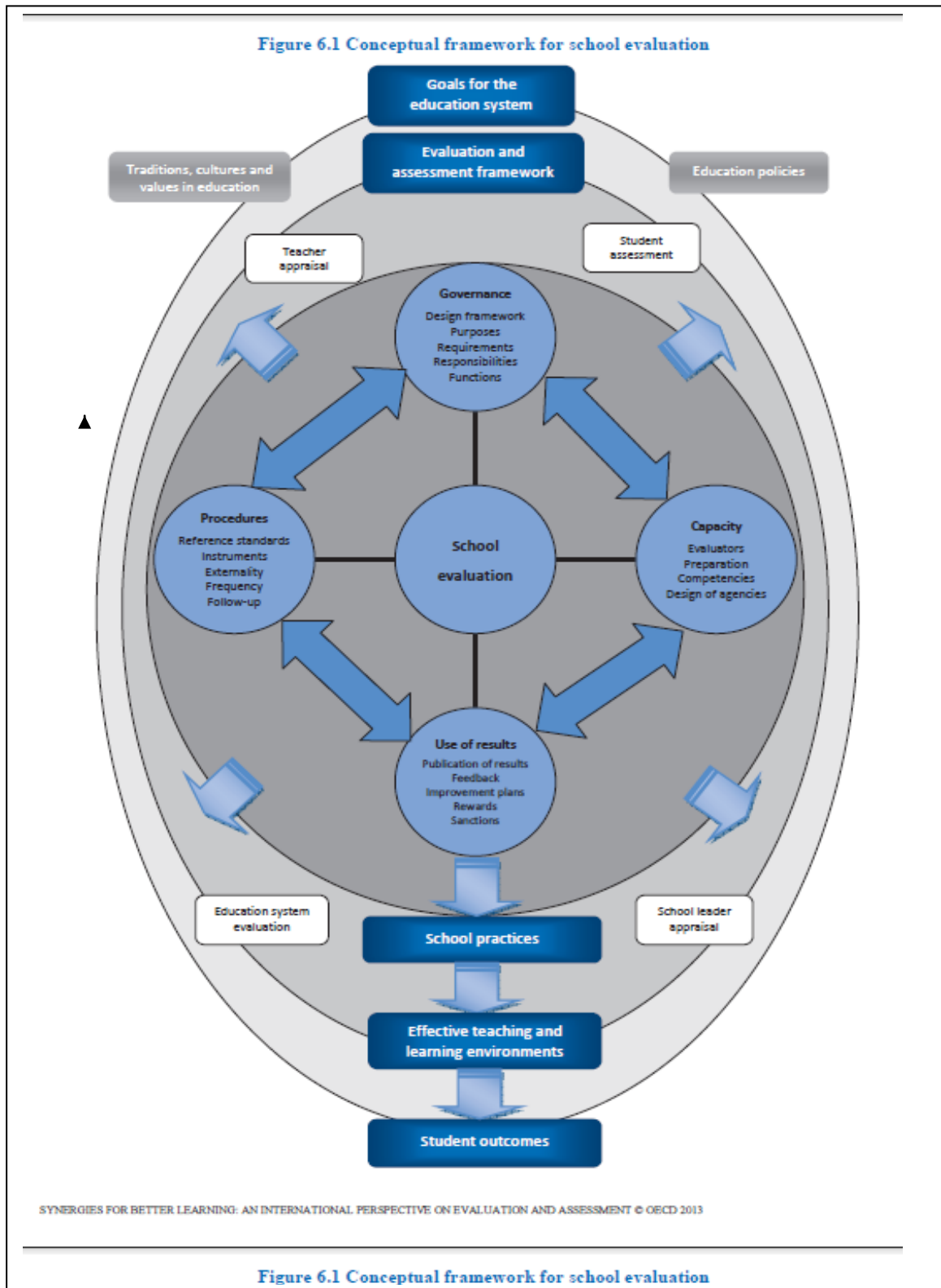
RECOMMENDATIONS: *Striking the Right Balance GTCNI Oct 2013 to improve approach to school improvement (endorsed by NITC)*

1. ***Undertake a cost benefit analysis*** of the relationship between inspection and school improvement (*Whitby, K. 2010 in Perry, C., 2012, P21*)
2. ***Develop a supportive quality assurance model*** (Finland/Scotland) which uses positive language (*for example, Very Confident, Confident, Not Confident as in Scotland*) aligned to support systems that involve more seconded teachers and principals;
3. ***Stream-line future school evaluation processes*** to provide clearer guidance on data requirements; permit verbal (and written) challenge; reduce reporting timescales; and improve the qualitative detail of unpublished reporting to schools.

to improve the assessment of value-added
4. ***Use NISRA census information*** and ***geographic information system (GIS)*** to identify school characteristics and to stratify schools by socio-economic intake to help allocate resources effectively, target social need and calculate value-added.
5. ***Assess productive language (oracy) on entry to school*** as a key indicator of future educational potential and as a base-line measure of school value-added.

to improve system monitoring
6. ***Use light sampling*** to provide robust and independent monitoring data over time, disentangling teacher assessment from accountability (*Tymms & Merrill*);
7. ***Use International data*** (PIRLS, TIMSS and PISA) to provide additional quantitative and qualitative information as a broader comparative measure.

for alternative measures of achievement

8. ***Commission international research*** and ***development*** to assist CCEA in developing innovative 21st Century assessments and examinations.
9. ***Separate teacher assessment from accountability*** to safeguard assessment for learning.
10. ***Develop wider indicators*** to '*enable progress in all important learning goals to be reported'* (*ARG, 2008*) and to broaden measurement of 'value-added'.
11. ***Use standardised testing data sensitively within schools only for*** diagnostic, formative and value-added purposes to prevent teaching to the test.
12. ***Use pupil attitudinal and 'well-being' surveys sensitively*** to gain insight into the correlation between 'motivation', 'liking' and achievement (*Sturman, 2012*).
13. ***Develop 'unseen' thinking skills assessments*** '*to ensure that important 21st Century skills become valued in the education system'* (*OECD, 2011: 19*).
14. ***Develop new qualifications for N. Ireland*** which reflect the needs of young people, the economy and employment in the 21st Century (*CBI, 2012*).
15. ***Introduce a measure to reduce the number of pupils leaving school with no qualifications*** by an agreed percentage.
16. ***Review Programme for Government Targets and NI Audit Office Monitoring*** to reflect these recommendations, based on an understanding of supportive accountability.

for additional powers, governance and transparency

17. ***Ensure accurate and transparent media reporting of educational outcomes*.**
18. ***Require that the evidence-base for ETI judgements is open and transparent.***
19. ***Ensure that all future educational policy is based on sound research***.
20. ***Invest in teacher professional development and improve political and public respect for teaching as a profession:*** Re-route spending on statutory assessment and evaluation systems towards teacher professional development. Develop greater political and public appreciation of the the quality of the public service which teachers provide.

1. **Fundamental principles:** A clear commitment to : broader system goals; broader data; sensitive analysis of data; value-added; supportive accountability

2. **Revised Government Targets** based on research-informed analysis of performance against a broad range of measures that align with system goals and are monitored in a way which avoids distortion of those goals

3. **Teacher Assessment** should be used for diagnostic and formative purposes only to inform qualitative reporting to pupils and parents

4. **Levels Progression** are revised: to take explicit account of conceptual knowledge and understanding and thinking skills; to be more useful to teachers in planning and assessing pupil work and providing feedback and to pupils in undertaking peer and self assessment*; numeric levels are replaced with progress indicators e.g. emerging, consolidated; to make it clear that achievement at one key stage may not be comparable to the next key stage due to changes in context and task demand

5. **Moderation** quality assures school's internal assessment processes and to enhance teacher capacity: to use 'assessment for learning' pedagogy; to devise appropriately challenging assessments; and to make valid assessments against knowledge and skills-based criteria across the Northern Ireland Curriculum focused on internally moderated assessments that include ICT and the development of thinking skills and personal capabilities supported by specifically designed tasks (and potentially future 'unseen' assessments)

6. **Equity and value-added** in addition to the Free School Meals (FSM) Index, other mechanisms are explored to inform the development of a statistical model to enable the stratification of schools by intake (for example the use of such as Super Output areas potentially refined by using Geographical Information System (GIS) analysis of individual pupils post-codes (as in New Zealand) or parental education (as in Sweden)

7. **Assessment Tools and Approaches** A range of research-informed diagnostic, predictive, performance monitoring and reporting tools and approaches (which are part of the assessment processes of many schools already) should be used across all schools to identify individual strengths and areas for development to inform targets to evaluate value-added

8. **Value-added Reporting:** Reporting school and system level is based on value added, adjusted for context. DE use an additional, or alternative, sampling mechanism for the purposes of accountability and policy formation

9. **Data Transfer:** Detailed rich pupil data is transferred each year in an agreed format to assist future planning, teaching, learning and assessment

10. **Piloting:** A number of case-study schools be identified at both primary and post-primary level to explore the quality, educational utility and manageability of the proposed model and associated diagnostic and monitoring tools before considering customised procurement

11. **Economic Appraisal** A full economic appraisal is undertaken of the merits of procuring a completely integrated suite of tools that has the support of all stakeholders in terms of:

- The use of quality information for educational and accountability purposes,
- manageability and teacher time saved for core professional purposes; and
- freeing up other agencies from a focus on accountability to a focus on providing much-needed capacity building support.
- (If NINAS & NILAS are to be included in this suite they must provide similar levels of diagnostic information as those available from 2 commercial providers)

12. **Interim arrangements** Teachers continue to assess and report to parents in qualitative terms as working at, above or below expected standards;
    - Schools are invited to register to have their internal assessment processes quality assured by CCEA
    - Best practice schools are enabled to act as centres of good practice for other schools in their catchment /area learning community

13. **Professional Capacity Building** Over the next few years that assessment support resources should focus on
    - developing teacher 'assessment for learning' capacity
    - Principal's pedagogical leadership skills and
    - Senior management skills in managing and interpreting data

14. **System capacity** Consideration be given to establishing a centre of excellence in diagnostic, predictive and standardised assessment and analysis

Power point Presentation OECD and System Evaluation

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