

Education and Lifelong Learning Committee ELL (2) 06-04(p.1)

Date: 28 April 2004

Time: 9:15am

Venue:

Title : Minister's Report

1. This report updates the Committee on specific issues raised by members and on issues of current interest. Annex A sets out major engagements since the last report.

2. COMPARISONS OF SCHOOL BUDGETS IN WALES AND ENGLAND 2003-04

My report to Committee on 17 March covered the comparison with budgets set in England . There was insufficient time to discuss the matter and I agreed to bring it back to this meeting. The analysis paper is at Annex E with Tables at Annex F.

The key points, as set out in my previous report are :

- Average budgeted per pupil spend in Wales in 2003-04 was £3,668 compared with £3,377 in the previous year (table 1 and chart 1). The overall budget per pupil for England was £3,697; £3,604 excluding London (table 2);
- The range was from £3,343 in Flintshire to £4,358 in Ceredigion (table 1 and chart 1);
- Between 1990-91 and 2002-03 spending (excluding nursery provision but including provision for post 16 provision) per pupil in Wales has increased in real terms by 29.1% compared with 25.8% in England (table 3 and chart 3);
- Cross border comparisons show per pupil budgets higher in mid and South East Wales than the neighbouring English authorities (table 4);

Average primary school size in Wales is 167 pupils compared with 229 pupils in England. Average secondary school size in Wales is 944 pupils compared with 962 pupils in England. Pupil/teacher ratio in the primary sector in Wales is 20.8, lower compared with England at 21.9, and slightly higher in both the secondary and special sectors (tables 5 and 6).

3. EDUCATION MAINTENANCE ALLOWANCE (EMAs)

I have previously mentioned to Members that I was following with interest the progress of the Education Maintenance Allowance schemes being piloted in England and Scotland.

EMAs schemes have been operating in about a third of England's LEA areas for the last three to four years. and Charles Clarke announced on 19 April that they are to be extended to the rest of England from this coming Autumn.

Whilst we have introduced the ALG scheme in Wales which has clearly benefited those aged 18 +, I do not underestimate the potential which EMAs have for encouraging 16 and 17 year olds to remain in education.

Following recent discussions with Treasury, it has been agreed that additional AME provision will be made available to enable a scheme with identical qualifying criteria and levels of awards to be introduced in Wales. There is an opportunity to collaborate with the Northern Ireland Department for Education and Learning in developing a system for delivering EMAs and I have instructed my officials to take this forward with the aim of introducing an EMAs scheme in Wales for the forthcoming academic year. I will update Committee Members orally.

4. CAREERS WALES REVIEW – FINAL REPORT

In my Report to the Committee for November 2003 I announced that GCL Management Consultants had been appointed to undertake an independent review of Careers Wales.

The Review has been completed. The Final Report has been published to the Assembly's Internet site and copies deposited in the Library.

There are a number of very positive findings:

- The Review found that Careers Wales, our all-age careers information, advice and guidance service, is one of only three such integrated services in the world. As such, the Review concludes that Careers Wales stands 'towards the forefront of current best practice.'
- Since establishment in April 2001, the Review states that Career Wales has shown demonstrable success. Careers Wales traditional services to its clients in education have been delivered to high

standards. This has evidenced by successive Estyn reports and favourable feedback from a questionnaire sent to a representative sample of secondary schools and colleges from across Wales.

- Adult services and the Youth Gateway have seen significant expansion.
- Careers Wales has pioneered a more cohesive, client-sensitive range of services with genuinely innovative developments by pioneering an all-Wales Quality Award for schools and colleges and an inter-active Website Careers Wales Online that is planned to go live in September 2004.

The Review also reports progress in drawing-up national standards and entitlements; but states that the evidence to demonstrate that these are delivered consistently across Wales needs to be developed more rigorously. The Review also recommends that Careers Wales and the Assembly should work more closely together in driving-up service standards and improving the research capacity in Wales.

It also suggests that Careers Wales services might be delivered more consistently across the whole of Wales if the number of companies were reduced from seven to three or four. Careers Wales should also attempt to foster better relationships with national partners to complement the excellent partnership arrangements at local and regional levels.

In summary, the Review gives a balanced picture of the considerable advances made by Careers Wales in its first three years. This is particularly noteworthy as this has been a period of considerable organisational challenges.

The Review proposes a range of detailed recommendations for improving service quality and delivery and aimed at creating a genuinely national service. The most urgent priority areas that need to be addressed in the short term are identified as:

- an audit of consistency of services delivered by companies across Wales;
- a bench-marking exercise to inform companies' and the Welsh Assembly Government's joint understanding of comparative performance;
- a more detailed milestone plan for the roll-out of Careers Wales Online;
- planning guidelines developed to promote convergence on important pan-Wales issues; and
- Careers Wales should explore the potential to develop a research capacity.

I met with the Careers Wales Association on 17th March to discuss these recommendations. The Association has broadly welcomed the recommendations and has committed to undertaking an ambitious work programme to address the most urgent priority areas over the next six months. I have agreed to meet the Association in the Autumn to review progress.

5. WORK BASED TRAINING TENDERING

On 4 March, ELWa invited 126 training organisations to submit tenders for Work Based Learning contracts worth around £100 million over the next year. The process is running to timetable, with

tenders returned by 16 April, and providers due to be notified of the outcome by the end of May.

New contracts will begin in August 2004 and run until August 2005 when ELWa's new Planning and Funding System goes live. In the meantime, ELWa is extending existing contracts to maintain activity. Tenders will be submitted on a standard price basis for the first time. The tender process and price harmonisation has enabled ELWa to bid for a significant level of European Structural Funds over the next three years.

6. FUNDING OF THE WIDENING PARTICIPATION AGENDA IN HIGHER EDUCATION

The Assembly Government is committed to the principle that all those people with the ability to benefit from higher education should have the opportunity to do so. There are three main thrusts to our strategy – removing financial barriers; overcoming aspirational barriers and improving retention.

On the first point, we are making £30 million available each year for the Assembly Learning Grant scheme, which makes grants available to the lowest income, Welsh domiciled students in FE and HE, wherever in the UK they choose to study. A further £12 million is available in FE and HE through discretionary financial contingency funds.

We are also putting substantial investment into initiatives designed to build links between institutions, schools and communities with the aim of building aspirations and contributing to improved attainment. In the current academic year, the Higher Education Funding Council for Wales is making £1.6 million available in support of institutions' widening access strategies. In addition, we have, through the Funding Council, continued to fund four *Reaching Wider* partnerships across Wales, including national co-ordination, to the tune of £1.95 million per year. Also, the Assembly Government, in partnership with the Royal Bank of Scotland, funds the Aimhigher Wales campaign. This highly interactive roadshow, representing an investment in excess of £700,000 over a two year period, is aimed at informing year 9 students of the opportunities presented by higher education.

Finally, in recognition of the increased costs of supporting and retaining non-traditional students, the Higher Education Funding Council for Wales distributes £2.46 million to institutions as a widening access premium. I have asked the Council to report to me on the costs of educating non-traditional students.

7. FE COLLEGE AND SCHOOL PARTNERSHIPS

The Assembly Government strongly endorses the principle of FE and School Partnerships and would encourage schools and colleges (indeed all providers) to establish strong and productive partnerships.

Examples of this are available in Conwy, where partnerships have been developed between secondary

schools and Coleg Llandrillo, providing through the "Vocational Pathways" programme vocational education and training for some 240 Key Stage 4 pupils who attend the college two days a week gaining nationally recognised qualifications at level 1. In addition, common timetabling has allowed groups from a number of schools to gain experience in construction, hospitality, engineering, information technology, hairdressing, beauty, motor vehicle maintenance and health and social care. Similar arrangements are made in Denbighshire, where Blessed Edward Jones Catholic High School has a partnership arrangement with Rhyl Community College in the delivery of AS level Psychology and AS/A2 Information Technology. Gorseinon College has direct links with 2 feeder schools: Penyrheol and Pontarddulais, including shared timetabling in respect of Penyrheol which allows motor vehicle training to be delivered in years 10 and 11. Similar arrangements are in place in both South East and Mid-Wales.

In respect of Welsh-medium provision, a partnership between Ysgol Gyfun Ystalyfera and Neath Port Talbot College has permitted the delivery of childcare courses bi-lingually (the CACHE course) and has allowed the school to expand its provision by putting on an extra course run by the College. Additional examples are the video-conferencing project funded by ELWa, which is paying for the installation of video-conferencing equipment in six sixth forms up and down the country to enable them to exchange lessons and expertise, with the potential for engagement with colleges throughout Wales in the future. In Rhondda Cynon Taff collaboration has taken place between Coleg Morgannwg and several Welsh language schools with pupils undertaking a variety of vocational subjects. ELWa's funding of fforwm's Sgiliaith Centre and improved working with Cydag is helping to foster good working links between schools and colleges across the board.

ELWa will be able to support developments in respect of partnership working through the *Learning Network Investment* element of its proposed National Planning and Funding System. In addition, ELWa's Operational Plan for 2004-05 sets out proposals to develop pathfinder learning networks. These networks might involve providers, including schools, working together on a geographical (local or regional providers), thematic (Welsh medium providers working together) or a sectoral basis (in specific types of provision such as construction or social care).

8.. FE PAY

The Assembly Government announced an initiative on 24 October 2002 to improve and restructure FE Pay in Wales and in 2003-04 provided ELWa with £9m to boost the pay of FE lecturers and support staff. This initial phase of a three phase policy drive funded:

- an across the board pay increase of around 3% (£6m) for FE employees;
- £2m targeted at FE lecturers in the lowest pay bands, increasing their pay by a further 1.7%; and
- £1m to target the low pay of support staff, raising their award by an additional 1.7% also.

The Assembly Government provided an extra £4m in 2003-04 to enable ELWa to fund new pressures arising from increased pension contributions and other costs.

Subsequently, fforwm and the Unions have engaged positively in complex negotiations to address the second phase of the FE Pay initiative, with a view to establishing a six point mainscale, which will achieve pay equivalence with schoolteachers during 2004-05, and an upper pay scale for lecturers who fulfil certain requirements. Subject to agreement by all of the parties concerned, the aim is for this second stage of the pay initiative to take effect retrospectively from 1 April 2004. ELWa has made provision for fully funding the cost of such a settlement in its Operational Plan for 2004-05. It will also consolidate the £9m additional provision for Phase I and the £4m additional provision that was made available last year for pensions and other costs into its 2004-05 funding for FE institutions.

During the coming months, fforwm and the Unions will consider the third phase of the FE pay initiative, with attention turning towards managerial allowances and other costs. Funding this third stage will, of course, be subject to consideration in the forthcoming BPR.

9. PERSONAL DEVELOPMENT FOR ELWa EMPLOYEES

In keeping with its task of promoting and developing learning in Wales, it is ELWa's policy to value and develop the potential of all its employees. As an organisation, ELWa seeks to encourage a learning culture by providing practical help and learning opportunities.

ELWa has developed a training plan for 2004 to deliver both core training courses and job related skills training. Directors and members of staff have been involved in identifying training needs and priorities across the organisation.

10. INVESTMENTS IN 14-19 AGENDA

In 2004-5 £1.48m has been made available to develop pilot programmes as part of the Learning Country; Learning Pathways Action Plan. Each 14-19 Network has £50,000 to help establish its initial delivery plan, and the remaining £380,000 will be used to support pilots in Learning Coach, Personal Support, Work Focus Experience and Community/Voluntary Experience. Funding for future years will be subject to the Spending Review.

11. COMPANY LEARNING ACCOUNTS AND LOCAL FE PARTNERSHIP

ELWa is piloting the second phase of its Company Learning Accounts (CLA) scheme which has been designed to encourage employer investment in learning, especially management development. Over 100 businesses are currently participating on the CLA programme and feedback from businesses is very positive. ELWa plans to open an additional 150 accounts this financial year and to evaluate the scheme by October 2004. The development of CLAs is part of ELWa's wider portfolio for business skills which ELWa is currently reviewing with a view to making it more efficient, effective and accessible.

Partnership is crucial to the success of all parts of ELWa's agenda, no less so the business skills agenda. FE colleges have long standing involvement with other organisations, including well developed links with a wide range of businesses and business organisations. I envisage that ELWa will build upon these

strengths and encourage providers and employers to work together.

12. ESTYN REMIT LETTER

On 9th March 2004, I issued the Welsh Assembly Government's remit for Estyn for the financial year 2004-05.

In addition to the Chief Inspector's statutory duties, Welsh Assembly Government commissions Estyn each year to carry out additional work set out in an annual remit. The remit complements Estyn's statutory functions and provides a framework for the advice required by the Assembly during the financial year on all aspects of education and training in Wales.

A copy of the remit is attached at Annex C.

13. PRIMARY FREE SCHOOL BREAKFAST INITIATIVE

The Welsh Assembly Government made a commitment that by the academic year 2006, all pupils of primary school age registered in maintained primary schools in Wales would be provided with the opportunity to have a free, healthy breakfast at school each day.

This scheme will be introduced incrementally on a pilot basis starting in Communities First areas. Nine LEAs have now been identified to pilot the first phase of the initiative commencing September 2004, and all Directors of Education have been informed. Authorities have been chosen to provide a good geographical spread and will mean that potentially, more than 11,000 children in Communities First Areas will be eligible to take part in this initiative from September 2004. Evidence gathered from the pilot will inform the subsequent staged rollout. I will be announcing the participating LEAs at Ysgol Goetre in Merthyr Tydfil on Tuesday morning.

Primary schools in Communities First areas in all remaining LEAs will be given the opportunity to participate in the second phase of this initiative from September 2005. New schools will continue to be added each term until by the Spring Term of the 2007 academic year, the policy will be rolled out to all maintained primary schools that want to participate.

Officials have now met with, and are working collaboratively with a number of key stakeholders, including the WLGA, the Association of Directors of Education in Wales and the Local Authority Catering Association in Wales to ensure effective rollout of the pilot.

A series of three stakeholder workshops involving all those with an interest in or upon whom the initiative might impact have been arranged. These are being held in early May in south, west and north Wales to help ensure stakeholder involvement in the process.

14. TRINITY COLLEGE CARMARTHEN - AUDIT OF WELSH LANGUAGE AND BILINGUAL

EARLY YEARS PROVISION

Members will have received a copy of the audit conducted by Trinity College on behalf of the Assembly into Welsh medium provision in the early years. Its conclusions are now being considered by the Foundation Phase Project Board and they will be making recommendations to me in due course.

15. DEVOLUTION OF STUDENT SUPPORT – Welsh Language Issues

The Prince 2 Project Board has agreed to the setting up of a Welsh Language: Devolution of Student Support Task and Finish Group. The Task and Finish Group will be representational of all stakeholders including NAFW officials; LEAs ; Welsh Language Board; Student Loans Company; NUS and DfES.

The Group's Terms of Reference will include and work to:

- Defined timescale (5- 6 months) starting in April 2004.
- Establish a common understanding of the current position in respect of Welsh medium provision of student support services.
- Ensure that stakeholders aspirations for the Welsh medium provision of student support services, are fully considered in respect of the new devolved Welsh student support system from academic year 2006/7.
- Identify requirements and prioritised, costed, recommendations for Welsh language provision in the Student support system from 2006/7 that are desirable, pragmatic and affordable by end September 2004
- Identify the extent to which these recommendations are critical to compliance with the Assembly's Welsh Language Scheme or are not critical to that compliance but are nevertheless desirable for specific (identified) reasons.
- Consider, alongside SLC, changes that would be required across SLC in order to provide a full Welsh system, "end to end."

17. IDENTIFYING BARRIERS TO ECONOMIC ACTIVITY IN WALES: DESK RESEARCH

A report "*Identifying barriers to economic activity in Wales: desk research*" was published on 31 March on the Assembly Government's website at: <http://www.wales.gov.uk/subiryssearch/content/eru/projects-e.htm>. It forms the first part of a two-stage project. Fieldwork, involving interviews of economically inactive people, is currently in progress and the outcomes of this second stage will be reported later in the year. "*Identifying barriers*" is the first of the research projects to be published from the programme recommended by the Economic Research Advisory Panel and agreed, and implemented, by the Welsh Assembly Government.

These research findings will be of particular relevance to the work of Jobcentre Plus in Wales in its task to help economically inactive people, to overcome a range of barriers to getting a job.

The research shows that growth in economic inactivity has increasingly been concentrated on the low skilled, and those who have long-term work limiting health problems or disabilities. The research also confirms that there are substantial differences in economic inactivity across Unitary Authorities ranging from 19.8 per cent in Powys to 34.8 per cent in Merthyr.

The role of the recently appointed Wales Employment Advisory Panel will be to advise the Welsh Assembly Government, and work with Jobcentre Plus, to develop better ways to tailor activities and support to help more people into work. This is a key policy objective of "*Wales: A Better Country*" and this research provides valuable underpinning evidence to take this work forward.

18. ASSESSMENT REVIEW OF THE WELSH MEDIUM INCENTIVE

SUPPLEMENT SCHEME

- The Welsh Medium Incentive Supplement (WMIS) scheme provides an incentive to eligible students undertaking qualifying secondary initial teacher training courses through the medium of Welsh. It is aimed at attracting on to those courses students who need additional assistance to raise their confidence and competence so that they can teach through the medium of Welsh.
- The scheme has operated since 1988 and provides a non means tested bursary of £1,200 to eligible students.
- The national plan for a bilingual Wales, "Iaith Pawb", includes a commitment to *"improve the operation and attraction of the Welsh Medium Incentive Supplement scheme which encourages ITT students to train through the medium of Welsh by increasing level of grant and improving support"*.
- Additional funding has been made available to develop the WMIS to support the "Iaith Pawb" commitment. The efficiency and effectiveness of the existing scheme will be subject to an independent assessment review prior to any changes. This will be carried out by an Assembly official.

Terms of reference

The terms of reference of this assessment review are:

1. to review how the WMIS is currently being promoted and operated, in particular by looking at how well or otherwise it fits with current initial teacher training incentives such as the Teaching and Training grants in terms of:
 - the level of grant – which has been set at £1,200 per student since its inception in 1988

- the absence of funding from the scheme for either the WMIS organisers' running costs or schools which participate
- perceived inconsistency as to which courses, at which institutions, qualify both as Welsh medium and as eligible for the WMIS
- the need for updated, detailed, published operating criteria

1. to assess its effect in attracting more students to train to teach through the medium of Welsh
2. to make recommendations for the continuing need for the scheme and for its future development, in terms of:

- the promotion of the scheme
- its administration and operation
- the appropriate level of grant
- whether any further more detailed review or other work is needed

with the objectives of maintaining and increasing the number and quality of students training to teach through the medium of Welsh. Present arrangements are for the assessment review to be completed by mid-July. Once we have been able to consider the results of the assessment review I will be making decisions on the next steps and will provide the Committee with a progress report in the Autumn.

19. EARLALL

On 18 March I attended a meeting of the EARLALL General Assembly in Brussels. To facilitate the sharing of good practice within EARLALL all members gave an update on developments within their regions. Copies of a number of these updates are attached at annex B for the Committee's information. We are still awaiting a number of outstanding updates from member regions and I will circulate these in due course. Via this information sharing process we learnt that the provision of school breakfasts is common place in Sweden and I hope that we can learn from the experiences of our EARLALL partners in Sweden in taking forward our own work in this area.

A representative of the European Commission also attended part of the meeting for a discussion on 'the Future of the European Social Fund'. This dialogue was particularly useful in strengthening links between EARLALL and the Commission and in raising EARLALL's profile within Commission circles. Wales is now co-ordinating a paper representing EARLALL views on 'the role of the regions in the future administration of the structural funds' and this will be forwarded to the Commission in due course.

Successful partnership working and project collaboration between the EARLALL partners continues. A Wales led pre-proposal for Leonardo funding for a joint project with the Basque Country, Tuscany and Scotland on the creditisation of post graduate learning in Higher Education was favourably received by the Commission at the beginning of the year. We await the Commission's response to the full proposal,

which was submitted in mid February. Wales is also working actively with partners in the Basque Country and Tuscany on a project to identify common occupational standards and competencies for particular jobs, starting with cooking and concrete laying, and with the Vastra Gotaland region on the 'Women in Management' exchange programme, which will start with a visit to Wales by female managers in the Swedish Health Service in the Autumn.

20. POST-16 TRANSPORT POLICY STATEMENTS – GUIDANCE TO LEAS AND OTHER STAKEHOLDERS

The Committee is invited to note the guidance at Annex D, which will issue shortly to Local Education Authorities, School and FE College Governing bodies and other interested parties. The guidance seeks to assist LEAs and other stakeholders in discharging their responsibility, under section 509AA of the Education Act 1996, as inserted by Schedule 19 of the Education Act 2002, to draw up statements setting out the provision of transport, and support for transport, for learners aged 16-19 in their local authority areas.

As set out in the Act, LEAs are required to draw up transport policy statements annually, and to publish these statements in a manner which they consider suitable by 31 May in the year in which the academic year in question begins.

The guidance is intended to assist LEAs in discharging this duty, by giving advice to LEAs and their partners on how to interpret the duty, including setting out:

- considerations to be taken into account when drawing up statements;
- the content of statements, and
- how and in collaboration with whom statements should be drawn up.

LEAs are required to have regard to this guidance in drawing up these statements.

It is anticipated that Community Consortia for Education and Training (CCETs) will have an important role in assisting LEAs in identifying transport provision requirements in their area.

It is intended that, after its use in drawing up statements for the 2004/05 academic year, the guidance will be the subject of consultation with a wide variety of stakeholders and other interested parties, with a view to issuing a revised version for use in drawing up statements for academic year 2005/06. Stakeholders will be requested to take the guidance into account when drawing up statements for their area, and then to reflect the experience of drawing up the statements in making their consultation responses. It is anticipated that by this process LEAs will identify examples of good practice in the drawing up of statements which can then be taken into account in the revised guidance.

21. AMENDMENTS TO SECONDARY LEGISLATION

Consultation on Exclusions Regulations and Guidance

Background

Exclusions procedures are currently provided for in The Education (Pupil and Exclusions and Appeals) (Maintained Schools) (Wales) Regulations 2003 and The Education (Pupil and Exclusions and Appeals) (Pupil Referral Units) (Wales) Regulations 2003. Guidance for these regulations is contained in Circular (1/2004), Exclusion from Schools and Pupil Referral Units.

We are proposing to make amendments to the exclusion regulations and to exclusion guidance. We aim to make the amendments on 6th July and bring them into force on 1st September. The consultation process is currently taking place, and will end on 7th May.

Proposals

Changes to regulations

The main change to the regulations involves reverting back to the balance of probabilities to be used as the standard of proof for decision-making for all exclusions. Other changes are for the purposes of clarification and for improved information. Changes made to regulations will be reflected in changes to the guidance which we intend to disseminate to recipients of the original guidance. In addition, we will make changes to information available on the Assembly's Internet site.

Amendment one: standard of proof

In July 2003, the Court of Appeal delivered its judgement in the case of R (On the application of S) v The Governing Body of Y P School. The judgement changed the burden of proof required to exclude a pupil, where the exclusion is based on the allegation of a crime being committed by the pupil, from the civil standard of balance of probabilities to the criminal standard of beyond reasonable doubt. The judgment has created practical difficulties, requiring head teachers having to gather extra information, or possibly require them to bring the police into schools at an earlier stage. It is, therefore, recommended that an amendment be made to the Regulations to include a provision to provide that the standard of proof used in all exclusion cases is the civil standard of a balance of probabilities, including where a pupil is accused of committing a crime. This position has been taken in by the DfES. in England, with effect from March 22nd 2004, provide for decisions on all exclusions, including those where a pupil is accused of committing a criminal offence, to use the civil standard of balance of probabilities.

Amendment two: obligations on governing bodies

The current Regulations place responsibility on governing bodies to consider all the circumstances surrounding the exclusion of a pupil. Regulations also place responsibility on the Governing Body to

consider whether a pupil should be reinstated, and where the Governing Body considers reinstatement is appropriate, they must consider whether reinstatement should be immediate or by a particular date. The intention of the existing Regulations is that these two responsibilities should be treated as mutually exclusive. That is, Governing Bodies are responsible for considering all circumstances surrounding exclusions whether it is practical, or otherwise, to reinstate the pupil. This responsibility was clearly articulated in section 66(3) of the Schools Standard and Framework Act, 1998. The existing Regulations however, have inadvertently created an ambiguity surrounding the exclusivity of the two provisions. The amendment intends to incorporate the provision within section 66(3) of the Schools Standard and Framework Act, 1998 into regulations.

Amendment three: inclusion of date of birth in exclusion information

The Regulations currently require the governing body to inform the LEA of a range of information relating to the pupil being excluded, including age, but do not require that the pupil's date of birth be stated. It is proposed to add the pupil's date of birth to the range of information to facilitate the accurate collection and monitoring of exclusion data.

Changes to Guidance

As well as making the above changes to regulations in revising the guidance we will take the opportunity to amend the guidance to clarify the requirements for the Pupil Discipline Committee to meet.

Clarification of when a meeting of the Pupil Discipline Committee is required

The existing Regulations require that the Governing Body must call a meeting of its Pupil Discipline Committee to consider the circumstances surrounding exclusion, where the total number of fixed exclusions within a term exceeds 15 days. Questions have been raised about whether the Regulations require further meetings of the Pupil Discipline Committee to be convened, after the number of days excluded exceeds 15 days, for every further exclusion in that term or whether after the first meeting of the Pupil Discipline Committee, the number of relevant days for that term would return to zero.

We would like to clarify in guidance that the Regulations should be interpreted as follows; that, where a pupil has been excluded for more than 15 days within a term and, where further exclusions take place within that term, the Pupil Discipline Committee are required to meet in relation to each exclusion to assess the effectiveness of the support plans put in place for that pupil.

Annex A

MINISTERS ENGAGEMENTS – 17th March 2004 to 27th April 2004

17th March

MTG - Board of the Careers Wales Association Ltd, Cardiff Bay

18th March

MTG - General Assembly of the Association of the European Regional and Local Authorities for Lifelong Learning (EARLALL), Brussels

20th March

SPCH – Maths Masterclass Presentation Ceremony, University of Glamorgan

22nd March

SPCH - Official Opening of the Early Years Unit Stepside TP School School, Pembrokeshire

MTG – UNISON, Cardiff Bay

23rd March

SPCH - Welsh Launch of the Faulkes Telescope Project, Cardiff

SPCH - Youth Event at the International Sustainable Development Conference, Cardiff

24th March

MTG - Wales Employment Advisory Panel, Cardiff

25th March

VISIT - Ercall Wood Technology College, Telford (Joint Visit with David Miliband)

VISIT - Lord Silkin School, Telford (Joint Visit with David Miliband)

VISIT - Ysgol Morgan Llwyd, Wrexham (Joint Visit with David Miliband)

VISIT - Deeside College, Deeside (Joint Visit with David Miliband)

29th March

MTG - Bilateral with Don Touhig, Cardiff Bay

SPCH - SEDA Annual Spring Conference, Cardiff

31st March

SPCH - Opening of Euroclio Annual Conference, Cardiff

SPCH - Wales TUC re: new equality legislation, Cardiff Bay

VISIT – RNIB Children and Families Centre established by RNIB, Cardiff Bay

ATTEND - Welsh Joint Education Committee presentation on the Welsh Baccalaureate Pilot Project, Cardiff Bay

SPCH - Presentation Evening at Byntirion Comprehensive School, Bridgend

1st April

SPCH - Launch AAA-Drws (SEN's new bilingual web resource), Cardiff Bay

MTG - Care Forum Wales, Cardiff Bay

ELL Committee

2nd April

SPCH - Open outside classroom at Willowbrook Primary School, Cardiff

7th April

MTG - Secretary of State Helmut Rau, Baden-Wuttemberg, Germany

MTG - Professor Dr Peter Frankenberg, Minister for Science Research and the Arts, Baden-Wuttemberg, Germany

14th April

SPCH - Launch INTERREG IIIA People+ Project, Llanrhystud

SPCH - NASUWT Annual Conference, Llandudno

15th April

MTG - Autism Cymru, Cardiff Bay

MTG –ELWa Chair and Chief Executive, Cardiff Bay

MTG - Wales Council for the Deaf, Cardiff Bay

17th April

MTG - Informal Meeting With Funky Dragon, Pendine

19th April

SPCH - Professional Practice Conference, University of Glamorgan

SPCH - Debating Club at Ysgol Gyfun Glantaf, Cardiff

SPCH - Open Barnardo's Open Door Project Info Shop, Pontypridd

MTG - John Hedger and Brian Connolly – Proposed Sector Skills Council for Lifelong Learning, Cardiff Bay

SPCH - British Federation of Women Graduates, Swansea

20th April

SPCH - World's Biggest Lobby in support of the Global Campaign for Education's campaign for a primary education for all children, Cardiff Bay

SPCH - First Annual Conference for Governors of FE Colleges and FE Institutions in Wales, Llandrindod Wells

SPCH - Governors Wales Conference, Wrexham

21st April

SPCH - NPQH Awards Ceremony, Llandudno

MTG – 4 Nations SEN Officials, Cardiff Bay

22nd April

MTG - Ysgol Dyffryn Taf's School Council, Whitland

VISIT - Pontrhydyfen Primary School to present the Basic Skills Agency Quality Mark, Port Talbot

MTG - Philip Carling, Chair of the Sports Council for Wales to discuss funding for the PE and School Sports Initiative, Cardiff Bay

MTG - Andrew Green, Ioan Matthews (Trinity College) and Alison Allan (HEFCW) re expanding Welsh language higher education, Cardiff Bay

24th April

SPCH - UCAC Annual Conference 2004, Llanelli

26th April

MTG - Professor Noel Lloyd - New Vice-Chancellor for University of Wales Aberystwyth, Cardiff Bay

MTG - Teacher Unions, Cardiff Bay

MTG – HEFCW Chair and Chief Executive, Cardiff Bay

27th April

MTG - Cllr Jeff Jones, Chris Llewellyn and Simon Williams WLGA, Cardiff Bay

MTG - Women in Democracy

Annex B

REGIONAL UPDATES

BRIEF UPDATE ON KEY DEVELOPMENTS IN LIFELONG LEARNING IN CATALONIA

- General Plan of Vocational Education and Training in Catalonia

The Catalan Council for Vocational Education and Training, established by the Government of

Catalonia, is the consulting and advisory organ to the Government in all areas of VET, including initial vocational education, occupational and continuous training.

The main aim of the Plan is to integrate the different systems of vocational and training currently in existence. It is a multi-year plan, which will ensure that educational needs are met. It will provide the flow of qualified professionals that industry and the service sectors need. It is aimed at producing an effective response to our social and economic needs while constructing an advanced country, cohesive both socially and regionally, capable of providing high quality employment for all its citizens, without exclusion.

- Actions/Programmes developed in Adult Education:

Instrumental training: basic subjects such as reading, writing and math

Language teaching and learning for immigrants

Leisure and Culture training

- University programmes: post-diploma and post-graduate courses.

Madona District, Latvia

Key Developments in Lifelong Learning

Life-long learning in Madona district, Latvia, is developing in accordance with the priorities set by the strategy of adult education of Madona district.

The main objectives are:

1. To raise public awareness of adult education.
2. To insure availability of adult education.
3. To provide varied and high-quality offer of adult education for regional development.

In order *to raise the public awareness and availability* of adult education in the district two basic lines are followed :

- Madona district project grant programme;
- Network of adult education coordinators in local

municipalities.

Madona district annual project and grant competition is organized to give the local authorities possibility to realize their initiatives of adult education in different fields, to support local adult education initiatives financially, to share experiences and disseminate best practices.

The adult education coordinators network functions to bring the idea of life-long learning to each municipality and each individual- to bring education closer to home.

In the last two years, the number of applications for the district project grant competition and the provided financial support has doubled. The variety of institutions applying for grants is increasing, including local governments, NGO, interest groups, etc.

In order *to ensure the variety and quality of adult education* different courses are organized

- to raise the professional qualification necessary for the developing labour market within the EU
- to ensure social skills for active participation in society and reduction of social exclusion

The courses are organized by a number of providers like Madona District Adult Education Center, different educational institutions, NGO's, municipalities, businesses. The target groups fall into two categories according to the aim of the course- those who want to raise their professional qualification and those who lack basic social skills to become included in society and labour market. The most popular courses are those providing general skills in computers, foreign languages, business management.

Timely and innovative offer of adult education, based on economic and social needs of the district and each individual, is the main concern of the Madona District Adult Education Centre

Madona District Adult Education Centre in cooperation with the Latvian Adult Education Association participates in several European Union programmes mostly ensuring mobility and social inclusion. The latest EU projects are "Building learning and social integration – pathways for excluded youth and young adults" and "Civic participation in youth – promoting integration in regions", which promote social skills and active citizenship to quite a number of young people in several municipalities of Madona district.

The Leonardo mobility projects, which are very popular in Madona district have developed into regular annual exchanges of young professionals and their job practise mainly in Germany.

The participation in EARLALL has been successful because of the possibility to exchange information and receive partnership offers which are extremely valuable to keep in pace with EARLALL and EU developments in lifelong learning.

EARLALL General Assembly Brussels, 18 March 2004

Paolo Nanni

Local Minister for Labour and Vocational Training

Provincia di Livorno

(Italy)

"The state of the art of Lifelong Learning activities in the Province of Livorno"

The European Commission approved a project for the development of a Local Action Plan for Employment by the Province of Livorno and funded it through the Innovative Actions ex article 6 of the European Social Fund. The LAP was constructed by means of a concerted action among all local entities and represents the programming instrument for provincial activities promoting labour, vocational training, education and welfare policy. The Plan, which was approved by the Provincial Council in February 2003, was defined according to the objectives and guidelines of the new European Employment Strategy and provides for the construction of a Province of Knowledge in line with EU objectives. The development of human resources through various types of initiatives for strengthening and raising the quality of initial and further training to extend the opportunities for Lifelong Learning is central to this comprehensive strategy.

Research involving the local and regional authorities participating in EARLALL was realized through the Change Facilitator Action project (funded by the Tuscany Region through its Regional Objective Plan, Ob. 3 ESF), which has developed a new professional figure able to manage changes in the labour market. The work will be presented at the Meeting and contains – laid out in tables – results from the study carried out to identify the elements characterizing the various local and regional governments and their actions and strategies for education, training and employment.

Research commissioned by the Province of Livorno on the organization, normative aspects and status of Adult Education in the province was completed and has recently been published. The study brings to light a variety of non-formal training activities in a stimulating context and in continual evolution. Women are particularly involved, while participation by immigrants is still scarce. Supply is present and extensive and it was pointed out that there is a need to reinforce supply through the construction of a system that provides for greater connectivity and coordination among all the experience found in the area. This is to answer the real training needs originating with the citizens.

Recent activity has been particularly centered on the start up of Study Circles within the sphere of the most comprehensive activities that have considered Adult Education within the specific ESF guidelines. Livorno is home to a regional project intended to guarantee adequate support to the structures put in charge of the individual circles. The project has been used to create a database, train tutors and

administrators, and set up a help desk. Furthermore, the Province has acknowledged the Tuscany Region's instructions to reserve 50% of its AE-earmarked ESF resources for setting up circles. Consequently, 255 study circles are in the start up stages with resources amounting to € 300,000.

Report by the Minister for Education and Lifelong Learning on

recent key developments in Wales

There have been many important recent developments in education and lifelong learning in Wales which have gone some way to achieving my vision that Wales should become internationally renowned as a learning country:

Primary schools

Free breakfasts in Primary Schools

The Welsh Assembly Government has made a commitment to provide all pupils of primary school age registered in maintained primary schools in Wales with the opportunity to have a free, healthy breakfast at school each day. The Assembly recognises that a healthy breakfast is linked to better health, concentration and behaviour in schools, and there is concern that many pupils miss out on breakfast. The Primary School Free Breakfasts Initiative will be introduced incrementally on a pilot basis starting in the Communities First areas (the most disadvantaged communities in Wales) for a small number of local authorities in year one. The pilot will begin in September 2004, and the evidence gathered will inform the subsequent staged rollout of the programme to all primary schools in Wales.

Secondary education

11-14: review of the current assessment arrangements.

Last summer Professor Richard Daugherty, an eminent academic, was tasked with undertaking a full and thorough review of the current assessment arrangements in Wales at age 11 (Key Stage 2) and at age 14 (Key stage 3). In January the Review Group's Interim Report – *Learning Pathways Through Statutory Assessment* – was presented to me. The report proposes a system that makes good and effective use of the teachers' own judgements and proposes ways in which these can become more robust and consistent.

The Report also proposes changes to the nature and purpose of the Key Stage 2 Tests. The provisional view of the Group is that at the end of year 5 (age 9-10) pupils take "tests" of literacy, numeracy and enquiry skills, which will inform the Year 6 (age 10-11) teacher and to the secondary school at the start of Key Stage 3. The group presents its final report in April 2004.

14-19: Learning pathways

In April 2003 the Welsh Assembly Government published the '14-19 Action Plan' which outlined new Learning Pathways for our young people. The Welsh Assembly Government has an aspirational target of '95 per cent of young people to be ready for high skilled employment or higher education by 2015'.

Various mechanisms are being put in place to ensure that we achieve this aim. These include

- Gathering examples of good practice to enable us to identify the range of activities already taking place all over Wales.
- Developing Local 14-19 Networks.
- Funding (£50000) will be available in 2004/5 to each Network to support local developments. £140000, to be match funded, will be available in 2004/5 for pilot developments in the Learning Pathways areas of learning coach and personal support.

The Welsh Baccalaureate

The pilot for the Welsh Baccalaureate commenced last September in 18 schools and colleges across Wales with a view to roll out to all schools and colleges in September 2007, subject to the assessment of the pilot. Initially the pilot is for post 16 provision.

Under the new Welsh Bac programme students will continue to take existing general and vocational qualifications – but all students will also follow a core programme comprising:

- 'Wales, Europe and the World' – study of political, social, cultural and economic issues;
- A modern foreign language module;
- An extended individual project;
- Key Skills;
- Personal and Social Education, and a period of community participation;
- Work- Related Education and a period of work experience.

Tackling Pupil Engagement

The Assembly is providing £0.5m each year from 2002-03 to 2004-05 to fund 10 pilot projects in order to evaluate the effectiveness of different approaches to address pupil disengagement. The piloted approaches include providing learning mentors in schools, for young pupils and using trained army personnel to deliver outdoor activity training. In addition, Grants for Education Support and Training (GEST) totalling £10.4m are available to local education authorities (for 2003-04) to tackle social disadvantage.

The proposals on the 14-19 Learning Pathways – and indeed in securing better pupil transition to Key Stage 3 and progression through Key Stage 3 - have an important role to play in ensuring that pupils continue to be motivated and included in school.

The Welsh Assembly Government is conscious of the need to equip teachers with the skills to be able to control classes and for this reason is running a pilot course throughout Wales on behaviour management. This started in October 2003-04 and we will evaluate its effectiveness.

Post 16 education

Credit and qualification framework

Wales is currently looking at revolutionising its accreditation system through the Credit and Qualification Framework. When fully developed this credit based qualification and transfer framework, will enable learners to "bank" learning credits as they go along, so that they can achieve various qualifications, one step at a time, to a recognised national standard through a varied route suitable to their own needs. The essential building blocks of this new system will be in place by 2006.

ELWa's National Planning and Funding System

ELWa, the body responsible for planning and funding post 16 education in Wales (excluding higher education) inherited a variety of funding and pricing regimes from its predecessors. ELWa was therefore tasked with creating a unified framework to integrate the planning, commissioning and resourcing for publicly funded education and training programmes post-16. The new arrangements will be introduced in August 2004 in parallel with current funding systems giving ELWa and providers opportunities to compare them for a year, prior to full running in August 2005.

Re-organisation of school sixth forms

The Assembly is bringing in new powers to enable ELWa to propose the re-organisation of post 16 education delivered through schools. The draft regulations will allow ELWa to propose the establishment, alteration or closure of school sixth forms or 16-19 schools. The new powers complement ELWa's existing strategic planning function with regard to post-16 provision, by giving it the tools to propose reorganisation where that would be in the interests of learners.

Higher Education

Aimhigher Wales

The Aimhigher Wales roadshow launched in March 2003 specifically targets 13-14 year olds in disadvantaged communities. It provides an inspirational experience for children who have been identified as having the potential to benefit from a higher education but may not consider it as an option. The roadshow is part of an all-Wales campaign and has already visited many secondary schools in Wales.

Reaching Wider Partnerships

An additional £2 million pounds was made available by the Welsh Assembly Government in support of widening access in 2002-03 and £1.9 million has been allocated for this purpose in 2003-04. The Higher Education Funding Council for Wales (HEFCW), the body responsible for higher education funding in Wales, is committed to providing £2 million in 2004-05 to ensure continuation of the work, which comprises a range of projects specifically linked at widening access to higher education (e.g. student mentoring, family learning and supportive residential GCSE revision courses).

Widening Access Statistics

Higher Education Institutions (HEIs) in Wales are already consistently outperforming UK averages in attracting a wide social mix of students and of working with groups and communities, which are under-represented in higher education. The latest figures show 90.8% from state schools to Welsh HEIs in 2000, compared with 85.7% for UK; 15% of young full time entrants from low participation neighbourhoods compared to 12.5% for the UK.

Higher Education Bill

On 27th January 2004, the UK Government introduced the Higher Education Bill which will transfer new powers to the National Assembly for Wales. The Bill will provide the National Assembly with powers over the support provided to higher and further education students who are domiciled in Wales, regardless of where in the UK they undertake their studies, and full responsibility for the tuition fee regime, including policy as regards variable fees (which will be introduced in England with effect from the academic year 2006/07). The Bill is expected to receive Royal Assent in July 2004.

EARALL –General Assembly 18 March 2004

recent Scottish developments round table paper

This paper contains information on recent Scottish developments since the last General Assembly meeting, September 2003 in Wales.

Competitiveness of Scottish Higher Education

the review phase 3

Update

· This review has from the outset been a collaborative venture. The remit of this review was drawn up and agreed by a steering group and approved by the Rt. Hon. Jim Wallace, MSP, Deputy First Minister and Minister for Enterprise and Lifelong Learning. The review has deliberately focused on

understanding where the competitive vulnerabilities of the Scottish system are most likely to lie in future, and identifying where the system funding pressures are likely to be most acute.

- This Executive has a strong track record in investing in higher education (up by a third to over £800m since devolution). Ministers have emphasised they will ensure that Scotland's universities maintain a competitive edge.
- The First Minister and Deputy First Minister have taken the unusual step, prior to the Spending Review, of committing the Executive to additional resources for higher education.

Background

On 4 March 2004, the Executive published the final report of Phase 3 of its review of higher education. This report on the competitiveness of higher education in Scotland was the product of a collaborative effort across the key stakeholders in HE in Scotland including Universities Scotland, the Association of Scottish Colleges, National Union of Students, Association of University Teachers, Educational Institute of Scotland. In total over 80 individuals from 20 organisations have taken part.

The agreed remit was to work together to create a robust base of information on HE in Scotland to understand the competitiveness of Scottish HE in a UK and wider context. The report creates that base and highlights a range of policy options and issues to monitor. The findings from the report are being carefully considered by Ministers. However, the report makes it clear that the evidence presented in the review will be considered alongside other evidence from the HE sector in the forthcoming spending review, and in other policy and decision making processes.

The document adds to the evidence base and has also identified additional work which, we all agree, needs still to be done. It has been agreed that the Review's steering group should be re-convened to carry this forward.

Enterprise in Education

Update

- The Scottish Executive launched its new strategy for Enterprise in Education – Determined to Succeed (DtS) – in March 2003.
- DtS is the result of a recent review of enterprise in education and is about developing in young people the skills, knowledge and attitudes that prepare them for the world of work, and for life more generally.
- It focuses on providing for pupils from P1 to S6 key areas of activity - enterprising and entrepreneurial education and work-based vocational learning with a relevant qualification for

those aged 14+.

- DtS calls for a change in the way pupils learn, teachers teach and the way the education and business communities interact.
- 10 pathfinder local authorities are already delivering Enterprise in Education in their own areas with the remaining 22 authorities due to commence activity from April this year.
- The Scottish Executive has committed £42 million over 3 years (2003-2006) to implementing this strategy and the private sector has contributed a further £2 million to support specific activity.
- Determined to Succeed can be found at: www.scotland.gov.uk/library5/lifelong/reer-00.asp

School and College review

Update

- The Partnership Agreement, between Scotland's coalition parties, contains a commitment which will enable 14-16 year olds to develop vocational skills and improve their employment prospects by allowing them to undertake courses in further education colleges as part of the school-based curriculum.
- The school-college review was launched on 20 October 2003 at a conference to help frame the consultation paper. The consultation paper issues on 25 February 2004 and runs until 1 June.
- The work-in hand includes 10 local authorities receiving additional funding for enterprise in education. The authorities will be encouraged to use part of this funding for plans to increase vocational training at FE colleges available to school pupils aged 14-16.
- The review has four key aims:
 - The purpose of school/college collaboration;
 - Managing supply with demand and funding responsibilities;
 - Implications for schools and colleges; and
 - Pupil welfare and support
- Pupils are at the heart of the review- 200,000 leaflets were issued to schools and colleges seeking pupils' views. The Scottish Executive is co-hosting an event for young people with the Scottish Youth Parliament in April 2004. Consultation seminars are also organised, including seminars for parents and for adult learners and regional seminars in various Scottish cities.

Background

The lifelong learning strategy published in February 2003, committed the Executive to 'develop a joint schools/FE strategy and implementation plan, including review of mechanisms to ensure flexibility of

delivery, so as to encourage locally relevant links between schools, FE colleges and local employers to ease school leavers' transitions into further learning, training or employment'. An inter-development team of Executive officials is co-ordinating the review.

Funding for Enterprise in Education was secured during the annual Spending Review 2002 (£40 over three years). It is likely that colleges will require additional funding to encourage them to make places available for 14-16 year olds and therefore additional funding beyond the £40 may be required.

At present, the Scottish Further Education Funding Council (SFEFC) give colleges about £26 million to fund enrolments of school pupils as part of their school-based curriculum. Guidance was issued to the Funding Council in January 2004 to cap existing level of SFEFC-funded activity for school age pupils, pending the outcome of the school/college review.

Lifelong Learning Forum

Update

The purpose of the lifelong learning forum is to mobilise the knowledge and expertise of key stakeholders in Scotland, and to help develop a coherent view on lifelong learning provision and its relevance to the needs of Scottish learners and employers. The inaugural forum met in December 2003 and was attended by both Jim Wallace, Deputy First Minister and Minister for Enterprise and Lifelong Learning and Lewis Macdonald, Deputy Minister for Enterprise and Lifelong Learning.

Its remit is to:

- Contribute to the future lifelong learning agenda by reviewing progress of the strategy, and acting as a sounding board for new policy initiatives;
- Provide an arena for Scotland's lifelong learning community to exchange information, bringing greater coherence to how stakeholders deliver learner-focused lifelong learning in Scotland;
- Act as a vehicle for encouraging partnership with, and between, private, public and voluntary sector stakeholders.

The existence and activities of a lifelong learning forum should contribute significantly to encouraging genuine, innovative and productive partnerships throughout the lifelong learning community in Scotland.

What's next

- Finalising the report of the first annual forum and following up actions that resulted from it
- Considering how to engage members between events
- Planning the next annual forum event.

Background

Life Through Learning; Learning Through Life, the lifelong learning strategy for Scotland that was launched in February 2003, gave a commitment to create a national lifelong learning forum and a number of specialist lifelong learning panels. A commitment was endorsed in 'A Partnership for a Better Scotland'. Scotland's lifelong learning strategy can be found at: www.scotland.gov.uk/library5/lifelong/lism-00.asp

Scottish Credit and Qualifications Framework (SCQF)

Update

- The third national SCQF Conference was held successfully in Glasgow on Monday 8 March. The event was attended by 360 learners, practitioners and policy-makers. The conference was entitled 'Making it Happen' and was aimed at building links with new sectors to widen the framework so that the framework can become 'the language of education and training in Scotland'.
- Since September 2003, there has been progress in a number of key areas, including:
 - A Scottish Social Services Forum has been convened to credit-rate and level social services qualifications to encourage continuous development among staff. Experience gained and lessons learned from this will be extended to other sectors such as health.
 - A consultant has just begun an 18-month project on developing guidelines to recognise non-formal, informal and formal learning. This is a complex and large piece of work which is very important to the future aim of the SCQF to include all pieces of education and training in Scotland.
 - The SCQF credit-ratings and levels will appear on the Scottish Qualifications Certificate, which all pupils completing Scottish national qualifications receive, by the end of 2004.

Background

The Framework comprises 12 levels covering all mainstream Scottish qualifications from *Access* level in National Qualifications to postgraduate qualifications (ie qualifications provided in schools, further education, higher education, training centres and the workplace). Work-based Scottish Vocational Qualifications (SVQs) are also included. The process involves allocation of credits and levels to individual qualifications according to their "size" in terms of notional learning hours (1 credit point for each 10 hours of learner effort, assuming a 1200 hour learning year).

The SCQF is intended to make the Scottish qualifications system easier to understand for individuals involved in learning, employees, employers and education and training providers. It will also show the relationships between qualifications. It will be a useful aid to learners for planning progress towards their learning and career goals; and will also allow them to transfer credits from one qualification towards another in relevant subjects.

The framework is developed in partnership between the Scottish Qualifications Authority (which awards and accredits all Scottish national qualifications), the Quality Assurance Agency for Higher Education (Scotland Office), Universities Scotland (which represents HE principals) and the Scottish Executive.

The framework has been in development since 1999. An Implementation Plan was published in December 2002 to co-ordinate the work undertaken by a number of bodies such as professional and statutory bodies, employers, Careers Scotland and *learndirect Scotland* (Scotland's broker of education and training which also has a network of 450 branded learning centres). Further information can be found at www.scqf.org.uk.

The Scottish Credit and Qualifications Framework

| SCQF level | SQA National Units, Courses and Group Awards | Higher Education | SVQs | SCQF level |
|------------|--|--|-------|------------|
| 12 | | Doctorate | | 12 |
| 11 | | Masters | SVQ 5 | 11 |
| 10 | | Honours degree Graduate Diploma/Certificate | | 10 |
| 9 | | Ordinary degree Graduate Diploma/Certificate | | 9 |
| 8 | | Higher National Diploma Diploma in Higher Education | SVQ 4 | 8 |
| 7 | Advanced Higher | Higher National Certificate Certificate in Higher Education | | 7 |
| 6 | Higher | | SVQ 3 | 6 |
| 5 | Intermediate 2 Credit Standard Grade | | SVQ 2 | 5 |
| 4 | Intermediate 1 General Standard Grade | | SVQ 1 | 4 |

| | | | | |
|---|---------------------------------------|--|--|---|
| 3 | Access 3 Foundation Standard Grade | | | 3 |
| 2 | Access 2 | | | 2 |
| 1 | Access 1 | | | |

March 2004

e-learning

The Assembly Government is seeking to identify how e-learning can be best utilised to achieve our aspirations for being a truly inclusive learning country. In 2003 a consultation exercise was undertaken on an e-learning strategic framework for Wales. This framework makes an explicit link between investment in technological infrastructure and action to build confidence and innovation in its use. It is the Assembly's intention to use e-learning as a catalyst to unify action between different ages and levels of education and training policy, including e-learning content development, practitioner development, and infrastructure support.

Welsh medium and bilingual education

For the first time ever – and as a direct result of legislation made by the Assembly - Welsh is taught in every maintained school up to the age of 16. By 2002, 99% of secondary pupils were learning Welsh – up from 78% in 1997. More secondary pupils are being taught Welsh as a first language and in primary schools, we have sustained the proportion of primary pupils in classes that are mainly or partly Welsh-medium.

The Assembly's strategy, *Iaith Pawb*, a national action plan for a bi-lingual Wales, was published in 2003. This plan recognises the role played to date by the education sector in fostering the Welsh language, and sets out two key goals for the education sector, namely to encourage individuals to learn and use Welsh and extending access to Welsh medium education. These aims are being incorporated into our lifelong learning policies across the board.

EARLALL General Assembly Brussels, 18th March 2004

Brief update on lifelong learning in Norway and the County of Sogn and Fjordane

1. The Competence reform in Norway

The Competence Reform in Norway is both a workplace reform and an educational reform. The main objective is to help meet the need for competence in society, in the workplace and by the individual.

The reform has given adults the right to primary education and to lower and upper secondary education. (In Norway the counties are responsible of upper secondary education.)

It is based on a broad understanding of knowledge, in which theoretical and practical knowledge, creativity, initiative, the development of self-confidence and social skills all work together. It includes all adults, both those in work and those who are not working.

Social partners and a number of ministries working in co-operation have developed the reform.

Society is complex and existing of individuals with a variety of different ways of learning. Our education system therefore must be built to reflect, appreciate and even encourage diversity among people.

The main challenges are:

- To find a possible main suitable "lifelong learning path" for each student individually – an individual orientation
- Adjustment for the individual to manage to find the main path for their own development - self adjustment
- System changes to do the pathway smoother for each individual - individual proposals for system improvement
- System changes that makes it smoother for the system itself to operate in the society - system learning and practical improvement

- Creation of a learning atmosphere and development of a pedagogy adjusted to adults
- Making practical examples to evaluate aspects of lifelong learning

The public education system has so far not been able to meet the competence development needs of the workplace to a sufficient degree. An adjustment is therefore necessary so that the public education system is able to adopt a central role in competence development for adults.

1. Validation of non-formal and informal learning

The "Realkompetanseprosjekt" was the governmental means to establish a national system for the documentation and validation of non-formal and informal learning, with legitimacy in both the workplace and the education system.

The Norwegian concept of "realkompetanse" refers to all formal, non-formal and informal learning acquired by adults. In practice, this means the sum of all overall skills individuals have acquired through the education system, paid and unpaid work, organisational activities and family life/life in society.

A national system for the documentation and validation of non-formal learning involves various bodies, organisations and companies working to co-ordinate their work according to national principles and guidelines. The work is of course carried out in accordance with applicable laws, regulations and agreements.

2. Adult learning in Sogn og Fjordane

The population of Sogn and Fjordane is approximately 108 000. The county divides into three regions, Sogn, Sunnfjord and Nordfjord, each with a "Servicecenter" responsible of the administration, planning and carrying out of adult learning on behalf of the education department.

The activities in the field of adult learning over the last years have been extensive, on a wide range of subjects and trades, but with the main emphasis in the areas of health and social care.

Networking is essential in adult learning, not only within the county, but also at a national and international level.

The use of ICT-based training is important in a sparsely populated area such as Sogn and Fjordane. Much effort has been put in developing new ways of using this tool in adult learning, in close co-operation with our secondary schools.

A manual for the Competence reform in Sogn and Fjordane has been worked out, and this has eventually become a model for other counties as well.

Still, too many adults have to wait too long for their rights to be fulfilled, mainly due to a lack of resources. Too many adults also leave their training because it is not adjusted to their specific needs.

The county therefore will increase its efforts in this area.

One important step is the drawing up of a strategic plan for the upper secondary education.

The County Council will approve this plan (programme) this month. The programme focuses on 8 important strategic areas for the development of upper secondary education in Sogn and Fjordane, including the challenges concerning adult learning.

As one first step the county carried out a pre-project in autumn 2003, The DELTA-project, in co-operation with several, both public and private, partners dealing with adult learning.

The main objects of the project were to develop, evaluate and effect various models for adult learning, due to the above-mentioned fact the too many adults leave upper secondary education.

The results of the pre-project indicate that the county should look more closely into these challenges. We are now working with financing together with local, regional and national partners, and hope to be able to carry out the project in a full scale in 2005.

An innovation in the field of competence development, unique also in a national perspective, is the establishing of the "Kompetanseforum" in Sogn and Fjordane two years ago.

The main purpose of the forum is to define a common strategy and common objects related to competence development in the county.

Members of the forum are the heads of strategic, influential and policy-making organisations in the county, representing both the business and the public sectors.

(Political and administrative representatives from the county, the county Governor, both employers' and employees' organisations, the College of Sogn and Fjordane, West Norway Research Institute, to mention some.)

Note for the EARLALL General Assembly

18th March 2004

Region of Vejle

Lifelong Learning Activities Spring 2004

1. Regional Network activities:

At the end of March the Region of Vejle will carry out 3 seminars on recognition and acknowledgement of prior learning and methods to deal with the problem. We have invited a Dutch professor, Mr Ruud Klarus, to make an introduction to the discussion as he since 1999 has been involved in developing the national Dutch strategy on that theme.

The seminars are targeted at 3 different groups: labour market politicians and managers of enterprises, educational institutions and a special workshop for people working with methods for recognition and acknowledgement of prior learning,

2. Nordic seminar on Lifelong Learning

The Region of Vejle will hold a seminar for Nordic Regions and local authorities on 8th June 2004. The themes of the meeting will be co-operation internally in the network, co-operation with the European institutions and co-operation between public authorities and

private enterprises to promote Lifelong Learning.

Key Note speakers will be: Mr Ken Johansson from the Region of Västra Götaland as well as representatives from two educational units in the Commission, Ms Alice Copette and Mr Alan Smith who are well known by the EARLALL network.

1. WHITE PAPER ON LIFELONG LEARNING FOR THE BASQUE COUNTRY

1.1. INTRODUCTION

At the Lisbon Summit in spring 2000, the European Council set the strategic objective of turning the European Union into the most competitive, dynamic knowledge-based society in the world.

This strategic objective led to a debate in the Basque Autonomous Community (BAC) between all the agents involved in lifelong learning: public administrations, teaching centres, associations, etc.

One conclusion arising out of this debate was the need for a White Paper to set out a coherent strategy for lifelong learning in the Basque Country, in line with European Union guidelines, to help towards achieving the objective set at the Lisbon Summit.

1.2. HOW THE PAPER WAS PREPARED

The white paper was prepared in two phases. The first phase involved writing a draft version largely for debating purposes. The second consisted of a review and the reception of proposals from the Departments of the Basque Government with powers in the area, Provincial Councils, town councils and training centres.

A commission of experts was involved in the first phase, which lasted until March 2003. The experts contributed extensive knowledge of the actions and initiatives implemented in the BAC and the guidelines issued by the European Commission as a consequence of the Lisbon objectives.

In the second phase, to enable the agents involved to make their contributions, the draft document was sent to:

- The Basque Government Departments of Industry, Trade & Tourism, Justice, Employment & National Insurance and Culture
- The three Provincial Councils
- EUDEL

- 67 councils of towns with more than 5,000 inhabitants

- 33 Adult Education Centres

1.3. THE WHITE PAPER: THE STRATEGIC APPROACH

It is now essential to give everyone the knowledge, capabilities and skills needed to meet the challenges of technological innovation and of changes in production and to ensure the active participation of society at large.

The White Paper establishes a three-point integral lifelong learning strategy covering:

- Innovation, enabling people to update their basic skills and capabilities to make use of the advantages of new technologies and of the information and knowledge-based society
- Personal autonomy, giving people a simple, practical, easy way to be fully active and involved in the new society as it emerges
- Active citizenship, to get everyone involved in the new model of society and strengthen people's critical sense

The White Paper on Lifelong learning presented today proposes a strategy for the Autonomous Community of the Basque Country on which to base global lifelong learning policies.

It has four main chapters:

1. Why lifelong learning is relevant
2. Lifelong learning in Europe: policies promoted by the European Union
3. Lifelong learning in the BAC: current action
4. The strategy for converting the Basque Country into a learning region

The last chapter sets out the future strategy on lifelong learning proposed for the Basque Country.

It defines 7 priority objectives:

1. Determining how Basque society should acquire a permanent learning culture;
2. Specifying the strategic objectives that will assure compliance with the threefold dimension

mentioned above: innovation, personal autonomy and active citizenship

3. Identifying specific goals as benchmarks for initiatives established;
4. Setting indicators to measure or calibrate the achievement of specific objectives;
5. Designing an action plan that will help us make access to training more flexible, bringing it closer to ordinary people, increasing the demand for lifelong learning and coordinating the actions implemented by the institutions, through the application of the accompanying schedule and budget;
6. Evaluating the results of the actions included in the plan;
7. Redefining and improving, where appropriate, any objectives or initiatives open to improvement.

This White Paper on Lifelong learning is available in Basque, Spanish and English on the lifelong learning portal www.hiru.com and on the portal of the Sub-Department of Vocational Training and Lifelong Learning www.euskadi.net/lanbidez

2. – LIFELONG LEARNING PORTAL: www.hiru.com

? This portal provides self-teaching materials for several areas of knowledge that will enable citizens to improve their levels of knowledge. The platform has a series of advantages for users and society as a whole, as it

- Facilitates a flexible learning schedule adapted to the time and space each user has available and to his interests and level of knowledge
- Brings learning into the home
- Familiarises people with the advantages the information society offers
- Contributes to the promotion and development of the knowledge-based society

The portal is currently divided into the following fields:

- *Live better*: Contains subjects of general interest relating to leisure and free time
- *Know more*: Presents contents relating to areas of knowledge and general culture, both in number-related areas, communication and social and natural sciences.
- *With your children*: School support games and activities, designed to be worked on together by parents and children
- *Play and learn*: Games classified by age groups; 3-5, 6-9, 10-14, all ages
- *Subjects*: Library of subjects related to art, philosophy, physics, literature, etc.

- *For reference:* Dictionaries, encyclopaedias

3. LANGUAGE LEARNING – e-LEA PROGRAMME

? The www.hiru.com portal will also use multimedia systems to promote language learning. The languages available will be English, French, German and Italian.

Users of the self-teaching materials available have the chance to become independent users of the language they study. In other words, such users would be able to

Understand the main ideas of texts written in clear, standard language, about daily issues concerning work, school, leisure, etc.

Know what to do and say in virtually all the situations likely to arise when they travel to a place where the language they are learning is spoken

Produce simple, structured texts on current issues or of personal interest

Describe experiences, describe events, express wishes, and give reasons and short explanations about ideas and projects.

All of which will help to promote people mobility, the exchange of experiences and the acquisition of information on Internet.

4. PERSONAL AUTONOMY

? The lifelong learning portal will also be enhanced with materials facilitating gradual improvements in basic competence acquisition, so that people acquire greater personal autonomy and can take an active part in the society that is emerging.

In this vitally important part of the strategy promoted by the Department of Education in the White Paper on Lifelong learning, people will be able to acquire or improve their knowledge and capabilities, for which a range of ways of learning will be established to increase and improve their ability to:

- Find information
- Analyse and synthesise
- Organise and plan
- Judge
- Decide

- Communicate

5. SATURE (Educational Emergency Aid Service)

How often have parents been unable to help their children to clear up doubts in their studies or to help them finish homework when they don't know who to ask? How often has an adult studying for his secondary school certificate been unable to find someone to help him with a subject when his teacher is unavailable?

In this kind of situation, when one is unsure and can't ask the teacher for help (because it's Saturday), SATURE uses information and communication technologies to offer a response to questions from people in compulsory secondary education.

This pioneering service will be available for the first time in the 2003-04 academic year for parents and children in 3rd and 4th level ESO (Spanish secondary education) and students at adult schools in the Autonomous Community of the Basque Country. To begin with, the service will offer help with mathematics and will gradually extend the service to other subjects and educational levels.

Users access the service via the Basque lifelong learning portal (www.hiru.com) and, once authenticated, will have access to an arsenal of frequently asked subjects and problems where they can see if their particular question is similar to others already asked. If the question has already been asked, they will get immediate answers, completed exercises and analogous cases previously worked out by teachers for the purpose.

If they can't find an answer in the case database to their enquiry, users can get in contact, via chat, with one of the online "tutors" to ask him about the problem they have. Using an audio chat, the computer keyboard, a shared digital blackboard and a set of educational resources, tutors will help users to solve their problems and doubts.

The service will work from Monday to Friday, 6 p.m. to 10 p.m. and weekends and public holidays from 9 a.m. to 12 noon and from 7 p.m. to 10 p.m., and will feature teachers specialising in the subjects available and trained to provide proper help and tutoring online.

Rather than aiming to replace traditional academies and learning centres or provide training, the service looks to solve problems on the spot when it receives one-off enquiries from people in lifelong learning processes.

6. OTHER LIFELONG LEARNING-RELATED ACTION: LEARNING MEDIATORS

In December 2002 the Basque Government published Decree 298/2002, which regulated financial aid schemes for lifelong learning-related initiatives.

? The aid envisaged in the Decree is designed to for all action involving useful learning activities carried out

- In any area of knowledge
- In the lifelong learning context
- To promote active citizenship, by increasing the professional qualifications, competence levels and skills of people of 25 and over

? Two types of action are possible:

- Ones referring to a specific initiative or action promoted by institutions and entities working in the area
- Ones developing and promoting a project with local or district initiatives or actions

For local or district projects a *learning mediator* will:

- Compile and update the entire offer of useful learning actions and initiatives in the geographical area in any sphere of knowledge, in the context of lifelong learning
- Assess and guide people in his area, paying particular attention to underprivileged groups, about their possibilities as regards lifelong learning
- work proactively to encourage and stimulate lifelong learning initiatives, as regards both supply and demand
- promote, design and implement specific lifelong learning actions, depending on the needs detected in this sphere in his geographical area

The job of learning mediator was included in *Illustrations of lifelong learning practices*, mentioned in the Services of the European Commission Working Document entitled "Lifelong learning – Practices and indicators" SEC (2001) 1939.

7. RESOURCES CENTRE

? Work is currently going ahead on the implementation of a Resources Centre to concentrate all the information on learning-related training offers available in the Basque Country. This information will be easy to access, very useful and eminently practical.

Annex C – is attached separately

Transport Policy Statements:

Guidance for LEAs and Partners on statements of transport provision for learners aged 16-19

2004/05

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Annex 1 - Policy Statement Template

PART 1:

Transport Arrangements for 2003/04

Introduction

Who is this circular for?

1. This circular has been written for:

- Local Education Authorities (LEAs);
- the National Council for Education and Training for Wales (ELWa);
- further education institutions (FEIs);
- schools with sixth forms;
- Higher Education Institutions (HEIs) offering FE provision;
- Providers of work-based learning, including employers with trainees who have to travel for training or study; and
- Community Consortia for Training and Education.

It has also been sent to transport authorities for reference and to Young People's Partnerships (YPPs) and Careers Wales Companies for information.

What is it about?

2. It provides guidance on the requirements upon LEAs and their partners in relation to statements of the provision of support for transport from home or place of employment to place of education or training for learners aged 16-19, and those completing courses started prior to their 19th birthday.

What is the status of this document?

1. This circular gives advice on how LEAs and their partners should interpret their duties in respect of transport policy statements. These duties apply from 1 September 2003, when section 199 of, and schedule 19 to, the Education Act 2002 were commenced in respect of Wales. Section 509ab (5) of the Education Act 1996, as inserted by these sections of the Education Act 2002, requires that LEAs and their transport partnerships shall have regard to this guidance.

Background

4. The passing of the Education Act 2002 has entailed significant development in the arrangements for transport provision and transport support for those aged 16-19. In particular, existing legislation has been changed to clarify the role and responsibilities of LEAs and their partners in assessing and providing transport for learners of 16-19 in FE, school sixth forms and work-based learning. These changes received Royal Assent in July 2002 and were commenced in respect of Wales on 1 September 2003. They placed a requirement on LEA-led partnerships to each produce transport policy statements and publish them in a manner which they consider appropriate, so that young people can see what transport support and services are available in their area.
5. By virtue of these sections of the Act, LEAs are required to specify the arrangements that they consider it necessary to make for the provision of transport, and support for transport, for learners in this age group. They are also given, by virtue of Section 509AA(7) of the Act, the vires to make such arrangements as are specified in the statements. The Act further requires that, where LEAs consider it necessary to make arrangements for the provision of transport or support for transport, these arrangements should be no less favourable for learners receiving full-time education or training in establishments other than LEA-maintained schools than for pupils of the same age at such schools.
6. These provisions supplement existing sources of support for learners in training and education settings. By virtue of section 34 of the Learning and Skills Act 2000, the National Council for Education and Training for Wales (ELWa) is empowered to provide financial resources to persons providing post-16 education or training, persons providing goods and services in connection with such education or training, and also to persons receiving such education or training. In respect of FE, ELWa and FE Colleges have the power to provide Financial Contingency Funds to assist learners with travel, whilst, in work-based learning settings, ELWa may provide funding to support the travel costs of those undergoing work-based learning. FE College governing bodies and work-based learning providers may, at their discretion use some of their resources to provide transport or support for transport for their learners.
7. Learners in this age range will also wish to be aware of their right to time off to study or train, as granted by The Right to Time Off for Study or Training Regulations 2001 (Statutory Instrument 2001 No. 2801) [<http://www.legislation.hmsso.gov.uk/si/si2001/20012801.htm>].

The Education Act 1996 as amended

8. Sections 509AA-AC of the Education Act 1996 (as inserted by the Education Act 2002) were commenced in respect of Wales on 1 September 2003. They give LEAs responsibility for preparing and publishing transport policy statements, following consultation with their partners, by 31 May each year. The policy statement should outline the transport provision made for learners aged 16-19 in their area, including any financial support in connection with transport needs. The learners are either those over compulsory school age but aged under 19, or those who are on a course which started before they reached the age of 19. The statements should, wherever

possible, include maps of the key areas of population, showing learning institutions together with the availability of cycling and walking routes, transport services and listings of fares/charges and any concessions, discounts, etc that apply. They should also include contacts for learners to obtain further information, tickets or passes, and transport information e.g. Traveline Cymru on 0870 6082608.

9. The legislation makes clear that, when deciding what transport support to offer by way of both services and financial support, LEAs, in consultation with their partners in providing these services and this support, must:

- take account of the needs of those who could not otherwise access and complete post-16 education or training. This is fundamental to the duty on LEAs with their partners to prepare transport policy statements and is critical to improving retention;
- take account of the need to provide learners with reasonable opportunities for choice between establishments and avoid preventing learners from travelling across LEA boundaries where the courses that they need cannot be provided locally. Learners should be supported in relation to their financial circumstances, subject to the overall availability of resources for assistance with transport costs. To make the best and most equitable use of these resources, LEAs should consider whether a charging policy is appropriate;
- consider the costs of travel against available and appropriate alternatives, e.g. residential provision or purchasing of bicycles etc;
- consider the length of journey, route and flexibility of travel relevant to the course; and
- specify what transport arrangements are available for learners with disabilities and/or learning difficulties. LEAs are referred to the Disability Discrimination Act 1995 for the definition of learners with disabilities and the Learning and Skills Act 2000 for the definition of learners with learning difficulties. Assessment of transport needs should normally be carried out by the LEA. This would include an assessment of the most appropriate type of transport, the need for specialist equipment and the need for escorts. Good practice suggests that wherever possible, LEAs and their partners should provide support for learners who have been identified as disabled and needing transport support until at least the age of 21, and ideally up to 25. In making such arrangements LEAs should be aware that these arrangements should be no less favourable for learners receiving education or training in establishments other than LEA-maintained schools than for pupils of the same age at such schools.

4. Finally, LEAs should consider parents' and pupils' religious preferences

with regard to the accessibility of denominational provision; and their

preferences with regard to the accessibility of Welsh medium education.

Further Considerations with regard to those with SEN

5. In addition, where a child has a statement of SEN, their transport needs may in exceptional

circumstances be stated in Part 6 of the statement under Non-Educational Provision. This then gives the parent the right to expect that transport support will be provided as set out in the statement, provided that that child is still in LEA-maintained education. For further details on this and other issues related to Special Educational Needs, see the SEN code of Practice for Wales (2002).

6. ELWa has powers to fund transport and to provide financial resources, including financial assistance to help with transport costs. In exercising its powers to provide financial resources, ELWa must have regard to the needs of persons with disabilities and/or learning difficulties (section 41(1) of the Learning and Skills Act 2000).

Stakeholders' Roles

7. The role of LEAs in the process is as set out in the Act. LEAs must prepare the statements and publish them, consulting as necessary to do so. In so doing they will wish to consult school and FE governing bodies, work-based learning providers, CCETs, ELWa and other LEAs. They will also wish to take account of any special projects they undertake to involve learners aged 16-19 in learning through community-based activities and consider the transport needs of such learners when drawing up statements.
8. CCETs are expected to consider the sufficiency, consistency and equity of transport provision and support arrangements in their area, including bringing forward proposals for improvements and seeking to broker such improved arrangements. In addition they should play a role in advising LEAs of work-based learning providers and employers to whose transport arrangements statements might reasonably make reference.
9. ELWa should co-operate with LEAs in drawing up statements, including providing details of work-based learning establishments that they support, and their own policies and activities with regard to providing financial support for transport for 16-19 learners.
10. School and College governing bodies, as set out in the Act, have a duty to co-operate with LEAs and provide them with such information as they might reasonably require. Providers of work-based learning, including employers offering work-based learning placements and apprenticeships, are encouraged to do likewise.
11. Only through co-operation between all these interests can the aims of the Act, to secure the fairer, more efficient and more equitable provision for all 16-19 learners, be achieved.

Policy Statements

12. Policy statements must include details of all local transport provision supported or made available by LEAs and their partners, together with any discounts and concessions from all known sources, both local authority supported and commercially-operated. LEAs and their partners should deliver, or arrange the delivery of, the provision and support set out in their statement.
13. Section 509AA (5) of the Education Act places a duty on the governing bodies of schools and colleges to co-operate in giving the LEA information and assistance to prepare the policy statement.

14. Policy statements are by necessity formal documents. They should where necessary be accompanied by a simple explanation of what is available to learners. Therefore, we have annexed (Annex A) a proforma to help partnerships present their services and support in a user friendly way for learners and their parents. In publishing the statements, LEAs will wish to consider what methods of publication will be best suited to the needs of the audience and make arrangements accordingly. Publication on the relevant section of the LEA's website will often be an appropriate way of making the statements available. LEAs should ensure that all parties to the preparation of the statement receive copies of it, as should the Assembly Government.
15. LEAs should include with their statement a simple map or maps showing bus/train/walking/cycle routes serving local colleges, sixth forms and significant providers of off-the-job elements of work-based learning provision. This will help the learner to determine the level of ease or difficulty associated with the journey.
16. Where there are no services, or gaps in services for learners to travel to courses, policy statements should indicate the support that will be available to help them to travel. For example, purchasing or subsidising mini bus services, Dial a Ride, working with Community Transport providers, or the provision of bicycles, etc. Where appropriate, charges may be made for these. Any spare capacity on services may be utilised by other learners or the wider public and may be subject to charges as the LEA deems appropriate.
17. ELWa and FEIs should continue to provide Financial Contingency Funds to assist learners with travel arrangements, either directly or through third parties. These funds may be used to finance either block or individual support arrangements. The amount of funding used for this will be at the discretion of individual FEIs following consultation with ELWa. However, FE institutions must ensure that sufficient FE Financial Contingency Funds remain available for learners who need help with other costs such as books and equipment HEFCW funding is available for FE students studying at HEIs who need help with transport or other costs.
18. In addition, ELWa may provide funding to support the travel costs of those undergoing work-based learning, including reimbursing trainees for their travelling costs above a certain threshold. LEAs should contact the Learning Provisions Team at their local ELWa regional office to establish the support available.
19. Where learner support is assessed as necessary to enable individuals to access or complete their courses, this may be made available by way of discounts, subsidies, travel cards or passes or as cash.

Local Transport Plans

20. 26. Transport support and services for learners aged 16-19 in FE must also

be reflected in local authority local transport plans. LEAs should ensure that they liaise with colleagues in the local authority transport section so that consideration is given to:

- inclusion of targets, issues and projects in the Local Transport Plan Annual Progress Report;
- inclusion of partnership bids for transport for learners in the next full Local Transport Plan;
- ensuring that the policy statement for learner transport support and services becomes part of the

overall plan at its next revision.

Failure to Comply

27. LEAs will need to ensure that their policy statements comply with the legislation and that in preparing the statements, they had regard to this and any future guidance provided by the National Assembly for Wales. LEAs should consult their own legal advisers for advice on how to meet their legal obligations. Where LEAs fail to comply, they could face legal challenges from learners or their parents. In addition, the Assembly Government may direct LEAs to make arrangements for provision of transport or financial assistance for transport which are not specified in the statement.

Partnership Working

28. Much work has already been done to build and develop effective partnerships in LEA areas, particularly through the medium of Community Consortia for Education and Training (CCETs). The Assembly Government sees collaboration as key to making improvements in transport planning, purchasing and the use of resources. LEAs should engage with their sixth forms, FEIs, other providers, local authority transport co-ordinating officers and ELWa as well as any other organisation as appropriate, in order to take this work forward. Special consideration should be given to involving young people or their representative groups in drawing up statements. LEAs should also ensure that they engage effectively with other LEAs and with relevant CCETs in planning across boundaries where there are issues of cross-boundary provision.
29. In particular, LEAs should take care to ensure that the relevant Community Consortia for Education and Training, as well as selected CCET members individually, are involved in the consideration and genesis of the statements. They will be particularly valuable in identifying those within their area who are significant providers of off-the-job elements of work-based learning provision, together with those employers engaged in work-based learning who also offer learning opportunities to non-employees, and other major employers who require employees in the 16-19 age range to travel off-site for work or study. Transport policy statements should take into account such providers wherever possible.
30. The existence of transport policy statements and the process of drawing them up should assist in recognising and addressing differences in approach to subsidy or charging between learners in different settings. To the extent that common approaches can be agreed or identified it should also be possible to seek efficiency savings and environmental benefits, by creating the scope for shared contracts with transport operators and by eliminating duplication of provision.

Timetable

31.

| | |
|------------------|---|
| 1 September 2003 | Schedule 19 of Education Act 2002 is brought into force |
| April 2004 | Assembly Government issues guidance to partnerships for 2004/2005 |
| 31 May 2004 | LEA transport policy statements for 2004/05 published |

Contacts

32. If you require any further information, or clarification of any issues in this circular, please do not hesitate to contact Justin Davies on 02920 82 6097 or Anthony Jordan on 02920 82 5880.

Annex 1

Transport Policy Statements for Learners Aged 16–19

Name of LEA :

Department Responsible:

1. Please provide details of all concessionary fares, discounts, subsidies, passes or travel cards available for learners aged 16–19 and who provides them. Please provide details of any costs to the learner.

2. During what times during the day can learners use their travel pass or obtain concessionary fares?

3. Please confirm that support will continue to be made available to learners who reach 19 whilst continuing on a course.

4. How will learners be assessed to see if they are eligible for support? e.g. will they be subject to means testing or must they be on benefits?

5. What help do you provide for learners with disabilities and/or learning difficulties or facing other difficulties in following their courses?

6. Do you provide mobility/ independence training for learners who face difficulty with transport?

7. When should learners start to apply for transport support?

8. What help can learners apply for if they need to travel to a course that is beyond your LEA area?

9. What help is available for learners who attend a further education institution which is beyond daily travelling distance and they need to stay away?

10. Please provide information about all points of contact for learners seeking transport support, e.g., LEA/college, bus company contact. Please include any websites and e-mail addresses.

Annex E

STATISTICAL ANALYSIS OF LOCAL AUTHORITY BUDGETS FOR SCHOOL SERVICES IN WALES

Purpose

1. To provide an analysis of budgets for schools set by local education authorities for 2003-04, including comparative information for England.

Summary

2. The key points to note from this analysis are :
 - Average budgeted per pupil spend in Wales in 2003-04 was £3,668 compared with £3,377 in the previous year (table 1 and chart 1). The overall budget per pupil for England was £3,697; £3,604 excluding London (table 2);
 - The range was from £3,343 in Flintshire to £4,358 in Ceredigion (table 1 and chart 1);
 - Between 1990-91 and 2002-03 spending (excluding nursery provision but including provision for post 16 provision) per pupil in Wales has increased in real terms by 29.1% compared with 25.8% in England (table 3 and chart 3);
 - Cross border comparisons show per pupil budgets higher in mid and South East Wales than the neighbouring English authorities (table 4);
 - Average primary school size in Wales is 167 pupils compared with 229 pupils in England. Average secondary school size in Wales is 944 pupils compared with 962 pupils in England. Pupil/teacher ratio in the primary sector in Wales is 20.8, lower compared with England at 21.9, and slightly higher in both the secondary and special sectors (tables 5 and 6).

Introduction

1. This paper analyses the resources that local authorities budgeted to make available for school services in 2003-04. The paper makes comparisons between Welsh local education authorities and between the Wales average and the regional averages in England. There is also brief consideration of the historical trend.
2. The figures for Wales are sourced from the same data that was used to produce the report on the Welsh local authorities education budgets for 2003/04. That report was presented to the Education and Lifelong Learning Committee as part of the Minister's report on 10 July 2003 ([paper ELL \(2\) 02-03](#)).

Data sources

3. The main source of financial information for 2003-04 is the budget returns made by local education authorities under Section 52 of the School Standards and Framework Act, 1998 (section 52 returns). The format and coverage of this return is similar in Wales and England. There are differences in the detail.
4. This return gives the basic details of each local authority schools budgets. The key components are the budgets delegated to individual schools; a breakdown of the funding for those services for schools which are not delegated; the total budget for schools services; and the budget for non-schools education.

5. Numbers of schools, pupils, teachers and free school meals are taken from the annual schools census. The census returns used in Wales and England are similar, but there are differences in detail.

Description of the analysis of 2003-04 budgets

6. The analysis of 2003-04 budgets is in two parts:

- Individual education authorities within Wales (table 1 and chart 1).
- Wales average and English regional averages (table 2 and chart 2).

1. The English regions used for the comparison are sub-divisions of the 9 standard regions. For the purposes of this work, London has been split to show inner and outer London separately. Other regions have been split into metropolitan and non-metropolitan components. Thus the north west region is divided into the metropolitan area – Liverpool and Manchester – and the non-metropolitan area – Cumbria, Lancashire, Cheshire etc.

2. For the different areas, tables 1 and 2 show the following information:

- Overall budget per pupil. This shows the budget for all school services. It includes funding for those services delegated to schools and for those provided centrally by the LEA. It includes funding from specific government grants (such as GEST and the Standards Fund).
- Delegated budget per pupil. This shows the budget delegated to individual schools. The figures are net of specific grants since in Wales delegated budgets are recorded net of any specific grants. However because in England some of the delegated funding is in the form of specific grants, LEAs in Wales appear to delegate a higher proportion of their overall school budget than their English counterparts.

1. These variables are shown as an amount and as a difference from the Wales average.
2. Charts 1 and 2 summarise the overall budget per pupil within Wales and for Wales and the English regions. The solid line on chart 1 represents the Wales average and on chart 2 the Wales and England average.
3. Tables 5 and 6 contain the following information:

- Number of LEAs in the area
- Full time equivalent pupil numbers. Total number for nursery, primary, secondary and special schools. Nursery classes in primary schools are included. Pupil referral units are excluded.
- Average school size. Average school size for nursery, primary, secondary and special schools using full time equivalent pupils. Nursery classes in primary schools are included. Pupil referral units are excluded.
- Pupil teacher ratio. Total full time equivalent pupils divided by total full time equivalent teachers for nursery, primary, secondary and special schools. Nursery classes in primary schools are included. Pupil referral units are excluded.

- Share of pupils entitled to free school meals. This is for nursery, primary, secondary and special schools. Nursery classes in primary schools are included. Excludes pupil referral units. This variable is included as a proxy for the level of deprivation.

1. These variables are shown as an amount and as a difference from the Wales average.

Historical trend in spend on school services

2. Table 3 shows the trends in spend on schools services, pupil numbers and spend per pupil from 1990-91 to 2002-03. The figures are based on final outturn expenditure except for 2002-03 for England where budgets have been used. Budget figures are also shown for 2003-04, although differences in the definitions for the budget forms for England and Wales make comparisons less reliable.
3. During this period there have been several functional changes. It is not always possible to properly adjust the figures to take account of these changes. The major changes to be aware of are:
 - Grant Maintained schools. Introduced in 1990-91 and returned to local authority funding in April 1999. The expenditure includes for this period the sums deducted from local authority funds to pay for grant maintained schools.
 - Removal of further and higher education from LEA control. This occurred in 1992-93 and 1993-94. The main effect on schools funding was the removal of sixth form colleges. This involved only two colleges in Wales, but had more impact in England. No attempt has been made to adjust the figures for this change.

Comparison between authorities on the Wales-England border

1. Table 4 provides a breakdown of school expenditure between delegated expenditure and elements of central expenditure for authorities in Wales and England. This allows a comparison of the elements of expenditure across the border.

Description of the background data (tables 5 and 6)

2. Table 5 looks at the characteristics of LEAs in Wales. Table 6 shows similar information in terms of the averages for Wales and the English regions. This information shows the differences between the various areas and helps to explain the differences in the budget data.

The source of the information is the annual census of schools, taken at January each year. The data presented here are from the January 2003 census and so relate to the 2002-2003 academic year. This gives a mismatch with the budget data, which are based on the 2003-04 financial year. For the purposes of this paper it is reasonable to assume that the two sets of data are consistent at the level of detail being considered.

Further information

3. The information presented in this paper draws on a large amount of information held by the National Assembly about spending on, and activity in, schools. More detailed analyses are available on request.
4. The standard published sources are as follows:
 - Welsh Local Government Finance Statistics, 2003
 - Schools in Wales: General Statistics 2003
1. Recent National Assembly statistical publications are available on the Assembly web site. These can be found at:

<http://www.wales.gov.uk/keypubstatisticsforwales/index.htm>

2. The Statistics Directorate holds the centrally collected information. Details of what data are available can be obtained from.

Local Government Financial Statistics

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Annex F – is attached separately