

CENTRAL SOUTH CONSORTIUM

REPORT FOR JOINT COMMITTEE

19th DECEMBER 2019

JOINT EDUCATION SERVICE

JOINT REPORT OF THE LEAD CHIEF EXECUTIVE – REVIEW OF THE FUTURE DIRECTION OF THE CONSORTIUM

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1. PURPOSE OF REPORT

- 1.1 To update members on the current position following the ISOS review of Central South Consortium and to acknowledge progress to date.
- 1.2 To present a detailed implementation plan attached at Appendix A to take forward the ISOS recommendaton to re-model the Consortium.

2. RECOMMENDATIONS

It is recommended that Members:

- 2.1 Review and accept the detailed implementation plan to remodel the current Consortium approach;
- 2.2 Request that the ISOS report attached at Appendix B is shared with the Cabinets of the five Local Authorities to the Consortium before the end of February 2020, and the five councils consider and restate their commitment to a joint approach to school improvement through the Consortium;
- 2.3 Request that a report is presented to the next Joint Committee meeting that sets out an indicative three year budget for the Consortium to make longer term planning easier.

3. BACKGROUND

- 3.1 Members agreed to commission ISOS to undertake an independent review of the Consortium at their October 2018 Joint Consortium Committee meeting. The context to the review was the national changes to the education system and the financial pressures facing schools and Local Authorities.

3.2 As Members will be aware, at a national level Welsh Government is making many changes to the education system in Wales, with a new curriculum from Foundation Phase through to Key Stage 5, new accountability frameworks, new approaches to supporting children with Additional Learning Needs, the implementation of schools as learning organisations, the introduction of a National Academy for Educational Leadership (endorsing programmes which will in turn attract funding), the launch of a professional learning model (which will impact upon school to school programmes) as well as changes to the way in which Estyn will inspect schools and local authorities. These changes are being made with no direct increase in the funding available to schools and local authorities.

3.3 The review was therefore asked to consider the following questions:

- How well are we performing currently and how well do we understand our own performance and strengths and challenges?
- Are there any other examples and work we can learn from in other consortium in Wales or other local education systems particularly around the development of a school led-system?
- Is the current model fit for purpose for the future taking into account WG planned changes to the education system?
- Is the model affordable over the next 3-5 years, with a likely continued period of austerity?
- What needs to change and how would you implement this change over the next 3-5 years?

3.4 The review was undertaken in two phases: an initial evidence gathering phase in November and December 2018 and further development and testing of proposals in February and March 2019. During the course of the review Isos have spoken to senior Consortium staff, LA representatives including Lead Members for Education, Chief Executives and Directors, over 20 Headteachers, 2 Governors, Trade Unions representing other school based staff, other Consortia in Wales and Welsh Government. A full list of interviewees is included in the final report from ISOS.

3.5 ISOS presented their final report to Chief Executives on the 29th April 2019. The rest of this report provides an overview of the ISOS findings and recommendations about the way forward.

4. SUMMARY OF ISOS FINDINGS AND RECOMMENDATIONS

4.1 The full ISOS report is included at Annex A. It is structured around the five questions the review was asked to address. The main findings are summarised below.

4.2 **Section 1: How well are you performing currently and how well do you understand your own performance and strengths and challenges?** The data shows that schools have made good progress over the last 5 years against most key performance measures supported by the work of the Consortia and Local Authorities but that key performance challenges remain. These include the need to:

secure further improvement to match the performance of the fastest improving Local Authorities; to narrow the gap in outcomes for eFSM pupils; to secure further improvements to ensure all schools in the region are judged good or excellent by Estyn; to respond to new challenges around Wellbeing, Attendance and Exclusions.

4.3 **Section 2: Are there any other examples and work you can learn from in other consortium in Wales or other local education systems particularly around the development of a school led-system?** Isos looked at work in other Consortium in Wales as well as drawing on our research into the way local education systems are developing in England. They identified a number of potential lessons including: looking at the way others have developed and used Cluster working to support improvement; ensuring the links between the different levels are clear so clusters are connected up locally and local partnerships are connected to the Consortium; looking at whether there is more you could do to strengthen and deepen the engagement from a wider range of Headteachers across the region; and learning from other Consortium in Wales around their approach to planning and budgeting.

4.4 **Section 3: Is the current model fit for purpose for the future taking into account Welsh Government planned changes to the education system?** Interim feedback from conversations with stakeholders was presented to Joint Consortium Committee in December 2018. Subsequent conversations largely confirmed these messages which show there are many strengths and successes of the current model. However they also highlight a number of challenges the Consortium will need to address moving forward including the following:

1. **Leadership and capacity gaps.** The absence of permanent leadership, gaps at a senior level and uncertainty around the future of the Consortium have impacted its ability to do its job effectively over the last 12-18 months. There is a need therefore to reset the vision and ensure the Consortium has the leadership, credibility and capacity to drive forward work across the system in partnership with Local Authorities and schools.
2. **Clarity about roles and responsibilities.** There is a need to set out again for everyone involved the respective roles of the Consortium, Local Authorities and Schools and to show how the connection between the Consortium and the work of Local Authorities can be strengthened. Senior Challenge Advisers also need to be more effectively connected to the wider work of the Consortium to play a stronger system leadership role.
3. **Tension between the Consortium's role as a regional school improvement service and delivery arm for Welsh Government.** This tension needs to be managed more effectively so Local Authorities and schools understand and see how their priorities fit alongside and/or are different from national priorities which the Consortium is being asked to deliver against and how funding is being used to support them.
4. **Support schools to implement the new curriculum.** This is the biggest challenge facing the system in the coming years and the Consortium needs to ensure that the school to school support structures that exist through Pioneer Schools, Hubs and Clusters have sufficient expertise and capacity for the task.
5. **Determine the future Challenge Adviser model.** There is a need to continue to improve the quality of Challenge Advisers support and challenge to schools

and to determine the future role of Challenge Advisers in relation to different types of schools and the fit with Peer Review.

6. **Strengthen Governance.** There is a need to be clearer about the role and purpose of different groups and to rationalise and simplify the current model. There is also a need to further strengthen the engagement of Headteachers and System Leaders in Governance.
7. **Funding pressures.** For schools and Local Authorities this remains the biggest challenge in the system so any action the Consortium takes will also need to take account of these pressures and deliver further savings where possible.

4.5 **Section 4: Is the model affordable over the next 3-5 years, with a likely continued period of austerity?** The report provides an overview of current core and grant funding and shows what it is currently being spent on. It identifies spending on Challenge Advisers and other core CSC staff as the two areas with the greatest potential for further efficiencies, given the current limitations around grant funding. It includes more detailed analysis of the potential savings in relation to the Challenge Adviser budget and Senior Management structure. It includes scenarios showing what a 2%, 5% and 10% annual reduction looks like and concludes that achieving even a 5% annual saving would be very challenging and require the significant savings to be delivered from the Challenge Adviser budget.

4.6 **Section 5: What needs to change and how would you implement this change over the next 3-5 years?** ISOS identified a set of options for the potential way forward:

1. Local Authorities take back all school improvement functions and end any form of regional arrangements
2. Local Authorities take back some school improvement functions but retain a regional delivery function to support national priorities
3. Identification of a Lead Local Authority to take responsibility for delivery of all school improvement functions on behalf of others
4. Formal mergers between Local Authority education services so joint LAs undertake all school improvement functions
5. A more formalised shared services company model where LAs commission and hold it to account but don't oversee the governance
6. A merger with another regional school improvement service
7. Re-modelling of the current Consortium model

In discussion, **options 2 and 4** emerged as the most likely alternatives to the current regional arrangements and ISOS has undertaken further analysis of each of these options alongside **Option 7** to remodel the current Consortium model. ISOS conclude having looked at each of the options that Option 7 - to remodel the consortium - is the one that builds most logically on where we are now and provides certainty and stability to schools during a period of significant change. ISOS highlight in the rest of the report a number of areas they recommend focusing on to strengthen delivery and argue that these steps would be necessary in the short term anyway

even if a different decision is taken about the way forward longer term.

5.0 PROGRESS TO DATE

Detailed updates on progress are included within the implementation plan in Appendix B. Items of progress to note include:

- Managing Director appointed November 2019;
- Consultation on senior challenge advisers underway;
- Acting Managing Director and or members of senior leadership team attended all Local Authority headteacher meetings ;
- Revised Central South Wales Challenge model communicated to schools;and
- Initial review of governance models

6.0 NEXT STEPS

Short term priorities include:

- Consult and agree a revised governance model;
- Establish a senior leadership structure;
- Review and consult on revised senior challenge adviser & challenge adviser models;
- Publish the revised communication strategy; and
- Review and amend presentation of funding models and monitoring reports

7.0 CONCLUSION

- 7.1 It is acknowledged that some progress has been achieved since the conclusion of the ISOS review
- 7.2 The plan attached at Appendix B provides a robust set of agreed actions for delivering the remainder of the recommendations in a timely fashion
- 7.3 Working in partnership with the five local authorities, the Central South Consortium will be well placed to deliver school improvement functions effectively, and support schools to manage the major reforms across the region.

Review of Central South Wales Consortium

Final report April 2019



Executive Summary

- Isos Partnership were commissioned by Central South Consortium to undertake a review of the regional delivery arrangements in the Central South region. The background and context to the review is shown on page 3 along with the key questions we were asked to consider.
- The review has taken place in two phases: an initial evidence gathering phase in November and December 2018 and further development and testing of proposals in February and March 2019. During the course of the review we have spoken to senior Consortium staff, LA representatives including Lead Members for Education, Chief Executives and Directors, over 20 Headteachers, 2 Governors and Trade Unions representing other school based staff, other Consortia in Wales and Welsh Government. Full details of interviewees are shown on page 4.
- The rest of the report is then structured around the five core questions we were asked to address:
 - **Section 1: How well are you performing currently and how well do you understand your own performance and strengths and challenges? (p5-17)** The data shows that schools have made good progress over the last 5 years against most key performance measures supported by the work of the Consortia and Local Authorities but that key performance challenges remain (see Slide 12 for a summary of the challenges).
 - **Section 2: Are there any other examples and work you can learn from in other consortium in Wales or other local education systems particularly around the development of a school led-system? (p18-21).** We have looked at work in other Consortium in Wales as well as drawing on our research into the way local education systems are developing in England and drawn out potential lessons for you.
 - **Section 3: Is the current model fit for purpose for the future taking into account Welsh Government planned changes to the education system? (p22-32)** This section summarises feedback from external evaluations/surveys as well as from our conversations with stakeholders. It suggests that whilst there are many strengths and successes of the current model there will need to be clear and committed action to address the challenges facing the Consortium if it is going to be fit for purpose moving forward (see p29 for a summary of these challenges).
 - **Section 4: Is the model affordable over the next 3-5 years, with a likely continued period of austerity? (p33-43)** This section provides an overview of current core and grant funding and shows what it is currently being spent on. It identifies spending on Challenge Advisers and other core CSC staff as the two areas with the greatest potential for further efficiencies, given the current limitations around grant funding. It includes more detailed analysis of the potential savings in relation to the Challenge Adviser budget and Senior Management structure.
 - **Section 5: What needs to change and how would you implement this change over the next 3-5 years? (p44-55)** We identify a series of three steps to work through to determine the way forward. Step 1 includes our analysis of the delivery options (see p50 for a summary of our views); Step 2 asks you to consider the potential three year budget; and Step 3 includes our recommendations to strengthen delivery.



Background and context to the review

Isos Partnership were commissioned by Central South Consortium to undertake a review of the regional delivery arrangements in the Central South region. The review was asked to consider the implications of the changing national landscape including changes to the curriculum and accountability arrangements and national policies to support school to school working including the new National Academy and professional learning model. The other major driver for the review is the continued financial pressures on local authorities and schools. The review will develop proposals for a fit for purpose model for the next 3-5 years that is affordable and meets the needs of local authorities and schools whilst continuing to deliver improved outcomes for children and young people in the region.

The review is looking to answer the following questions:

- How well are you performing currently and how well do you understand your own performance and strengths and challenges?
- Are there any other examples and work you can learn from in other consortium in Wales or other local education systems particularly around the development of a school led-system?
- Is the current model fit for purpose for the future taking into account Welsh Government planned changes to the education system?
- Is the model affordable over the next 3-5 years, with a likely continued period of austerity?
- What needs to change and how would you implement this change over the next 3-5 years?

The review has been undertaken in two broad phases:

- an initial evidence gathering stage with interim feedback (Nov – Dec 2018)
- further development and testing of proposals for the future model with a final report (Jan-March 2019)



Who we have spoken to during the review

During the initial phase of the review we spoke with the following:

- A selection of Consortium staff including Senior Managers, Senior Challenge Advisers and other consortium staff working on a range of school improvement initiatives
- The Lead Member for Education, Chief Executive and Lead Director with responsibility for Education for each Local Authority; and the Scrutiny Leads in Cardiff, Vale, and Bridgend
- A sample of 18 schools nominated by their Directors to participate to achieve a mix of secondary, primary, special, welsh language schools
- A Governor representative and three representatives from Delegate Heads group
- We have also spoken to Welsh Government, the Managing Directors of other Consortium in Wales and Professor Mark Hadfield.

During the second phase of the review we held further discussions with senior consortium staff, a workshop with Delegate Heads and had further conversations with Headteachers who were chairing or leading Headteacher groups or clusters in Cardiff, Merthyr, RCT and Vale of Glamorgan. We also received feedback from Cardiff Secondary Headteachers, spoke to a Governor representatives from Merthyr Tydfil and Trade Union representatives from NEU, NASWUT and UCAC.

The full list of schools spoken to during the review is shown below:

- St Marys & St Illtyd's R C Primary
- Abercanaid Primary
- Tonysguboriau Primary
- Porthcawl Comprehensive
- Cynffig Comprehensive
- Blaengawr Primary
- Cwmlai Primary
- Springwood Primary
- Pencoedtre High School & Whitmore High School
- Caegarw Primary
- Ysgol Bro Eirwg
- Riverbank/Woodlands/Ty Gwyn
- Eastern High
- Cadoxton Primary
- Coryton Primary & Tongwynlais Primary
- Ferndale Community School
- Maesybryn Primary
- Greenway Primary
- St Mellons Primary
- Ysgol y Deri
- Peterston super Ely CiW Primary



Section 1: How well are you performing currently and how well do you understand your own performance and strengths and challenges?

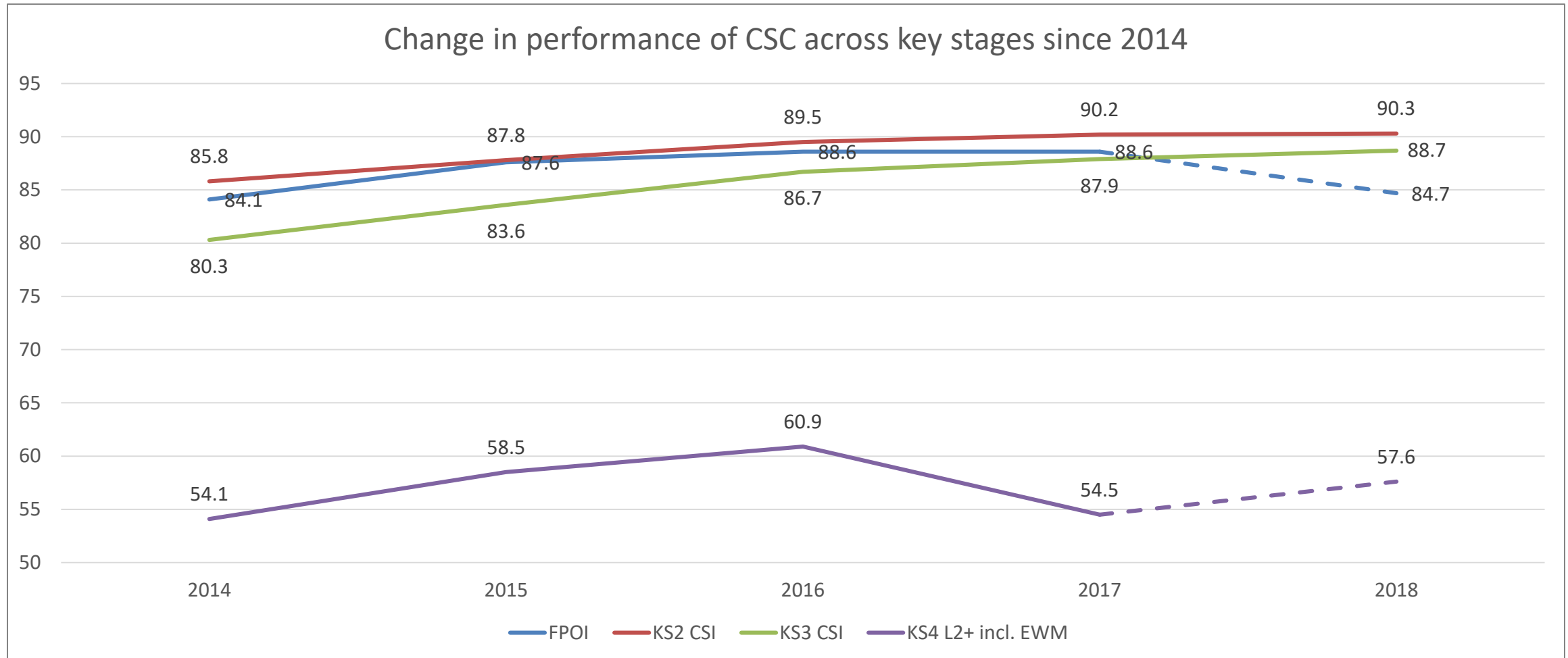
This year's data shows an overall positive picture with CSC above the national average for all key stages and improvement against all apart from Foundation Phase

Performance Measure	Current performance	Improvement since previous year	Improvement over last three years	Range of performance across CSC	National average
Foundation Phase¹ (% of pupils with FPOI Outcome 5 or above)	84.7	-3.9	N/A	- Bridgend: 86.3 - Cardiff: 85.2 - Merthyr Tydfil: 85.5 - RCT: 81.3 - VoG: 87.5	82.6
Key Stage 2 (% of pupils with KS2 CSI Level 4 or above)	90.3	+0.1	+2.5	- Bridgend: 88.3 - Cardiff: 90.2 - Merthyr Tydfil: 88.3 - RCT: 89.3 - VoG: 94.9	89.5
Key Stage 3 (% of pupils with KS3 CSI Level 5 or above)	88.7	+0.8	+5.1	- Bridgend: 90.2 - Cardiff: 87.3 - Merthyr Tydfil: 88.1 - RCT: 87.9 - VoG: 92.3	88.1
Key Stage 4² (% of pupils with KS4 Level 2 or above inc EWM)	57.6	+3.1	N/A	- Bridgend: 56.5 - Cardiff: 60.4 - Merthyr Tydfil: 42.6 - RCT: 53.1 - VoG: 66.3	55.1
Categorisation outcomes (% schools as Green)	47%	+3%	+19%	- Bridgend: 49% - Cardiff: 55% - Merthyr Tydfil: 42% - RCT: 36% - VoG: 53%	41%

Confidential - for discussion at Joint Consortium Committee

Notes: *1. Changes to FP Areas of Learning were made, making historical comparisons inappropriate. 2. Historical comparisons before 2017 are inappropriate due to change in measures at KS4.6

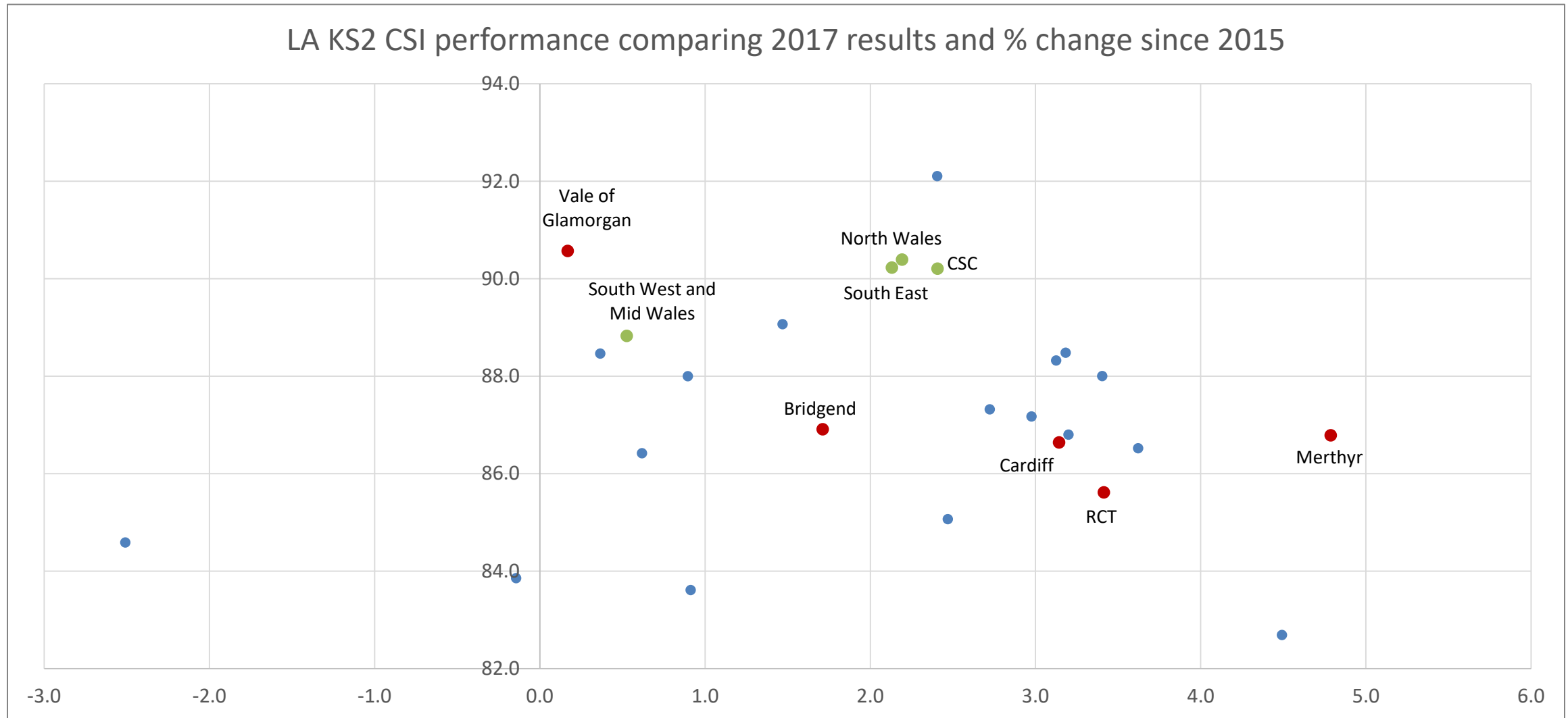
It is also important to remember how far performance has improved since 2014



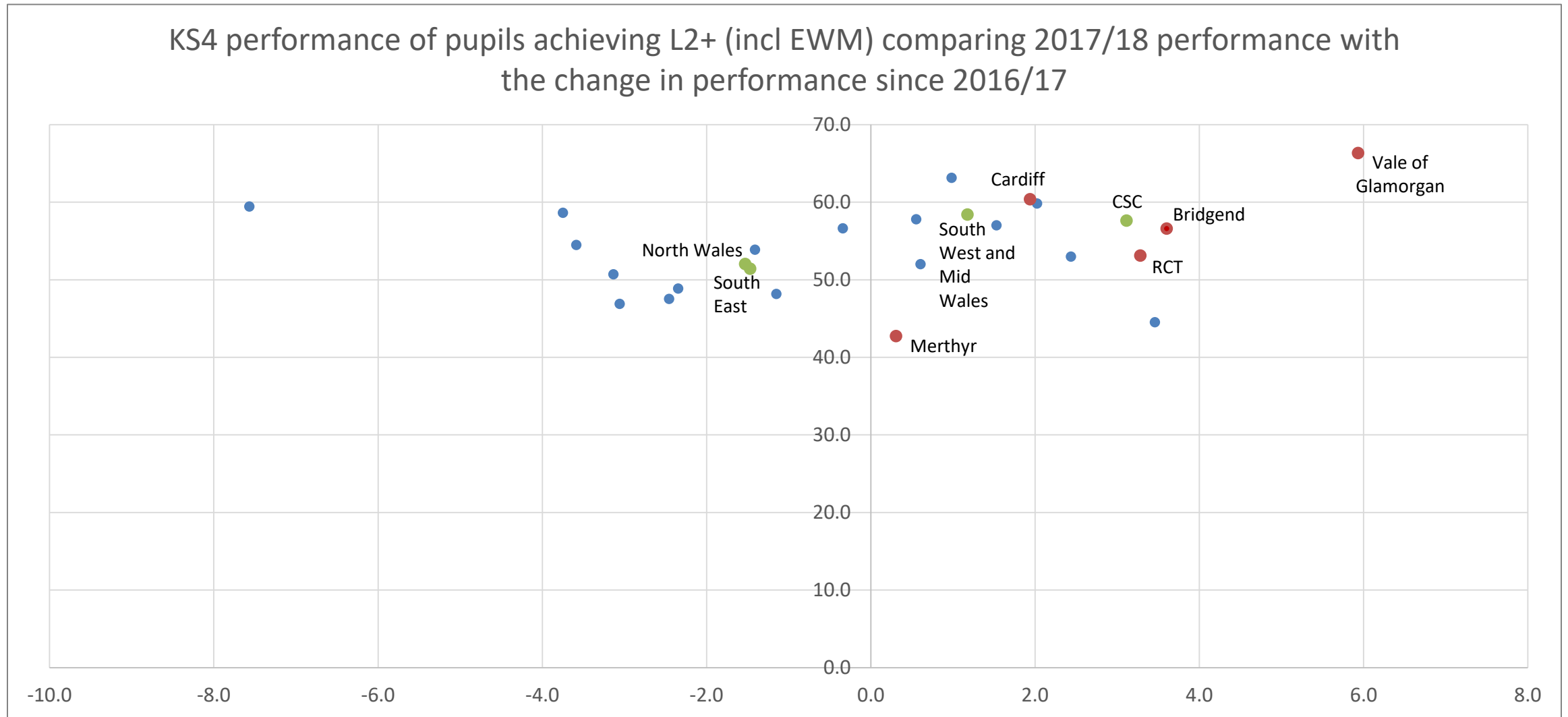
Note: Changes to FPOI Areas of Learning makes it difficult to compare historic performance with current. KS4 measure changed 2017-18 and therefore, results pre-2017 are not comparable to post 2017.



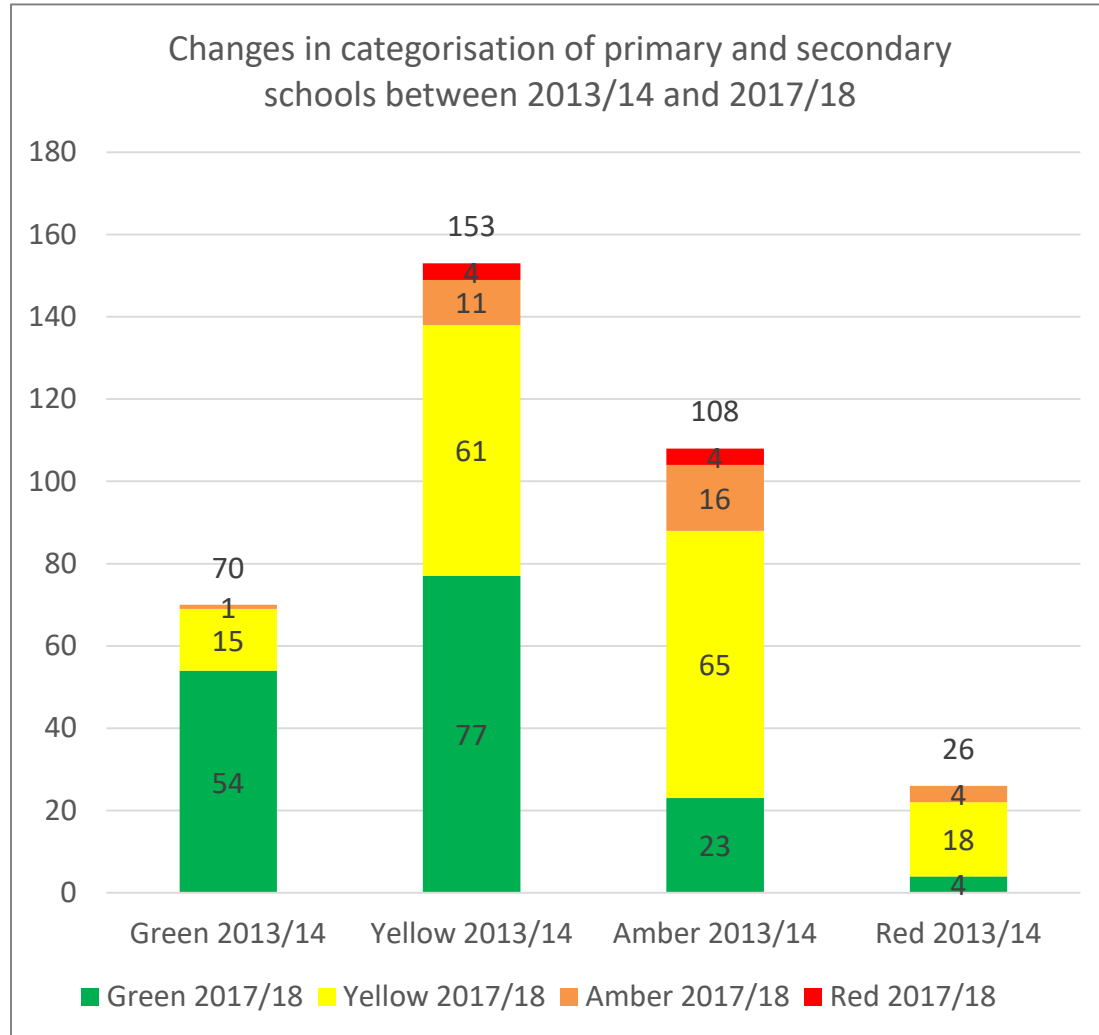
As a region CSC shows the best improvement rate at KS2, driven particularly by Merthyr Tydfil's strong improvement and improvement in RCT, Cardiff and Bridgend



At KS4 CSC also shows the strongest improvement since the new measures came in in 2016/17 driven particularly by VoG's strong improvement and increases in Bridgend, RCT and Cardiff

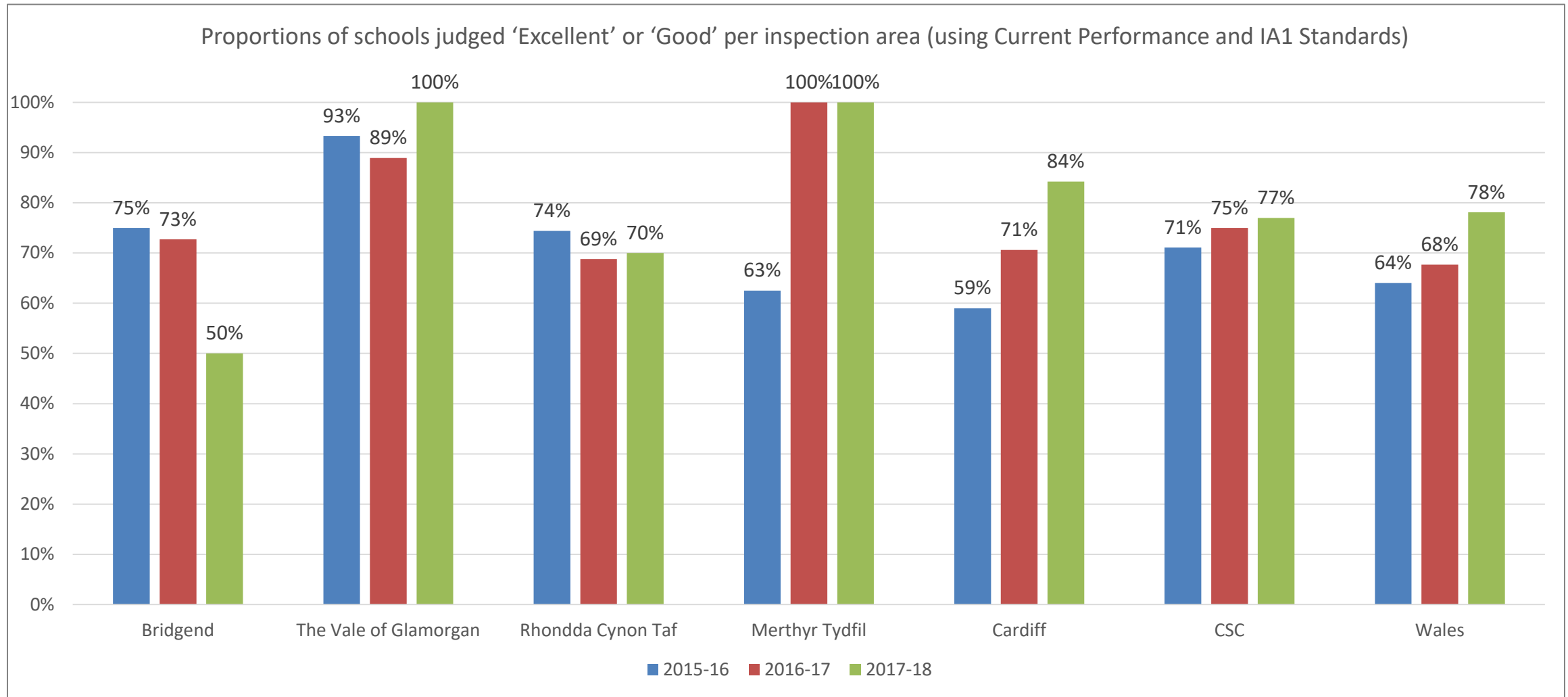


CSC schools have moved up National Support Categorisations since 2013/14



- 30 schools moved down one support group (either from Green to Yellow, from Yellow to Amber or from Amber to Red).
- 5 schools moved down two support groups or more
- 131 schools remained in the same support category
- 146 schools moved up one support category (for example, from Yellow to Green); and finally
- 45 schools moved up two support categories or more (for example from Red to Yellow)
- Therefore, out of 357 possible primary and secondary schools to compare across this time period:
 - 37% remained the same
 - 54% went up
 - 10% went down
- The 2017/18 picture, therefore, is:
 - 3% Red (was 8% in 2013/14)
 - 8% Amber (30%)
 - 41% Yellow (43%)
 - 47% Green (19%)

There has also been an increase in the proportion of schools judged good or excellent each year over the last three years at CSC level although CSC is below Wales in 2017-18



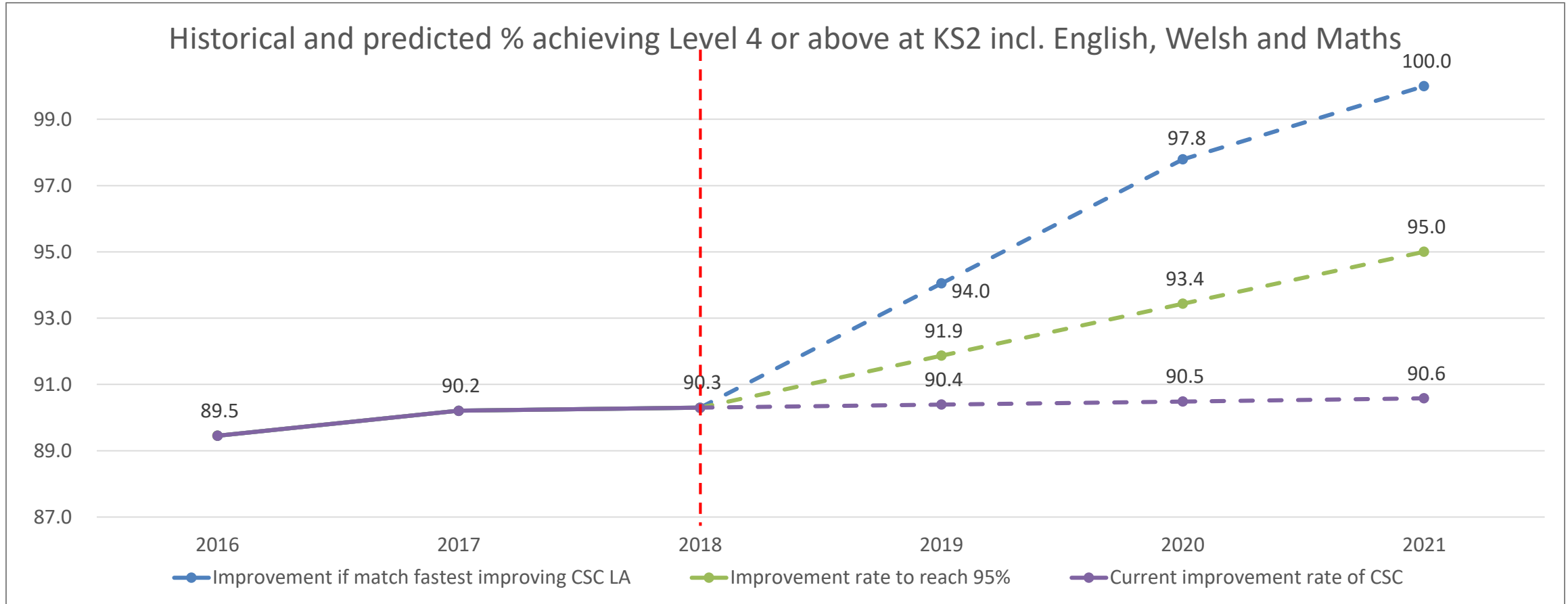
However there are still a number of areas where the region needs to improve further

- **There is room for further improvement at all Key Stages especially if all LAs could match the progress shown by the fastest improving LAs** in the region as Slide 13 and 14 show. At Key Stage 2 four out of five LAs are still in the lower half of performance amongst all LAs. At KS4 Merthyr is the lowest performing LA nationally and RCT is in the lower half of performance amongst all LAs.
- **There is more work to do in narrowing the gap for outcomes for eFSM pupils especially at Secondary level.** As slide 15 shows although the gap in performance between eFSM and non-eFSM pupils has narrowed year on year at KS2 this has not yet translated through to secondary level where the gap has increased at Key Stage 4 in each of the last 2 years despite a significant focus on improving the performance of eFSM students.
- **The region is performing less well on inspection outcomes under the new inspection regime and there is some way to go to ensure all schools are judged good or excellent.** Slide 16 shows the profile of inspection grades across the region and by LA under the new inspection arrangements. Merthyr and Vale of Glamorgan have achieved some consistently excellent or good judgments but performance in the other three LAs looks more variable. As Slide 17 shows just under a third of all schools across the region would need to improve to achieve the mark of 100% judged excellent or good.
- **There are new performance challenges emerging in other areas like Wellbeing, Attendance and Exclusions.** Tackling these challenges will require an even more joined up response with Local Authorities, who have primary responsibility in these areas, needing to work closely with the Consortium and with schools to drive improvements in these areas.



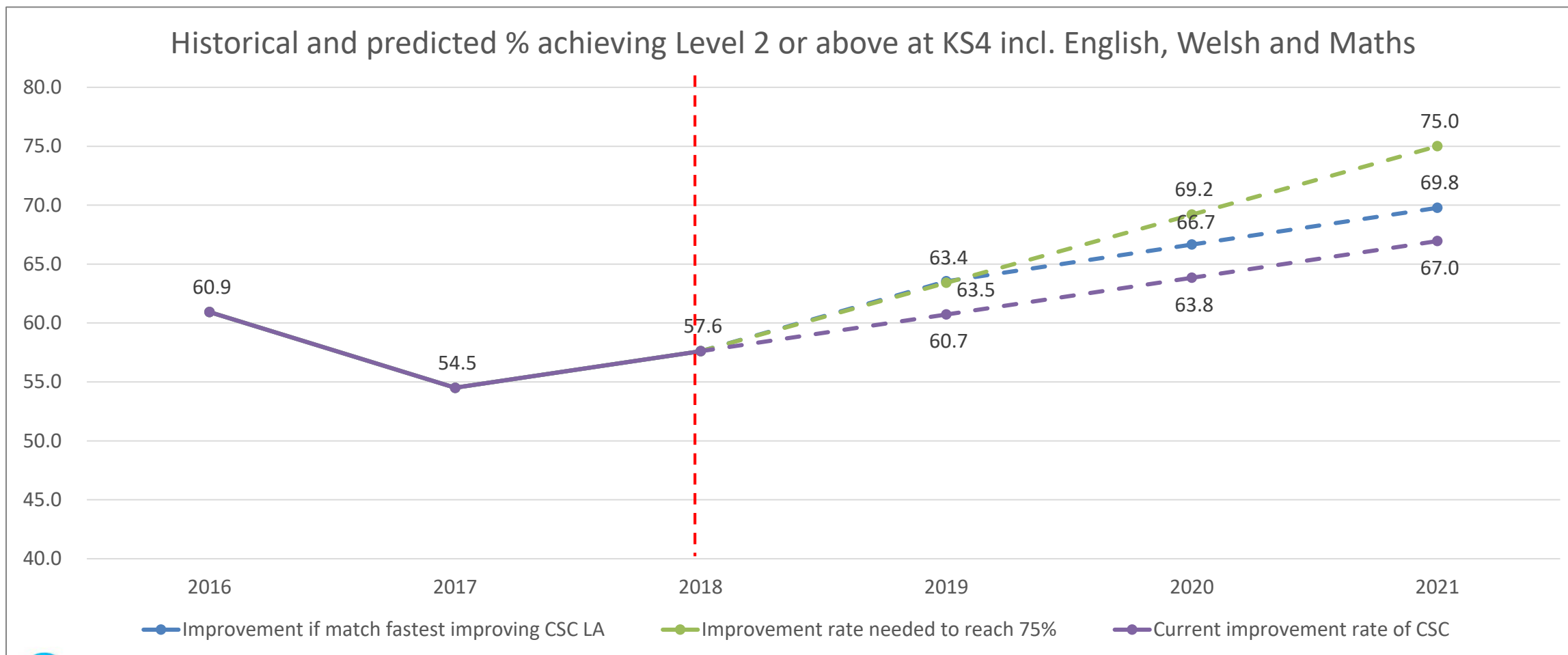
At KS2 if CSC continues at current rate of improvement it will see very little change by 2021. If however all LAs could match CSC's fastest improving LA it would be possible to reach 100% by 2021

If CSC continues at the rate of improvement seen this year, the growth in the number of pupils achieving L4 or above would be marginal. The fastest improving LA in CSC, Merthyr Tydfil, achieved growth of 3.7% last year. If all LAs could match that rate of improvement it would be possible to achieve 100% of pupils achieving L4 and above by 2021. Or it would be possible to achieve a level of 95% of pupils achieving L4 or above with an improvement rate of an average of 1.6% per year – less than half the rate achieved by the fastest improver last year.



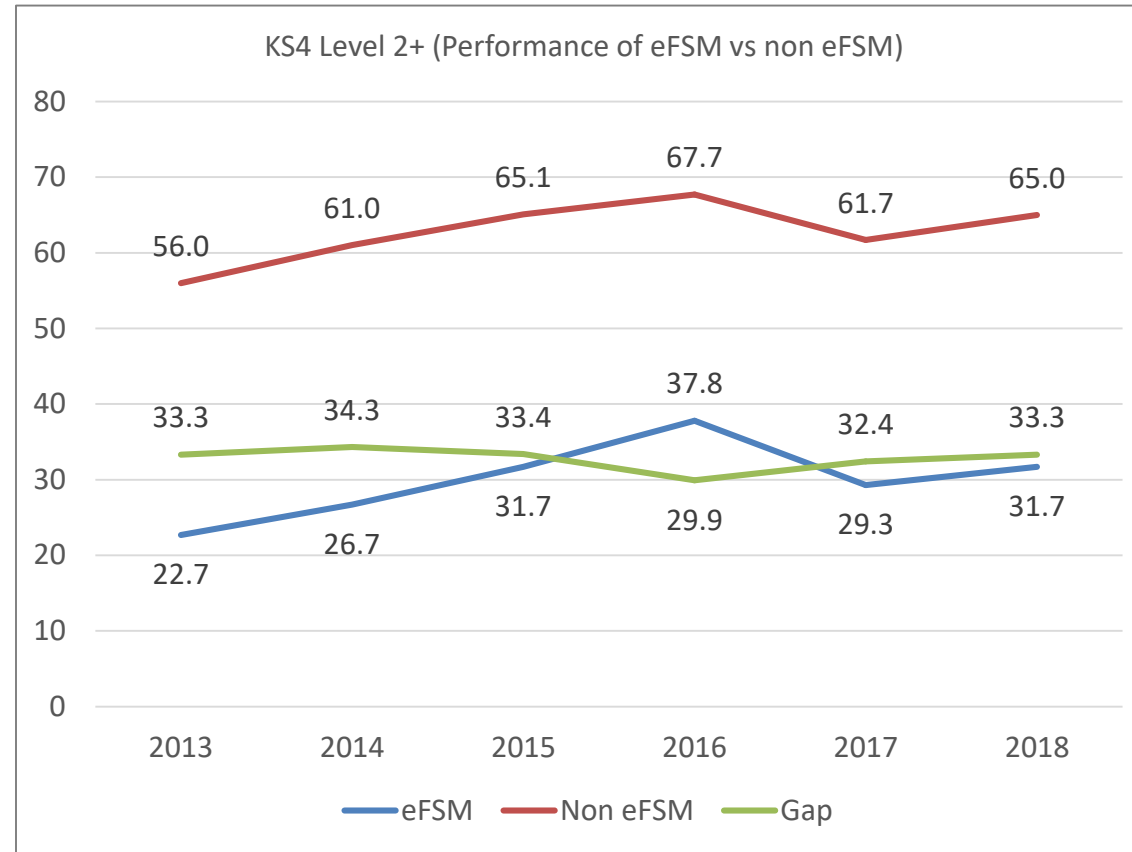
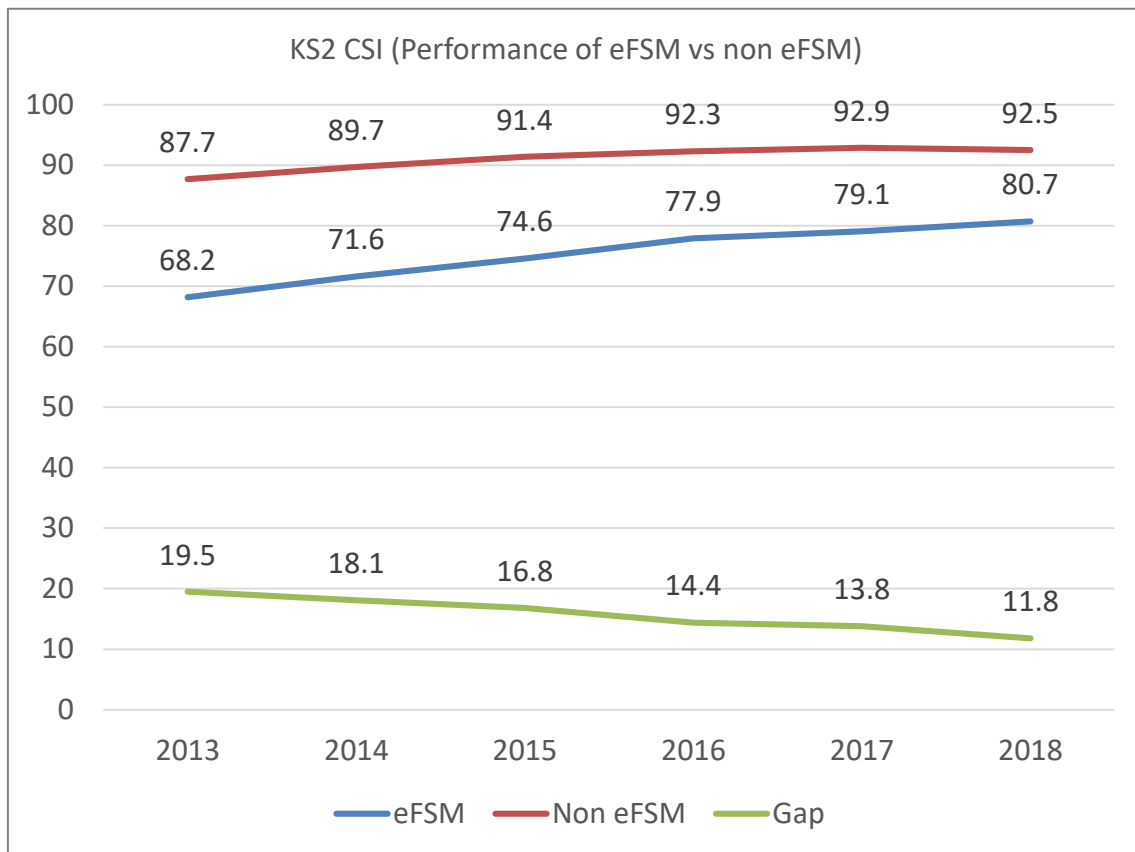
If CSC continues to improve at current rate it could get to 67% of pupils achieving Level 2+ at KS4 (incl. EWM) by 2021. If all LAs could match the highest rate of improvement seen last year it could get to 70%

CSC improved at a rate above the national rate of improvement last year. If it can sustain this rate of improvement it would get to 67% of pupils achieving L2+ (inc EWM) at Key Stage 4 by 2021. If however all LAs could match the rate of the fastest improving LA¹ last year it would be possible to achieve close to 70% of pupils achieving this level. If CSC wanted to set an even more ambitious target of say 75% of students achieving Level 2+ (inc;. EWM) CSC would need to almost double the current rate of improvement.



1. This is based on the improvement Vale of Glamorgan exhibits the highest rate of improvement for 2017-18

Performance of eFSM pupils: The gap has continued narrowing at KS2 over the last 5 years but at KS4 gap has widened in last 2 years and is above the gap at national level.

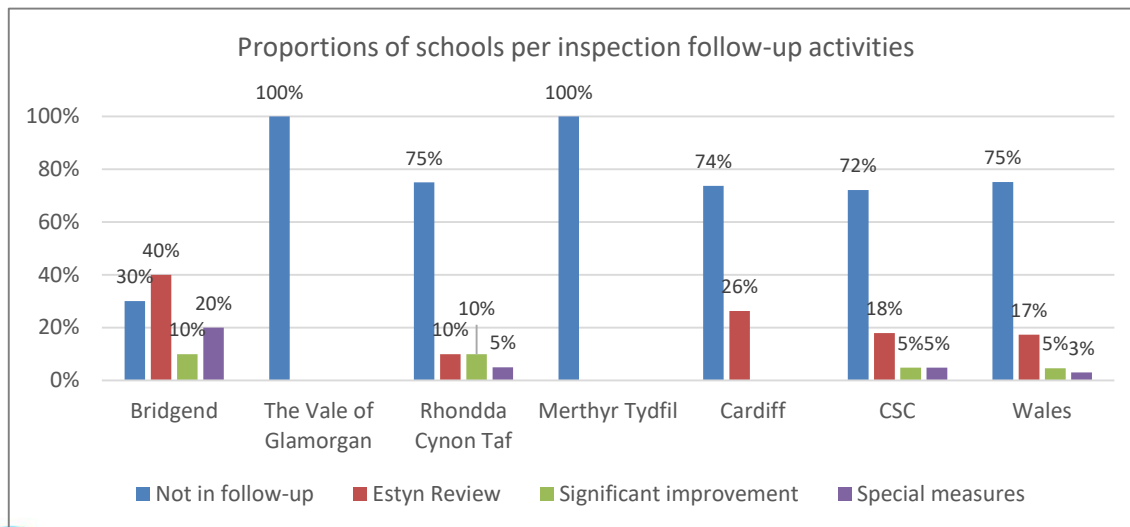
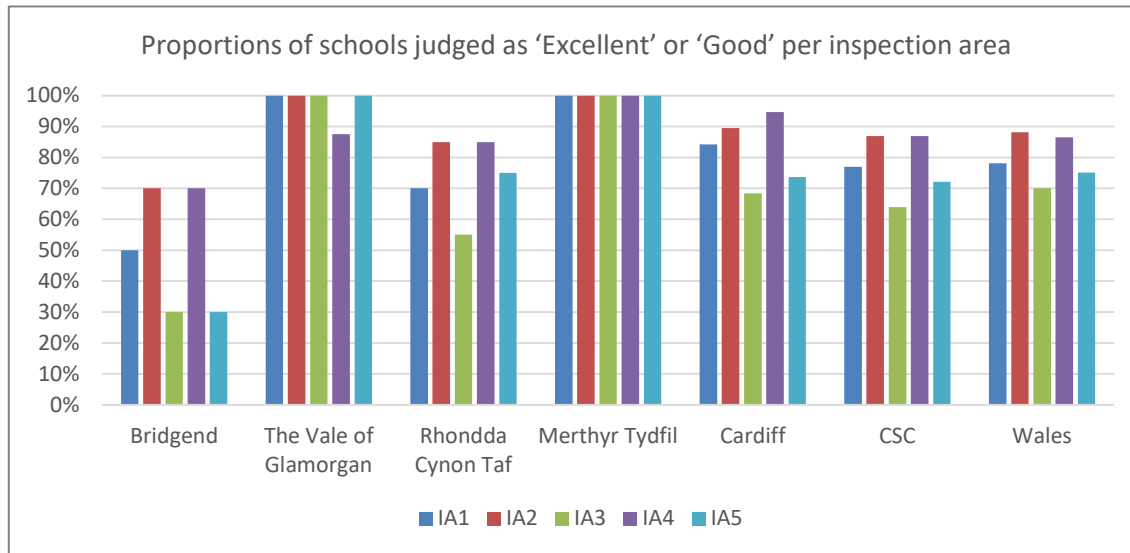


- The gaps in performance between eFSM and non eFSM pupils has decreased for all performance measures at both expected level and above-expected level
- This is driven by an increase in all performance measures for eFSM pupils, at both expected and above-expected level –whilst performance of non eFSM students has been more variable.

- The gap in performance for **KS4 Level 2 threshold** (incl. EWM) has widened, despite increases in performance for both eFSM and non eFSM
- This gap is wider than the national picture (CSC gap of 33.3pp and Wales of 32.3pp)



Given changes to the inspection framework, CSC is now the second lowest region for four out of five inspection areas although some LAs have performed very well on these new measures



Inspection Outcomes

- Given the new inspection framework introduced for 2017/18, there is no trend information for the breakdown of inspection areas
- The CSC region is below the national proportion of inspections judged as either 'Excellent' or 'Good' for all inspection areas, other than Inspection Area 4 (Care, Support and Guidance)
- There are some LAs within the region, however, that far outperform the national proportions – Merthyr Tydfil have 100% of schools inspected judged to be 'Excellent' or 'Good' for all inspection areas and Vale of Glamorgan has 100% for 4 out of 5 outcomes
- Overall, CSC is the second lowest region for the proportion of schools judged as either 'Excellent' or 'Good' for inspection areas 1, 2, 4 and 5 and is the lowest region for inspection area 3

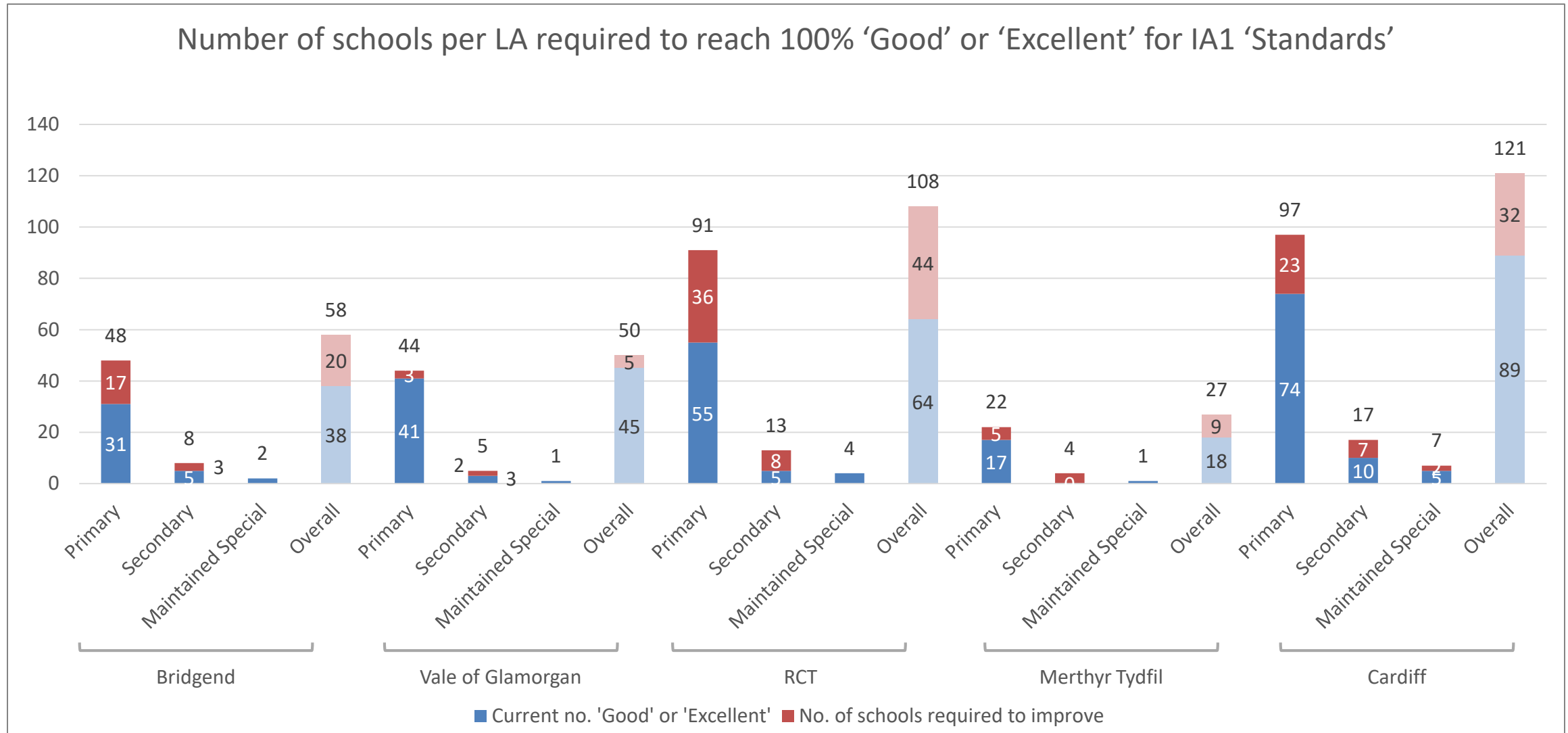
Inspection Follow-Up

- CSC has fewer schools placed into the follow-up activity than the national proportion, and has similar proportions placed into follow-up activities Estyn Review and Significant Improvement
- But, CSC has a higher proportion of schools placed in Special Measures than national proportions

Excellent Practice Case Study

- Nearly four in ten schools inspected in CSC are invited to create excellent practice case studies, which compares favourably to national proportion of 32.5%

Out of 364 schools in the region with an inspection judgement, 110 would have to improve for CSC to reach 100% 'Excellent' or 'Good' for IA1 'Standards'



* Only 364/387 schools have a current inspection judgement. The remaining 23 schools are not included in these figures.

Section 2: Are there any other examples and work you can learn from in other consortium in Wales or other local education systems particularly around the development of a school led-system?

Learning from other Consortium in Wales

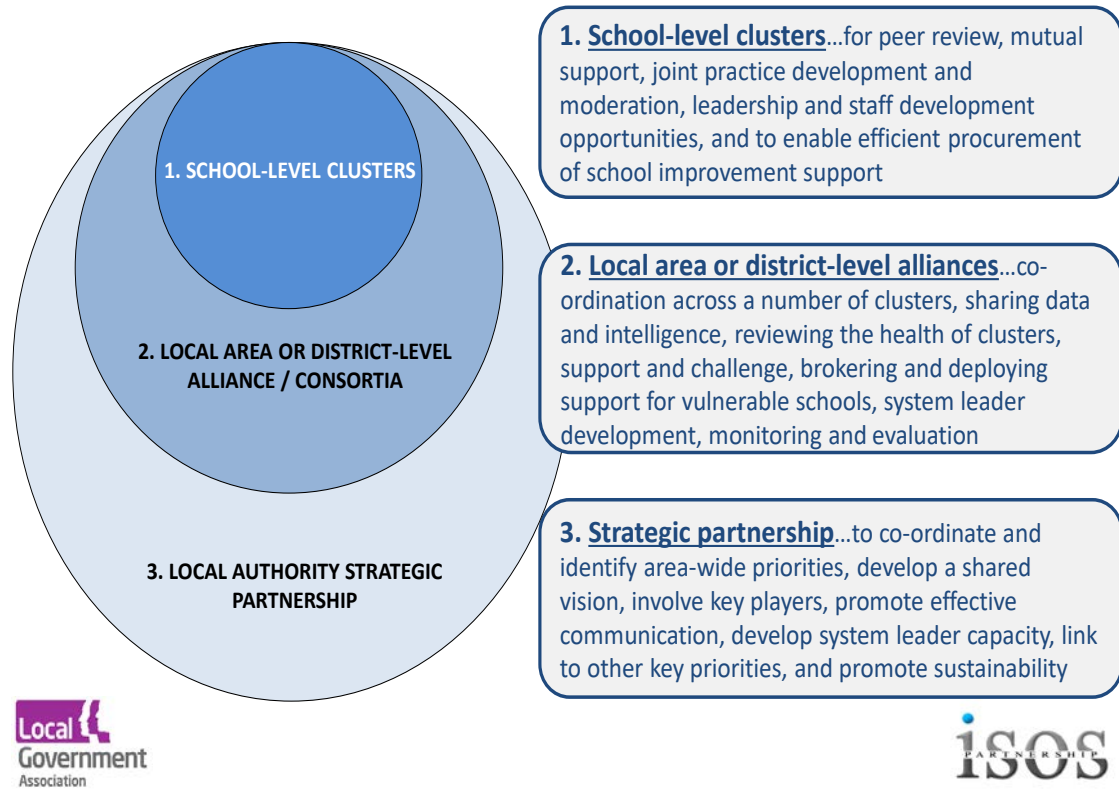
We have spoken to the Managing Directors in the three other regions to understand how their approach to Consortium working is evolving and changing. It is important to say that each of the other regions has a different delivery model to Central South – EAS has a company structure, GER has moved to a pan-region Consortium model and ERW is currently undergoing changes which will establish a stronger Consortium role for providing professional learning support. Whilst it is important to recognise these differences we believe there are still things you can learn from how they have developed elements of their delivery model and their business, planning and finance processes. Our main reflections are summarised below:

- **Be clear about your professional learning support offer and how this is distinct from the challenge role.** For example ERW have made it explicit that the Consortium's focus is all around supporting schools in three areas i) implementing the new curriculum ii) professional learning and iii) leadership development and this is a separate and distinct offer from the Challenge Adviser role. In GER they have made a deliberate change to the description of their Challenge Adviser role renaming it as a 'Supporting Improvement Adviser' to explicitly recognise that the role is about more than challenging schools and as important is the role they play in brokering and connecting schools to professional learning support.
- **Set forward budget projections in advance.** Two of the other Consortium have already set three year budgets to be clear to Local Authorities what the contributions required will be. In one this was discussed and agreed by Chief Executives, in the other the Consortium developed their proposals and put these to Members and Directors to agree. In both cases they were also looking at their core and grant budget as a single pot of funding and deciding how it would be allocated to meet their agreed strategic priorities rather than separating core and grant funding.
- **Provide transparency of spending and delegation to schools to allow easy reporting to Local Authorities.** EAS have developed an online tracking system that shows exactly what level of funding has been allocated to each school along with conditions of grant they are expected to meet. Schools are expected to report against this spending – either by uploading their own evaluation process or by completing simple one page form. The details of any support being provided and the latest Challenge Adviser reports are also available so LAs have this all in one place. ERW also talked about being more transparent about the delegation of grants to schools so schools and Local Authorities could more clearly see where the money is going and avoiding the perception that the Consortium was top-slicing a large part of the grant budgets.
- **Use the Business Planning process to engage widely around the strategic priorities and then stick to them.** Other Consortium described their business planning process as the key mechanism for engaging with LAs and schools about their priorities. They talked about consulting widely on the business plan as the chance for Heads and Governing Bodies to feed in their priorities too. In GER they develop local school improvement plans to feed into the regional plans and have regular local quality boards to review progress against the plans. GER also talked about the effort they have put into developing relationships with Members including having informal opportunities to meet and provide updates outside of the formal Governance processes. EAS have also invested heavily in the development of their relationships with Members.



Lessons from England

Partnership structures at three different levels



There are important differences in the way the education system has developed in England and the partnership structures that have emerged as a result. There are a range of different models now at a local level from local strategic partnerships, schools owned companies and traded services as well as the school level partnerships such as Federations and Multi-Academy Trusts. Whilst recognising the differences in the context and legal framework we think there are lessons you might learn from the way these partnerships are developing.

Learning from England

In our research for the LGA published in 2018* we observed partnerships working at the three levels described in the diagram on the left. Our research identified a number of lessons from experiences in England over recent years in developing a self-improving system that might be relevant to your challenges in Wales:

1. Developing a self-improving system is harder to achieve in a period of reducing budgets: reduced resources make school-to-school support more difficult and partnerships have had to prioritise what they want to use school to school capacity for
2. Many local areas are developing their own strategic partnerships to drive forward school improvement locally; these partnerships often have both Headteacher and Local Authority representation
3. The links and connections between the different levels in the system are critical to making it work. Clusters can provide good opportunities for developing peer review, building engagement with evidence-based practice, and creating staff development opportunities. But clusters need to be connected to local groups of schools and local groups to the strategic partnership and this is likely to require dedicated coordinating capacity and effort.

* *Enabling School Improvement: research into the role of LAs in supporting local school improvement systems* Isos Partnership for LGA (2018)

What implications might this learning from other systems have for you?

- **Other Consortium and local Partnerships in England have both seen the role of Clusters as critical to their delivery model** and invested time and effort in strengthening the work of these clusters. Given the focus on cross-regional collaboration in Central South over the last few years there has been less attention paid to the role of Clusters as more time and effort has been put into the development of SIGs and Hubs. This is now changing with a greater role envisaged for Clusters in relation to implementation of the new curriculum and ALN reforms and suggests that the same degree of effort will be required to get consistent implementation from clusters across the region. There is currently likely to be significant variation in the quality and capacity of cluster working.
- **In England one of the key features of the development of partnership working has been the links between the different levels of the system.** In many cases this means the work of clusters of schools is brought together in larger local area based groupings which in many cases are then overseen by the work of a whole area based strategic partnership which involves both Heads and the Local Authority. You are facing a similar question about how best to connect the work of local schools within their clusters to groups of Headteachers coming together in local partnerships with work at a regional level. Our understanding is that recent work has helped to develop stronger Headteacher led partnerships at local authority level which help join up the work going on in individual clusters of schools but there is less clarity about how these local partnerships come together with each other and join up with the work at regional level.
- **In most cases the partnerships in England are Headteacher led although they still have strong involvement from Local Authorities.** This might raise questions for you about how strong the involvement of Headteachers and System Leaders is in the current Governance model and whether there is more you could do to strengthen and deepen the engagement from a wider range of Headteachers across the region. One other feature of many of the partnerships in England is they have opted for an Independent Chair for the partnership so that neither schools nor Local Authorities are placed in the 'lead' role in chairing the partnership discussions. This might be something you also want to consider for your own Governance model moving forward.
- **There might be learning from some of the other Consortium in Wales around the disciplines of their planning and budgeting processes.** A number of other Consortium talked about the processes they used for engaging Local Authorities and schools in developing their annual business plan and had strong systems in place for making transparent to Local Authorities and schools where funding was then going. In some cases they had also developed a proposed three year budget for the work of the Consortium and got agreement from Local Authorities to this.



Section 3: Is the current model fit for purpose for the future taking into account Welsh Government planned changes to the education system?

There have already been a number of external evaluations and surveys conducted seeking more feedback on the work across the region...

- **NFER undertook two surveys of headteachers in 2015 and 2017 to test the development of a self-improving system.** They found a marked difference in the attitudes of school leaders between the first and second round of interviews with most now believing the development of a school-led model was the right direction for the region. They also found deeper engagement from middle leaders and classroom teachers and that they were increasingly involved in cross-regional work with structures such as SIGs, Hubs, Pathfinders and Peer Enquiry becoming more embedded. They identified that some schools were more engaged than others in cross-regional work. They identified priorities for development: the relationship between Peer Enquiry and Challenge Advisers; quality assurance of Hubs; and more effective brokerage.
- **The Consortium itself commissions an annual survey of a sample of leaders, teachers and pupils in 20% of its schools to seek their feedback.** The latest survey found that there has been a deepening across all phases in collaborative school-to-school work such as undertaking action research, joint practice development and learning walks – two thirds of staff said they had involvement in action research, for example. Over three quarters of staff said collaborative working had improved their classroom practice and was impacting pupil learning and attainment. The survey showed large numbers of staff felt confident in their ability to access high quality and varied external support. Priorities for improvement included: clearer alignment between the work of Pioneer and Hub schools; and the need to develop a comprehensive plan to support the implementation of the new Curriculum for Wales. It also identified the challenge of maintaining the commitment to self-improving culture and system at a time when many schools and Local Authorities would be facing further budget pressures.
- **RCT has undertaken its own survey of headteachers which included questions on the work of the Consortium around school improvement.** The survey found that over 80% of headteacher respondents strongly agreed or agreed that the Consortium had a clear vision for improving education and that there was effective and appropriate support and challenge for school improvement provided in schools/PRUs. Heads were slightly less positive about the LA/CSC facilitating school-to-school support and joint working and collaboration between Education Services and Central South Consortium in supporting schools to improve: just over two thirds were very positive or positive about these elements.



What did we hear when we spoke to headteachers, LAs and Consortium staff?

- We shared interim messages with you based on early conversations with headteachers, LAs and Consortium staff. They reinforced many of the strengths and challenges that had been identified by earlier evaluations and surveys. They are included on slides 24-26.
- Since then we have tested these further with the Delegate Heads Group and with other selected headteachers (we invited the headteachers who were originally nominated to participate, as well as those chairing each of the local headteacher partnerships/groups to participate and have had conversations with heads from Cardiff, Merthyr, RCT and VofG. Some of the other chairs had participated in our earlier workshops so chose not to participate in further discussions).
- These further conversations reinforced many of our earlier findings although we highlight some additional messages on slide 27.
- Overall the message coming from heads is still largely a positive one about the role they want the Consortium to play as a middle tier that connects and joins up the system from national to regional to local, and continues to promote and push a self-improving system.
- Some heads thought this role for the Consortium was even more vital during a period of such turbulence and change – *‘The Consortium can be the rock that provides some stability for schools during this period of uncertainty and change’* as one Delegate Head put it.
- However there was also a strong sense from Heads that if the Consortium is going to play this role it needs a re-launch or a refresh of its vision and purpose again, and to ensure it has the right capacity to lead work and drive this forward in partnership with LAs and schools.
- Communications and governance emerge as two other critical themes from the feedback. There is confusion and uncertainty about the purpose of different groups and how they are meant to connect to each other currently. Whilst local headteacher meetings seem to be providing a valuable connection between schools and cluster working and Delegate Heads play a powerful role at Consortium level in advising on the future strategy, there is no clear line of sight through these groups from regional to local to cluster working.



What were the main messages we heard – current strengths in the system

- **As a region we have come a long way in a relatively short period of time** – a number of interviewees said to us it was important not to forget what it was like before the consortium existed: we didn't know our schools well enough, too many of them were failing, and all of the LAs were judged adequate or unsatisfactory by Estyn. We had different systems and processes for school improvement across LAs and no way of bringing them together effectively. By working together across the region we've been able to address many of these system level weaknesses.
- **We've seen the collective impact we can have by working together across the region.** The continued improvement against key performance measures is a big part of the evidence for this, but so is the softer feedback from schools and leaders about the types of school improvement activity they are now undertaking working with colleagues from across the region in other schools. The development and depth of school to school working was seen as a key strength of regional working by many.
- **Despite improvement there is no complacency and a drive to improve further.** The commissioning of this review, the development of proposals for changes to HUBs, SIGs and other elements of the challenge as well as a desire to dig beneath the positive overall headline data to focus on improving outcomes for key groups of students such as disadvantaged, EOTAS and ALN are all evidence of the collective desire to secure even greater impact from working together as a region.
- **The Challenge Adviser model is seen to have improved over the last few years.** The quality of Challenge Advisers is seen to have improved, particularly by Local Authorities, and they welcome being allocated a dedicated Senior Challenge Adviser, although they still have questions about accountability and what their time is being spent on. Schools were still concerned about consistency of quality and frequent changes in their Challenge Advisers but were positive where the relationship was working well with their Challenge Adviser that this could help the school improve.
- **Schools were most positive about the opportunities to work with other schools.** SIGs were the most frequently mentioned element of the challenge and were seen positively by many schools for the opportunities they have provided to work with other schools from across the region and outside their LA. For schools in smaller LAs this push to look outwards across the region was particularly welcomed and schools who had both given and received support through these models were positive. This feels like a big change in the culture of collaborative working that shouldn't be underestimated.
- **At a time of budget pressures, the Consortium has already delivered savings** particularly to the core budget and by looking more flexibly at the way it uses core and grant funding as a combined pot. It has delivered a 5% saving to the core budget in each of the last two years and is proposing to do the same this year. This represents a total reduction in LA contributions of £626,000 over the last 3 years.



What were the main messages we heard – current challenges in the system

- **We've lost sight of the vision for school improvement over the last 18 months** – Many interviewees said they don't feel there is clear overall regional strategy or vision for school improvement or what comes next. They contrasted this strongly to the period when the Central South Challenge was first developed when the consortium, LAs and schools were all seen to be working towards the same aim, there was a strong sense of excitement from many schools, and everyone could explain the mission and purpose. School leaders said this wasn't just an issue for the Consortium to address – they were also looking to LAs for leadership on this - *'we should all be in this together but it hasn't felt like that over the last 12 months'*.
- **LAs feel a strong sense of loss of ownership over the Consortium's direction** and ability to influence its work. In large part this is driven by concerns that the level of demands being placed on the Consortium by Welsh Government has turned it into a regional delivery arm for large scale national initiatives. LAs feel like they are not part of the conversation and don't have the ability to influence how the Consortium delivers to their schools. The conditions attached to grants are seen as a barrier to being more flexible in the approaches that can be taken. There were concerns that the breadth of the Consortium's work had gone beyond the core focus on school improvement and too much resource was being spent on delivery of other priorities.
- **Questions were raised about value for money and evidence of impact.** At a time when LAs are being asked to deliver significant savings they are asking questions about value for money from the consortium. Concern was expressed that there isn't detailed enough information about the impact of different initiatives and how money is being spent to answer these questions effectively. Value for Money reports provide an overview of participation data and evidence of impact where available, but there is a strong view that more work is needed to give judgements of whether support is working to help improve schools or not.
- **Although the Challenge Adviser model is seen to have improved there are still big questions about it** – for LAs there remain questions about what Challenge Advisers are expected to spend their time on and how they are being held accountable for the impact of their work. Schools are still concerned about the variability in quality and the frequency of changes in personnel; they wanted to see Challenge Advisers playing more of a broker and signposting role. All were agreed there is a need to consider how the model will need to evolve in light of new arrangements for self evaluation and peer review and new national approaches to accountability. Some thought that Challenge Advisers should no longer be working with schools that are performing well and the role should be reserved for schools that are in difficulty.

What were the main messages we heard – current challenges in the system

- **Schools were less positive about how some elements of the Challenge model are working currently.** SIGs as a model were seen to work better for primary than secondary schools and there were questions about how they would fit with cluster working moving forward. Questions were raised about duplication and overlap in the role of Pioneer Schools and Hubs and there were concerns expressed by a number of schools about the quality and quality assurance of some Hub provision.
- **Questions were raised about Governance and the role of the Delegate Heads' Group.** For some this had provided the driving force behind the development of the strategy but there was concern that it has lost direction in recent months. There was very little visibility of the work of the Group to other Heads. Heads were concerned about capacity gaps at Consortium level and who would be taking forward key pieces of work. They also said there was confusion at times over roles and responsibilities between the Consortium and LAs and who to contact on different issues.



What additional messages emerged from our further interviews with heads?

- **Local headteacher meetings are providing a useful forum for connecting up the work of schools and clusters** and sharing information both in terms of feeding up and down to cluster level. In a number of cases, headteachers have taken on more responsibility for setting the agenda and managing these meetings. The Senior Challenge Adviser is playing an important role in connecting the Consortium to these discussions and the connection to the Local Authority remains strong in most cases. However there was confusion about how these arrangements are supposed to connect in and link to the Consortium's governance arrangements – what should the relationship be with Delegate Heads or Representative Head Group? The current arrangements are also very reliant on Senior Challenge Advisers playing the connecting role. There is also no forum currently for bringing together the heads leading these groups across Local Authorities to discuss and raise common issues and challenges.
- **There is greater clarity now about the delivery model moving forward and the important role of clusters.** The proposed development of the role of clusters within the Central South Wales Challenge model fits well with the way that clusters are being used and developed locally in many cases. Heads are keen to maintain cross-regional working through SIGs and other forums but recognise that much of the day-to-day collaboration between schools and teachers is more likely to come at a cluster level. However there is recognition that not all clusters are as strong as others, and more work will be needed to define their roles and ensure all are equipped to play them. The role of cluster convenor is likely to become as critical as the SIG convenor role and we should learn the lessons about what it has taken to make SIGs more effective and apply to clusters.
- **There are examples where the regional model is seen to be working well.** The most commonly mentioned example was the recent work around implementation of the ALN reforms which was seen to have been well led with clarity around roles and responsibilities, clear communication and engagement with schools, and a clear plan about how work is going to be take forward. It was described by some heads as a model of how regional working should look from a school's perspective. This was contrasted with other work led by the Consortium where there had been changes in personnel and uncertainty about who was taking work forward. One example given was the the Executive Head development programme which held a number of positive initial meetings but which has subsequently stopped. Some heads felt that the frequent changes in staff at Consortium level and consequent capacity constraints were too often limiting the effectiveness of the Consortium's work in many areas over the last year.
- **The role of the Consortium in filtering and communicating messages about national change is seen as critical during this period of change.** A number of heads were positive about the information the Consortium was providing them that helps them to understand the national agenda and upcoming developments like the curriculum changes. They saw the Consortium as the critical body to provide this intelligence and help them make sense of what can be a complex and confusing picture with so much change. However some Heads said they were still having to work hard themselves to find and interpret this information and thought the Consortium could do a better job at flagging critical information through its regular newsletters and bulletins. There was also seen to be too little face-to-face communication with not enough Consortium representation at Headteacher meetings and no one able to tell heads the 'bigger picture' story about what the Consortium was doing and how it connected to schools and LAs.

Conclusion: Is the Consortium fit for purpose for the future?

- In addition to the positive overall story about regional performance set out in Section 1 there are lots of positive messages from the qualitative feedback about the Consortium. Many of the Headteachers we spoke to remain committed to the development of a self improving system and regional working and still see the Consortium as the best vehicle for making that happen. The external evaluations and surveys of the Consortium's work also show a level of positive feedback from Headteachers and school staff which is impressive.
- However it is also clear from the feedback we received that the view of the Consortium has not been as positive over the last 12-18 months. It has suffered from frequent changes in staffing and has not provided clear direction and leadership as a result. Our conclusion to the question 'is the Consortium fit for purpose for the future' therefore would be not in its current state. We believe you will need to address a number of challenges if you want the Consortium to be fit for purpose for the future. It is important to say that many of these challenges would exist whatever organisational model you decide to opt for in future. We outline below our summary of the main challenges and provide more detail on subsequent slides.
 1. **Leadership and capacity gaps.** The absence of permanent leadership, gaps at a senior level and uncertainty around the future of the Consortium have impacted its ability to do its job effectively over the last 12-18 months. There is a need therefore to reset the vision and ensure the Consortium has the leadership, credibility and capacity to drive forward work across the system in partnership with Local Authorities and schools.
 2. **Clarity about roles and responsibilities.** There is a need to set out again for everyone involved the respective roles of the Consortium, Local Authorities and Schools and to show how the connection between the Consortium and the work of Local Authorities can be strengthened. Senior Challenge Advisers also need to be more effectively connected to the wider work of the Consortium to play a stronger system leadership role.
 3. **Tension between the Consortium's role as a regional school improvement service and delivery arm for Welsh Government.** This tension needs to be managed more effectively so Local Authorities and schools understand and see how their priorities fit alongside and/or are different from national priorities which the Consortium is being asked to deliver against and how funding is being used to support them.
 4. **Support schools to implement the new curriculum.** This is the biggest challenge facing the system in the coming years and you will need to ensure that the school to school support structures that exist through Pioneer Schools, Hubs and Clusters have sufficient expertise and capacity for the task.
 5. **Determine the future Challenge Adviser model.** There is a need to continue to improve the quality of Challenge Advisers support and challenge to schools and to determine the future role of Challenge Advisers in relation to different types of schools and the fit with Peer Review.
 6. **Strengthen Governance.** There is a need to be clearer about the role and purpose of different groups and to rationalise and simplify the current model. There is also a need to further strengthen the engagement of Headteachers and System Leaders in Governance.
 7. **Funding pressures.** For schools and Local Authorities this remains the biggest challenge in the system so any action you take will also need to take account of these pressures and deliver further savings where possible. We look in more detail at the options around funding in Section 4.



Further analysis of the challenges facing the Consortium

Challenge	What are the issues facing the Consortium that you need to address?
1. Leadership and Capacity Gaps	<ul style="list-style-type: none">• Absence of permanent Managing Director has created uncertainty amongst Heads and CSC staff• Frequent changes in senior staffing have left gaps and meant that key pieces of work haven't been taken forward or are delayed e.g. Closing the Gap strategy, Executive Head Leadership Development• The ongoing debate about the future of the Consortium and consequent lack of clarity over the way forward has damaged morale amongst staff and created recruitment and retention issues for the Consortium• The uncertainty also means there has been no 'guiding coalition' driving the Consortium forward – there is a need for LAs (both members and Directors) as well as key system leaders to be seen to be setting a clear vision and way forward again
2. Roles and Responsibilities	<ul style="list-style-type: none">• At a basic level challenge here is about being clearer about the respective roles of the Consortium, Schools, Local Authorities and Welsh Government and how they all work together as part of one overall system contributing to improved outcomes• Given the extent of change at Consortium level there is also an immediate need to set out again key roles and staffing• Another challenge here is how to strengthen the connection between the work of the Consortium on school improvement and the wider responsibilities Local Authorities have in relation to areas such as place planning, inclusion and wellbeing etc• For Local Authorities part of the challenge is about how well connected Consortium staff are to their own work – in some cases this is more of a practical issue about not being on the same e-mail system and not having regular opportunities to meet with Consortium staff to build relationships on a face to face basis• For Senior Challenge Advisers there is also a significant challenge in having to face both ways to Local Authorities and the Consortium. This means they often don't have the time needed to be both the lead officer for the Local Authority and to stay connected to the wider Consortium work. This in turn limits their effectiveness in being able to support and connect Local Authorities and schools to the wider work of the Consortium around the professional learning and leadership support.



Further analysis of the challenges facing the Consortium

Challenge	What are the issues facing the Consortium that you need to address?
3. Tension in the Consortium role between LA commissioned service and Welsh Government delivery body	<ul style="list-style-type: none">• The challenge here comes from the combined role the Consortium is being asked to play to both deliver a school improvement service for Local Authorities and act as a regional delivery arm for Welsh Government on the national mission• Given the similarity in the aims of the national mission and Local Authorities ambitions for education there is nothing inherently incompatible in the Consortium being asked to play both of these roles at the same time• In practice however Local Authorities often feel that they have lost ownership over the direction of the Consortium's work, that they have no control over how a large part of the Consortium's budget is being spent given the conditions of grant funding whilst still having to bear all of the overheads associated with the Consortium's management and infrastructure• There is also a need to ensure there is more engagement and transparency in the conversations between the Consortium and Welsh Government so that all are clear about what they can influence and what they cannot
4. New Curriculum	<ul style="list-style-type: none">• Getting all schools ready for the implementation of the new curriculum is one of the biggest challenges facing the region• One of the challenges here is the limited engagement of most schools in the curriculum design work to date – whilst the region has had a number of Pioneer Schools leading curriculum design work they have not always been well connected back into the Consortium's current structures for supporting school to school working like SIGs and HUBs• The Consortium now plans to deliver the majority of support and development for implementation of the new curriculum through local cross-phase clusters of schools. The challenge here is that whilst some Clusters have a strong history of working together in other cases their track record is more mixed and this will be asking them to take a much bigger role than they have played before. Ensuring all clusters are effectively supporting schools around the new curriculum will be a big challenge.



Further analysis of the challenges facing the Consortium

Challenge	What are the issues facing the Consortium that you need to address?
5. Challenge Adviser role	<ul style="list-style-type: none">• There is an continuing need to improve the quality and consistency of Challenge Adviser advice, support and challenge to schools to ensure all schools are benefitting from positive external professional scrutiny and challenge of their performance• There is a need to review the role of Challenge Advisers moving forward to determine whether the same level of challenge and support needs to be given to different types of schools. There is also a need to review how the role of peer review and cluster working might change the role. This will also need to take account of developing Welsh Government thinking.• As part of re-designing the role there is a need to give greater emphasis to the 'support' side of the role to strengthen the role of the Challenge Advisers in brokering and signposting schools to appropriate professional development support and connecting them to other schools that they could learn from. This will become even more important during the implementation of the new curriculum. Challenge Advisers will need to be better connected to the wider work of the Consortium around Professional Development and Leadership development to play this role effectively.
6. Governance	<ul style="list-style-type: none">• There are a number of different layers to the current Governance model with a number of groups playing different roles meaning that decision making is not always clear and transparent. There is a need to be clearer about the role and purpose of different groups and to look again at whether you can rationalise and simplify the current Governance structure.• For Local Authorities and Directors there is a lot of time and energy being put into Governance with frustration that they still cannot always influence decision making. For the Consortium there are also frustrations around the amount of time spent managing the current Governance structures without discussions necessarily contributing to moving the agenda forward.• There is too little engagement of Heads in the current Governance model and where that engagement does exist through the Delegate Heads group there is too little visibility of that role to other heads. There is the potential for the Headteachers who are leading local partnership structures to play a much stronger role in connecting the Consortium to clusters and schools.



Section 4: Is the model affordable over the next 3-5 years, with a likely continued period of austerity?

Overview of funding: sources of funding for CSC

There are two principal sources of funding that support CSCs work:

1. **Local Authority Core Contributions** determined using the Indicator Based Assessment for education (IBA) and agreed by Joint Committee.
2. **Grant Funding from Welsh Government** which has now been consolidated into one grant the Regional Consortium School Improvement Grant. The vast majority of this grant (90%+) is delegated direct to schools but the centrally retained element funds a large element of CSCs work.

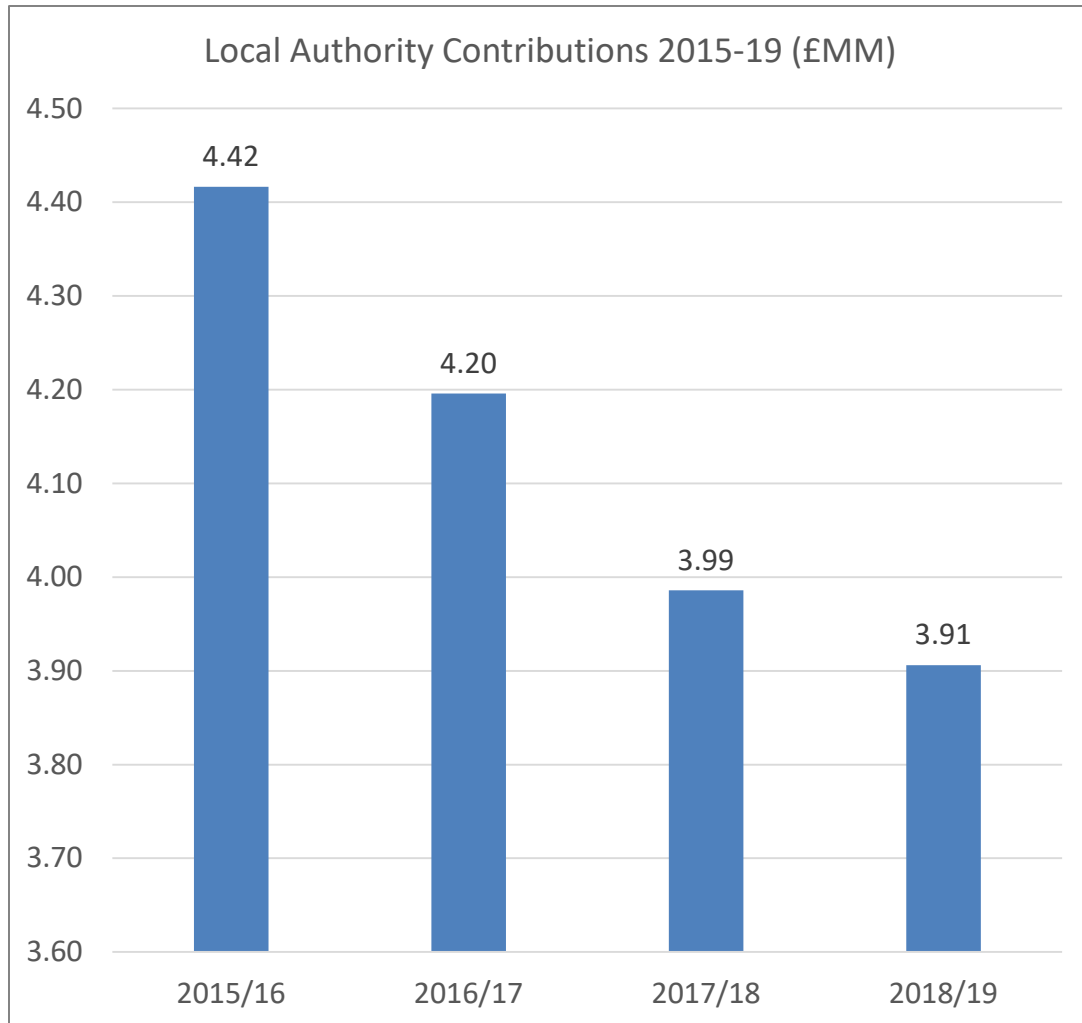
In addition to the above the Consortium receives and allocates the Pupil Development Grant to schools. The majority of the grant (95%) is delegated to schools however 5% of the Children Looked After element is retained to provide professional learning opportunities across the region to support previously looked after adopted children. Given it is not available to support the wider work of the Consortium it has not been considered as part of this review.

The Consortium does not seek to make income from any services provided to schools because it wants to encourage and promote school to school working as part of developing a self-improving system. So additional income generated is now a very small part of the total funding of CSC (c.80K). Given the commitment to the development of a self-improving system increasing income generated by the Consortium from its schools has not been considered as an option as part of this review.

In looking at the future budget of the Consortium therefore our focus has been on the two principal sources of income outlined above. We have looked at the recent trends in these budgets, how the funds are currently being spent as well as examining where there might be most potential for future efficiencies and savings. It is worth noting upfront that there are constraints on the Consortium's choices and options here imposed by the conditions of Welsh Government grant funding which currently limit the ability to use this budget on a more flexible basis.



Overview of funding: historical trends of core local authority contributions



- Local Authority contributions have reduced since 2015
- The National Model initially recommended £5.4m of contributions to the Central South Consortium based on the constituent Local Authorities involved
- However, actual contributions agreed were less than this
- Furthermore, an additional 5% reduction was agreed in financial years 2016/17 and 2017/18, and a further reduction of 2% was approved for 2018/19
- These efficiencies have been achieved through a number of different strategies including:
 - A decrease in Challenge Advisers FTE (decrease from 2012/13 from 33.3 FTE to 22.8 2018/19)
 - Remodelling of Business Support Functions (reduction of 2.5 FTEs)
 - Relocation of CSC offices in Summer 2018 and removal of conference centre facilities (reduction of 7.5 FTEs)
 - General budget reductions



What is the core funding currently being spent on and where might there be most scope for further efficiencies or savings?

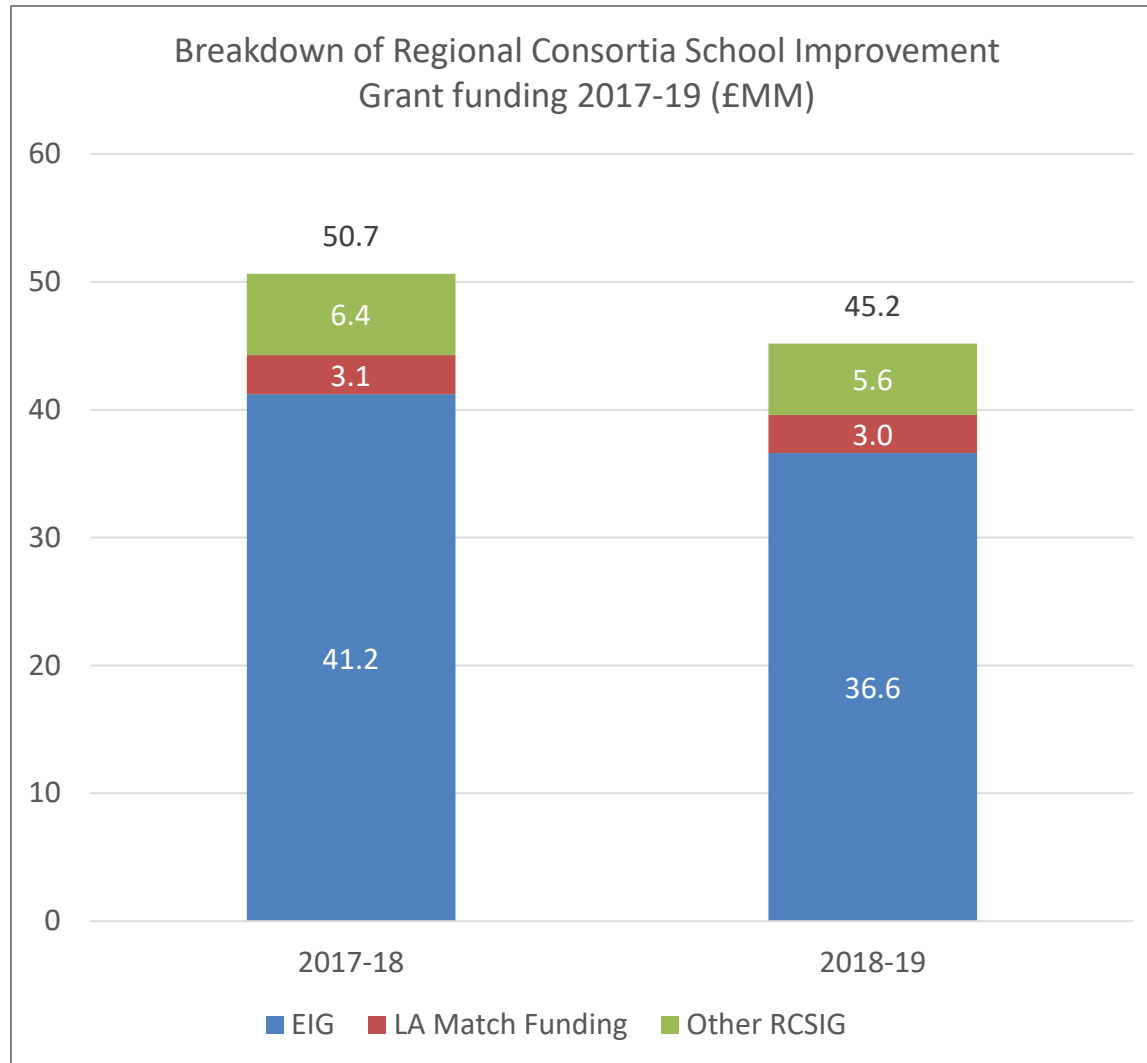
Table showing LA financial contributions and allocations 2017-18

Cost Category	Outturn 2017-18	City & County of Cardiff	Bridgend CBC	Vale of Glam CBC	Merthyr CBC	RCT CBC
		£	£	£	£	£
		36.02%	15.59%	14.71%	6.39%	27.29%
LA Contributions	3,985,879	1,435,669	621,381	586,223	254,827	1,087,779
Senior Challenge Advisers	477,431	135,971	68,004	70,361	67,523	135,572
Challenge Advisers	1,631,330	587,587	254,317	239,928	104,295	445,203
Other Employees	1,354,186	487,763	211,111	199,167	86,576	369,569
Premises	493,871	177,887	76,992	72,636	31,574	134,781
Transport	25,404	9,151	3,960	3,736	1,624	6,933
Supplies & Services	474,689	170,978	74,002	69,815	30,348	129,546

- The largest categories of expenditure are on Challenge Advisers and Other CSC Employees suggesting these are the areas with the greatest potential for further efficiencies/savings
- We shall consider the potential options for achieving further savings in the Challenge Adviser budget later in this report. This will include the role of Senior Challenge Advisers as well.
- In relation to the other Employee line this is funding a range of different posts currently including:
 - Senior Management Team (split 50:50 with grant funding)
 - Business Management Support
 - Data Team
 - Governance Support
 - Outdoor Education Adviser
 - Finance Team (split 30:70 with grant funding)
 - Project Support Staff (split 30:70 with grant funding)
- We will explore potential options around the future Senior Management structure of the Consortium later in the report.
- There have already been significant savings delivered on premises and supplies/services lines so we have not explored the potential for further efficiencies in relation to these.



Overview of funding: trend in Regional Consortia School Improvement Grant



- There has been an overall decrease in the Regional Consortia School Improvement Grant (RCSIG) for CSC by £5.3MM
- This is driven by large decreases in Education Improvement Grant (EIG) and in other elements of the RCSIG
- Since the introduction of the EIG in 2015, the funding allocation of the new grant was cut by 10% when compared to the historic funding levels of the previous standalone grants
- This has been followed by a further 5% cut in 2016/17, a 0.62% cut in 2017/18 and a 2.37% cut in 2018/19



What is the RCSIG currently being spent on and where might there be most scope for further efficiencies or savings?

Cost Category	Outturn 2017/18	City & County of Cardiff	Bridgend CBC	Vale of Glam CBC	Merthyr CBC	RCT CBC
		£	£	£	£	£
		36.02%	15.59%	14.71%	6.39%	27.29%
Regional Support to LAs :						
Support for Vulnerable Schools	205,300	137,748	19,902	6,970	625	40,055
PDG CLA	329,112	116,742	44,474	48,177	21,512	98,207
LIDW	93,360	38,185	13,820	28,180	180	12,995
Specific Projects						
Hubs	1,701,670	557,002	251,251	286,417	120,000	487,000
Pathfinder Support	141,000	59,000	22,000	26,000	16,000	18,000
Peer Enquiry	23,350	3,750	250	4,100	-	15,250
School Improvements Groups	726,560	224,404	88,689	91,734	47,085	274,648
Governor Improvement Groups	6,000	-	-	1,500	4,500	-
Leadership	410,868	140,545	85,780	81,078	22,100	81,365
Literacy	2,775	900	225	75	675	900
Pioneer	1,349,465	418,892	305,000	285,000	40,000	300,573
New Deal Pioneer Network	669,248	216,715	94,700	94,200	45,900	217,733
NQTP Induction	47,750	15,600	5,850	13,650	250	12,400
Digital Competency Framework	78,200	15,200	6,600	24,600	12,600	19,200
Assessment for Learning	51,100	5,325	5,925	20,275	225	19,350
Modern Foreign Languages	11,600	5,100	3,000	2,300	-	1,200
Welsh Linguistic Skills	225,305	73,911	36,330	22,550	25,177	67,337
Welsh Language Charter	19,000	6,750	2,000	2,750	-	7,500
South Wales Valleys Project	38,905	-	3,850	-	19,655	15,400
Closing the Gap	40,350	40,000	-	350	-	-
School Challenge Cymru	303,684	180,466	60,921	61,196	552	549
Other Projects	37,492	-	-	22,492	-	15,000
LA Annex	128,421	46,262	20,023	18,992	8,095	35,049
Total	6,640,515	2,302,497	1,070,590	1,142,586	385,131	1,739,711
% spend received		34.67%	16.12%	17.21%	5.80%	26.20%

- As noted previously as this is grant funding from Welsh Government there are generally grant conditions attached to each line item that limit the scope for flexibility e.g. two of the largest line items here are for Pioneer Schools and New Deal Pioneers over which the Consortium has no influence as budget allocations to schools are already pre-determined by Welsh Government.
- It is also worth noting that in most cases if efficiencies here can be achieved it will be schools who receive any additional savings not Local Authorities.
- The largest spending lines (other than Pioneer Schools) here are Hubs, SIGs and Leadership support where there are already proposals planned to reduce the budget and to ensure there is less duplication with other strands. This is the area where CSC have greatest control and can influence the decisions about what is spent where.
- Over time it might be expected that the support for vulnerable schools line and pathfinder support could be reduced further as less schools are in need of direct support although it is always likely that some schools will be at risk and will need additional support.
- Welsh Linguistic Skills is the other largest line item but given the priority attached to this nationally this is not an area which CSC are likely to be able to reduce spending.
- There are some areas where you might even want to consider whether the budget is sufficient given the priority attached to this work e.g. Closing the Gap.

Where are the opportunities to achieve greater efficiencies/savings?

- Given the way that budgets are currently allocated there is limited room for the Consortium to make savings around its grant funding and the focus is therefore likely to need to be on making any further savings around the core budget.
- This is difficult because the core budget is where many of the savings in recent years have already been delivered and it makes achieving further efficiencies more difficult without significant changes in the delivery model.
- The two areas which make up the largest element of the core funding budget are Challenge Advisers and other CSC employees funded by core including the Senior Management Team. These are the areas we have therefore looked at in more detail to see if further savings are possible.
- The only alternative way of making savings to the core budget is to further shift some of the costs currently incurred there to be met by grant funding – for example increasing the proportion of Senior Challenge Advisers and or Senior Management that is paid for by Grant Funding.
- This may be possible but it will require a clear story to Welsh Government about how these functions are supporting delivery of national priorities and grant conditions – for example if you could demonstrate clearly that Senior Challenge Advisers are taking more of a strategic leadership role across the Consortium it might be possible to justify funding a higher proportion of their time from Grant budgets.
- There may also be value in continuing to explore with Welsh Government whether further flexibility could be allowed in the use of Grant Funding. There are other examples where Welsh Government has moved towards more flexible funding arrangements and there is a strong case to be made that if you are continuing to deliver improvements in outcomes than you should be free to determine how best to use your overall budget. This would allow you to look more flexibly at the way the core and grant budget are allocated and whether there might be other efficiencies you could achieve with different combinations. There may also be a case to be made to Welsh Government that they should be directly funding more of the Consortium management overhead given the increased role it is playing in the delivery of the national mission.



What are the potential options for reducing Challenge Adviser time?

What are the potential options for reducing CA time?	What potential savings would it provide?	What are the risks/ downsides to the option?
<p>1. Reduce the amount of time CAs spend in Green and/or Yellow schools. Options could include:</p> <ul style="list-style-type: none"> a) Reduce all Green and Yellow by 1 day b) Reduce Yellow by 1 day and Green by 2 days c) Reduce Yellow by 1 day and Green by 3 days 	<p>On the basis of the number of Green and Yellow schools in 2017-18 this would reduce CA days by:</p> <ul style="list-style-type: none"> a) 352 days = saving of c. £140,800 b) 529 days = saving of c. £211,600 c) 702 days = saving of c. £280,800 <p>Note: all savings calculated on an average day rate of £400 which is the agreed day rate for partner headteachers. Savings may be less than this for employed CAs.</p>	<p>The argument against reducing CA time in these schools is twofold:</p> <ul style="list-style-type: none"> - It makes it less likely CAs will spot the risks or sign of decline in the schools early enough - It is harder to identify good practice in Green and Yellow schools to share with others <p>However as Slide 10 shows only 1 Green school has declined to Amber since 2013/14 so the risk for Green schools is small (15 have declined to Yellow). The risk of Yellow schools declining is greater with 15 that were Yellow in 2014 now Amber or Red. Set against this is the argument that the risks for all schools may increase over the next few years given the extent of national changes. It would also be important to ensure there is still enough time for statutory functions in all schools (although these may reduce with changes to categorisation).</p>
<p>2. Reduce the amount of time CAs are spending with Red and Amber schools by more strictly limiting their role to brokerage and evaluation. Options could include:</p> <ul style="list-style-type: none"> a) Reduce time spent with Amber and Red by 2 days b) Reduce time spent with Red schools by 2 days and with Amber schools by 4 days 	<p>This is more difficult to estimate as it depends on the precise package of support being provided to individual schools.</p> <ul style="list-style-type: none"> a) 88 days = saving of c. £35,200 b) 160 days = saving of c. £65,600 	<p>The additional support has arguably been critical to turning round these schools over the last few years, and schools that remain Red/Amber are likely to be some of the most challenging. Some Executive Heads argued to us that there has been too much support being put into Red and Amber schools that is not being well coordinated. Given the relatively small numbers of Red and Amber schools remaining in the region you would have to cut the support significantly to make big savings here.</p>
<p>3. Allocate Challenge Adviser time to a cluster of schools rather than on an individual basis and judge level of need at cluster level. Options could include:</p> <ul style="list-style-type: none"> a) Reduce av. time spent with each school by 1 day b) Reduce av. time spent with each school by 2 days 	<ul style="list-style-type: none"> a) 396 days = saving of c. £158,400 b) 792 days = saving of c. 316,800 	<p>Similar risks to those outlined above for less time with Green and Yellow schools although could be mitigated to some extent if clusters are doing a good job at spotting where risk may exist through peer enquiry. Not clear how achievable it would be to allocate all Challenge Advisers to clusters of schools – requires a minimum level of capacity which might mitigate against aim to increase serving headteachers playing the role.</p>

What are the potential options for any savings around Senior Challenge Advisers?

1. Increase consistency around functions and caseloads across LAs

- We understand that there are currently significant differences in the roles and functions which Senior Challenge Advisers are asked to play within Local Authorities and the deployment rates to schools.
- We would recommend developing a consistent and detailed specification for the Senior Challenge Adviser role which sets out a common set of agreed functions and roles across all LAs and which documents the amount of time they are expected to spend on these. It will then be possible to see whether there are potential efficiencies by greater standardisation in the role across LAs.
- There is also a question to address about whether Senior Challenge Advisers should be working with similar caseloads of schools or not. On the current model the allocation of Senior Challenge Advisers are weighted to ensure there is at least one Senior Challenge Adviser per Local Authority.
- If however the allocation of Challenge Advisers was based on a notional number of schools there would not necessarily be a need for one per Local Authority which might reduce the overall number. There might however be strong operational arguments for maintaining a dedicated Senior Challenge Adviser for each LA to provide dedicated oversight in each case.

2. Increase % of time spent on CSC activity so more time can be funded by Grant

- Currently approximately 15% of Senior Challenge Adviser time is funded by grant funding with 85% coming from the core budget. If it was possible to increase the proportion of time funded by grant funding there would potentially be a significant saving to the core budget.
- There is also a strong operational argument in favour of Senior Challenge Advisers playing a stronger strategic role within the Consortium. This could help to connect them better to the wider work the Consortium is undertaking to deliver support for the new curriculum and the wider workforce and leadership reforms. As we noted in Section 3 of this report they currently feel quite disconnected from this work and that is limiting their ability to represent the Consortium on these issues to LAs and Schools. It also limits their ability to help Challenge Advisers to connect, broker and signpost schools to the wider support available. This will arguably become an even more critical part of their role in the coming years.
- Increasing the proportion of Senior Challenge Adviser time spent on wider strategic roles would undoubtedly require freeing them up from some of the current roles they are undertaking on behalf of Local Authorities so it would need to be considered as part of the work above to redefine their role specification. But the potential savings to core budget are significant – increasing the proportion of Senior Challenge time funded by Grant to 50% would save nearly £200,000 from the core budget.

Senior Management Structure

It is worth noting that under the current staffing structure only the posts of Managing Director (75%), Senior Lead Business and Operations (50%) and Senior Lead Standards and Improvement (100%) are funded by the core budget as well as the majority of Senior Challenge Advisers time (85%). All of the other Senior Leads and Strategic Lead posts are funded 100% by Grant funding. In looking at potential savings in the core funded posts below it is important to note the inter-dependency between core funded posts and grant funded posts e.g. if you can shift some of the core funded responsibilities and roles into grant funded posts you potentially realise savings from the core budget as well:

- **Key initial decision is the Managing Director role.** You have found it challenging to recruit to this post in the past. The ideal candidate would have the leadership skills to navigate between the sometimes competing demands from Welsh Government and Local Authorities, and have school leadership background and/or high credibility with Heads. However this is a pretty unique skill set. An alternative would be to split the role into separate posts that could be more suited to more specific individuals. For example, recruiting senior staff who are already credible system leaders to posts that would speak to the system might then allow the MD function to be focused on coordinating and oversight (and perhaps also lead on business and operations). Alternatively, you might opt for an MD role that was both a figurehead to the system and a lead for lots of the work with schools; this would then require a dedicated Senior Business Manager role within the structure to undertake the other parts of the role.
- **At the next level of the leadership structure we think it is vital to ensure you have the skills and credibility to drive forward work with schools and Local Authorities.** There have been a number of changes in senior leadership and current vacancies in the staffing structure which creates opportunities to re-think what model you want to move forward with. In part this depends on decisions you make in relation to the Senior Challenge Adviser role – if they could be freed up to take on greater strategic leadership responsibility you might reduce the need for so many senior leadership posts. One potential structure would be to have two senior management posts sitting under the Managing Director with one given responsibility for standards and improvement and line managing the Senior Challenge Advisers and the other playing a combined role around the new curriculum and all of the professional learning that goes with it. Other strategic leadership posts could then sit under this senior post.
- **At the next level down we think the most important step needed is to clarify roles and responsibilities and ensure accountability and line management is clear** to drive work forward. We are assuming that the Strategic Adviser roles around Teaching and Learning, Curriculum, ITE and Leadership and Welsh would need to be maintained at least in the short term given the extent of changes you are being asked to manage. We think there would be real benefit in each of the Senior Challenge Advisers being matched to one of these areas and sharing some of the ownership and responsibility for the implementation of these strands. Over time it might then be possible to reduce the need for as many strategic lead posts. We also think you need to clarify roles and accountability for driving forward the key elements of the delivery model – SIGs, Hubs, Clusters. Currently there feels like there has been insufficient oversight and responsibility for following through on progress in some of these areas and it should be clear where leadership responsibility sits for each of these. Again Senior Challenge Advisers should be more explicitly linked to each of these strands of activity in our view.



Conclusions – what core budget savings are possible over the next three years?

Year	Core Budget	2% Annual Saving	5% Annual Saving	10% Annual Saving
2019-20	£3,710,853 (on basis of 5% saving from 18-19)	£74,217.06	£185,542	£371,085
2020-21	£3,525,311 (on basis of a 5% saving from 19/20)	£70,506.22	£176,265.55	£352,531.1
2021-22	£3,349,045.45 (on basis of a 5% saving from 20/21)	£66,980,909	£167,452,272	£334,904.55
2022-23	£3,181,593.18 (on basis of 5% saving from 21/22)			
Total saving over 3 years	£529,259.82 (on basis of 5% saving each year)	Confidential - for discussion at Joint Consortium Committee		

- The table sets out on an annual basis what the scenarios would be if the core budget is cut by 2, 5 or 10% each year
- The scenarios are modelled on the basis of a 5% cut each year but show what the choices would then look like annually for 2/5/10%
- The total savings over a three year period if you opted for a 5% cut each year needed would equal £529,259.82
- This would be very challenging and would require the significant savings to be delivered from the Challenge Adviser budget as set out on Slide 40
- From the options we set out on Slide 40 for example a combination of 1b and 2a would save just less than £250,000.
- If you were also able to move 50% of Senior Challenge Advisers time as discussed on Slide 41 to Grant Budget you would save another c. £200,000.
- Finally depending on decisions taken around Senior Management Structures there might be further savings of c£50-100,000 possible. This would need to be balanced against the need to ensure you have sufficient leadership capacity to refresh and renew the Consortium as described in the following slides

Section 5: What needs to change and how would you implement this change over the next 3-5 years?

Moving forward:

There has been uncertainty over the future direction of regional working for some time now and it has undoubtedly had an impact on the way the Consortium is able to operate, affecting staff morale and causing some of the recruitment and retention issues. There is an urgent need to provide clarity about the way forward whatever decisions are taken about the future approach. We think there are a number of interlinked steps to determining the way forward:

Step 1: Decide the right organisational structure to drive forward the development of the self-improving system.

A number of potential alternative options have been identified that could become the organisational structures for school improvement in the region. We have examined which of these we believe are most feasible, what they would look like in practice, and the potential advantages and disadvantages. Members, Chief Executives and Directors need to decide which option they want to pursue or whether they want to retain and renew the current Consortium. Whatever decision is taken there are then a number of issues that will need to be addressed around the future budget and strengthening delivery by re-engaging schools and improving the effectiveness of delivery which are covered by Steps 2 and 3 below.

Step 2: Determine the future funding for whatever organisational structures will exist for the next three years.

The annual uncertainty over the Consortium budget combined with the uncertainty over levels of grant funding from Welsh Government make forward planning difficult and have arguably led to wider uncertainty which is having an impact on the functioning of the Consortium. Whatever organisational structures you decide on, ideally you would decide now what budget that organisation will need and commit to funding for at least a three year period. This will require key decisions around the future role of Challenge Advisers and organisational capacity and staffing for whatever organisational arrangements you decide on.

Step 3: Strengthen the delivery arrangements in a number of areas. We have identified three priority areas to take forward immediately:

- Renew and refresh the vision and strategy for regional working and re-communicate this extensively to schools and other partners
- Implement the revised delivery model including the new role for clusters and strengthen further school-to-school working
- Review and revise the Governance arrangements and agree the different ways school leaders are engaged in these



Step 1: Examining potential alternative delivery arrangements

We have identified six potential alternatives to the current Consortium arrangements for delivering school improvement. In addition to these options there is of course a seventh option of continuing with the current Consortium model. We have described this option as 'Re-modelling the current Consortium arrangements' because we think there are a number of changes that would be needed to make this option viable in the long term:

1. Local Authorities take back all school improvement functions and end any form of regional arrangements
2. **Local Authorities take back some school improvement functions but retain a regional delivery function to support national priorities**
3. Identify a Lead Local Authority to take responsibility for delivery of all school improvement functions on behalf of others
4. **Formal mergers between Local Authority education services so joint LAs undertake all school improvement functions**
5. A more formalised shared services company model where LAs commission and hold it to account but don't oversee the governance
6. A merger with another regional school improvement service
7. **Re-modelling of the current Consortium model**

In discussion with Directors, **options 2 and 4** emerged as the most likely alternatives to the current regional arrangements and we were asked to work up what these options might look like in practice and the potential advantages/disadvantages and cost implications of each. We were also asked to work up the same analysis for **Option 7** to remodel the current Consortium model.



Examining alternative delivery options: Option 2 to separate out LA school improvement function/role from a regional function to support national priorities

What is the rationale for this option and what might it look like in practice?

The development of the National Mission and in particular the implementation of the new curriculum over the next 5-10 years are going to require an intensive focus and support to schools. This option would recognise the difference in the roles currently being undertaken by the Consortium to provide support and challenge to schools largely through the role of Challenge Advisers from the implementation of support to help deliver the national changes. It would mean that Challenge Advisers were employed and managed directly by Local Authorities (although Senior Challenge Advisers might continue to provide a link to any regional organisation). The regional organisation (which might become a regional arm of Welsh Government or regional presence for the new National College) would then have a focus on delivering the support to schools and teachers to implement the new curriculum. That could still be done through the structures of the Central South Wales Challenge which could continue to be overseen and driven forward by a regional group of system leaders.

What are the potential advantages to this option?

- Clearer separation of roles and responsibilities between LAs and Welsh Government – challenge and support for schools would belong to LAs and implementation of support for the National Mission to Welsh Government
- The regional delivery body could have a much clearer focus on supporting the National Mission and implementation of curriculum reforms and this could be driven more effectively by Welsh Government with less variation by region
- Local Authorities have stronger oversight and responsibility for the quality of Challenge Advisers and their support and challenge to schools. It might be easier to manage the deployment of Challenge Advisers at a local level to link to clusters.

What are the potential disadvantages?

- Unclear that such a separation of roles is in practice possible – the intelligence and brokerage function of the Challenge Adviser should be helping schools to understand the changes facing them and connecting/signposting them to support
- Would place a heavy burden still on Senior Challenge Advisers as they would have to join the dots and connect Challenge Advisers to the wider support and development. This might be made more difficult if in separate organisations.
- Schools are largely positive about Challenge Advisers working across the region and at least being connected to schools and practice in other Local Authorities. Might be more difficult if a Challenge Adviser is employed by single Local Authority
- More challenging for smaller LAs to recruit high quality Challenge Advisers

What would the potential cost/resourcing implications be?

- Unclear that it delivers any efficiencies or savings overall as the roles needed in the system remain the same – they are just split between different organisations.
- Argument might be made that it would be easier to achieve efficiencies around Challenge Adviser allocation and time if this was being managed more directly closer to the ground by Local Authorities.
- Might also make an argument that there could be greater efficiencies achieved if the regional body was acting more directly on behalf of Welsh Government with a standardised agenda and plan to follow.
- Greatest potential benefit to Local Authorities would be they were no longer paying for the overheads associated with the regional delivery body and this funding was coming instead from Welsh Government.

Examining alternative delivery options: Option 4 to move to joint Local Authority Education Services

What is the rationale for this option and what might it look like in practice?

There could be significant benefits in joining up school improvement work with other Local Authority functions around inclusion and ALN more effectively. Merging Local Authority Education functions could allow for significant economies of scale to be achieved and would also potentially provide a more manageable number of organisations for Welsh Government to engage with directly in pursuit of the national mission. This might then negate the need for any form of regional infrastructure although it is also potentially possible to see how this option could be combined with an option in which a regional delivery arm of Welsh Government continues to operate. Under this option Challenge Advisers would be directly employed by joint Local Education Services but could therefore operate across more than one Local Authority area. It could still be possible to organise some roles and functions across more than one Joint Education authority although it may prove simpler and easier to organise the bulk of professional learning and development through the new joint functions.

What are the potential advantages to this option?

- Closer working between school improvement service and other Local Authority services like inclusion, wellbeing and ALN is easier to achieve.
- Provides a manageable footprint for Welsh Government and others to engage schools in pursuit of the National Mission and curriculum change.

What are the potential disadvantages?

- School leaders may be less positive about this option if they have been supportive of the Consortium and seen it as the champion of the self-improving system.
- School leaders would need reassurance that opportunities for working across the region could be maintained under this model.
- There may be concerns from schools in smaller Local Authorities that this will be a take-over model from larger Local Authorities and that they will get less attention as a result. Consortium is seen by many schools as providing independent view of needs across all schools regardless of which Local Authority they come from

What would the potential cost/resourcing implications be?

- Potential savings at management level – potential to have a single joint Education Director across Local Authorities and reduced need for Senior Management structure at regional level potentially. Savings at levels below this are unclear – some LAs who have explored this option already thought there were few savings to be achieved.
- Likely to require other senior school improvement posts to be created at local level (although these exist or are being created in some LAs already) - a) to oversee and manage Challenge Advisers and b) to lead the interaction with national level support. Therefore potentially less efficiency to be gained particularly as may be some duplication in roles if these posts are needed in each of the new organisations.
- Challenge Advisers could be employed jointly across Local Authorities which should make their deployment easier to manage and potentially more efficient than in a single Local Authority model. Senior Challenge Advisers could work across more than one Local Authority which could potentially reduce the overall number needed.

Examining alternative delivery options: Option 7 to remodel the current Consortium

What is the rationale for this option and what might it look like in practice?

The logic and arguments for continuing with the Consortium remain similar in many ways to the reasons why it was originally set up. It provides a way of organising school improvement support across the region that allows schools to work with other schools from outside their Local Authority and to deploy support and challenge wherever it is needed most across the region at any one time. There is also a strong argument that at a time of extensive national change and uncertainty for schools making the current model work more effectively is likely to provide more stability and certainty for schools than moving to another structural solution which might be destabilising and create more uncertainty for schools in the short term at least. The evidence also shows that the Consortium, working with Local Authorities and schools, has contributed to significant improvement in outcomes over the last five years. The development of the Central South Wales Challenge and model of school to school working are strongly supported by schools. However as this review has shown significant change will be needed to rebuild the commitment of school leaders and Local Authorities to the work of the Consortium moving forward so this should not be seen as the 'no change' or easy option. Step 3 of this section of the report sets out some of the areas we believe you will need to focus on to remodel the Consortium to make it fit for purpose for the future.

What are the potential advantages to this option?

- It builds on what exists already including the continued commitment of many Headteachers to regional working and the work of the Consortium
- It continues to balance the needs of Local Authorities and schools across the region and means resources are deployed to the local areas with greatest need
- Continues to provide opportunities for schools to work with other schools across the region which many have found beneficial and want to maintain
- Provides a delivery vehicle for Welsh Government to engage with schools in pursuit of the National Mission and curriculum change.

What are the potential disadvantages?

- Will require a lot of hard work and effort to reinvigorate the Consortium and Heads around a clear sense of purpose and shared vision of where you want to go next
- Will continue to have to work with the tension between an LA commissioned SI service and a regional model supporting Welsh Government priorities – this is likely to continue to be challenging
- Finding the right leadership capacity to renew the Consortium and build the confidence of Heads and schools will be challenging

What would the potential cost/resourcing implications be?

- See Slides 40-43 for more detail on options here
- Difficult to see how further savings can be achieved to core budget without significant changes to Challenge Adviser model



What is our view on the feasibility and desirability of different options?

- The most important point we would want to make is that a decision needs to be taken quickly by Members, Chief Executives and Directors so that you end the uncertainty that exists. Everyone involved then needs to commit to the decision and support the implementation of it. What Headteachers and schools in particular need now is certainty and they need to know who they are going to be working with during this period of extensive national change.
- Having said this, we felt we should give you our views about the potential feasibility and desirability of the different options which we set out below:
 - **In relation to Option 2**, whilst we can see the **attractiveness to separating out local challenge and support from the wider support** being provided around national change, in practice **this feels as difficult to us to achieve under separate organisations as it does now within the Consortium**. **Challenge Advisers would still need to connect up to the national work** to ensure their knowledge and understanding of the national support on offer was well informed and used to signpost to schools. **This would arguably be more difficult to achieve if they worked for separate organisations**. It would also be more difficult for smaller Local Authorities to manage. It is also the option which feels the most difficult to achieve given it would require agreement with Welsh Government and it is unclear to us what benefits Welsh Government would see in separating out these roles.
 - **In contrast, Option 4 seems to us more directly achievable**. If Local Authorities came forward with serious proposals to merge their education services that demonstrated economies of scale were possible **there could be a lot of potential support for this option from both schools and Welsh Government**. This option **would require some hard choices about shared functions across LAs** including at senior leadership level. There would also need to be a lot of work **to give reassurances to Heads and schools in smaller LAs that this wasn't just a 'take-over' from larger LAs** and they wouldn't be forgotten about in any new organisational arrangements. The other key risk is losing the benefits schools have seen in working with schools from right across the region; however this could be mitigated particularly if the Central South Wales Challenge and key elements were maintained for a period of time across all LAs. **If these obstacles could be overcome we think this option has the potential to provide a simpler and more efficient system** although more detailed modelling would be needed at Local Authority level to determine the level and scale of any potential efficiencies. The other caution we would have about this option is how quickly it could be achieved in reality.
 - **In our view, Option 7 to remodel the consortium is the one that builds most logically on where you are now and is most attractive in providing certainty and stability to schools during a period of significant national change**. However we do not see this as an easy option. It will require a **significant commitment and investment of time and effort to rebuild the commitment from schools and Local Authorities** to the Consortium. We set out in the final section of this report the areas we would recommend you focus on next if the decision is taken to re-commit to the Consortium. **We would argue these steps are necessary in the short term anyway even if a different decision is taken about the way forward longer term**.



Step 2: Determine the funding needed for the next three years

Whatever organisational model is decided, the two areas of greatest cost within the core budget are likely to remain the Challenge Adviser budget and the Senior Management/Other Employee costs that we identified earlier in the funding section. We have therefore focused on these two areas to look at what potential opportunities there might be for efficiencies and savings.

In relation to [Challenge Advisers](#) we have identified a series of options for ways in which you might think about reducing the overall number of days required from Challenge Advisers and Senior Challenge Advisers. For the latter we have also looked at ways in which the role and function could be shifted to enable more of it to be funded by Grant funding.

There is also an important decision to be made about whether individual Local Authorities could make different decisions about the Challenge Adviser role e.g. could some opt for a more intensive challenge and support role, whilst others might opt for a lighter touch model. There is nothing in principle to stop this model from working but it might be more challenging for the Consortium to manage Challenge Advisers playing such different roles.

On [Senior Management and other staffing costs](#) we have only looked in detail at the potential future organisational structure for the current Consortium. If the decision is taken to pursue one of the other organisational options more detailed work would be needed to develop alternative organisational structures to compare and contrast.

You will need to make decisions now on the indicative three year budget projections (see Slide 43 for an example of what a 5% annual reduction would look like) and what savings you believe are achievable. You can then ask the Consortium to plan against this indicative budget and make more detailed proposals for how they would deliver these savings.



Step 3: Strengthen delivery in a number of critical areas

We have identified a number of areas where we believe you need to take action to address the current challenges we identified facing the Consortium:

A. Re-launch the regional strategy and ways of working

- Re-launch and re-invigorate the regional commitment to a self-improving system
- Clarify roles and responsibilities and be clear about who does what in the overall system
- Ensure communications channels are clear to all and seek regular feedback
- Strengthen relationships between Consortium and Local Authorities and Welsh Government

B. Implement the revised delivery model

- Ensure all are clear about the revised delivery model for CSWC including role of clusters
- Improve the quality and consistency of implementation of current strands like SIGs and Hubs
- Give careful time and attention to ensure the successful implementation of new role for clusters
- Re-design the Challenge Adviser model

C. Strengthen governance

- Consider the benefits of bringing different groups together into one overarching decision making board
- Develop the role and relationships within JCC to become more of a problem solving forum
- Strengthen the connection between clusters, local heads groups and the consortium to enable Headteachers to communicate with their peers about the work of the Consortium and refreshed regional vision
- Explain the role of Delegate Heads clearly and be transparent about who they are and how they are selected



A. Re-launch and re-invigorate the regional commitment to a self-improving system

- **Re-launch and refresh the regional way of working and strategy over the summer term.** Use the opportunity of this review and publication of the new business plan to set out a renewed commitment to regional working and the changes you plan to make as a result. Consider holding specific events/conferences or use existing mechanisms to set out the vision for the next three years including the areas where there remains uncertainty about what the future will look like. Use all stakeholders – Directors, Chief Executives, Members, Delegate Heads and CSC staff - to get out and communicate the message clearly about the need to get ‘back on track’ and be clear about the commitment to schools to do that. Develop and agree a core script for the key messages you want all heads and schools to hear during this period about the future direction.
- **Clarify roles and responsibilities and explain clearly who does what.** Many heads said to us they were unclear now about who does what in the system and who they should contact about specific areas. In part this is the result of recent changes in personnel but it is also probably due to confusion amongst Local Authorities and CSC staff themselves. We think there would be real benefit therefore in setting out again clearly the respective roles of the Consortium, Local Authorities and schools and showing how this works together as a single self-improving system. There are also some clear practical steps that would help here such as publishing an updated staff structure for the Consortium including contact details for key staff. It might even be possible to include key contact details for Local Authority staff as part of the same system so that schools have all of their key contacts in one place.
- **Ensure communication channels are clear to all and seek regular feedback.** This will need to link to the restatement of the roles and responsibilities described above as well as the development of the revised governance proposals set out on . But the priority should be ensuring all heads and schools are clear about the channels they can use to get information from the Consortium and also to feed it back. This includes their Challenge Adviser and Senior Challenge Advisers; their local cluster; and their network or group of local heads and their local Delegate Head or equivalent (depending on what is decided). There should be a big push on using these channels to get a consistent set of messages out to the system – these could be agreed at the weekly or monthly SLT meeting. And they should also then be used as a regular source of information and intelligence to feed back into the Consortium.
- **Strengthen relationships between Consortium and Local Authorities** and find ways to connect Local Authorities to conversations with Welsh Government. Develop ways for Consortium staff to engage on a more regular basis with Local Authority personnel and ensure communications are open and transparent – for example consider hosting Consortium senior management meetings in different Local Authorities on a rolling basis and add on time for meetings with other Local Authority staff, ensure Challenge Advisers contact details are easily available to Local Authorities to make regular connection easier. Find opportunities to increase the visibility/transparency of conversations between the Consortium and Welsh Government including communicating to LAs and schools grant conditions and timescales e.g. a termly meeting between the Consortium and WG in which either all Directors are present or Lead Director and Chief Exec represent LAs.



B. Implement the revised delivery model

- **You have set out the future delivery model for the Central South Wales Challenge and implementation of the new curriculum** and other national reforms. This envisages continuity in a number of cross-regional elements of the model such as SIGs and Hubs with clusters playing a more prominent role in the delivery of the new curriculum and other reforms like ALN. We think this is a sensible way forward but the key challenge will be about quality and consistency of implementation.
- **In relation to the existing strands of work within the Challenge the key next step is about improving the consistency and quality of delivery** across each of these. For example by looking at what the most successful SIG groups and Hubs have been doing and learning from this to push and develop others to match them. We understand there are already plans to develop stronger quality assurance mechanisms around Hubs and SIGs but the challenge will then be in following through on this and ensuring they are held to account for the quality of their implementation. You will also need to be clear about what levers you have if implementation is off track and how to intervene quickly to get it back on track.
- **Clusters will also need specific time and attention to get consistency of implementation right.** In many cases clusters are already established and are working well but there is likely to be significant variation across each local area in how well they are working now. The role of cluster convenor or cluster lead will be likely to become an increasingly important one in the system given the enhanced responsibilities they are being given. You will need to think about what support these convenors need in a similar way to the support that SIGs convenors have required and it may be that Challenge Advisers need to play a stronger role in overseeing and ensuring clusters are fulfilling their new role in the system. You will also need to be clear about the levers available to you if a cluster is not working and how to broker any additional support or interventions in these cases.
- **The other piece of the delivery model where further work is needed is the design of the future Challenge Adviser role.** You will need to decide what expectations you want to set around the Challenge Adviser role and time they should be spending with different types of schools as well as considering how the role might need to change to take account of new models of Peer Review and national accountability arrangements including Estyn. Our view is that there is scope to reduce the amount of time they are spending in at least green and yellow schools and there may be opportunities to do more on a cluster basis moving forward. We also think there would be benefit in reviewing the role description for Senior Challenge Advisers and ensuring there is a greater degree of consistency in their role in each Local Authority. This could help to free up time for Senior Challenge Advisers to be more connected to strategic work within the Consortium which we see as vital to strengthening their ability to help Local Authorities and schools to connect to the wider professional development and leadership support the Consortium delivers.



C. Strengthen governance

- **Consider the benefits of bringing different groups together into one overarching decision making board.** There are currently a number of separate and distinct groups offering advice and making decisions across the Consortium. It may be necessary to maintain these different groups for a period of time whilst you re-establish momentum but we think there would be benefits in the longer term in bringing these groups together into one single overarching decision making body which would have representatives from each of the groups. In our experience the numbers would need to be kept small (8-12) to make this group effective so you would be unable to have all of the current parties represented in the same way. For example you could nominate 2 Directors, 2 CSC staff, 2 Delegate Heads, 2 Other Heads. You might also want to consider the benefits of having an independent chair for this group.
- **Review the role being played by Joint Consortium Committee and strengthen its function as a forum to share and problem solve together.** Whilst recognising the role that the JCC has to play in scrutinising and signing off on key Consortium decisions and documentation there is the potential for it to play a greater role in sharing approaches between Local Authorities and problem solving issues together. This would help to demonstrate clearly to elected Members the value of regional working. There may also be a need to do more informally with Members to build relationships and deepen their understanding of the way the Consortium currently works so they can provide more informed challenge and support through JCC.
- **Strengthen the connection between clusters, local heads groups and the Consortium.** The local groups of heads that meet together to pull together the views of different heads seem to be providing a relatively effective mechanism at connecting to clusters and bringing in Local Authorities and Senior Challenge Advisers. But it is unclear where that intelligence then goes or how messages from the Consortium are fed down. There does also not appear to be any forum in which these heads are brought together to discuss issues and solutions across Local Authorities. This feels like a missed opportunity as these individuals are influential system leaders and could be advocating on behalf of the region and helping to drive forward implementation if they were well connected in. There seem to us to be two options here i) they could be added to the Delegate Heads Group ii) there could be another representative group of heads that meet less frequently (termly perhaps) and asked to feedback their collective views from heads meetings.
- **Explain the role of Delegate Heads clearly and be transparent about who they are and how they are selected.** We can see the value of having a passionate and committed group of system leaders working to drive forward the self-improving system. At its best a number of heads talked about previous incarnations of this group – the Strategy Group – being a powerful and exciting forum to engage in. Part of the challenge we have heard in relation to Delegate Heads is confusion about who they are and how they were selected and a perception that they may be making decisions that benefit their schools. This needs to be taken on by being transparent about the role of the group and who is on it. The plan for Delegate Heads to attend local heads meeting and explain their role next term seems a sensible one to us. It will also be important for Delegate Heads to continue offering opportunities for other heads to connect with them and raise issues. There may also be benefit in more formally connecting the Delegate Heads with the heads leading the local groups of heads to ensure they are sharing information and intelligence regularly and see their respective roles working in tandem with each other.



**Central South Consortium: Post Review Action Plan
December 2019**

Plan Reference	Action	CSC Lead	LA Director Lead
1.0	Decide the right organisational structure to drive forward the development of the self-improving system		
1.1	Undertake Independent Review and agree Organisational Structure	Acting Managing Director	All
1.2	Review CSC staffing structure in light of recommendations from ISOS	Acting Assistant Managing Director / HR Director	Vale of Glamorgan
1.3	Review and agree proposals on changes to the Challenge Adviser structure / role	Temporary Assistant Director	Lead Director (Merthyr)
1.4	Review and agree proposals on the function and role of the Senior Challenge Adviser	Acting Assistant Managing Director	Lead Director (Merthyr) / RCT
2.0	Determine the future funding model for the next three years		
2.1	Agree with Members & Chief Executives a three-year funding model	Acting Managing Director / Lead Chief Executive	Bridgend
3.0	Strengthen the delivery arrangements in a number of areas.:		
3.1	Renew and refresh the vision and strategy for regional working and re-communicate this extensively to schools and other partners (Including Members)	ALL	Lead Director (Merthyr) / Cardiff
3.2	Implement the revised delivery model including the new role of clusters and strengthen further school-to-school working	Senior Lead for Curriculum Reform	RCT
3.3	Review and revise the governance arrangements	Acting Assistant Managing Director	Bridgend

1.0	Step 1: Decide the right organisational structure to drive forward the development of the self-improving system.				
1.1	Undertake Independent Review and agree Organisational Structure				
CSC Lead: Lead Chief Executive / Acting Managing Director		Director Lead: Lead Director (Merthyr)			
Action(s)	Success Criteria	Deadline Date / milestones	Aspect Lead (s)	Progress & Impact Evidence	Resourcing Commitment
<p>Present recommendations from Chief Executives to Joint Committee on initial findings</p> <p>September Joint Committee Meeting agenda item to outline any queries from Cabinet meetings</p> <p>Present Implementation plan to Joint Committee</p> <p>Chief Executives present recommendations to Cabinet and scrutiny committees</p> <p>Sign off implementation plan</p>	<p>Removal of uncertainty</p> <p>Clarity of role of the consortium</p> <p>Improvement in retention / recruitment to the consortium</p>	<p>Joint Committee 21st May 2019 & 25th November 2019</p> <p>Cabinet meetings in December / January 2019 / 20</p> <p>December 2019</p>	<p>Acting Managing Director (CSC)</p> <p>Lead Chief Executive</p>	<p>Initial findings and recommendations presented to Joint Committee in May 2019.</p> <p>Initial action plan shared with Directors June 2019</p> <p>Implementation of action plan developed in partnership with Directors from across the region.</p>	Officer time
<p>Develop business case for further shared services. (Chief Execs)</p>	<p>Identification of areas for consideration</p> <p>Business Case developed supported by ISOS</p>	TBC	Lead Chief Executive	<p>Discussion with Joint Committee May 2019 on future shared services.</p>	ISOS capacity

1.0	Decide the right organisational structure to drive forward the development of the self-improving system				
1.2	Review CSC staffing structure in light of recommendations from ISOS				
CSC Lead: Acting Assistant Managing Director / HR Director		Director Lead: Vale of Glamorgan			
Action(s)	Success Criteria	Deadline Date / milestones	Aspect Lead (s)	Progress & Impact Evidence	Resourcing Commitment
<p>Undertake review of staffing structures to include:</p> <p>Consideration of senior and middle leadership capacity</p> <p>Comparisons with other consortia</p> <p>Full review of job descriptions of Managing Director, Senior Leaders, Senior Challenge Advisers and Challenge Advisers</p> <p>Identify posts required for national reform linked to 2.1 and 2.2</p> <p>Consider financial implications including value for money</p> <p>Agree structure of senior leadership team</p>	<p>Managing Director appointed</p> <p>Permanent leadership team in place</p> <p>Confidence in CSC improves resulting in reduction in staff turnover as well as attracting stronger candidates during recruitment processes</p> <p>Clarity and stability of roles within CSC ensuing clear direction / vision articulated to staff and schools</p> <p>Clarity regarding the role of senior challenge adviser's / challenge advisers</p> <p>Organisation has the capacity to drive forward school improvement work across the system in partnership with Local Authorities and schools</p>	<p>Review starts 1st May</p> <p>Proposals presented to Directors (June 2019)</p> <p>Managing Director recruitment November 2019</p> <p>Senior Leadership structure agreed Feb 2020</p>	<p>Acting Assistant Managing Director (CSC)</p>	<p>Managing Director recruitment underway</p> <p>Review of senior staffing structure underway</p> <p>Review of roles and functions of senior challenge advisers undertaken with Directors in each Local Authority</p>	<p>ISOS to undertake work re role of the senior challenge advisers</p>
<p>Consult with recognised trade unions</p> <p>Consultation period with staff</p> <p>Recruitment process</p>	<p>Management of change supported by trade unions</p> <p>Staff provided with the opportunity to engage with the consultation process</p>	<p>Engagement with trade unions December 2019</p> <p>Staff consultation December 2019</p> <p>Structure fully implemented September 2020</p>	<p>Director of Human Resources (RCT) / Acting Assistant Managing Director</p>	<p>Consultation with senior challenge advisers underway</p> <p>Draft Job description for senior challenge advisers shared with trade unions as part of consultation process</p>	

<p>Clarify and communicate roles</p> <p>Produce communication plan</p>	<p>Capacity established within CSC to provide effective and efficient service to stakeholders</p> <p>Clarity regarding roles and responsibilities within consortia, LAs and schools.</p> <p>Stronger connections between the Consortium and the work of Local Authorities.</p>	<p>Ongoing</p> <p>Spring Term 2020</p>	<p>Acting Managing Director (CSC)</p>		
<p>Produce structure diagrams and share on CSC website</p> <p>Produce pen portraits of key personnel with contact information on the website</p> <p>Link to LA websites from CSC</p> <p>Include key LA staff and their contact details</p>	<p>Clarity of information provided regarding the roles within the middle tier and within CSC</p> <p>Improved channels of internal and external communication established</p>	<p>Spring Term 2020</p>	<p>Acting Managing Director (CSC)</p> <p>Communications Manager (CSC)</p>		
<p>Develop strategies to engage all parties more effectively to understand the developing role of the consortium within the national reform agenda.</p> <p>Termly meeting between WG, CSC, Lead Director & Lead Chief Executive</p> <p>Establish formal process of recording these meetings and feeding back to Directors / Heads</p> <p>Publish dates of these meetings and ask for agenda items from Directors / delegate heads etc</p>	<p>Acknowledgement of potential tensions between WG / Consortia /Other Middle Tier Organisations/ LAs and schools</p> <p>Greater clarity and understanding of schools regarding how their priorities fit alongside and/or are different from national priorities</p> <p>Improved clarity about the respective roles of the Consortium, Other Middle Tier Organisations, Schools, Local Authorities and Welsh Government and how they all work together as part of one overall system contributing to improved outcomes</p> <p>Transparency of the use of funding to support national, regional and local priorities.</p>	<p>Ongoing</p>	<p>Acting Managing Director (CSC)</p>	<p>Acting Managing Director attended meetings with headteachers in every local authority to deliver consistent key messages</p> <p>Termly meetings with WG arranged</p>	

1.0	Decide the right organisational structure to drive forward the development of the self-improving system				
1.3	Review and agree proposals on changes to the Challenge Adviser structure / role				
CSC Lead: Acting Assistant Director	Director Lead: Lead Director (Merthyr)				
Action(s)	Success Criteria	Deadline Date / milestones	Aspect Lead (s)	Progress & Impact Evidence	Resourcing Commitment
Update challenge and review framework detailing what CAs are expected to focus on ensuring greater emphasis on the 'support' side of the role to strengthen brokering and signposting schools to appropriate professional development support and connecting them to other schools that they could learn from.	Framework reflects the interim arrangements for School Support and Authentication. Consistent clarity on support and expectations understood by LAs, Schools, CSC	June 2019	Acting Assistant Director (CSC)	Framework re written and renamed as Framework for School Improvement Clarity over termly focus included. Protocol for resource board amended to ensure diligence is given to professional learning offer Central South Wales challenge relaunched with 4 training sessions for all CSC staff	
As full time challenge advisers leave the organisation replace with seconded senior staff from schools.	Workforce is skilled in current practice, with current and relevant experience.	July 2019	Acting Assistant Director (CSC)	Aug 2019 CA Vacancies were filled with 1 FT secondment and 4 PT secondments.	
Allocate Challenge Advisers to clusters of schools and facilitate working between secondary and primary CAs	CAs working to support peer engagement models with groups and clusters of schools. Evidence of shared development work between schools facilitated by one CA.	July 2019	Acting Assistant Director (CSC)	CA deployment focussed on clusters where possible to enable efficiencies through group working	
Review QA processes, line management and Performance management process and ensure consistency across the organisation	Rationalise processes and paperwork in place to track effectiveness and areas for individual development	August 2019	Acting Assistant Director (CSC)	Performance management targets agreed with staff to focus on 2 corporate areas and third focussed on an area of the business to ensure improvement in service delivery and outcomes for young people. Line management linked to PM and SCAs in specific LAs, equitable spread of line management responsibilities to SCAs	
Improve the quality and consistency of Challenge Adviser advice, support and challenge to schools through effective line management and appropriate effective professional learning Ensure robust process are in place to ensure all CAs are accountable for the support they provide to schools	A plan is in place, CAs prioritise attending meetings and training ensuring all schools are benefitting from positive external professional scrutiny and challenge of their performance	September 2019	Acting Assistant Director (CSC)	Programme of professional learning in place to ensure content and knowledge is continually updated as well as skills to be able to facilitate, enable and coach schools.	

Review the allocation of days to CA tasks taking into account, admin time, senior appointments, Estyn preparation/inspections, LA Meetings and direct work with schools. Clarify how long a day or a session is. Consider if a limit on number of schools a CA can work with is appropriate	CAs deployed effectively with improved efficiency. Potential reduction in overall number of CAs. The time allocation model enables line managers to hold CAs to account for their time.	January 2020	Acting Assistant Director (CSC)		
Review termly the working of the peer engagement groups.	Information gathered shows the work of CAs and peers identifying any duplication.	January May July 2020	Acting Assistant Director (CSC)		
Consult within CSC and with LA colleagues on the name for Challenge Advisers and Strategic Advisers. Consider changing the name to an overarching school improvement title.	The name of the school improvement professional in CSC reflects the work carried out and acknowledge the impact strategic advisers have on school improvement work	January 2020	Acting Assistant Director (CSC)		
Review CA Job Description to reflect the needs of the changing role and the commitment to supporting CSC	Expectations of the role are clear and the JD is used to inform PM. Full time core CAs have a strategic role within the organisation.	February 2020	Acting Assistant Director (CSC)	Challenge Adviser job description shared with Directors and Trade Unions	

1.0	Decide the right organisational structure to drive forward the development of the self-improving system				
1.4	Review and agree proposals on the function and role of the Senior Challenge Adviser				
CSC Lead: Acting Assistant Director		Director Lead: RCT & Lead Director (Merthyr)			
Action(s)	Success Criteria	Deadline Date / milestones	Aspect Lead (s)	Progress & Impact Evidence	Resourcing Commitment
Interview all Directors to explore requirements and expectations of each LA of the functions of Senior Challenge Advisers	A set of agreed functions and roles across all LAs which documents clearly the expectation of Directors	September 2019	Acting Assistant Managing Director (CSC)	Options on future roles and functions of senior challenge advisers presented to Directors October 2019	ISOS capacity
Review and revise job descriptions linked to 1.2 in collaboration with Directors	Job descriptions agreed with staff and Trade Unions	December 2019	Acting Assistant Managing Director (CSC)		
Consult with Senior Challenge Team on proposed amendments to job descriptions	Job descriptions agreed with staff and Trade Unions	January 2020	Acting Assistant Managing Director (CSC)	Senior Challenge Advisers consulted on revised job descriptions	
Using the work profile for each SCA identify additional strategic roles within the Consortium.	SCAs better connected to the wider reform agenda to deliver support. Improved SCA ability to empower Challenge Advisers to connect, broker and signpost schools to the wider support available through the Central South Wales programs	September 2019	Acting Assistant Managing Director (CSC)	Senior Challenge Advisers allocated strategic responsibilities according to service need and skillset	

2.0	Determine the future funding model for the next three years				
2.1	Agree with Members & Chief Executives / Members a three-year funding model				
CSC Lead: Lead Chief Executive / Acting Managing Director		Director Lead: Bridgend			
Action(s)	Success Criteria	Deadline Date / milestones	Aspect Lead (s)	Progress & Impact Evidence	Resourcing Commitment
Prepare medium term financial plan for consideration of chief executives & Members	Forward budget projections set in advance	January 2020	Service Director – Finance and Improvement Services (RCT)	Medium Term financial plans presented to Joint Committee	
Review and amend how funding models are presented to show a combined budget (rather than core / grant)	<p>Transparency of spending and delegation rates to schools to ensure effective reporting to LAs</p> <p>Schools effectively report against spending by development of online tracking system which all school improvement officers have access to from CSC and LA</p>	<p>Financial year 2020/21</p> <p>Pilot the use of the tracking system from March 2020</p>	<p>Assistant Business Manager (CSC)</p> <p>Service Director – Finance and Improvement Services (RCT)</p>	<p>Reducing bureaucracy and workload task and finish group established to review streamlining of reporting.</p> <p>Online tool trialled with members of the budget forum – further development required, and feedback incorporated from the reducing workload group.</p>	
Attendance at budget forums at least once per year. Attended by the MD and SMT	Clarity of understanding of the budgets available to CSC and the delegation rates across the region	Dates throughout academic year	Acting Managing Director (CSC)	SMT member attending budget forum meetings	
<p>Establish more systematic reporting on value for money</p> <p>Possible consideration to shorter theme specific reports spread throughout the year including case study evidence</p> <p>Analysis of VfM in respect of performance / inspection outcomes to be considered in Autumn Term</p>	<p>Detailed information regarding the impact of different initiatives is shared in a timely manner to inform future planning</p> <p>Stakeholders able to make judgements on the effectiveness of support</p>	March 2020	Acting Managing Director (CSC)		
Chief Executives engage in discussions with WG regarding the flexibility of grants to cover fixed costs of CSC	<p>Improved flexibility of grant funding</p> <p>Greater flexibility over funding envelope</p>	July 2019	Lead Chief Executive	Lead Chief Executives have met with Welsh Government to discuss (July 2019). Ongoing discussions with Acting managing Director and Director of Education (Steve Davies) November 2019. Discussions with Minister in Challenge and Review session 07th November 2019	

3.0	Step 3: Strengthen the delivery arrangements in a number of areas.				
3.1	Renew and refresh the vision and strategy for regional working and re-communicate this extensively to schools and other partners				
CSC Lead: Senior Management Team		Director Lead: Lead Director (Merthyr) & Cardiff			
Action(s)	Success Criteria	Deadline Date / milestones	Aspect Lead (s)	Progress & Impact Evidence	Resourcing Commitment
Attendance by SMT at engagement events to include: <ul style="list-style-type: none"> Headteacher meetings LA Budget forum Welsh Government briefings (to promote CSC message) Member events Develop and agree a core script for the key messages about the future direction.	<ul style="list-style-type: none"> Re-launched vision and purpose Clarify of the purpose of different groups Consistent delivery of key messages Renewed commitment to regional working Shared vision delivered by all (including Directors / chief execs / Members)	Summer Term 2019 Autumn Term 2019 - ongoing	Acting Managing Director	SMT attendance at Head Teacher Briefings in the summer term supported by Directors and Lead Chief Executive Agreement on shared key messages with Directors Continued senior management team attendance at all local authority headteacher meetings	
Clarify roles and responsibilities and be clear about who does what in the overall system (see 1.2 above)					
Ensure communications channels are clear to all and seek regular feedback Comprehensive communication strategy in place	All heads and schools are clear about the channels they can use to get information from the Consortium and also to feed it back. This includes their Challenge Adviser and Senior Challenge Advisers; their local cluster; and their network or group of local heads and their local Delegate Head or equivalent Consistent set of messages out to the system –agreed at monthly SLT meeting & used as a regular source of information and intelligence to feed back into the Consortium.	Spring Term 2020 Spring Term 2020 publication	Communications Manager		
Development of publication materials to support attendance at events: <ul style="list-style-type: none"> Presentation Newsletters Social media presence Video / case study materials Blog 	All heads and schools are clear about the channels they can use to get information from the Consortium and also to feed it back. Consistent set of messages developed	Ongoing	Communications Manager	Refresh of vision and branding at all events	

Attendance at wider LA meetings					
Attendance at wider LA meetings	Holistic school Improvement and partnership working	Ongoing	Acting Assistant Director		Officer Time

3.0	Decide the right organisational structure to drive forward the development of the self-improving system
3.2	Implement the revised delivery model including the new role of clusters and strengthen further school-to-school working

CSC Lead: Senior Lead for Curriculum Reform	Director Lead: RCT
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Action(s)	Success Criteria	Deadline Date / milestones	Aspect Lead (s)	Progress & Impact Evidence	Resourcing Commitment
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<p>Implement the revised delivery model</p> <ul style="list-style-type: none"> Ensure all are clear about the revised delivery model for CSWC including role of clusters Improve the quality and consistency of implementation of current strands like SIGs and Hubs Give careful time and attention to ensure the successful implementation of new role for clusters - consideration of the role of LAs in support of this Re-design the Challenge Adviser model 	<p>Consistency and quality of delivery across each of the aspects of the Central South Wales Challenge</p> <p>Robust quality assurance processes in place (for all aspects of the challenge)</p> <p>Systematic reporting of impact which can be used to effectively inform future planning</p> <p>Effective management of risk</p>	Summer Term 2019	Senior Lead Curriculum Reform (CSC)	<p>Model revised and implemented summer 2019. Robust process of application and selection for hubs and lead practitioners.</p> <p>Senior Lead presented revised model in CSC staff professional learning sessions and at all Local Authority headteacher meetings, except for Penarth Cluster and RCT Primary HTs.</p> <p>Evaluation strategy developed and implemented for SIGs, Cluster, Hubs using Kirkpatrick model – beyond participation into impact, i.e. learning, behaviours and results. Evaluation strategy for peer engagement developed using appropriate model during autumn 2019.</p> <p>Challenge Adviser involved in Professional Learning signposting and brokerage of Central South Wales Challenge for schools. Collaborative working between Challenge Advisers and Professional Learning teams further strengthening with improved processes and Central South Consortium professional learning opportunities.</p>	
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<p>Strategy developed to ensure all stakeholders understand the revisions to the CSWC</p> <p>Clusters are provided with effective communication regarding the role of the cluster & cluster convenor</p> <p>Identification of training needs of the cluster convenors</p>	<p>Shared understanding of the revised Central South Wales Challenge Model</p> <p>Communication materials available to all schools</p> <p>Training needs analysis undertaken</p> <p>Agreed role of the CA in the process</p>	Autumn Term 2019	Senior Lead Curriculum Reform (CSC)	<p>Senior Lead presented revised model in CSC staff professional learning sessions and at all LA headteacher meetings, with the exception of Penarth Cluster and RC Primary HTs. Also presented at a number of other stakeholders' meetings, e.g. Cardiff scrutiny, Trade Unions, Vale of Glamorgan Governors, etc.</p>	
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<p>Identification of the role of the challenge adviser in SIG / Cluster working</p>				<p>Cluster convenor training Sept 19 attended by 46 clusters and all communications and resources shared with all clusters. 46/56 cluster plans submitted to date. Further cluster convenor training session planned for Spring 20.</p>	
<p>Further refine the strategy for supporting schools to implement the new curriculum.</p> <p>Development and implementation of cross-regional PL programme for Curriculum for Wales</p>	<p>Effective school to school support structures are in place engaging pioneers, hubs and clusters</p> <p>All delivery partners have sufficient expertise and capacity</p> <p>Effective engagement with the consultation process by the majority of schools</p> <p>Effective engagement with PL for curriculum reforms by majority of schools</p>	<p>March 2020</p>	<p>Senior Lead Curriculum Reform (CSC)</p>	<p>School to school support embedded within hubs, SIGs and clusters. Regional AOLEs leads appointed from pioneer schools and to also participate in National Networks.</p> <p>Development of regional strategy to fully utilise the expertise and capacity of the pioneers beyond January 2020 is ongoing during autumn 19 for full implementation 2020. Professional Learning pioneers identified to support a minority of SIGs and/or clusters.</p> <p>78% of school participated in engagements events June 19. 72% school to date are engaging with the hub programmes (2019/20).</p> <p>Cross-regional programme is being developed for Professional Learning for curriculum reforms. Programmes will be written autumn 19-spring 20 and delivered from spring 20 onwards.</p> <p>Require further capacity within the CSC team to deliver and quality assure the CSW Challenge and further develop the cross regional programme of professional learning for the curriculum reforms.</p>	

3.0	Decide the right organisational structure to drive forward the development of the self-improving system				
3.3	Review and revise the governance arrangements				
CSC Lead: Acting Assistant Managing Director		Director Lead: Bridgend			
Action(s)	Success Criteria	Deadline Date / milestones	Aspect Lead (s)	Progress & Impact Evidence	Resourcing Commitment
Strengthen Governance Audit the role and remit of all the groups comprising the governance structure of the Consortium	Strengths and areas for improvement identified of current governance arrangements identified	October 2019		Review of governance undertaken with options for roles and remit of the different groups at each level currently under consideration	ISOS Capacity
Present options paper to Directors with recommendations for strengthening governance at all levels Undertake workshop with Members facilitated by ISOS on possible governance options Present recommendations to Joint Committee for approval	More effective decision-making process established	November 2019 January 2020 March 2020		Paper presented to Directors November 2019	
Seek legal advice before any changes are implemented	Governance structure in line with Welsh Government requirements	January 2020			
Strengthen the engagement and understanding of all headteachers on the work of the Consortium	Increased engagement of headteachers in the revised governance structure	Ongoing			
Improve the business planning process to ensure shared ownership of the plan. Joint scrutiny of progress and identification/celebration of good practice	Improved engagement with local authorities in the development of the business plan LA priorities explicit within the BP Business Plan consultation is wide ranging and includes all stakeholders. Views and suggestions are incorporated as the BP consultation process develops	Ongoing	Acting Managing Director		

	<p>SLT forward planner identifies opportunity for each operational plan to be systematically scrutinised by peers</p> <p>Progress of the specific LA priorities within the business plan is reviewed at termly local authority performance meetings</p>				
Develop relationships with members	Members have a deeper understanding of the way the Consortium currently works so they can provide more informed challenge and support through JCC	Summer Term	Acting Managing Director with Directors of Education		

