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Research Survey 4/3

QUALITY ASSURANCE IN ENGLISH PRIMARY EDUCATION

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This is one of a series of 32 interim reports from the Primary Review, an independent enquiry into the condition and future of primary education in England. The Review was launched in October 2006 and will publish its final report in late 2008.

The Primary Review, supported by Esmée Fairbairn Foundation, is based at the University of Cambridge Faculty of Education and directed by Robin Alexander.

A briefing which summarises key issues from this report has also been published. The report and briefing are available electronically at the Primary Review website: www.primaryreview.org.uk. The website also contains Information about other reports in this series and about the Primary Review as a whole. (Note that minor amendments may be made to the electronic version of reports after the hard copies have been printed).

We want this report to contribute to the debate about English primary education, so we would welcome readers' comments on anything it contains. Please write to: evidence@primaryreview.org.uk.

The report forms part of the Review's research survey strand, which consists of thirty specially-commissioned surveys of published research and other evidence relating to the Review's ten themes. The themes and reports are listed in Appendices 1 and 3.

The theme: this survey relates to Primary Review theme 4: Quality and Standards.

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Suggested citation: Cunningham, P. and Raymont, P. (2008) *Quality Assurance in English Primary Education* (Primary Review Research Survey 4/3), Cambridge: University of Cambridge Faculty of Education.

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QUALITY ASSURANCE IN ENGLISH PRIMARY EDUCATION

Abstract

This research survey begins with a brief introduction highlighting two key recent works selected for their understanding of historical and comparative dimensions in the evolution of quality assurance. It goes on to outline the range of methodological approaches from critical analysis and empirical research at the national level, to smaller scale qualitative case studies of the impact of inspection locally, and on to international comparative studies. Following consideration of the cultural and political contexts of inspection, a representative selection of studies is then reviewed under headings defined by research focus and methodology: national policy and theoretical critique; empirical studies of national practice; case studies of local experience with particular regard to teachers; teachers, curriculum and emergent self-evaluation, and comparative international studies. Key findings and insights from the research are synthesised, implications for current policy and practice are considered, and suggestions for further research are made.

Research themes

Monitoring, assuring and maintaining quality in primary education are processes that are historically embedded in more than one respect. Firstly there is an inherent chronological dimension in 'maintaining' or 'improving' standards, where current or past conditions are adopted as a benchmark, and secondly the procedures for monitoring and assurance are cultural practices constantly subject to change over time. The evaluative overview of research below will be set in the context of a brief historical account of debate on policy and structure as it evolved up to and beyond the creation of Ofsted, and necessarily referring to political and media debates in order to highlight the contentiousness of the topic. The link between quality assurance and questions of standards also addressed in Theme 4 may appear self-evident, but a key issue for debate remains how far monitoring is on the one hand driven by concerns about national and international standards, or on the other hand provides the necessary credible data for charting progress and making international comparisons.

Two key works that emerge in the following research report are characterised by an acute awareness of the historical dimensions. Learmonth's (2000) outstanding overview of inspection offers a perspicuous and sensitive overview drawing on historical data that ranges from political angst to personal anguish. Through historical example we can graphically illustrate and begin to comprehend the high stakes entailed at national and local levels, and the interdependence of broad principle and detailed practice. Contrasting approaches in research of quality assurance are characterised both by philosophical and by technical perspectives and Learmonth provides a concise and accessible synthesis of both. MacBeath (2006) achieves a similar breadth of analysis, and like Learmonth, encompasses both historical and comparative international perspectives. As a leading researcher and critical developer of strategies for school improvement MacBeath has promoted self-evaluation in collaboration with the NUT through a succession of research projects. He has also networked internationally and the outcomes of these exchanges inform the arguments he brings to bear on the UK.

The present survey begins with a review of historical research, establishing the narratives that underlie and explain current theory and practice. Regarding the last two decades, the survey provides a broad overview of published research, organised in distinct but

overlapping themes: English national policies and practices; experiences at school level with regard to teachers, curriculum and the trend towards self-evaluation; international and comparative research. Whilst this survey cannot be comprehensive it offers a detailed account of selected pieces of research in order to provide a representative picture of the kinds of enquiry that inform the continuing evolution of quality assurance in primary schools.

Research questions and methodological trends

National education policies in general from the mid 1970s onwards, and the creation of Ofsted in 1992 in particular, triggered a great deal of research into monitoring and school improvement. The macro level of government policy provoked theoretical critiques of the political and power relations embodied in systems of inspection and control, informed both by the immediate political contentiousness of the reforms and by trends in sociological and philosophical thought during the last quarter century. Historians have adopted longer time-scales in seeking to understand change in national school inspection since its origins, and especially over the last fifty years.

Concern for standards at the international level had been marked by large scale quantitative surveys, but despite the increasing quantity of available data for children's and schools' achievements, there has been less research associating these trends specifically with changing methods of quality assurance, where the variables may be too diverse to allow of convincing correlation. Notwithstanding, Ofsted has sought to evaluate and validate its own inspection procedures, and to demonstrate the effectiveness of inspection in securing school improvement. Much inspection data is freely accessible to independent researchers and some have also gained access to less public documentation and to key officials for interview in exploring the development and application of policies and practices.

Far more research on quality assurance and its impact is available at the meso and micro levels of Local Authority, schools, and classrooms, where qualitative rather than quantitative methods predominate. Most independent researchers appear motivated by their closer association with schools and with teachers than with national policy and administration, and many studies have focused on the impact of monitoring and evaluation on the quality of life in primary schools. Here the data is generated through questionnaire, interview and ethnographic methods, sometimes longitudinal over the period before, during and following inspection (or following failure and re-inspection). One perennial challenge for the researcher in these contexts is balancing critical distance with empathetic understanding; another is the problem of generalising from case studies. Where such empirical research investigates the effects of inspection on curriculum and teaching methods, researchers have also drawn on documentary evidence by analysing national frameworks and official guidance, and well as the texts of inspectors' reports. Documentary analysis may facilitate examination of the quality and consistency of prescriptive documents and feedback, and evaluation of the scope for implementing recommendations.

International comparison has been prominent in the discourse over standards that led to greater emphasis on quality control, so it is unsurprising that independent research on monitoring and evaluation has also been heavily influenced from overseas. International research offers an overview of global developments (as well as of educational provision that may transcend national boundaries), comparative analysis of two or more countries' policies or practices has also provided some insights, as have trans-national studies of the transfer of practices or 'policy borrowing'. Comparative research has been especially influential in the introduction of school self-evaluation as a model of quality assurance.

Selection of literature

Our survey is based on a search of relevant literature in available databases of educational research. The selection referred to below is representative of articles appearing in the principal educational research journals, and of book-length studies. Unpublished papers have not been included, nor has a category of literature comprising books of advice on inspection for teachers, from which a good deal of inference might be drawn but which do not in themselves constitute first-hand research of a formal kind. A further exclusion, with just one or two exceptions, is the considerable volume of published discussion by parliamentary committees, and responses from Ofsted; a lengthier review might have included more of this material as constituting a genre of 'research' that contrasts interestingly with the academic mode. A good deal of press comment that would not count as research has been excluded but one non-academic item referred to is a Channel 4 documentary, as a token reminder of the power of the media in popular dissemination of research. The selection is designed to be representative of four groups identified in terms of focus and research methodology, and may not therefore be either statistically representative of the whole field nor indicative of the level of influence that such studies have had.

Quality assurance and research, cultural and political contexts

An excellent starting point for historical and philosophical consideration of quality assurance in schooling is provided by Silver (1994). He observed how defining a good school over the centuries and in different countries and localities, had been a question not only of the way a school operated but of the way its aims had been established, by whom, and with what intentions. The variety of purposes that schooling has had, meant that judgments have been made from a range of competing viewpoints.

In the first half of the twentieth century, expert opinion began to play an influential role, and two features are significant: firstly, the expert and research community was by no means homogeneous, and over time pre-eminence was accorded variously to educational psychologists, sociologists, evaluators or curriculum developers amongst other specialists; secondly was the increasingly international nature of educational development and debate. Scientific approaches to evaluation of school performance are identified by Silver as emerging in the 1960s with the educational 'war against poverty' in Britain and the USA, but policy concerns distracted from the internal processes of schools, so that in Britain the focus was on school systems and access to secondary schooling, rather than on the specifics of curricula and teaching methods. School effectiveness research of the 1970s and 1980s however shifted attention away from social equity and concentrated on the correlation of detailed internal features.

Characteristic of the twentieth century also were changing systems of school organisation and control, in the role of state and public agencies and increasing opportunities for expression of public and media opinion.

Origins and tensions

Research on the origins and development of school inspection in Britain has been synthesised in a number of book-length studies. (Lawton and Gordon 1987; Dunford 1998; Maclure 2000) Her Majesty's Inspectorate was conceived in 1839 for accountability, to monitor value for money as the state began to subsidise school buildings and teachers' salaries. A small number of men drawn from the upper echelons of society and with little personal experience of working class education were appointed to this role. As the century drew to a close and the elementary school system expanded, their growing numbers were reinforced by assistant inspectors drawn from the elementary school teaching, and women who specialised in the housecraft curriculum for girls and in the education of infants. During

the twentieth century Her Majesty's Inspectorate provided a career route for some outstanding elementary teachers, and following the 1944 Education Act with its creation of a universal primary schooling, many HMI's had specialist expertise in that sector, as well as curriculum subject specialisms. Their work was increasingly supplemented by local education authorities' own inspectorates, and though the structure, organisation (and status) of national and local inspectorates were quite distinct, both bodies undertook increasingly a supportive role of curriculum and professional development with schools and teachers. HMI's principal function continued to be national reporting for the benefit of policy-makers; organised in geographical regions, they would individually make many short visits to individual schools according to need, and, working in teams, would undertake a very small number of 'full inspections' of schools each year as a basis for the annual reports compiled by the Senior Chief Inspector.

Though educationists have cited in positive terms the purpose of school improvement as uppermost in Sir James Kay-Shuttleworth's original instructions to inspectors, the notorious 'Revised Code' of 1862 instituted a system of testing children and 'payment by results' to ensure that schooling would be cost effective. Idealists such as HMIs Matthew Arnold (1822-1888) and Edmond Holmes (1850-1936) vocally resisted utilitarian curriculum and mechanical teaching methods, however, and as centralised curriculum control was loosened HMI transformed its function to curriculum innovation and fostering professional development. Local Education Authorities, established in 1902, also began to provide forms of local inspection that through the middle decades of the century focused increasingly on providing curriculum support and ins-service training for elementary and primary teachers (Cunningham 2002).

Lawton and Gordon (1987) have revealed how antagonism between elementary (later primary) teachers and HMI has been quite complex and ambiguous. The official *Suggestions* of 1905 left a great deal of judgment and initiative to the teacher, yet teachers were often criticised by progressive inspectors for their 'cast-iron' methods and dull routines. Over the first half of the twentieth century however, HMI gradually built a more constructive relationship with the LEAs, schools and teachers (Dunford 1998). A developmental and supportive aspect of the inspector's role was implicitly endorsed by Plowden (1967) but at the same time HMI enhanced their research role. For the Plowden Committee HMI made a comprehensive survey of the 20,664 primary schools of England, for which they had, however, no objective measures of quality such as achievement in literacy and numeracy, but rather rated them subjectively (and often on flimsy evidence) in nine categories, the ninth (bad schools) comprising 0.1 percent of the total, while a sixth were not very good, a half were more or less average, and about a third were pretty good (Maclure 2000).

In terms of inspection, or the monitoring of quality, practice by the middle years of the twentieth century had changed from the annual inspection and assessment made by Victorian inspectors, to occasional and often small-scale inspections for particular purposes of information gathering. Full inspections were relatively few – an inspection of every school in England and Wales was achieved between 1944 and 1960 (Dunford 1998). These inspections provided the data for advice to policy-makers and administrators, which constituted an important part of the HMI role. From 1988 onwards the Senior Chief Inspector was required to produce an annual report on teaching and learning which became a much publicised exposé of problems faced by the educational system, and this annual publication continued under the Ofsted regime to attract considerable attention as a platform for criticism of policies and practice.

Quality and policy

Maclure's detailed research of HMI in their contribution to educational policy-making from 1945 has drawn on swathes of documentary evidence, published and unpublished, formal and informal, as well as personal testimony of many key figures. HMI became closely involved in formulating policies in the aftermath of Labour Prime Minister Jim Callaghan's famous speech at Ruskin College (October 18th, 1976). They were increasingly deployed as an information-gathering service, their reports and surveys used to legitimize central intervention. This function was epitomised in the survey *Primary Education in England* (DES 1978) although it had been planned as follow up to Plowden before the events of 1977. It broke new ground by combining the outcome of an HMI inspection programme (using a carefully constructed sample of schools) with a parallel testing programme devised by National Foundation for Educational Research using standardised tests. Maclure noted that the decision to bring in the NFER was recognition of the growing need to provide quantitative evidence as well as the assessments of HMI; in the event the joint design was successful in presenting a complementary database from which to assemble a balanced assessment (Maclure 2000). By this time, the development of a three-tier system of compulsory schooling had been adopted by a significant number of LEAs, so the primary school survey was followed by others relating to First Schools (age ranges 5-8 and 5-9) in 1982, 9-13 Middle Schools in 1983, and 8-12 combined and Middle Schools in 1985. These surveys, and their earlier work for Plowden, are of particular importance in marking the confluence of routine inspection and methodical research in the work of the national inspection body. Targeted, thematic research constitutes at this point in its history an emergent mode of official engagement with quality and standards that is reflected in various discussions below.

Quality assurance in primary schools required attention to the quality of teacher training and this aspect received close attention from the mid 1980s. A Council for the Accreditation of Teacher Education established in 1984 was to assess individual providers' fitness for the task according to set criteria, the evidence provided by HMI inspections of institutions (Dunford 1998). Its successor in 1993, the Teacher Training Agency (later the Training and Development Agency), had responsibility for funding the courses and inspection became ever more detailed; sets of competencies or Standards to be demonstrated by qualified teachers were determined, reflecting curricular priorities such as literacy and numeracy, and institutions continue to be judged according to both the trainees' demonstration of these Standards and also the accuracy of trainers' own assessments.

A key policy theme from 1991 became the 'Citizen's Charter' and subsequent 'Parent's Charter'; inspection was henceforth to act on behalf of the consumer, a 'regulator' of standards and quality, so that HMI would have to accept new responsibilities towards parents and the Secretary of State, and rethink their relationship with schools. This aspect of public accountability through inspection had been pre-figured by the radical innovation of Secretary of State Keith Joseph who in 1982 had decreed an end to the traditional closely guarded confidentiality of school inspection reports (Dunford 1998). From 1983 reports were to be published (foreshadowing the later policy of New Labour's Secretary of State, David Blunkett in 1997, of 'naming and shaming' so-called 'failing schools'). These policy trends led to the Education Act of 1992 which had 15 of its 17 substantive clauses devoted to inspection. Its radical reconstruction of the mechanism and manner of school inspection created the Office of HMCI of Schools in England, whose task was to commission independent teams of inspectors, operating in a commercial market, to inspect all schools on a four yearly cycle. 'Ofsted' was the name and acronym coined by Professor Stewart Sutherland as first incumbent of the post.

Inspection and controversy

1992 also saw publication by the DES of a discussion paper that generated a highly polemical debate on primary curriculum (Alexander *et al* 1992; Alexander 1997). In seeking to review available evidence and make recommendations for implementation of the National Curriculum at Key Stage 2, the paper drew on data accumulated from HMI inspections and shifted the debate on primary schooling from 'content' which had preoccupied discussion around the introduction of the National Curriculum, to 'method' as the critical issue of concern. It was followed one year later by a 'progress report' from Ofsted on the basis of inspections conducted in the intervening months and highlighting 'benefits' arising from the NC together with 'serious weaknesses' arising from a mismatch between the curriculum and its assessment, on the one hand, and the capabilities of primary schools and teachers on the other (Ofsted 1993). A further survey by inspectors of curriculum organisation and classroom practice in 49 schools identified specific factors underlying high achievement (Ofsted 1994); this was followed by a series of eight national conferences, the proceedings of which were published (Ofsted 1995a).

One of the 1992 discussion paper's co-authors, Chris Woodhead, was subsequently appointed in 1994 to lead Ofsted, where he initiated a controversial and campaigning role, especially aimed at 'progressive' methods and 'incompetent' teachers. In 1995 a revised *Framework for the Inspection of Schools* was issued, including guidance on the inspection of nursery and primary schools. From 1996 teachers were graded on their performance, and parental opinion became a significant source of data for school inspection. Considerable opposition was generated both from professionals and from educational researchers concerning the unreliability of Ofsted inspection methods and data and the uses to which it was put. By 1998 all primary schools had been inspected at least once under the new regime and 3000 inspection reports per year were published, creating an unprecedented database. The experience also generated a great deal of independent research into the process of inspection and school improvement generally.

An independent group, entitled the Office for Standards in Inspection, reviewed the practices of Ofsted (Duffy 1997). Here Carol Fitz-Gibbon argued that Ofsted's inspection methodology did not meet research standards, and that Ofsted had been allowed to operate without adequate validation, with potential to mislead and distress parents, pupils and teachers, and with apparent faith placed in its findings by politicians (Fitz-Gibbon 1997). Two major purposes of inspection, school improvement and accountability, were found to be confused but also further confused by two other purposes: maintenance of minimum standards of quality, and collection of standardised national data on school performance. Complexity of the inspection process was seen to put primary schools at a particular disadvantage.

In 1997 New Labour established a Standards and Effectiveness Unit (SEU) at the DfES to encourage and monitor school improvement, with an ever increasing availability of data, and emphasis on 'value added' measures. Data and inspection evidence provided a foundation for HMCI advice to ministers and for public pronouncements. PICSI data (Pre-Inspection Context and School Indicators) were used in early Ofsted inspections, succeeded by PANDA (Performance and Assessment data) reports issued annually to all schools and Local Authorities. RAISEonline is now the web-based source for disseminating school performance data. This ability to monitor continuously through statistical data led in 1998 to increasing the interval of school inspection from 4 to 6 years. Ofsted also increasingly sought to monitor quality and standards through other means in addition to regular inspection. There were surveys on specific issues such as class size and the teaching of reading (Ofsted 1995b, 1996) and, following the change of government, evaluations of New Labour's

National Strategies for literacy and numeracy (Ofsted 2002a, 2002b, 2005). Ofsted also engaged in significant collaboration with academic researchers following Woodhead's departure; one example was a highly structured international study of education for six year olds comparing England with Denmark and Finland (both examples of lightly inspected national systems offering considerable autonomy for teachers) but this kind of research was given less publicity in the policy-making process than international comparative statistics on standards of literacy and numeracy (Ofsted 2003).

Widespread concern with inspections and their place within a continuing programme of politically driven educational change led to House of Commons Select Committee enquiry, whose report was published in 1999. Having heard a great deal of written and oral evidence, amongst many other conclusions it acknowledged the stress that the current programme placed on teachers and proposed reducing the period for notice of inspection from one year to four weeks; it recommended that inspectors take account of self-evaluation procedures used by the school, and that HMCI 'should be concerned to improve morale and promote confidence in the teaching profession'. Responses from the government and from Ofsted were subsequently published by the committee (House of Commons Education and Employment Committee 1999a, 1999b).

With the accession of David Bell as HMCI in 2003, research was commissioned in collaboration between Ofsted itself and independent researchers to evaluate the impact of Ofsted's work (Matthews and Sammons 2004). Ofsted's 'New Relationship', following government policy initiatives to improve standards in all schools by giving greater autonomy and responsibility to schools within the context of more intelligent accountability and reduced bureaucracy, was launched in June 2004 followed by a new School Inspection Framework and guidance on self-evaluation in March 2005. Shorter, sharper school inspections began in September, and by October Ofsted had published the first new-style school inspections on its website.

Policy developments since 1992 have generated a great quantity of research into the inspection process in particular, closely related to the exponential growth of school effectiveness and school improvement research. Research projects can be broadly classified by focus and methodology, though clear boundaries are not always easily drawn; the present research review adopts four categories:

- National policy, critical theory;
- National practice, empirical studies;
- Local experience, empirical studies (with particular consideration of teachers, curriculum and self-evaluation;
- International policies and practices, comparative research.

National Policy, critical theory

The broader political role and significance of a national inspection body was subjected to examination by critical theorists. Smith (2000) addressed the developments that took place in respect of the relationship between inspection and research, over two decades as HMI transformed into Ofsted. As education policy had become central and contested, HMI had been increasingly called upon to provide data for policy-makers. Smith examined the similarities and contrasts between inspection and research, and how the two began to converge as HMI drew on research-like methods such as rating scales and other quantitative methods. Increasing attractiveness and sophistication of statistical data on school performance gradually overcame the reservations maintained by traditional HMI. Political pressure groups used statistical data gathered expressly to underpin particular policies,

described by Smith as 'forensic research'. These tendencies informed Ofsted's way of working, with the establishment of a Research and Analysis section to handle the mass of data expected from the new inspection regime. Research Reports published by Ofsted that caused contention amongst education researchers included the class size study (Ofsted 1995b) and a report on reading standards in inner London (authoritatively but not uncontroversially criticised by Mortimore and Goldstein 1996), because of the political spin that they were given, leaked to the media, with high profile coverage and generating extensive public debate. In 1998 Ofsted published Tooley's critical assessment of the state of educational research, with a foreword by Woodhead attacking educational researchers (Tooley 1998).

Hartley (2003), like other observers, focused on Ofsted and its inspection methods, which effectively encouraged a pedagogy that conflicted with policies espoused in other areas of government. His critique was set in the context of a globalised economy, with its demand for flexibility and innovative thinking, contrasted with the traditional teacher-centred pedagogy prevalent in primary schools, as revealed not only by Galton's follow-up research to ORACLE (1999), but also greeted with approval by Ofsted in its review of English primary schools 1994-1998. Hartley identified 'Ofsted-driven, subject-based' teaching as at odds not only with pedagogies advocated in some high-performing Asian economies, but also with directions advocated by other government departments such as that of Media, Culture and Sport, and the Department of Trade and Industry. Policy-makers were caught between pedagogies that might foster global competitiveness on the one hand, and those that are more 'cost-effective' on the other. A bias towards whole-class traditional pedagogy may reduce costs, standardise procedures and raise test scores, but economic benefits would be few in the long run (see also Hartley 2006). Brehony (2005) highlighted the significant role of Ofsted in the development of national strategies for literacy and numeracy, the report on reading in London primary schools as key to the former, and that commissioned from David Reynolds on international standards for the latter (Reynolds and Farrell 1996). Analysing education policy from the standpoint of political theory, Brehony focused specifically on curriculum and teaching in England. He noted that ability grouping was one particular New Labour policy implicitly supported by Ofsted who reported an increase in ability grouping for Maths and English at Key Stage 2 especially in their review of primary education 1994-98. Her Majesty's Chief Inspector's Annual Reports of 2002 and 2003, however, had confirmed that concentration on literacy and numeracy were detracting from the enquiry, problem-solving and practical work that bring these subjects to life, and had observed that pressure on literacy and numeracy were producing a 'two-tier curriculum'.

International comparison

Comparative studies made a contribution to critical research on the ideological and political contexts of new approaches to quality assurance, especially on New Zealand and the UK as the two national contexts in which the creation of 'quasi markets' had been taken furthest. Gordon and Whitty (1997) saw the restructuring and deregulation of state education in England, Wales and New Zealand as part of a neo-liberal project, but they held that the rhetoric of neo-liberal schooling was far removed from reality as governments confronted the classic tension between fiscal imperatives and the need for legitimation. Regarding accountability, they argued that even the neo-liberal state was unlikely to abdicate responsibility for the shaping of education to either a fully 'marketised' public sector; in both countries the 'quasi market' had produced new and sometimes enhanced forms of accountability, based on a belief that state agents, bureaucrats and teachers, would act only in their own interest rather than that of the students. Deliberate separation of accountability from curriculum development agencies meant that both Ofsted and the New Zealand

Education Review Office (ERO) were divorced from other national educational concerns, placing potentially conflicting rather than consistent demands on schools. Martin Thrupp (1998) examined how the ERO and Ofsted constructed blame for failure at school level in order to gain ideological power as agents of accountability. While these 'politics of blame' were contested in both countries by an alternative 'contextual' claim that took account of broader social constraints on schools, where New Zealand academics had been distrustful of ERO's agenda English researchers into school effectiveness had often provided support for Ofsted's 'politics of blame'; in fact, as 'failing' schools in both countries invariably served low socioeconomic communities, reasons for poor performance were unlikely to be so straightforward.

National practice, empirical studies

Wilcox and Gray (1995) described the reactions of LEA chief inspectors to the Ofsted inspection model and *Handbook for the Inspection of Schools*. Methods and procedures were discussed, and although chief inspectors generally commended the thorough nature of the inspection process, substantial reservations were expressed about certain aspects, particularly the logistics including cost, time demands made on inspectors, and the availability of a sufficient pool of experienced inspectors, particularly in the primary field. A leading critic of external inspection as practised in the Ofsted model was Carol Taylor Fitz-Gibbon (1996) who argued that all-pervasive and simplistic politically driven concerns about performance evaluation, effectiveness, efficiency and appraisal had to be avoided. Instead she celebrated self-evaluating educational systems. Fitz-Gibbon argued that if we conceived of education as a highly complex system then simplistic attempts to describe 'good schools' or 'effective practices' were misjudged; what was required was a sensitive system of performance indicators used to feed back information to the providers of education at a local level, who could then advance their own development as they interpreted the data into their 'live' context. Her critique ranged from the philosophical to the basic statistical procedures for monitoring and the design of performance indicator systems or the impact of monitoring on other systems. Computers meant that monitoring systems were here to stay, so a major challenge was to get them working for the benefit of society as a whole, for staff and students in institutions, and for the advancement of knowledge. Stoll and Fink (1996) took the reality that school systems worldwide had come under political attack, with policies such as decentralisation, market based reform and high stakes testing, and attempted to describe a future that they believed both inevitable and desirable. They concluded, however, that the metaphor of a factory for a school, with its standardisation, control, compliance, and focus on deficits as opposed to quality, was no substitute for the metaphor of the school as caring family.

Meanwhile, Ofsted conducted research into its own procedures. Matthews *et al* (1998) presented the results of the first study of the reliability and validity of judgements of teaching quality made by independent inspectors in the classrooms of primary and secondary schools in England. A total of 173 pairs of observations were received from 100 inspections representing about thirteen percent of the inspections conducted during November and December 1996. Individual teachers' strengths and weaknesses identified by applying Ofsted evaluation criteria were shown to be agreed by the two inspectors. It was concluded that Ofsted's Framework and related advice provided an effective means by which inspectors could judge teaching with considerable reliability, and the authors noted that their results were in keeping with similar findings by the Dutch Inspectorate. Much of Ofsted's own research, however, was discredited by independent scholars, and this particular research piece was criticised as flawed in the 1998 Channel 4 Despatches, which

also featured distinguished independent researchers and was aimed at a wide audience (Channel 4 Television 1998).

Cullingford (1999) edited an authoritative collection of chapters reporting a variety of research on Ofsted at the crucial turning point of 1999. In Cullingford's collection, Winkley offered a critique of the inspection process, arguing that much of a school's and of children's achievements may be overlooked; from a survey of 200 recently inspected schools he found dislike of and opposition to the process amongst head teachers, and evidence of personal damage in terms of paranoia and self-doubt (Winkley 1999). He did acknowledge that it was better to have Ofsted proclaiming improving standards, based on evidence of whatever kind, to counter the continued and baseless claims of right wing pressure groups about 'falling standards'. Though much of work in this volume was criticised by Goldstein (2000) for the poor quality of its research, it stands as an important collection of positions questioning the Ofsted regime (and Goldstein was also critical of Woodhead's dismissive attitude to all research, and of Ofsted's failure to conduct any credible research of its own practices).

A significant change of tone in Ofsted's attitude to research came with David Bell's term of office, and the commissioning of an evaluative enquiry into the inspection process, conducted by Ofsted in collaboration with an independent partner from the University of London, Institute of Education. Matthews and Sammons (2004) noted that the inspection system in England has attracted much international interest and generated a minor research industry. They referred also to Ofsted holding one of the world's largest longitudinal educational databases holding both qualitative and quantitative information by collating data from 4000 inspections per year since 1993. Following a steady rise in the later 1990s both in pupil performance at Key Stage 2 and in primary teaching of 'good or better' quality, they illustrated also the plateau that appeared from 1999. The revised *Framework* of inspection in 2003 was designed to address this problem. Significant improvements in leadership and management were demonstrable as a consequence of schools being placed in 'special measures', and this improvement was more marked in primary than in secondary. Their conclusions regarding school improvement (both primary and secondary) were that the schools most likely to act successfully on inspection findings were those that were self-critical and capably led, often those already highly effective, but that weak schools also made substantial and rapid improvements through additional efforts following a poor inspection, and the incentive of a follow-up inspection. Their conclusions also addressed the dilemma that whilst professional education providers were typified by a desire for public accountability through self-evaluation, this entailed problems of credibility – with evident variability between institutions, public and parents wanted up-to-date reports on schools. Despite a general desire to reduce unnecessary stress and workload, especially for primary teachers, 'high stakes' were bound to lead to some apprehension. The thrust of government policy was to look for improvement *by* rather than *through* inspection with Ofsted *reporting* and not *advising*. The general conclusion of the report was an evaluation of Ofsted's work as 'very good' on most counts, but as being only 'good' in respect of its contribution to improvement, its user perspective, and its value for money, and as being 'fair' only in its tailoring of inspection to the specific needs of individual schools or 'proportionate inspection'.

Local experience, empirical studies

Local Education Authorities (LEAs) enjoy a century or more of experience in monitoring and evaluating school quality, the ambivalence of their role however reflected in ambiguous role descriptions of adviser and inspector, in Winkley's terminology 'diplomats and detectives' (Winkley 1985). 'Progressive' LEAs secured their achievements through proactive advisory work with primary schools, but education policy has become more centralised at the same

time as it has promoted delegation of powers to individual schools, which has left Local Authorities caught in between. Local government's role has frequently been contended and politically inconvenient for the state, but the need for some level of local or regional accountability in the provision of education has not disappeared. Whitbourn's authoritative analysis of LEA functions dedicates one chapter to statutory requirements and examples of best practice in monitoring and improving standards (Whitbourn 2004). The 1996 Act (Section 13) required authorities to meet the needs of its population in contributing to the spiritual, moral, mental and physical development of the community, which includes securing *efficient* primary education, and in particular to promote high standards (Section 13A). Specific funds have been made available to support *improvement*, latterly under the 2002 Act (Section 14). Until quite recently the basis of agreement between LEA and schools has been DfEE (1999) *Code of Practice for School-LEA relations*, but much of the monitoring is now through continuous streams of ever more sophisticated data relating to pupil attainment, attendance, exclusion and so on, with value-added calculations.

Potentially well placed to reconcile conflicting requirements of both local knowledge and detachment in the evaluation of individual schools' performance, local inspectorates or advisory teams in the years before and after Plowden were central to provision of in-service education and training and in the modernisation of curriculum and teaching methods. With a more interventionist approach of central government from the mid 1970s, LEAs were called to account for their curriculum monitoring, an accountability that had been determined in the 1944 Act but had not been actively pursued. Influential research conducted at the local level included that of Peter Mortimore and others (1988) in London. In Leeds the local authority commissioned an evaluation of their £14m project of primary school improvement over the late 1980s which identified specifically, amongst many other recommendations, the need for closer monitoring of schools achievement (Alexander 1997). Although the relationship between local inspectorates and their schools was open to attack as too 'cosy', the continuing value of face-to-face work in evaluation and school improvement has been extensively researched. Learmonth (2000) has provided a concise account of significant initiatives and their merits, from the early work of the 'IBIS' ('Inspectors Based in Schools') scheme developed by the Inner London Education Authority.

Nixon and Rudduck (1993) addressed the role of professional judgement in the local inspection of schools, analysing the situation of LEA advisers/inspectors in a time of transition when professional judgement had become increasingly politicised and problematic; they concluded that although local inspectorates would continue to have a significant role to play, the production of public lists of criteria, driven by social and political considerations, would not resolve the tensions around local inspections. Local inspection was concerned primarily with the exercise of professional judgement, not with the measurement of school performance against pre-determined norms or standards. Ribbins and Burridge (1994) provided a critical reflection by practitioners and researchers into what they had attempted and achieved over a period of eight years in promoting the quality of schools in Birmingham. They concluded on a positive note recognising that the price of improvement was high but worth paying, while the path to it difficult but passable. In a final chapter the editors described the key purposes, principles and working practices of an approach that is based on the notion of supported self-evaluation. Stoll and Thomson (1996) adopted the concept of 'doors' to improvement in schools such as collegiality, research, self-evaluation, curriculum, teaching and learning, quality approaches, teacher appraisal and school development planning. Partnerships provide one such 'door' and, unlike others 'that are often operated alone and internally', partnerships encourage voluntary activities and projects that link schools with one or more external partners in pursuit of improvement. Their partnership between Lewisham LEA, its schools, and the London University Institute

of Education launched in 1993 with four aims blending school effectiveness and school improvement goals. After two years, researchers identified partnership elements that support the improvement process; shared values and beliefs, collaborative negotiation and planning, support, joint evaluation, and critical friendship. The authors concluded that whereas one of the difficulties of schools taking responsibility for their own improvement was insufficient rigour in self-evaluation, the partnership approach provided the necessary empowerment for real commitment to change, improvement and rigour. Several case studies collected by Earley (1998) and others (Ouston *et al* 1997) drew attention to the value of LEA input in the context of national inspection.

Teachers – before Ofsted

Regarding the impact of the new inspection methods on schools, most of the research focuses on teachers, and this will be considered before turning to studies concerning particular aspects of the curriculum. Inspection and assessment of one's working practices is never a comfortable experience and, as noted earlier, a template for tension between teachers and inspectors was laid in the Victorian era of 'payment by results'. Learmonth (2000) records two tragic individual cases from the nineteenth and early twentieth centuries, of teacher suicides resulting from inspectors' judgments. For primary teachers in particular, power relations in various configurations over time have coloured their responses to inspection. But the tension needs to be understood in broader terms than any specific historical set of power relations. Elliot Eisner in *The Art of Evaluation* (1985, cited by Learmonth 2000) exposed the uncomfortable relationship between 'accountability defined in terms of specific operational objectives and precise measurement of outcomes' and the more incommensurate goals that teachers espouse, a contrast even starker in primary education than in secondary. A body of psychological research had already focused on 'investment of self' and consequent vulnerability even as the Teachers' Contract and the National Curriculum began to erode professional status and self-confidence (Steedman 1987; Nias 1989).

Ian Sandbrook's (1996) research was conducted mostly in the period immediately preceding Ofsted. His twelve case studies covered a variety of primary schools in seven different authorities, and revealed inspection to be much more than a singular event in the life of a school but rather a complex set of interactions between inspectors, head teachers, teachers and governors. With regards to the developmental consequences of inspections for the schools, views of participants were mixed and Sandbrook conceded that to track longer term effects would require further research. The measurement of development remained problematic however, with too many variables and too many qualitative factors. For benefits to outweigh costs in the inspection system, the process must be such as to lead to increased professional learning, confidence and self-esteem of teachers. Joan Dean (1995) analysed the reactions of teachers and head teachers in five local authorities after inspection during 1992 and 1993, including three primary schools, three junior and one middle. From her interview data, she concluded that Ofsted would be less than satisfactory in providing adequate teacher feedback and or follow-up advice and support. She noted that most headteachers saw Ofsted inspections as being about accountability.

Teachers and Ofsted

Continuing through the decade, a major research project was conducted on the effects of new organisation, curriculum and working practices, including the new Ofsted inspections, on English primary schools (Woods *et al* 1997; Jeffrey and Woods 1998; see also Hargreaves *et al* 1998) An early article explored how the technicist approach of an Ofsted inspection conflicted with the holistic and humanistic values of teachers, producing a high degree of trauma (Jeffrey and Woods 1996). Long-term observation from three months before inspection to one year later was combined with continual semi-formal and informal

interviewing of staff, and the study of documents. The trauma expressed was not a simple emotional response of the moment nor was it a product of school failure or lack of leadership. Professional uncertainty was induced, with teachers experiencing confusion, anomie, anxiety and doubt about their competence. Of three individuals who feature in the 1997 book, one female head teacher planned her inspection 'like a wedding', the successful outcome of which legitimated her management approach and boosted her confidence, one deputy head found the event 'cut deep into her being' but the 'negative trauma' reflected her energies back into teaching and away from managerialism, and she 'returned to her educational roots of active learning and pupil engagement', while a Year Two teacher reported having 'played safe' and quickly 'got back to normal'. Six years on from their original article, Woods and Jeffrey (2002) contended that primary teachers had had to reconstruct their identities in response to the reconstruction of the education system. Government attitudes and policies had thrown up dilemmas which Woods and Jeffrey contended had engaged teachers in identity talk and a number of emotional and intellectual strategies; the result had been a partitioning of the 'old Plowden self-identity' with the 'real self' largely withheld from the new personal identity and the sense of vocationalism set to one side. The new identity was of necessity more instrumental and situational in outlook and continued to change as teachers resolved how to relate to two or more competing discourses.

Ouston *et al* (1997) were surprised at the level of satisfaction they found following inspection, especially where the process exposed issues that schools were aware of but hadn't faced. However they also perceived the danger of audit culture imposing a way of working. In 1998 the NUT commissioned NFER to survey the impact of Ofsted, focusing on the effects on schools placed in special measures (Scanlon 1999). Effects to be surveyed included school monitoring, teachers' workload, health and stress, professional support and relationships between staff, LEA, governing body and parents, school improvement, staff morale and staff turnover. Most head teachers agreed with key problems identified – raising the question of whether inspections identified issues of which schools were already aware. Monitoring increased, a 'culture of inspection' was developed, but negative responses included loss of confidence, public humiliation, health, stress and an increase in bureaucratic workload precisely where more effort was needed in teaching. School monitoring addressed some problems but created others. Positive responses included greater solidarity amongst the teaching team, mutual support, and increased support from the LEA.

Case, Case and Catling (2000) argued, on the basis of a relatively small scale ethnographic study, that Ofsted was little more than a grand political gesture and classroom teachers understood themselves to be stage managing a performance for inspectors. Ethnographic methodology was used to collect data over a three year period, and the cumulative experience of respondents represented inspection of ten schools from three LEAs. Contextualising their research amidst the adoption of a managerialist discourse, their account drew attention to the effects of intensified control on the overall wellbeing of teachers and, by implication, the quality of children's classroom experience, and despite the evident intensity of the experience their study showed that there was no lasting impact upon what the teachers did in their classroom one year after inspection.

Other recent research articles have referred obliquely to the role of inspection, within a reform agenda, in teachers' understanding of their identity (Kelchtermans 2005; Burns 2005; Forrester 2005). Brunsden, Davies and Shevlin (2006), however, questioned explicitly the psychological effects of an Ofsted inspection, concentrating their quantitative study on a single primary school where stress and anxiety scales, as determined by two self-reporting personality measures, were administered not only to teachers but to all staff, governors and

PTA committee members. These were administered three months and a fortnight before the inspection and ten weeks after it. The authors reported that unhealthy levels of anxiety were found to be present in teaching staff at all times and, by contrast to other participants, teachers also demonstrated symptoms of severe traumatic distress. Significantly, their data suggested that the inspection process rather than its outcome generated psychological distress with its potential impact on the children's schooling. The framework for Ofsted inspections subsequently changed in 2005 with schools now given less than a week's notice to prepare an inspection of no longer than two days.

Curriculum

The impact of inspection on curriculum subjects has attracted limited research, focusing on single subjects including mathematics, design and technology, physical education and religious education, and on cross-curricular issues such as spirituality, pastoral care, racial equality, and citizenship. Ofsted inspection generated a wealth of documentary and statistical data on which researchers have drawn, and interviews have been conducted with inspectors and key personnel.

Millet and Johnson (1998a, 1998b) reported ESRC-funded research to examine interpretations of Ofsted policy on primary mathematics through three levels of mediation. Ofsted facilitated access to senior personnel, allowed use of its database for sampling purposes, and provided anonymous textual data for a small set of schools. Analysis focussed on consistencies and inconsistencies of interpretation within and between those responsible for policy, primary inspectors, and key personnel in schools. Findings suggested evidence of a tension between 'experience and expertise' and 'baggage' at different levels of the process; some inspectors were less attuned to problems arising from lack of teachers' subject knowledge than to those arising from particular teaching styles. The researchers concluded that the greater the inspector's subject expertise, the more likely that judgements were made on mathematical criteria instead of general teaching criteria and subject knowledge. Documentary evidence was drawn on by Osler and Morrison (2002) to examine for the Commission for Racial Equality the effectiveness of school inspection in monitoring how schools address and prevent racism. Content analysis of sixty inspection reports and interviews with inspectors, head teachers and advisers provided the data. Osler and Morrison supported other research findings (Ouston *et al* 1997; Fitz-Gibbon and Stephenson-Forster 1999) with doubts about reliability and validity of inspections. Reid (2006) analysed and evaluated comments on school attendance in Ofsted inspection reports for 2003, revealing a gap between inspectors' expectations and everyday reality. Sampling 200 of the 1,163 primary schools inspected by Ofsted in 2003, he found minimal allowance for socio-economic profile, location or pupil intake; the overall average score awarded for attendance was lower than for any other of the aspects of the school assessed; and inspectors interpreted the government's targets literally, taking no account of mitigating circumstances. Ofsted's annual national subject summary reports and individual primary school inspection reports on design and technology for the years 2000 to 2004 were analysed thematically by Alan Cross (2006a, 2006b): he found that, while inspectors say much about the teaching, their approach was neither systematic nor comprehensive, concluding that Ofsted needs to be clearer, more systematic and more thorough in its summary of good practice.

Questionnaire, interview and observation have been used to elicit both teachers' and inspectors' understandings in relation to particular curriculum areas. Ron Best (1997) was optimistic about the impact on pastoral care and PSE after a decade of educational policy change; his research based on a questionnaire survey of 159 members of a national association found respondents more positive than expected about Ofsted guidance, though divided as to the effect of inspections. Ofsted's inclusion of children's spiritual development

in its inspection framework was examined by Sokanovic and Muller (1999); their interviews of a small sample of inspectors and teachers indicated a significant gap between the views and understandings of both groups as to what should be provided for the spiritual growth of children in schools, and in what they looked for as indication of children's spirituality. Hanlon's (2000) study of twenty-eight teachers from two LEAs found that inspections had a positive short-term effect on initiating change in religious education. In relation to inspection, children's views have been little researched, but in Flecknose's (2002) case study of one school, she interviewed eight pupils, five teachers and three co-professionals to explore democratic procedures. Analysing this data in the light of official guidance on *Inspecting Citizenship* she argued that HMI had defined citizenship in an unhelpfully narrow and academic way and that the society's needs would be better served by inspecting citizenship through its influence on the structure of schools. Davies (1999) drew on his inspection experience in 35 schools and his own empirical research into PE standards, to conclude that Ofsted inadvertently generated practices unhelpful to the promotion of improved standards in PE; partly the result of greater emphasis on literacy and numeracy, and lack of specialist knowledge of PE by most primary teachers, it also reflected the limited knowledge of PE by most primary inspectors.

Self-evaluation

Self-evaluation as a mode of quality assurance evolved uncertainly from the 1970s, and in 1991 became embedded in Scottish practice. Its logic became all the more persuasive following Local Management of Schools (LMS) and School Development Planning (SDP) but was formally resisted in England until election of New Labour in 1997. In 1995 the NUT commissioned a study of school self-evaluation to see if the kind of model developed in Scotland could be applied to the English and Welsh context, and the report 'Schools Speak for Themselves' was published in 1996. In 1998 the union commissioned a follow-up study published by Macbeath (1999), offering case studies of developments at school and local authority levels, and the consequent self-evaluation framework was adopted by some LEAs – including Newcastle, where David Bell was director. Ofsted itself began to make gestures towards self-evaluation in its frameworks for inspection.

Ouston and Davies (1998) had found that schools most positive about school inspection were those that had high level of professional self-confidence and refused to allow the process of external inspection to intimidate them – demonstrating an incipient or well-developed self-evaluation culture. A NFER survey visited sixteen schools in nine LEAs using an explicit package or model as a self-evaluation framework; a mixture of models was used, but mostly models developed by the LEA (Davies and Rudd 2001).

International policies and practice, comparative research

Given the prominence of international comparisons in discourse over standards that underpinned arguments for rigorous and even punitive models of external evaluation, it is ironic to find that self-evaluation as a mechanism of quality control was also heavily influenced from overseas. Comparative research grew steadily in influence over the course of the last century; Bone (1968) drew on two large international surveys of school inspection undertaken by the International Bureau of Education in 1937 and the International Conference on Public Education in 1956, and found instructive the variety of ways in which inspectors' work was defined around the globe. Comparative work subsequently flourished and most particularly in relation to school improvement (Silver 1994, cited above). Watson's 1994 survey of 'School Inspectors and Supervision', for the *International Encyclopaedia of Education*, observed how all governments tried to ensure that their system of public schooling was not only regulated but controlled and monitored so that minimum standards of academic performance, teaching, administration and maintenance of physical plant were

upheld; some or all of these functions might be roles for school inspectors. The more centralised the system and the more politically doctrinaire its governance, the more likely that school inspectors were seen as instruments of control over the system (Watson 1994).

International research and self-evaluation

A comparative study of curriculum change in English and Finnish primary schools (Webb, Vulliamy, Hakkinen and Hamalainen 1998) offered insights on external inspection and school self-evaluation. The two countries' policies on inspection and monitoring moved in opposite directions in the mid-1990s as Finland abandoned its national inspection system in favour of self-evaluation. Qualitative case studies were made of six English schools and six Finnish schools, a diverse sample in size, location and curriculum approach. Analysis of the interviews, classroom observations and documents revealed how in England the impact of Ofsted inspections had been mainly on policies and procedures rather than on classroom practice, and the effects on teacher morale had been debilitating. In Finland, although early attempts at school self-evaluation had lacked a whole school strategy, there was evidence of ownership of the evaluation process by teachers, together with inputs from parental feedback and pupil self-assessment. Together these contributed to positive changes in classroom practice.

MacBeath's (1999) wide ranging account of international practice indicated that many countries, whilst seeking stronger accountability, simultaneously respect the professionalism of teachers and the integrity of the school as a self-evaluating organisation. Norwegian Trond Alvik's three categories of internal/external evaluation – parallel, sequential and co-operative – are taken to describe how different countries attempt to accommodate school evaluation to the unique context and history of their own systems. MacBeath considered countries in Europe, Israel, Central Asian Republics, the 'Pacific Rim', Australia, and North, Central and South America. Learmonth (2000) followed MacBeath by analysing six examples of self-evaluation in the UK, including Scotland, the Channel Islands and the London Borough of Wandsworth, together with the USA, Netherlands and Victoria, the second largest state of Australia. Scotland was described as a system moving from parallel to the sequential with the hint of some genuinely co-operative evaluation. In the Channel Islands a process of 'validated school self-evaluation', which included a 'framework' for development and review, influenced by Ofsted but agreed by working parties, provided opportunities for teachers to develop evaluative skills in other schools and to exchange information or ideas about effective practice across the school system. In the Netherlands a distinctive feature of self-evaluation was the influence of a higher education institution; the University of Twente contributed to a sequential system in which the school conducted its own self-evaluation validated by external inspection. In Victoria the school charter, annual report and triennial review were key elements in the accountability framework and underpinned the planning, monitoring, reporting and performance review over a three year period. As in many English LEAs, Wandsworth included support for individual schools in self-evaluation in their Education Development Plans.

A European Socrates project, 'Evaluating Quality in School Education', and a large body of research literature provided data for MacBeath *et al* (2000). A hundred and one schools in eighteen countries agreed to work with a common approach while at the same time developing thinking and practice within the context of their own cultures and histories. The authors recognised that a successful marriage between internal and external evaluation was, and remains, the goal for which European systems are striving: evaluation of quality must enhance the capacity of school and teachers and cannot progress without the commitment of teachers, students and parents who have their own personal stake in quality, standards and improvement; external expectations had to meet internal needs and pressure does not work

without the push of some internal direction or vision. Within the UK, Learmonth (2000) noted experimental self-evaluation that incorporated 'pupil voice' in Scotland (Improving School Effectiveness Project) and in Northern Ireland (Making Belfast Work: Raising School Standards project) linking with the International School Effectiveness and Improvement Centre at the University of London Institute of Education. Potential for pupil voice has been identified at the primary stage especially in connection with citizenship education and 'practical democracy' in schools.

Developments in self -evaluation

The government's 'new relationship' from 2004 triggered further steps towards self-evaluation in the UK, including the allocation of critical friends or School Improvement Partners (SIPs) to every school. The SIP scheme for primary schools will be completed nationally by 2008 and research so far has been limited, but MacBeath (2006) drew together some early evaluations. He related them to research in other countries, including experimental projects in new European countries. He provided a synthesis of findings that are both critical of national policy but constructive and practical in exploring possibilities for implementation and continuing development according to sound principles of professional development and rigorous accountability. One such practical development is the ever more sophisticated software available to schools for self-evaluation (Target Tracker 2007). MacBeath did however identify a lack of realism in trying to inspect the broad agenda of Every Child Matters within a tightly constrained inspection framework.

Evaluations of the new inspection regime continue, both by Ofsted itself and by the NFER. The House of Commons Select Committee on Education and Skills suspended judgement on self-evaluation and on new shorter inspections in July 2007, with a need to be certain that inspection continues to identify both failing schools and schools that are coasting. NFER maintains a web-based resource for such evaluation and information (NFER 2007).

Divergence, disagreement and consensus

Fundamentally conflicting positions between a 'skills' and a 'culture' approach to curriculum, and the implications of these for monitoring performance and quality control, go back to the Victorians Robert Lowe and Matthew Arnold. Political and ideological differences are also fundamental regarding the propriety and effectiveness of public or privatised systems of school inspection, and the aggressive stance adopted by HMCI Woodhead not only in inspection of schools but also against independent educational research undoubtedly exacerbated the inevitable conflict and disagreement. These differences and disagreements are reflected in much of the literature cited above.

Also pertinent to the divergences emerging in published research is Silver's historical perception of competing interests that may be found reflected in divergences in on-going research. The expert and research community is rooted in different intellectual traditions. Sociologists examining power relationships in the control of education may share concerns but diverge in their perspectives from social psychologists whose focus may be teachers' identities and working practices. The latter have interests in common but very different ways of working from curriculum evaluators or policy developers, whose horizons are national levels of attainment.

Substantive disagreement emerges on the effects of inspection on standards: though there was clear evidence for improvement in schools placed in special measures, the question remained as to whether the particular methods of inspection adopted were necessary to achieve this end; in some cases the positive effects in individual schools were found to be short-lived. Regarding the impact of quality assurance procedures in raising standards nationally, researchers continue to disagree about relevant measures. Arguments between

statisticians about validity of data and rigour of analysis are accompanied in some cases by broader disagreements on research method. Many researchers are aware of the multiple concurrent policy developments that make it almost impossible to isolate or assess the influence of any one factor in the decade and a half since Ofsted, let alone during the past thirty years or more of increased curriculum intervention and monitoring.

A formidable consensus accumulated on the negative effects of inspection at the school level, though some researchers identified ways in which it worked to teachers' advantage. Some agreement could also be found on the ways inspection distorted curriculum by concentrating on core subjects, and through lack of expertise across the curriculum amongst teams of inspectors. But wide consensus may also be found in the many studies of self-evaluation, from which positive effects on school culture and on professional development can be identified.

Synthesis of key findings

Quality assurance procedures have changed and continue to change, to meet shifting cultural and political expectations. National inspection has provided a means not only of monitoring, and thus generating considerable data, but also of raising standards and a means of effecting change through influencing curriculum and teaching methods. As a mode of achieving accountability for educational expenditure, it has been used more or less self-consciously as a means of controlling teachers as well as schools. Consequently the methods and findings of national inspection have not gone unchallenged and have provoked a good deal of critical independent research, which has, for example, revealed contradictions within national policy.

Research has been of variable quality, but has engaged with a wide range of aspects. Some research has challenged official conclusions drawn about standards based on inspection data, whilst other, often small-scale local studies, have revealed unintended effects such as distortions of the curriculum. A large body of research has focused on teachers, the effect of different patterns of inspection on their professional fulfilment and the compatibility of inspection frameworks, especially in primary schools, with broader concepts of the teacher's role and their commitment to the 'whole child'.

The need for identifying and addressing poor provision and poor teaching is undisputed but empirical studies revealed flaws in the inspection processes adopted, as well as indicating possibilities for improvement. That an important role evidently remains for the Local Authority in providing support to schools following poor inspection outcomes has been demonstrated, as have the merits of the 'advisory' role that can be more effectively supplied locally rather than nationally. A positive direction has been the development, through research, of self-evaluation, and identification of the ways in which this can be combined with sufficiently rigorous forms of accountability. Many valuable insights and possibilities have derived from comparative international studies.

Some implications

The research surveyed above underlines the need for a national education policy with regard to quality assurance that inspires the maximum possible trust between politicians, people (parents, children, taxpayers) and professionals. Monitoring of standards has to be credible and transparent, to provide reliable data, and to be supportive of values that reflect both the wide aspirations of parents and the professional understandings of primary pupils in relation to their development. Inevitably this will entail embracing, if not resolving, competing and conflicting claims. That is the stuff of politics. But a healthy research culture in the field of quality assurance should contribute to informed and reasoned argument and the avoidance of doctrinaire posturing. National policies will also need to employ inspection

procedures to address more effectively issues of equality, monitoring factors such as gender, race, poverty and deprivation, and special learning needs for their impact on achievement, and providing a conduit for sharing good practice.

For national agencies such as Ofsted, one implication of the research surveyed above is that high profile partisanship in the conduct of its affairs is likely to forfeit the three-way trust advocated above. It needs to be seen as neutral and not campaigning, to gain the trust of the profession, to supply sound and credible data for policy-makers. Whilst undoubtedly its task will be to advise government and to help formulate policy, its energies must be focused on achieving the most effective and efficient mechanisms for maintaining quality in primary education. One evident possibility is that of proportionate inspection, avoiding the potential waste of resources in heavy inspection of good schools, but on the other hand addressing the problem of coasting schools. Inspection must generate positive outcomes for average schools. Many research studies point to the importance of continuing to foster the whole curriculum and avoid distortion through narrow inspection.

Research appears to demonstrate self-evaluation as one of the most promising developments in squaring professional development of teachers with quality control. To foster collaboration between schools in this respect, Local Authorities are ideally placed. A level of administration that understands the nature and needs of the locality, and knows the strengths and weaknesses of neighbouring schools, can remain an effective broker for School Improvement Partners (SIPs). In their turn, primary schools have the capacity and scope to become mature in self-evaluation; they now have access to advanced software for school self-evaluation that can incorporate both qualitative and quantitative evidence. They are also the best placed to engage parents, and ultimately the Local Authorities and the schools can combine, using new technologies, to provide parents and local communities with good quality information about the character and achievement of their neighbourhood schools.

Suggestions for further research

The need for research is never-ending. Research, like education, is conditioned by its time, and changing preoccupations of policy makers, practitioners and researchers themselves generate a constantly moving agenda. There is continuing need for research that critically scrutinises and challenges the principles on which quality assurance mechanisms are founded; this will research into policy-making as it develops for a mature and contemporary understanding of the political dimensions of quality assurance. Developments in mechanisms of quality assurance need to be monitored constantly for their effectiveness and cost-effectiveness, and given the political contentiousness of education policy, this research and evaluation needs to be seen to be independent. Globalisation of education implies that international and comparative studies will continue to be desirable, not simply in comparing levels of attainment of school populations but also in drawing on the experience of alternative models of quality assurance.

Research may continue to inform the development of professional independence of teachers in evaluating the processes and outcomes of teaching and learning. In particular the role of ICT in school self-evaluation, with ever more sophisticated software packages, will accommodate a 'bottom up' as well as a 'top down' approach to the collection of data, and will be a topic for investigation. As 'pupil voice' will undoubtedly play a part in these 'bottom up' models, a useful topic of investigation would be the impact this mode of quality assurance might have on children and their families, especially in the exercise of school choice.

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Acronyms

CRE	Commission for Racial Equality
DES	Department of Education and Science
DfEE	Department for Education and Employment
DfES	Department for Education and Skills
EMIE	Education Management Information Exchange (NFER)
ERO	Education Review Office (New Zealand)
ESRC	Economic and Social Research Council
HMCI	Her Majesty's Chief Inspector
HMI	Her Majesty's Inspector(ate)
LA	Local Authority
LEA	Local Education Authority
LMS	Local Management of Schools
NFER	National Foundation for Educational Research
NC	National Curriculum
NUT	National Union of Teachers
Ofsted	Office for Standards in Education
PANDA	Performance and Assessment Data
PICSI	Pre-Inspection Context and School Indicators
PTA	Parent Teacher Association
SDP	School Development Plan(ning)
SEU	Standards and Effectiveness Unit
SIP	School Improvement Partner

APPENDIX 1

THE PRIMARY REVIEW PERSPECTIVES, THEMES AND SUB THEMES

The Primary Review's enquiries are framed by three broad perspectives, the third of which, primary education, breaks down into ten themes and 23 sub-themes. Each of the latter then generates a number of questions. The full framework of review perspectives, themes and questions is at www.primaryreview.org.uk

The Review Perspectives

P1   Children and childhood
P2   Culture, society and the global context
P3   Primary education

The Review Themes and Sub-themes

T1   Purposes and values
        T1a   Values, beliefs and principles
        T1b   Aims

T2   Learning and teaching
        T2a   Children's development and learning
        T2b   Teaching

T3   Curriculum and assessment
        T3a   Curriculum
        T3b   Assessment

T4   Quality and standards
        T4a   Standards
        T4b   Quality assurance and inspection

T5   Diversity and inclusion
        T5a   Culture, gender, race, faith
        T5b   Special educational needs

T6   Settings and professionals
        T6a   Buildings and resources
        T6b   Teacher supply, training, deployment & development
        T6c   Other professionals
        T6d   School organisation, management & leadership
        T6e   School culture and ethos

T7   Parenting, caring and educating
        T7a   Parents and carers
        T7b   Home and school

T8   Beyond the school
        T8a   Children's lives beyond the school
        T8b   Schools and other agencies

T9   Structures and phases
        T9a   Within-school structures, stages, classes & groups
        T9b   System-level structures, phases & transitions

T10   Funding and governance
        T10a   Funding
        T10b   Governance

APPENDIX 2

THE EVIDENTIAL BASIS OF THE PRIMARY REVIEW

The Review has four evidential strands. These seek to balance opinion seeking with empirical data; non-interactive expressions of opinion with face-to-face discussion; official data with independent research; and material from England with that from other parts of the UK and from international sources. This enquiry, unlike some of its predecessors, looks outwards from primary schools to the wider society, and makes full though judicious use of international data and ideas from other countries.

Submissions

Following the convention in enquiries of this kind, submissions have been invited from all who wish to contribute. By June 2007, nearly 550 submissions had been received and more were arriving daily. The submissions range from brief single-issue expressions of opinion to substantial documents covering several or all of the themes and comprising both detailed evidence and recommendations for the future. A report on the submissions will be published in late 2007.

Soundings

This strand has two parts. The *Community Soundings* are a series of nine regionally based one to two day events, each comprising a sequence of meetings with representatives from schools and the communities they serve. The Community Soundings took place between January and March 2007, and entailed 87 witness sessions with groups of pupils, parents, governors, teachers, teaching assistants and heads, and with educational and community representatives from the areas in which the soundings took place. In all, there were over 700 witnesses. The *National Soundings* are a programme of more formal meetings with national organisations both inside and outside education. National Soundings A are for representatives of non-statutory national organisations, and they focus on educational policy. National Soundings B are for outstanding school practitioners; they focus on school and classroom practice. National Soundings C are variably-structured meetings with statutory and other bodies. National Soundings A and B will take place between January and March 2008. National Soundings C are outlined at 'other meetings' below.

Surveys

30 surveys of published research relating to the Review's ten themes have been commissioned from 70 academic consultants in universities in Britain and other countries. The surveys relate closely to the ten Review themes and the complete list appears in Appendix 3. Taken together, they will provide the most comprehensive review of research relating to primary education yet undertaken. They are being published in thematic groups from October 2007 onwards.

Searches

With the co-operation of DfES/DCSF, QCA, Ofsted, TDA and OECD, the Review is re-assessing a range of official data bearing on the primary phase. This will provide the necessary demographic, financial and statistical background to the Review and an important resource for its later consideration of policy options.

Other meetings (now designated National Soundings C)

In addition to the formal evidence-gathering procedures, the Review team meets members of various national bodies for the exchange of information and ideas: government and opposition representatives; officials at DfES/DCSF, QCA, Ofsted, TDA, GTC, NCSL and IRU; representatives of the teaching unions; and umbrella groups representing organisations involved in early years, primary education and teacher education. The first of three sessions with the House of Commons Education and Skills Committee took place in March 2007. Following the replacment of DfES by two separate departments, DCSF and DIUS, it is anticipated that there will be further meetings with this committee's successor.

APPENDIX 3

THE PRIMARY REVIEW INTERIM REPORTS

The interim reports, which are being released in stages from October 2007, include the 30 research surveys commissioned from external consultants together with reports on the Review's two main consultation exercises: the community soundings (87 witness sessions with teachers, heads, parents, children and a wide range of community representatives, held in different parts of the country during 2007) and the submissions received from large numbers of organisations and individuals in response to the invitation issued when the Review was launched in October 2006.

The list below starts with the community soundings and submissions reports written by the Review team. Then follow the 30 research surveys commissioned from the Review's consultants. They are arranged by Review theme, not by the order of their publication. Report titles may be subject to minor amendment.

Once published, each interim report, together with a briefing summarising its findings, may be downloaded from the Review website, www.primaryreview.org.uk .

REPORTS ON PUBLIC CONSULTATIONS

1. *Community soundings: the Primary Review regional witness sessions* (Robin Alexander and Linda Hargreaves)

2. *Submissions received by the Primary Review*

PURPOSES AND VALUES

3. *Aims as policy in English primary education*. Research survey 1/1 (John White)

4. *Aims and values in primary education: England and other countries*. Research survey 1/2 (Maha Shuayb and Sharon O'Donnell)

5. *Aims for primary education: the changing national context*. Research survey 1/3 (Stephen Machin and Sandra McNally)

6. *Aims for primary education: changing global contexts.* Research survey 1/4 (Hugh Lauder, John Lowe and Rita Chawla-Duggan)

LEARNING AND TEACHING

7. *Children's cognitive development and learning*. Research survey 2/1a (Usha Goswami and Peter Bryant)

8. *Children's social development, peer interaction and classroom*. Research survey 2/1b (Christine Howe and Neil Mercer)

9. *Teaching in primary schools*. Research survey 2/2 (Robin Alexander and Maurice Galton)

10. *Learning and teaching in primary schools: the curriculum dimension*. Research survey 2/3 (Bob McCormick and Bob Moon)

11. *Learning and teaching in primary schools: evidence from TLRP*. Research survey 2/4 (Mary James and Andrew Pollard)

CURRICULUM AND ASSESSMENT

12. *Primary curriculum and assessment: England and other countries*. Research survey 3/1 (Kathy Hall and Kamil Özerk)

13. *The trajectory and impact of national reform: curriculum and assessment in English primary schools*. Research survey 3/2 (Dominic Wyse, Harry Torrance and Elaine McCreery)

14. *Primary curriculum futures.* Research survey 3/3 (James Conroy, Moira Hulme and Ian Menter)

15. *Assessment alternatives for primary education*. Research survey 3/4 (Wynne Harlen)

QUALITY AND STANDARDS

16. *Standards and quality in English primary schools over time: the national evidence*. Research survey 4/1 (Peter Tymms and Christine Merrell)

17. *Standards in English primary education: the international evidence*. Research survey 4/2 (Chris Whetton, Graham Ruddock and Liz Twist)

18. *Quality assurance in English primary education*. Research survey 4/3 (Peter Cunningham and Philip Raymont)

DIVERSITY AND INCLUSION

19. *Children in primary education: demography, culture, diversity and inclusion.* Research survey 5/1 (Mel Ainscow, Jean Conteh, Alan Dyson and Frances Gallanaugh)

20. *Learning needs and difficulties among children of primary school age: definition, identification, provision and issues*. Research survey 5/2 (Harry Daniels and Jill Porter)

21. *Children and their primary schools: pupils' voices*. Research survey 5/3 (Carol Robinson and Michael Fielding)

SETTINGS AND PROFESSIONALS

22. *Primary education: the physical environment.* Research survey 6/1 (Karl Wall, Julie Dockrell and Nick Peacey)

23. *Primary education: the professional environment*. Research survey 6/2 (Ian Stronach, Andy Pickard and Elizabeth Jones)

24. *Teachers and other professionals: training, induction and development*. Research survey 6/3 (Olwen McNamara, Rosemary Webb and Mark Brundrett)

25. *Teachers and other professionals: workforce management and reform.* Research survey 6/4 (Hilary Burgess)

PARENTING, CARING AND EDUCATING

26. *Parenting, caring and educating*. Research survey 7/1 (Yolande Muschamp, Felicity Wikeley, Tess Ridge and Maria Balarin)

BEYOND THE SCHOOL

27. *Children's lives outside school and their educational impact*. Research survey 8/1 (Berry Mayall)

28. *Primary schools and other agencies*. Research survey 8/2 (Ian Barron, Rachel Holmes, Maggie MacLure and Katherine Runswick-Cole)

STRUCTURES AND PHASES

29. *The structure of primary education: England and other countries*. Research survey 9/1 (Anna Riggall and Caroline Sharp)

30. *Organising learning and teaching in primary schools: structure, grouping and transition*. Research survey 9/2 (Peter Blatchford, Judith Ireson, Susan Hallam, Peter Kutnick and Andrea Creech)

FUNDING AND GOVERNANCE

31. *The funding of English primary education*. Research survey 10/1 (Philip Noden and Anne West)

32. *The governance and administration of English primary education*. Research survey 10/2 (Maria Balarin and Hugh Lauder).

... children, their world, their education

The Primary Review is a wide-ranging independent enquiry into the condition and future
of primary education in England. It is supported by Esmée Fairbairn Foundation,
based at the University of Cambridge and directed by Robin Alexander.
The Review was launched in October 2006 and aims to publish its final report in autumn 2008.

FURTHER INFORMATION

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Published by the Primary Review,
Faculty of Education, University of Cambridge
184 Hills Road, Cambridge, CB2 8PQ, UK

ISBN 978-1-906478-23-0

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