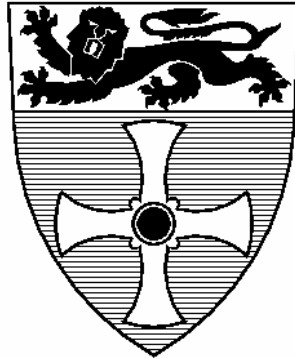


UNIVERSITY OF
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**Research into the theme:
'Transition between Key Stages in Schools'
Second Output Report**

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Section 1

Research Focus and Methodology

The Research Focus.

The purpose of this research study is to provide research-based evidence and information in relation to the theme 'transition between Key Stages (KS) in schools'. However, given that the panel has a specialist member for this theme, who will be familiar with key works and materials, it is not the aim of this research to provide *all* of the research-based information. Instead, we propose to provide research-based information on the gaps in specialist members' knowledge, and provide an academic review and analysis of such materials.

Research Context.

Transition between Key Stages¹ can coincide with transfer between schools but this is not exclusively the case. When moving from Key Stage 1 to Key Stage 2, and Key Stage 3 to Key Stage 4, most children will remain in the same school. The transition from Key Stage 2 to Key Stage 3 however is often coupled with a change in schools, although some regions maintain a middle and high school system in which pupils transfer at the end of year 8. The most complex transition takes place between Key Stage 4 and 5. Key Stage 4 marks the end of compulsory schooling and so offers many more alternative paths for students to follow.

Research Aims and Objectives.

Three issues were addressed in respect of this research theme:

1. What is known to be effective in enabling the transition of pupils between different institutions and phases of education?
2. The role of schools (and other educational institutions and organisations) in achieving these transitions
3. The value that can be added by local authorities.

The focus of this research project was on the third of these issues. In particular, the review was organised in terms of the value added by local authorities in the following respects:

- The enhancement of schools' efforts through appropriate forms of challenge and support
- The direct provision of services to children (e.g. Educational Psychology Service, Education Welfare Officers)
- Strategic planning and co-ordination activities, (e.g. bidding for and managing funding, promoting inter-agency collaboration, developing corporate approaches, liaison with central government and regional Government Offices).

¹ For a description of Key Stages and how these match on to school years and ages, please refer to the Glossary in Appendix 1

The research study identified evidence and materials that relate to transition and transfer, and we collated, collected, reviewed and critically evaluated this material. We focused our research to United Kingdom-based materials rather than internationally focused materials, although we did include any internationally focused materials where appropriate. In conducting our meta-analysis of materials, we paid particular attention to the following themes:

- A definition of the issue, in this case 'transition', by outlining its nature, scale and history and the factors that contribute to it;
- Identification of what local authorities should be seeking to achieve, in terms of overall aims or objectives, in promoting 'smooth' pupil transition,
- An outline of the issues involved in addressing pupil transitions which will affect the local authority's ability to develop and/or implement an appropriate response;
- A descriptive baseline of current practice based upon available quantitative and qualitative data;
- The essential characteristics of an approach that ought to constitute 'Best Practice' based upon normative considerations as well as empirical observations.

Methodology.

Our method for this study was three-fold:

- Brief bibliographic searches for academic research literature
- Written requests to Local Education Authorities (LEAs) and
- Follow-up telephone calls and discussions with LEA personnel.

We wrote to all LEAs in England, Northern Ireland², Scotland and Wales. An example of the covering letter is attached as an Appendix 2. A breakdown of those contacted, and those who responded to our requests for information can be seen below.

Table 1: Total of LEAs contacted during the research and the responses

| Areas | Number of LEAs Contacted | Number of LEAs who responded | Response Rate (%) |
|------------------|---------------------------------|-------------------------------------|--------------------------|
| England | 144 | 50 | 34.7 |
| Northern Ireland | 6 | 2 | 33 |
| Scotland | 32 | 14 | 43.8 |
| Wales | 22 | 3 | 13.6 |
| Total | 204 | 69 | 33.8% |

A complete list of all those LEAs who provided us with material to review can be found in Appendix 3.

Response Rates.

² Within Northern Ireland the equivalent body to a Local Education Authority is an Education and Library Board.

Generally, the responses to our requests for help with the research have been reasonably positive, with an average response rate of around one third. Very few LEAs declined to take part in the research, but justifiable reasons for their decisions were always given. These included involvement in other research projects (and hence no time to respond to this one) and transition and transfer not being an important issue. A breakdown of those LEAs can be seen below.

Table 2: Number of Local Education Authorities contacted who declined to take part

| Areas | Number of LEAs who have responded |
|------------------|--|
| England | 3 (2%) |
| Northern Ireland | 0 |
| Scotland | 2 |
| Wales | 0 (6%) |
| Total | 5 (2.4%) |

Factors affecting responses.

By far the biggest impact on responses was the timescale involved in the research. Despite access to, and use of, specific addresses of LEAs, it took considerable time for our letters to reach the 'relevant' or 'most appropriate' person. On average, this took around three to four weeks. However, once received, responses were rapid and enthusiastic, and individuals frequently took the time to telephone members of the research team to discuss the research before providing materials to review.

Another issue worth noting is that many LEA members we spoke to verbally described a great deal of activities in relation to the theme of transition. However, quite often there was very little 'formal' written evidence that reflected such activities. In addition, transition was often a named theme or initiative in many Educational Development Plans (EDPs), but as 'planned' areas for action rather than descriptions of what had happened, or was happening. Again, formal documentation in relation to 'planned' transition activities was scarce.

Materials Received and Reviewed

In the process of the research, we have reviewed just over 100 materials. An approximate breakdown by phase (or focus) of this material can be seen below. Some materials received, however, were inevitably cross-phase or covered all phases.

Table 3: Breakdown of reviewed materials by phase

| Phase/Focus | Approximate percentage breakdown |
|-------------------------------|---|
| Foundation, Key Stage 1 and 2 | 15% |
| Key Stage 2 and 3 | 60% |

| | |
|-------------------|-------------|
| Key Stage 3 and 4 | 8% |
| Post 16 | 4% |
| Targeted groups | 13% |
| Total | 100% |

Section 2

Context and Introduction

Concerns about the impact of transfer, the move from one school to another, on pupils have been expressed for many years. Schools and their LEAs have tried different methods of ensuring that transfer is managed efficiently and in the best interests of the pupils concerned. Over the past twenty years the emphasis has tended to be on the administrative procedures of transferring information from schools in one phase to the next and on the pastoral care of pupils during this period of change. More recently, the academic progress of children has been identified as an issue in the light of evidence showing a ‘dip’ or hiatus in pupil progress in the year immediately following transfer. Hargreaves and Galton (1999), for example, found that two out of every five pupils fail to make the expected progress in the year after transition from Key Stage 2 to Key Stage 3. The literature offers several possible explanations for this lack of progress. Explanations include difficulties adjusting to the new routine (although these are usually short-lived), the impact of the long summer break, repetition of previous work, new work that underestimates the capabilities of pupils, and organisational structures that give pupils a negative sense of themselves as learners. At the same time, studies of pupil attitudes suggest that the concerns expressed about the impact of transfer are also reflected in the individual progress made by some pupils as they move from one year group to the next within a school. The term transition is used to describe this movement from year to year within a school.

International comparison of issues linked to transfer and transition is limited and made more problematic by the complexity of the English system where transfer takes place at different points depending on the arrangements in particular regions. The management of the middle years, deemed to be anything from the age of 8 to 13, has attracted comment in recent reviews (Demetriou *et al.*, 2000 and Galton *et al.*, 2000). Recent work in the USA (Anderson *et al.*, 2000) demonstrates the shift in understanding from an assumption that problems associated with transfer were a symptom of developmental difficulties to an acknowledgement of the contribution institutional discontinuities make and how they can impact on different groups of pupils. In Norway, whilst secondary schools tend to be smaller than is typical in the UK, a study of pupil attitudes and perceptions of transfer reveals similar social concerns for pupils and anxiety about how they will settle in to the new environment. What is interesting is that although changes in teaching style are noted there is not the same level of reporting of the repetition of work previously covered in the primary phase. The report does not focus on the strategies used by the schools to manage transition and so it is not possible to identify how they overcome the ‘fresh start’ tendency, where teachers approach the teaching of their subject with no reference to previous learning in the primary phase, that is still so prevalent in English secondary schools.

In 1999 the Department for Education and Employment (DfEE) commissioned a literature and effective practice review on the effects on pupils' progress of these two related experiences: transfer and transition (Galton *et al.*, 1999). The review builds on the work of the Centre for the Study of Comprehensive Schools (CSCS) who surveyed practice on transfer/transition in 215 secondary schools and conducted its own survey of 11 LEAs. Existing strategies for the management of transfer and transition are grouped into the following categories:

- Administrative approaches (the exchange of information)
- Pupil-centred approaches (the preparation of pupils to meet social aspects of change)
- Curriculum continuity approaches (shared topics across the last term in primary school and the first term of the secondary school)
- Pedagogy approaches (the engagement of pupils in new ways of teaching and learning)
- Metacognitive approaches (helping children to know more about themselves as learners).

They found that only a small number of studies, including one or two by LEAs, have considered impact of transfer and transition on academic progress, as opposed to outlining administrative structures and identifying the pastoral needs of pupils. As a survey carried out by one English rural LEA in 1997 indicates, the type of information passed on at points of transfer reflects this concern with pastoral issues rather than academic progress: 80% of schools passed on pastoral information, around 50% passed on statutory assessment results and only 20% made use of portfolios of work. The need for a better balance between social and academic concerns at transfer as well as at various transition points is highlighted in the review.

Few LEAs in 1999 had established regular monitoring systems that would allow the progress of pupils to be followed across the various transition and transfer points. One practical measure being pursued in some LEAs was investment in computer systems for pyramids or partnerships of schools so those teachers have a common system for recording progress. In other LEAs, an English Southern LEA for example, the need for liaison activities to focus more closely on standards of work and the expectations of pupils had been identified so that all teachers share a common understanding of what constitutes high attainment in a subject at a given age. The review recommends that attention should also be given to the development of extended induction programmes such as the 'learning to be a professional pupil' programmes designed to help pupils cope with discontinuities in teaching approaches recommended by Lahelma and Gordon (1997). LEAs could establish and share baseline data on the impact of different approaches to managing transfer and transition so that schools have a benchmark.

Schagen and Kerr (1999) looked at three aspects of transfer from Key Stage 2 to Key Stage 3 in another major review of provision for NFER. They also found that whilst systems for pastoral care were well developed, provision for curriculum continuity and individual progression was problematic. The National Curriculum has not, as was originally intended, solved problems associated with curriculum continuity across points of transfer. It has not done so mainly because of the persistence of the 'fresh

start' attitude amongst secondary teachers, who prefer to lay the groundwork for their subject area in Year 7 with little regard for the pupils' previous learning. Also, the differences in teaching approaches in the different phases have an impact on the curriculum.

Eleven LEAs were included in the NFER evaluation and their potential to act as 'honest brokers' between schools in the current climate of competition brought about by open enrolment and parental choice is identified. LEA-led initiatives would also offset any perceptions that the secondary schools were attempting to dictate to feeder primaries. One key role for LEAs could be the facilitation of cross-phase working groups with a more focused agenda and clearer outcomes. Other activities which have proven beneficial in achieving effective transfer are cross-phase moderation exercises to look at the capabilities of a range of Year 6 pupils and observation of teaching methods. The LEA also has a key role to play in encouraging more secondary schools to make use of transfer data, evidence from a range of studies shows that the use of such information is minimal, by negotiating a standardised format for such data and acting as a clearing house. However, any attempt to produce common transfer forms are thwarted if there is insufficient consultation with schools. The provision of a national transfer form co-ordinated by the LEAs suggested as an even more attractive option that could accommodate transfer across LEA boundaries. Finally, the LEA could alleviate the pressure on primary schools by co-ordinating induction programmes across the secondary schools within its remit.

Evidence from LEA Educational Development Plans (EDPs) indicates that there is a growing awareness of the need to move beyond bureaucratic procedures and the provision for the pastoral care of pupils at points of transfer. Reference is made to the need for cross-phase liaison to develop better understanding of approaches to teaching and learning and a number of LEAs highlight the need for cross-phase moderation to assess pupil capabilities. However, in most instances plans are not yet fully operational and whilst the focus still tends to be on transfer from Key Stage 2 to Key Stage 3 there is a trend towards considering transition from Key Stage 1 to Key Stage 2 and also from early years provision to school.

The recent Green Paper Schools Building on Success emphasises the need for smooth transition between early education and the greater formality of school. Recommendations include the Foundation Stage to be located in one place and clusters of early year's providers to be linked to one school. The need to promote a more consistent approach to pedagogy is acknowledged in the suggestion that there should be staff exchanges and joint approaches to professional development across the phases. The recommendation that there should be a common transfer form has been taken up and is now available electronically. In 2002 there will be a new 'Common Basic Data Set' that will facilitate the tracking of each individual pupil's progress across changes of school. Other initiatives outlined in the Green Paper reflect the findings of the two recent major reviews of provision and include common schemes of work in core subjects across Key Stage 2 and Key Stage 3 and joint training for primary and secondary teachers. LEAs are identified as having a key role to play in co-ordinating initiatives and through their remit to secure school improvement and tackle failure.

Section 3

Early Years - Foundation, Reception and Key Stage 1

There was little response from LEAs with regard to Foundation to Key Stage 1 transfer and only light response regarding Key Stage 1 and 2 transition. Of the materials we reviewed, these only represented 15% of the total. However, It is unlikely that this response reflects the reality of work nationally on transfer/transition from Home to Nursery/Nursery School, Nursery to Reception classes, and Foundation stage to Key Stage 1. There are many settings nationally (no evidence received here) which have developed systems of links with parents prior to children entering Nurseries and processes, e.g. 'staggered entry'. This means that staff can give more attention to each new child and parent at admission into 'school' whether that is at Nursery stage or Reception.

It may be the case that the statutory (and public) reporting of results at the ends of Key Stages leads LEAs with limited sources of funding to prioritise and support projects which focus upon these stages of transition. Requests to LEAs for their information on transition may have been interpreted as relating only to end-of-Key Stage rather than a broader definition to include pre-Foundation and Foundation stages and 'within Key Stages'. If such documentation is separate from Primary/Middle/Secondary phase transfer material, this may account for lack of evidence being received.

Types of LEA support - level 1

One Scottish LEA has worked to identify 'the most appropriate system of record keeping and Baseline Assessment for Scottish schools', based on seven principles:

- ensuring clarity of purpose
- depending on professional judgement
- starting with the pre-school year
- including all children in Scotland
- using current curriculum guidelines
- reflecting good practice
- involving parents.

The resulting record and guidelines identify aspects of learning and develop the following principles that emanate from the themes in published curriculum documents (pre-school and 5-14 curriculum):

- effective communication at all levels
- curriculum planning & organisation which builds on previous knowledge and experience and affords the flexibility to meet individual needs
- partnership with parents
- developing practical strategies for settling and inducting children into new situations

- maintaining an ethos which aims to provide staff development activities and which values children and adults as individuals
- Staff development activities and case study exemplars are included. A good section on role of parents highlights the fact that the constant throughout each transition is each child and their parents.

A strong sense comes through of the importance of sharing views on the learning environment, ethos and organisation of the school and aiming for consistency and well-planned induction, e.g. through case studies describing strategies— one example addresses ‘how to play’, with different patterns of play in Nursery and Primary so preparing for this in the last term in Nursery. Staff and children visit a Primary playground and the Nursery staff develop strategies to wean children gradually away from Nursery play patterns using bikes, etc. to those where they learn to play together.

Following recognition of inconsistencies in transfer documentation, there are examples of LEAs providing packs that detail both statutory and recommended documentation at transfer, for example in a Southern English Authority and a Northern English Authority. It is the latter area where Foundation stage transition is a focus in their work 'Charter for Transition Project'. This was developed by adopting a ‘mini-projects’ approach, where home-school liaison was featured to develop pre-school practices such as the parent and child using books, songs, etc. together as a model which could be disseminated to other schools in the LEA. This project is currently in its (3rd year) dissemination stage of its 5-year duration, now implementing ‘policy and good practice’ developed in its 2-year pilot, to all schools in the LEA.

Types of LEA support - level 2

Some LEAs, including three English urban Authorities, have secured funding from sources such as the Single Regeneration Budget (SRB) and the Standards fund to develop transfer of information and projects. For instance, the 'clustering' of schools to devise common transfer policies and support school-based moderation of understanding of levels of attainment where teachers across phases and schools compare judgements on school work, with the aim of increasing the teachers' understanding of levels of attainment. The 'Charter for Transition Project' is such an example, having SRB funding and also a 'Block Fund' available to support school-based developments.

Effective use of documentation

Two urban LEAs in the North of England have run projects emanating from the QCA 'Building Bridges' recommendations; these have documentation and liaison processes developed in pyramids of schools. A Southern England LEA's transfer documentation lists minimum information for transfer to meet statutory requirements and to enable schools to benefit from the knowledge of pupils acquired by teachers in the feeder schools. This LEA also supports local arrangements between schools that have *developed* the minimum LEA materials to reflect local needs.

Issues

LEAs have some issues in common, for instance concordant documentation that needs to be manageable and useful in assuring consistency within the county. Minimal coverage attends to individual pupils' achievements and coverage of subject by transferring pupils described by class or group and some also have the issue of assuring consistency of curriculum experience for pupils transferring at different ages (where there is a range of school types within a county such as the two and three-tier systems).

Students often have to handle adjustments to transition between stages of schooling on their own. Children from families with low-income, from culturally diverse families, and from families experiencing problems are most likely to change schools and are at greater risk as they may not be able to cope with difficulties at school as well as at home. 'Continuity' is raised in Galton *et al.* as an aspect which although being an assumed virtue in terms of the curriculum, may signal also a case for knowing when 'discontinuity is important for instance to mark a new stage in pupils' education'.

One urban LEA in the North of England mentions discontinuity as a potentially negative issue with regard to Cultural, Organisational and Personal aspects of transition from the pupil's viewpoint, but also acknowledge that not all children react adversely to change. They point out that systems for managing transfer whilst meeting the needs of the majority need to pay most attention to the minority to minimise possible detrimental effects on behaviour, attitudes and performance. Effective management of the process can result in strategies to help children have less-unsettling discontinuity and to cope better with it when they do.

There is some evidence (in LEA documentation mentioned above) of factors that have resulted in improved transfer practice. These broadly fall into categories of:

- consistency in practice both in planning and teaching;
- common understanding of standards through use of NC level descriptors;
- use of ICT to ease transfer of information; use of assessment data at all levels i.e. pupil, school comparative data, LEA and nationally; and
- pastoral support prior to and post transfer.

Pupils covering work that they have already been taught has been identified as an issue if transferred information is not used effectively to determine appropriate curriculum continuity. Whilst documentation and projects tend to report on this aspect especially at Key Stage 2/3, it is acknowledged as an issue at all stages of transfer. Reductions in LEA budgets have resulted in lack of expertise and resources to carry out evaluations of impact of various transfer strategies identified across schools.

Section 4

Key Stage 2 to Key Stage 3

As can be seen from the Table 3 in Section 1 of the report, the vast majority of material received from LEAs (approximately 60% of the total) focused on issues connected with pupils changing schools at the end of Key Stage 2 (age 10-11). This is unsurprising given that it is the most common transfer point for pupils and within the majority of LEAs it is only time that large cohorts of pupils move between schools.

As seen in Section 2, there has also been significant research in this area (in particular, the work of Galton) and concerns raised as to a drop in achievement, or at least no gain, during Year 7. The national concern has impacted upon the standards, which need to be attained by trainee teachers before they can be recommended for Qualified Teacher Status (QTS). One particular Standard requires, for secondary trainees, that:

'Those to be awarded QTS must, when assessed, demonstrate that they understand, for their specialist subject(s), progression from the KS2 programmes of study'.

There are similar requirements for primary trainees. Government publications (QCA, 1998) have raised awareness of this issue and suggested some strategies which may help to reduce the reported detrimental effects. Many of these strategies have been at a school level. An example of school-level action is the use, by more than 100 schools in a city in the North of England, of a transition programme designed by two educational psychologists. The programme sets out a 2-year planning process (final year primary and first year secondary) for addressing the emotional and social needs of the pupils. It tries to emphasise that transition is not confined to the summer term in year 6 and then first few days at secondary. The pack is organised into a number of sections, which have an overview and then a series of resource ideas. The sections are the timeline, schools, teachers, pupils, parents, and pupils with distinctive needs, dealing with change. It is seen as developmental and to be customised by schools in use.

There are significant areas of good practice exemplified in work carried out by LEAs.

Foci of Support by LEA

There are three main foci for LEAs within the context of effective liaison at the Key Stage 2/3 interface: pastoral issues; administrative details and curriculum links.

- *Pastoral issues* are concerned with addressing younger pupils' fears of 'big school'. These concerns may include not being in the same class as their friends, worrying about 'initiation' ceremonies or simply getting lost.
- The *administrative aspect* tends to be focused solely on the efficient transfer of pupils' personal and academic details between schools. There is a strong move

towards more effective use of ICT to lighten this load. There is little mention as to how the data should be used once received.

- The *curriculum focus* has two distinct dimensions. The first relates to reducing the chance of gaps being left in specific subject knowledge or the avoidance of repeating topics. While the second addresses the potential change in teaching and learning style experienced by pupils when they change from primary to secondary school.

Levels of Support from LEA

Within each of these foci there appear to be three distinct levels of support.

- The highest level of support has been termed *level 1*. The LEA provides documentary evidence, through its own research, of an area in need of development. This is then shared with schools. Strategies as to how to address the identified need are discussed. This may result in further work at LEA level, such as the funding of school level initiatives or the production of a document to support schools in addressing key areas of concern. Level 1 support therefore can be seen as an '*Initiate and Facilitate*' role.
- In the next level of support, *level 2*, the LEA identifies good practice within their schools through meetings and/or visits. This is then collated and shared with schools – usually in the form of a report or checklist rather than through training or conferences. Level 2 support therefore can be seen as '*Identify and Disseminate*'.
- The lowest level of support, *level 3*, is exemplified as follows. The LEA collates the transfer documents from schools and puts together a document that combines all the requirements of their schools. This is then re-distributed to all head teachers so that a common format prevails across the LEA. This sometimes includes a move towards more effective use of ICT to transfer pupil data. Level 3 support can therefore be seen as '*Collate and Combine*'.

Specific examples of the different foci and levels of support

An example was found of one LEA combining all three foci at *level 1* in the strategies adopted by an urban LEA in the North East of England to address lowering progress from Key Stage 2/3 transfer. This was notable in its more complex approach to the issue of transition. Key features included: interest in pedagogical issues, different responses being encouraged for different schools, funding given to schools for transition, issues of children's confidence and social skills included - not just communication regarding National Curriculum subjects.

As mentioned at the start of this section there are many areas of good practice within LEAs. The examples below can provide only a flavour of their work. It has not been possible to include all the examples of good practice which have received.

Level 3 – pastoral

- One LEA in the North of England has supported schools to re-organise their teaching so that 50% of the Year 7 timetable is taught by the same teacher in the form's base-room.

Level 2 – pastoral

- An urban LEA in the North West of England has worked closely with other agencies to identify good practice in its region. These have been circulated to schools. Key activities in this section include:
 - i. taster days for Year 6 pupils;
 - ii. joint secondary and primary activities such as sports or arts events;
 - iii. using drama to look at the issues and feeling associated with transition itself;
 - iv. 'peer mentoring' of Year 7 pupils to allay the fear of the Year 6 pupils.

Level 3 - administrative

- As a new unitary authority, one Southern English LEA took advantage of its new status and developed a common electronic transfer document for use between itself and its primary and secondary schools. Academic data is sent to the LEA for additional analysis before being combined with personal details and re-distributed to schools.

Level 2 - administrative

- An LEA in the North of England was not alone in finding that secondary teachers mistrusted data received from their primary colleagues – either because they felt it was unreliable or difficult to interpret. This has been partially addressed by funding secondary teachers to visit their primary colleagues' lessons and the encouragement of more team teaching between Year 6 and Year 7 teachers in the summer term.

Level 1 – administrative

- One borough of London LEA has been proactive in working with neighbouring LEAs to improve inter-borough transfer LEA responsibilities. They have produced a document that clearly sets out the roles and responsibilities of all parties with respect to transfer. LEA roles include; management of the data transfer process; publishing of guidance for schools and the provision of any necessary training; liaison with neighbouring LEAs (a particularly important role given the mobility of pupils); securing funding for further innovations and reporting on the effectiveness of the transfer process.

Level 3 - curriculum

- One Welsh urban LEA has funded a project to explore links between Key Stage 2 and 3. It provided a review of current practice among a selection of secondary school clusters under three headings: co-ordination of transition programme;

develop curriculum links; improve communication (schools, pupils, parents, governors). The report encourages cross-phase projects for pupils and joint planning (cross-phase) in core subjects. Detailed appendices include draft liaison policies and action plans.

Level 2 - curriculum

- One Southern England County LEA has supported schools with an emphasis on curriculum and developing a common understanding of teaching, learning and the assessment of attainment across Key Stages 2 and 3. This has been realised through joint moderation and discussion of the interpretation of National Curriculum levels and tests. A planning model has also been developed to facilitate cross phase planning and to support the continued development of pupils – initial trials have been carried out in science and geography. One of the main conclusions from the science study is the tendency, in both phases, to focus on tasks and activities rather than the scientific thinking required.
- A Welsh urban LEA has funded partnerships, initially in three secondary school pyramids, to focus on raising attainment in Year 7 numeracy or literacy by learning and building on good practice in Year 6. They were not alone in finding, as a result of the pilot, that they needed to be more prescriptive in identifying narrower, more focused target, e.g. reading rather than literacy. The project has since been extended to five other secondary schools.
- A similar approach, and findings, informed another London borough LEA. Although they have also reported receiving positive feedback from the parents of those involved in the study.

Level 1 - curriculum

- One LEA in the South East of England provided support to enable teachers to revise schemes of work in core subjects to ensure Year 6/7 continuity. As part of this work, there was an emphasis on target setting and benchmarking as a way of tackling low expectations. Working with tracking tools produced by Homerton College facilitated this work.
- Further good practice in this area is exemplified by one urban LEA in the North East of England. Here the foci were informed by published and internal research into pupils' achievements following transfer into Key Stage 3. Across six clusters subject planning included literacy, Modern Foreign Languages (MFL), History/Geography, ICT and numeracy. Teachers, advisers and Higher Education Institute (HEI) staff working together on the projects found that there were real benefits in terms of the development of cross-phase professional dialogue and sharing of good practice on teaching and learning.
- A similar approach has been taken by a Southern English LEA. Areas of concern were identified and researched and the findings shared with school based colleagues. The LEA then funded sixteen case studies, with subject specialist

advisers working with schools to develop new ideas. Subjects addressed include music, geography, science, maths and English.

- One LEA in middle England has initiated a joint project with an HEI and another LEA focusing on improving teaching skills in delivering and assessing the Scientific Exploration attainment target at Key Stage 2/3. The project raised teachers' awareness of differences in their teaching; their differing expectations of pupils and the need for teachers cross-phase to discuss and identify different concepts and skills that should be introduced at Year 7. They have also used the Advanced Skills Teachers (AST) scheme to encourage the sharing of expertise. 15 ASTs will be distributed among cross-phase groups of schools. LEA will play a strategic role in the co-ordination of 'outreach' activities and also be involved with head teachers in the monitoring and evaluation process.

Overview and General Issues

As reported by Galton, Ruddock and Gray (1999), the vast majority of LEAs either have no monitoring in place with respect to the impact of their transition related initiatives or have not had programmes in place for a sufficient period of time in order to draw valid conclusions. The issue of monitoring and evaluation in this area is complex. No educational innovation is carried out in isolation of other developments. In this case, the introduction of the National Numeracy and Literacy strategies with their concurrent training and active involvement of LEA staff in this cross-phase initiative means that it is very difficult to factor out the actual impact caused by improved transition.

However, it could be argued that anything that facilitates communication within and between schools is beneficial. Evidence from LEA projects suggests that increased professional contact between colleagues in primary and secondary schools raises awareness of, and respect for, the work of each sector. This should go some way in addressing the key issue of the lack of trust, by secondary teachers, in the judgements made by colleagues in primary schools. Joint teaching of pupils also appears to have more positive impact on continuity and progression than a 'paper chase' of portfolios. These appear not to be used by secondary teachers to inform their planning.

This lack of use is perhaps not surprising. Large secondary schools may take 350 pupils from a dozen feeder schools. If there is any doubt as to the quality of the transfer data there is unlikely to be much motivation to disseminate it amongst all year 7 teachers.

Some Government initiatives, such as the DfEE's Best Practice Research Scholarships (BPRS) list 'managing transition from primary to secondary school' as one of its priority areas. However, as the projects are expected to run from September to August, it is unlikely that this potentially powerful mechanism for developing, researching and disseminating good practice will produce ideas, which follow through even the short-term impact of initiatives in this area.

Section 5

Key Stage 3 to 4 and Post 16

In comparison with KS2 and KS3 transfer, fewer materials (only 8% of the total) were received from LEAs focusing transition from Key Stage 3-4. Very few materials (only 4% of the total) were relevant to Key Stage 5 and beyond (i.e., post-16).

Key Stage 3 to 4

The review of the available materials suggests that only a few LEAs have made strategic developments on transition at Key Stage 3/4, while the majority of the LEA focus is on transfer at Key Stage 2/3. Some international studies, in spite of the differences in educational system and consequently different age points for transfer/transition, have offered some implications for Key Stage 3 and 4 transition in the UK. A few studies which examined the experience of transfer and transition from the students' points of view have provided useful insights into ways in which to help students improve their attainment at Key Stages 3 and 4.

Our review suggests that LEA support and school activities have focused on ensuring continuity and progression in the curriculum. At the same time, efforts are directed in order to sustain motivation and commitment to learning of pupils 'at risk' at Key Stage 3.

Difference in function

Galton (2000) has made a very useful distinction about functions between primary and secondary schools, pointing out primary and secondary schools have distinctively different functions in terms of pupil education:

‘The main function of the first school Stage, (known as primary or elementary), is to impart basic skills of literacy and numeracy. In contrast, the main function of the second school Stage (known as senior or secondary) is to provide a broad and balanced curriculum that emphasise the acquisition of knowledge and conceptual understanding across a range of subjects’ (p. 321).

Therefore, Galton said, the transition or transfer of students from one school level to the next raises issues about curriculum, teaching and learning. For instance, how can a balance be struck between ensuring that students move from one school level to the next with minimum levels of anxiety while at the same time having procedures in place to emphasise the links in the curriculum and in pedagogy. In particular, Galton draws our attention to students' personal development from childhood into adolescence and its association with points of school transfer/transition, and their account of these 'status passages' and insights into their academic behaviour.

Similar evidence was provided by other studies confirming that a drop in pupils' academic performance occurs not only at Year 8, but at Year 9 as well. Demetriou *et al.*, (2000) look at the impact of transition and transfer on pupils' academic performance. Their study is unique in that it looked at the issues of transition and

transfer through the views and experience of students. Transition emerges through the interviews as:

‘... a neglected but important experience, reflecting the difficulties some students have in sustaining their commitment to learning and in understanding continuity in learning’ (p.425).

In their review of recent work on transfer and transition, they pointed out that there was a lack of attention given to sustaining progress across the years in-between:

‘We are so pre-occupied with the ‘entrance and exit’ years that, in comparison, relatively little attention is given to sustaining progress across the years in between’ (p.428).

Their data suggested that there are ‘twin peaks’ in students’ engagement, - at Years 7 and 11, and ‘in-between years’ (Years 8 and 9) are times when students can easily lose commitment to school. In comparison to Key Stage 2/3 transfer, issues concerning transition at Key Stage 3 and 4 seem to have a different focus. Although some students in the three-tier-system also need to experience learning in a new environment, transfer at the end of Year 9 seems to make transfer a lot smoother and less problematic than transferring at the end of Year 6 (Ward, 2000). A couple of studies suggest that students perform better in Year 10, as it is the year when the work for the Year 11 examination starts (Demetriou *et al.*, 2000). Therefore, strategies to ensure Key Stage 3 and Key Stage 4 transition seem to focus on sustaining and improving students performance at Key Stage 3, and preparing them for Key Stage 4.

Galton *et al.* (1999) proposed some main strands of activity concerning transition and students’ attainment:

1. Establish a diagnostic profile of progression and identify where the ‘dips’ do in fact occur.
2. Develop strategies to discourage the impact of friendship groups on the formation of anti-work culture in Year 7 and 8.
3. Look at ways teachers could help those pupils in Year 9 and 10 (with boys in the majority) who have ‘messed about’ and fallen behind, and change them to be committed to work again.

Role of LEA and provision of support

In the Green paper (DfEE, 2001) the future role of an LEA is defined as providing certain essential local services – school transport, Special Educational Needs, co-ordinating of electrical data, and serving as an agent/regional broker for effective school improvement.

- *Making strategic planning for development work and improvement on transition at Key Stage 3/4.*

One North-Eastern English LEA has identified raising attainment in Key Stage 3 and 4 as one of its priorities in its EDP (1999-2002). It is aiming to improve students’

attainment in the core subjects, and boys have been identified in particular as a target group. Of the eight activities that have been outlined in order to raise attainment in Key Stage 3 and 4, one is to develop and promote systems to improve continuity and progression within and across Key Stage 3 and 4 phases. This particular LEA is going to develop generic and specific guidance on 'Scheme of Work' to ensure continuity of education within secondary schools. In addition, the LEA also focuses on nurturing 'professional learners' (Galton, 2000) in students. The LEA is to develop cross-phase liaison work to support and disseminate good practice in promoting students' personal development plans in key skills learning and portfolio at transfer from Key Stage 3-4 within Personal and Social Education (PSE) curriculum.

- *Providing training and dissemination of good practice to schools*

One Midlands County Council has provided support and guidance on a formative induction programme. This LEA has also organised and provided training courses open to all teachers in the county to look at cross Key Stage issues. A Southern English County Council has organised a collection of case on transfer activities for schools within the county to share or adopt in line with their development priorities and needs.

- *Co-ordinating electronic data of pupils across the LEA*

One Southern English County Council is responsible for co-ordinating all pupil-level data, which is used to chart progress and make pupil level targets. A Midlands County Council has designed a common pupils transfer record form, but schools are given freedom to use other formats. In fact, few schools are reported to use the LEA version.

- *Initiating projects on innovative work or undertaking reviews and evaluation on transition*

A Southern English County Council has established links with Homerton College and has provided training in evaluation methods on transfer to all schools. The training is structured around five key questions addressed by the LEA's Transfer Review in 1996. Advisers in this County Council tracked selected pupils and interviewed them over a period of two years.

Examples of good practice on Key Stage 3/4 transition

The limited material we received suggests that improving continuity and progression within and across Key Stage 3 and 4 should be the focus of transition. Leicestershire County Council has stood out as one authority which has made a series of strategically directed developments in the last couple of years over the issues on transition from Key Stage 3-4. Their work suggests three foci concerning successful transition:

- *Seamless curriculum and continuity of teaching and learning styles*

A Midlands County Council highlights the need to develop an appropriate work ethic - teacher exchange activity should be used to model the lesson structures and learning

'conventions'. Ideally, there should be a common teaching and learning policy across high and upper schools. Accelerated learning has had an impact in some secondary schools in this County through its focus on classroom climate.

- *Pastoral care*

A Midlands County Council includes counselling in the induction to ensure good communication between teachers and pupils, especially focusing on teachers showing an interest to pupils and listening to them.

- *Peer mentoring*

Currently one Midlands County Council has a peer-mentoring programme, Year 10 pupils were mentored by Year 11 pupils. This LEA is going to involve Year 10 pupils in supporting Year 9 pupils through transfer by developing a programme of 'future counselling'.

- *Target setting to pastoral as well as academic sphere prior to transfer*

A Midlands County Council has suggested applying 'target-setting' to pastoral as well as the academic sphere prior to transfer so that pupils have a set of personalised aims focused on the transfer experience itself and how best to manage/learn from it. They have used video diaries as a means of conveying information across the phases and to minimise logistical problems.

Based on the review of Key Stage 3-4 work, this County Council made the following recommendations:

- Designing 11-16 schemes of work across the curriculum.
- Establishing cross phase curriculum groups.
- Sharing contract, across high (10-14) and upper schools (14-19) where possible and practical.

A survey conducted by one LEA in Scotland on parents and teachers' views on transfer expressed concern on a 'dip' at Key Stage 3. They perceived a similar drop in attainment in S2 (Year 9) as in S1 (Year 8). Following the survey, a working group was set up and ten possible strategies were suggested to secondary schools in order to improve pupil attainment. Some of the strategies included starting the Standard Grade early in Year 9, improving continuity of staffing from S2 into S3 and 4, mixed age teaching, and decreasing the number of teachers teaching S2. However, it was not clear what support there would be from the Council.

A similar strategy of introducing Standard tests early in Year 9 was reported by one County Council in Southern England. This LEA has developed work (using fieldwork) to bridge years within and across Key Stages. It has a three tier-system, and pupils at the LEA transfer from middle schools to high schools at the end of Year 8. One particular High School has initially run fieldwork days for all Year 8 pupils during the latter part of the summer term as part of transfer arrangements since 1995. A number of follow-up activities have been developed by the feeder schools and are used in different ways at the end of Year 8. In 1999, a small unit of work was introduced into the beginning of Year 9, specifically designed to follow up these fieldwork activities, aimed to bridge the 'gap' between Year 8 and Year 9. Positive feedback was reported from both students and parents, suggesting that the unit was

successful in helping student to transfer from a pastoral perspective, building on skills and prior learning, thus sustaining pupils motivation in learning. The high school is currently developing a fieldwork activity for Year 9 students to specifically try and develop a 'bridge' to the first GCSE unit of work.

One Midlands County Council conducted a review of continuity and progression issues at Key Stage 3-4 in 1997-8. The review was set against three contextual factors: local government re-organisation; high profile nationally of transition/transfer issues, and increased availability of reliable comparative data.

Overviews and Issues

Transition at Key Stage 3/4 seems to be less targeted by LEAs in their Educational Development Plans. One explanation could be that transfer at Key Stage 2/3 is seen as a national priority. In comparison with activities and initiatives to ensure smooth and success transfer at Key Stage 2/3, our review seems to suggest a different foci on transition on Key Stage 3/4. There seems to be less focus on pastoral, and more on continuity of curriculum and progress. However, although when pupils move from Key Stage 3 to 4, they usually do not face adaptation into new schools, they still need to meet new teachers.

Our review highlights the 'twin peaks' in pupils' engagement in learning, and 'in-between- years' concerning students' personal development and potential impacts they may have pupils' withdrawal from and lost commitment to learning. A couple of LEAs have introduced GCSE work earlier to get pupils prepared for Year 10. Some surveys found a great deal of commitment to achieving effective liaison, but this does not appear, at least, to have an impact on attainment in Key Stage 4.

One Midlands County Council - in its review of Key Stage 3/4 work - has concluded that inadequate teacher knowledge and understanding across the Key Stages, and the lack of time to focus on curriculum continuity, could have an impact on the fall back in attainment from Key Stage 3 to Key Stage 4 in their schools. However, it also recognises other associated factors such as institutional factors and pressures of external exams.

Post 16

Materials relevant to the post-16 phase (i.e. Key Stage 5 and beyond) represented only 4% of the materials we received and reviewed. Of these materials, none were post-16 specific - but were more generic by referring to *all* phases - and most materials were Educational Development Plans (EDPs).

Many LEAs in their EDPs listed priorities, or activities which focused on 'improving continuity and progression' across all areas and phases of schooling, but inevitably, then focused on Key Stage 2/3 transition. These included several urban LEAs in the North of England. One LEA in the North East of England, as one particular example, in their EDP (1999-2002) list one activity as 'Support schools (pre-school, and further education institutions) in their efforts to develop a culture within which potential barriers to learning are minimised' (p.62). They aim to establish effective strategies to ensure continuity and progression between pre-school experience and Key Stage 1,

between Key Stages 2 and 3 and between Key Stage 4 and further education institutions or sixth forms. However, at the time of writing these were planned activities and also, we did not have access to any further documentation which outlines, or reviews the plans for, any of the strategies.

Potentially, the work of the Learning and Skills Council (LSC) - of which there are 47 local LSCs - could help to impact on the issue of transfer and transition in the post-16, or post-compulsory sector. The LSC aims to bring a new strategic focus to lifelong learning and will be responsible for planning, funding and improving the quality of post-16 learning up to University level. One of the main aims of the national LSC is to develop national partnerships - so that there is a closer understanding of the needs of key partners - and agree strategies for working together with local authorities and LEAs. In particular, the LSC proposes that Local Authorities will be central partners in the new post-16 arrangements - which will mean that they will have a greater strategic influence over post-16 in local areas than is currently the case. LEAs will be responsible for submitting strategic plans that demonstrate how they will contribute to securing adult and community learning for their area.

The work of the LEAs in relation to the LSC meeting their aims will, in time, become more documented, as at the time of writing, it is early days yet. One example to date of a joint LEA/LSC initiative is within a large city in the North of England, which established a post-16, women-only centre in an area where there is a high proportion of residents of Pakistani origin. Previously, there was no such provision in the locality, and the curriculum is heavily based on local employment opportunities. Although just one example, this does appear to fit the trend that the partnerships between Local Authorities, LEAs and the LSC will focus on innovative ways of giving access to learning opportunities to traditionally excluded groups. However, the LSC specifically refer to the transition from school to other post-16 provision - but states that such strategies and policies will be developed.

Section 6

General Issues, Effects and Good Practice

Some of the materials we received and reviewed (approximately 13%) were difficult to classify as one particular phase, or with one particular focus. This section of the report, therefore hopes to encompass this material, and has two main strands: barriers to effective transition and general issues, effects and good practice for particular 'targeted' groups.

Barriers to effective transition

Developments such as Local Management of Schools open enrolment, specialist schools and increased emphasis in policy on parental choice pose problems for LEAs seeking to manage transfer and transition. However, the absence of clear links between feeder schools need not deflect LEAs from their mediating role. LEAs can respond to the challenge of open enrolment by focusing their attention on working across their region rather than attempting to maintain school pyramids. Lack of earmarked funding for liaison work has been secured by some LEAs through a system of ring-fenced 'matched funding' that encourages schools to pool resources so that provision can be co-ordinated. The Standards Fund now makes provision for cross-phase work and LEAs are also able to target funding for school improvement on supporting the effective management of transfer and transition.

However, even when resources can be diverted, the LEA may not have access to the necessary expertise to carry out evaluations. Improved access to examples of best practice in transition and transfer would enable LEAs to deploy limited resources more effectively and set appropriate benchmarks for schools within their region. Previous experience of LEAs supporting schools in the management of transfer suggests that the real challenge lies in ensuring that cross-phase and inter-school issues remain high on an individual school's agenda once the period of innovation and funded interventions has passed.

General issues, effects and good practice for particular 'targeted' groups

A key question is whether transition or transfer differentially affects particular groups of children – and whether strategies to ameliorate difficulties need to be targeted at a particular way at such groups. This section examines both evidence and current practice. Of the total materials we reviewed, materials with this particular focus totalled 13%.

Galton *et al.* (1999) suggested that 'transitions and transfers have different effects on different pupils' (p.16), quoting evidence from a follow-up study of pupils into Years 3, 4 and 5, reported that pupils from certain groups made less progress on attainment tests (Minnis *et al.* 1998). Galton *et al.* suggest a cumulative effect – that existing gaps begin to widen. Minnis *et al.* suggests vulnerable groups include "boys, for example, in relation to progress in reading and spelling and girls in relation to written and mental maths". Also, those on free school meals, pupils with special educational

needs, pupils less fluent in English, and those from some ethnic minority groups. Research is also in progress, but has still to report, on transition issues for children of travelling families (Derrington 2001). One of several projects being carried out by Galton *et al.* (1999) is one looking at ways to help pupils in risk of disengagement from learning. A meta-analysis carried out of United States research found differential effects on maths progress after the summer break of children from different income groups: with a large negative effect on children from low income groups, and a small negative effect on children from middle and high income groups.

Although there is some research suggestive of different effects on different groups of pupils, studies are few and there is no longitudinal research demonstrating that transfer leads to widening gaps. Research is lacking in detail on any particular group. For example, there are likely to be very different issues for the effects of transfer on children with different 'special educational needs', or for boys from families with different levels of cultural capital.

Many LEAs appear to be focusing attention on data collection to facilitate improvement in transition from Key Stage 2 to 3. There seemed little evaluation of the information such data can provide as an indicator of children's progress. A senior educational psychologist from one London Borough Council carried out a project in 1999 looking at the usefulness of a variety of test scores – and found little indication that test scores were responsive enough to be useful.

There are several examples from documentation on LEA responses to transition of differential responses to particular groups despite a lack of evidence from the literature that such responses were needed, or of the nature of a 'best' response. Such interventions include the following:

- A report from an Education Action Zone in the North West of England, which looked at the views of school of 65 children from 12 schools, the children were deemed to be at risk (from data on attendance, parental influence, attainment, and classroom behaviour). Children were asked about what they expected at the new secondary school, what were their concerns, and what would be their actions if faced by a problem. They used such data to identify possible interventions to ease the transition process. However, there was no evidence in the material available to the review team on the reliability of the chosen 'at risk' indicators, or evaluation of interventions to find effects on progress of 'at risk' children.
- There were several examples of interventions to take account of perceived needs of particular groups of children. For example, transition arrangements in one Scottish Council for entry to school have modifications in the suggested process for schools to use with children deemed to have special educational needs and those who speak Gaelic or are from ethnic minority groups.
- Many LEAs are targeting low attainment at the end of Key Stage 2 prior to transfer through summer schools (e.g., a North West LEA – low level maths group 64). One County Council in middle England, in its EDP, lists the need for strategies to be developed for children from traveller families and 'looked-after' pupils in Key Stage 2/3 transfer. The Behaviour Support Plan emphasises transfer

issues for children identified on a Special Educational Needs register for behavioural reasons.

- Some LEAs in Scotland are looking at perceived drop in attainment in transitions between year groups within Key Stages – for example, one particular Council looking at strategies to improve performance between Year 8 and Year 9 (S1 and S2).

The documentation revealed several other issues in relation to particular groups. Children from some groups may be more likely to change schools – for example those from some low income groups and from culturally diverse families (Garland, 1999). Strand (2000) provides statistical evidence of the effect of school change on attainment by looking at associations between pupil mobility and sat scores at the end of Key Stage 1. Pupil mobility was associated with significantly lower levels of attainment in reading, writing and mathematics, and mobility was also associated with free school meals, identified special educational needs, and to have English as a second language (ESL). However, when the relative impact of special educational needs, parent income, and ESL were considered, the effects of mobility were substantially reduced. When looking only at pupil progress (by including the results of baseline assessment results) there were no mobility effects on the children except in mathematics. The direct effect of mobility on pupils seems to be small, but implications for school and classroom management and resourcing is likely to be substantial.

The particular issues for the transfer of pupils with special educational needs has not been considered in detail in this review. Such issues can be subsumed under the current policy and practice of inclusion, and would merit a major review of this issue alone. In an area in Southern England, attention was given to the transfer of pupils with behaviour difficulties, which focused on information and record keeping. The general omission of Special Educational Needs can be linked to another, that of the involvement of professional group external to schools such as, educational psychologists and education welfare officers, in transition arrangements, either in particular projects or in policy development. However, Principal Educational Psychologists have often been involved in the preparation of the LEA EDP, and are almost always involved in some way in the transfer and sometime transition arrangements of individual children with special educational needs. There are particular issues for the Key Stage 2/3 transfer of children with special educational needs in terms of school choice. Exceptions to this omission include several references to the role of educational psychologists:

- One middle England City Council's Behaviour Development Plan looks to educational psychologists for advice on transfer in the preparation of children on school's Special Educational Needs register for behavioural reasons;
- A London Borough Council involved educational psychologists in assessing the usefulness of test data to facilitate transfer arrangements (from Key Stage 2/3);
- A northern England LEA's educational psychologists carried out an evaluation and investigation of best practice of the process of 'able' students transferring early from Key Stage 2 to 3.
- Two educational psychologists in a northern city in England have designed a transition programme that has been sold to more than 100 schools. It sets out a 2-

year planning process (last year primary and first year secondary) for addressing the emotional and social needs of the pupils. It tries to emphasise that transition is not confined to the summer term in year 6 and then first few days at secondary.

Almost all documents reviewed spoke of a differentially worse effect of transfer on particular groups of children. However, a review of transfer of pupils in an area in Southern England, found some evidence from observations pre- and post- transfer that children with special educational needs were better catered for than others, due to more effective use of records and more appropriate standards. The group identified as more 'at risk' on transfer were children deemed 'able learners'. Referring to this group, able learners, was an example of the only detailed attempt to evaluate best practice.

Hymer and Harbron (1998) investigate the practice of one northern LEA in England of accelerating transfer to secondary school for some children deemed more able learners. A survey of parents, children, and head teachers of both primary and secondary schools suggested that early transfer was seen by parents, and less so by children, as being a positive factor in a child's educational outcomes. The research was, of course, unable to relate early transfer and outcome in any direct causal sense. However, it was able to provide detailed guidelines to facilitate best practice.

Section 7

Conclusions and Recommendations

When drawing conclusions and making possible recommendations, a degree of caution must be exercised with regards to this research. Our knowledge and experience in this instance is based only on the materials we received and reviewed.

There was a paucity of information on transition or transfer issues for particular groups. Groups being provided in some kind of way seemed to include: children with special educational needs, children for whom English was not their first language, children with behavioural difficulties, traveller children, 'able' learners, boys and looked after pupils. Those also discussed in the research included 'mobile' children (those often changing schools).

There was, overall, a complete lack of data to show that special arrangements are needed for particular groups – and a lack of evaluation of LEA initiatives. Although there is some, though limited, evidence to suggest that there is a differential effect of transfer on different groups of children, there has been little research in a number of key areas to assist policy planning and school actions. These key areas include data on the magnitude of negative effects and on what those effects might be (motivation, attendance, behaviour, attainment etc.). There is an assumption of homogeneity within different groups, and little investigation of the effect of interventions.

Many interesting strategies are being implemented to facilitate transfer, particularly the Key Stage 2/3 level. The LEA seems to have a much greater involvement in transfer initiatives than in the past. However, Foundation/Key Stage 1 and Key Stage 3/4 transfer seem neglected areas, as does the transfer of particular groups of pupils at Key Stage 2/3. It was impossible to identify good practice in these areas since the examples were so few. It was also difficult to identify good practice with any certainty in Key Stage 2/3 due to the lack of any evaluation of initiatives.

There was very little information given on the way professionals who work in support to schools (educational psychologists, social welfare offices, education social workers etc.) might work with schools in supporting and evaluating the transition arrangements for particular groups. Some of this work was 'hidden', such as the work each summer term, and earlier, by every educational psychology service on effecting the Key Stage 2/3 transfer of almost all special educational needs children who have statements.

There is too little evidence from Foundation Stage to Key Stage 1 to draw firm conclusions, parents/carers are more closely involved in transfer because of the age of the children; that close involvement may be a key feature of transfer at this stage

perhaps being seen as less of a 'problem'. Students often have to handle adjustments to transition between stages of schooling on their own; processes which involve teachers and parents in easing that adjustment could be developed further.

One Scottish LEA may have much to recommend not only in documentation but also in terms of strategies and activities that aim to 'put principles into practice' and turn transition into a positive development for children.

Management of information with regards to transition appears to be an important factor running through all phases and stages from home to nursery, to school and beyond school. There are issues of gathering information, updating information and the passing on of information to colleagues within the same settings. The use of ICT systems in managing this information could be a way forward, with the LEA taking the lead and responsibility for co-ordination.

Possible recommendations:

- Schools have to bid, in partnership, for funded projects with LEAs offering and running training on how to prepare a bid and project management. There could be a potential positive 'knock-on' effect for schools when applying for other funding sources, such as EAZs, etc.
- Consider potential impact on transfer liaison issues when reviewing the timing of the school year.
- A strategy for LEAs to raise teachers' awareness of the 'two peaks' in pupils learning.
- Developing strategies to sustain 'at risk' pupils motivation and commitment to learning within Key Stage 3.
- The LEAs to organise and initiate projects on continuity of the curriculum within and across Key Stages.
- Raising pupils' awareness of the importance of the continuity of learning, and empowering them and encouraging them to take the responsibilities of their own learning.
- More research is needed into the investigation of pupils' views on 'in-between' years, and insights into the relationship between personal development and their needs.
- Possible research might be useful to explore the effectiveness of transfer information and practical issues of implementation vis-à-vis pupils' performance.
- With particular reference to inner-city areas, it would be interesting to investigate the efficiency of transfer and nature of information that supports pupils transferring between schools other than at designated transfer stages, for example, children whose family circumstances result in more frequent transfer between schools.
- The development and establishment of 'good' management systems for transfer on those children who in one LEA's terms represent a "small but significant minority who may find change less easy to cope with".

Appendix 1

Glossary

The following guide should help to clarify various descriptions, phrases and terminology used throughout the report.

Education level table

England, Wales and Northern Ireland Scotland

| Age | Stage | Year | Stage |
|---------|-------------|-----------|-------|
| 3-4 | Foundation | | |
| 4-5 | | Reception | |
| ----- | | | |
| 5-6 | Key Stage 1 | Year 1 | P1 |
| 6-7 | | Year 2 | P2 |
| ----- | | | |
| 7-8 | Key Stage 2 | Year 3 | P3 |
| 8-9 | | Year 4 | P4 |
| 9-10 | | Year 5 | P5 |
| 10-11 | | Year 6 | P6 |
| ----- | | | |
| 11-12 | Key Stage 3 | Year 7 | P7 |
| 12-13 | | Year 8 | S1 |
| 13-14 | | Year 9 | S2 |
| ----- | | | |
| 14-15 | Key Stage 4 | Year 10 | S3 |
| 15-16 | | Year 11 | S4 |
| ----- | | | |
| 16-17 } | Post 16 | Year 12 | S5 |
| 17-18 } | | Year 13 | S6 |
| 18-19 } | | | |

Glossary of terms

Since the 'language' of transition and transfer is sometimes quite complex and convoluted, we have supplied a glossary of terms that occur quite frequently in the literature around transition and transfer.

Baseline assessment - The statutory assessment of children on entry to primary school, at age four or five. Baseline assessment takes place within the first seven weeks of a pupil entering primary education and became statutory in England in September 1998. It will become statutory in Wales from September 1999. Baseline assessment is also compulsory in Northern Ireland, and must only take place before the end of the pupil's first year in primary education.

Chief Education Officer (CEO) - The senior appointed official with overall administrative responsibility for education in a LEA in England or Wales. Required in every LEA and sometimes known as the Director of Education, the Chief Education Officer is responsible to the Education Committee of the local authority, on which elected councillors form the majority.

Cross-curricular theme - Strands of provision that run through the National Curriculum in England and Wales and may also extend into religious education and provision outside the basic curriculum. These include, at appropriate stages, such aspects as careers education, health education, political and international understanding. Cross-curricular themes are also a feature of the Northern Ireland Curriculum.

Education and Library Board - The regional bodies in Northern Ireland which are responsible for the local administration of primary and secondary education (cf. LEAs in England and Wales).

Education welfare officer - Also sometimes known as 'social workers in education', education welfare officers are employed by the local education authority to monitor school attendance and combat persistent pupil absence.

Key stage - The periods in each pupil's education to which the elements of the National Curriculum apply. There are four key stages, normally related to the age of the majority of the pupils in a teaching group. In England and Wales these are: beginning of compulsory education (age 5) to 7, 7-11, 11-14 and 14 to the end of compulsory education at 16. In Northern Ireland they are: the beginning of compulsory education (age 4) to 8, 8-11, 11-14 and 14 to the end of compulsory education at 16.

Local education authority (LEA) - Local education authorities are locally elected county, metropolitan district or borough councils in England and Wales, which have a statutory duty for the provision and organisation of public education services in their area.

Middle School - Schools catering for children in compulsory education from the ages of 8-12 or 9-13 years. Legally, such schools are deemed primary schools when most of the pupils are under the age of 11 and secondary when the majority of pupils are over 11.

National Curriculum - Requirements for the curriculum for all pupils of compulsory school age (5-16) in England and Wales were introduced under the Education Reform Act 1988, and are now governed by the Education Act 1996. Pupils are required to follow a basic curriculum comprising the National Curriculum subjects and religious education. National Curriculum subjects include: English, Welsh (in Wales), mathematics, science, design and technology, information technology, history, geography, art, music, physical education and a modern foreign language from key stage 3.

Pastoral care- The guidance given to pupils by school staff relating to their academic, personal and social development, attendance and behaviour.

Transition - Commonly used to refer to the change from secondary school to post-secondary programs, work, and independent living typical of young adults. Also used to describe other periods of major change such as from early childhood to school or from more specialised to mainstreamed settings.

Special educational needs - Term used to describe the requirements of children with difficulties in one of the following areas: learning, behaviour or emotional, social or physical development, which either affect their educational progress or require provision other than that normally made. In England and Wales, if a child is considered to need additional provision to that which is made generally available, the local education authority is obliged to consider the issue of a formal statement of the child's identified needs with proposals to meet them. The child is described as 'statemented'.

Appendix 2

Covering Letter

2nd April 2001

Dear Sir/madam

Research into transition between key stages in schools

The QCA has identified you as a key person working with reference to a piece of research we are undertaking. We apologise if this request is not relevant to you personally, but ask if you would kindly pass it on if you are aware of someone else who may be able to help us.

We have recently been commissioned by the DETR to review research into the theme of 'Transition between key stages in school'. We are therefore trying to collect as much information as possible, and are hoping that you may be able to help us.

The review we are conducting is very much focused on transition and transfer both within and between schools. However, the particular focus we are exploring is the role and involvement of the Local Education Authority in this issue. We are keen to identify and explore those authorities that are targeting transition and transfer specifically, with the view to highlighting 'best' and 'good' practice.

In order to complete this research, we need to collect all the documentation we can which relates to the issue of transition and transfer. If you have any resources, materials or documentation that you may feel is relevant to the research, would you consider sharing it with us as part of the research?

We are especially keen to collect materials which fall outside of the traditional 'academic' arena, but which focus on transition and transfer, such as:

- Policy and strategy documents
- Internal research reports

- Guidance/action plan documents
- Educational Development Plans
- Behaviour Support Plans
- Proposals to Excellence in Cities; EAZs, etc., etc.

Any help from you would be gratefully received, and all contributions will be acknowledged in the research process. If you wish to discuss any aspect of the research, please do not hesitate to contact a member of the team listed below.

We thank you for your time and effort, and look forward to hearing from you soon.

Yours sincerely

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Appendix 3

Full list of participating Local Education Authorities

All of the following LEAs in England, Wales, Northern Ireland and Scotland agreed to participate in the project. However, due to the timescale, some of the working papers, evaluation reports and strategy documents arrived after the cut off point. We would, nevertheless, like to acknowledge their assistance with the project.

England

Barking and Dagenham
Barnsley
Bexley
Birmingham
Blackpool
Bradford
Camden
Cumbria
Darlington
Derbyshire
Gateshead
Halton
Hammersmith and Fulham
Hampshire
Harrow
Hartlepool
Hertfordshire
City of Kingston upon Hull
Leeds
Leicester City
Leicestershire
Lincolnshire
Liverpool
Medway
Middlesbrough
Newcastle upon Tyne
Norfolk
North Tyneside
Northumberland
City of Nottingham
Oxfordshire
Portsmouth
Redbridge
Redcar and Cleveland
Rochdale
Sefton

South Gloucestershire
South Tyneside
Southampton
Staffordshire
Stockton on Tees
Suffolk
Sunderland
Tower Hamlets
Wakefield
Wiltshire
Worcestershire
City of York

Wales

Caerphilly
Cardiff
Torfaen

Northern Ireland

Southern Education and Library Board
North-Eastern Education and Library Board

Scotland

Argyll and Bute
Clackmannanshire
Dumfries and Galloway
Dundee City
East Lothian
City of Edinburgh
Glasgow City
North Ayrshire
Perth and Kinross
South Lanarkshire
West Lothian.

Appendix 4

Bibliography

Key Texts:

Barking and Dagenham Community Grid for Learning (2001) Transition Between Key Stages in Schools: Beacon Council Support Paper, pp.4.

Details of the strategies promoted by Barking and Dagenham to promote KS2 to KS3 transition. Curricular issues tackled include teachers revising schemes of work in core subjects to ensure Y6/7 continuity. Emphasis also on target setting and benchmarking as a way of tackling lowering expectations. Use of Homerton College tracking tools and summer schools.

DfEE, (2001) Schools Building on Success, Green Paper, HMSO.

Whilst the paper makes scant reference to transition, the absence of the LEA from much of what is said about modernising the education system is important in terms of the constraints LEAs will face

Duffy, J. (2000) 'Bridging the Gap' Pupil progression from Key Stage 2-3: Case Studies from Sunderland Schools 1998 - 2000 Autumn, pp.1-24, Sunderland LEA.

This is a report written by an LEA adviser who has initiated a number of 'bridging projects' in the schools within her local authority, and aimed for headteachers and senior management teams. In this report she has decried the rationale, the development of the bridging projects, and findings.

Galton, M., Gray, J., Rudduck, J. (1999) The Impact of School Transitions and Transfers on Pupil Progress and Attainment, pp.1-37, DfEE, ISBN 1. 84`85 050 0

DfEE commissioned literature and effective practice review on the effects on pupils' progress of 2 related experiences: the move from one school to another (transfer) and the move from one year group to the next within a school (transition). Particularly concerned with pupils' progress at Key Stage 2 and with the 'dip' post Key Stage 2.

Hampshire LEA (1999) Improving Continuity and progression from Key Stage 2 to Key Stage 3, ISBN: 1 85975 243 8

Description of a school improvement project with two pyramids of schools that focused on main areas: Managing the work of the pyramid; Improving information flow; Using assessment data.

Perth and Kinross Council, (1998) Early Education 3-8 guidelines for transition.

Transition Record and accompanying guidelines that are the result of work to identify what would be the most appropriate system of record keeping and Baseline Assessment for Scottish schools.

Suffolk LEA (1999) Transfer Case Studies

Sixteen case studies (all from different schools) – each in a two-page format which comprises: short description, positive features, and difficulties. In some case studies, subject specialist advisers work with schools to develop new ideas.

Complete bibliography of all reviewed materials

Academic/government materials (transition generally)

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